

QuickBooks Online 2021

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Lesson 01. Introduction

QuickBooks is an [accounting software](#) package developed and marketed by [Intuit](#). QuickBooks products are geared mainly toward [small and medium-sized businesses](#) and offer [on-premises](#) accounting applications as well as [cloud-based versions](#) that accept business payments, manage and pay bills, and payroll functions.

QuickBooks



Developer(s)	Intuit Inc. ^[1]
Initial release	1983; 38 years ago
Stable release	2019
Operating system	Microsoft Windows ^[1] macOS (USA only)
Type	Accounting software
License	Proprietary
Website	quickbooks.intuit.com 

History

Intuit was founded in 1983 by [Scott Cook](#) and [Tom Proulx](#) in [Mountain View, California, USA](#). After the success of [Quicken](#) for individual financial management, the company developed similar services for small business owners.

QuickBooks Online vs. QuickBooks Desktop: What's The Difference?

Install your computer = Cloud Base

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Lesson 02. Create a new company

The screenshot shows the QuickBooks Online 2021 website. At the top, there is a navigation bar with the QuickBooks logo and links for Small Business, Pricing, Accountants & Bookkeepers, Learn & Support, Free Trial, and Sign In. A prominent green banner offers "50% off QuickBooks for 3 months" with a "Buy Now" button. A dropdown menu is open over the "Buy Now" button, showing "QuickBooks Online Support" and "Covid Recovery Hub". Below the banner, the main content area features the text "Smart, simple online accounting software for small business" and "Track expenses, customise invoices, run reports and even more all from one place." There are two buttons: "Buy now" and "Free 30-day trial". To the right, a green box highlights the "50% off" offer and includes a "Buy now" button and a note: "Or, Sign up for a Free 30-day trial without a credit card." Below this, three pricing plans are displayed: Simple Start (US\$8.00/mo), Essentials (US\$12.50/mo), and Plus (US\$17.00/mo). Each plan includes a "Buy now" button and a "Free 30-Day Trial" button. The Plus plan also lists additional features like tracking inventory and creating purchase orders.

ACCOUNTING SOFTWARE | INTUIT QUICKBOOKS | GLOBAL

Smart, simple online accounting software for small business

Track expenses, customise invoices, run reports and even more all from one place.

[Buy now](#) [Free 30-day trial](#)

Buy now and get **50% off** QuickBooks

[Buy now](#)

Or, Sign up for a Free 30-day trial without a credit card.

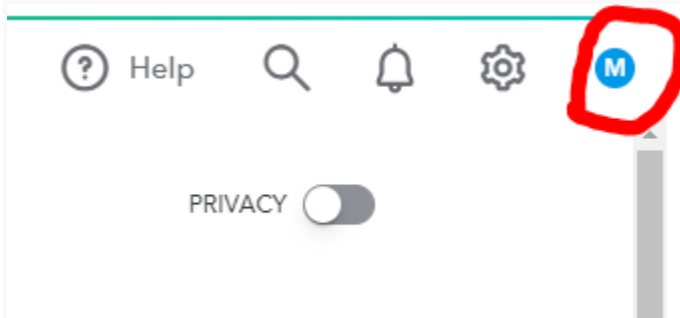
Plan	Description	Price	Features
Simple Start	Start your business	US\$16.00 US\$8.00 /mo	<ul style="list-style-type: none">Track sales, expenses and profitsCreate & send unlimited invoicesTrack and manage your sales taxWorks on PC, Mac, and mobileFor one user, plus your accountant
Essentials	Run your business	US\$25.00 US\$12.50 /mo	<ul style="list-style-type: none">All Simple start features +Manage and pay billsTransact in multiple currenciesGenerate sales quotesFor three users, plus your accountant
Plus	Grow your business	US\$34.00 US\$17.00 /mo	<ul style="list-style-type: none">All Essentials features +Track inventoryCreate purchase ordersTrack project or job profitabilityFor five users, plus your accountant

1. Visit QuickBooks Website
2. Click - free 30-days -
3. Select Plus
4. Enter your full information
5. Tell us about your business
6. What would you like to do in QuickBooks – Click All Set

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Lesson 03. Sing out and Sign In



Sign In



Sign in to your Intuit account to access all our products including QuickBooks. [Learn more](#)

 Sign in with Google


OR

User ID

Password

Use 6 or more characters and no spaces.

 Sign In with Email

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Lesson 04. Environment (Explorer)

- Dashboard
- Report / Balance Sheet
- How to use left navigation bar.
- Three little horizontal lines (Upper corner)(You can hide left navigation bar)
- QuickBooks button (Upper corner) this button we use like Home Page.
- In the Dashboard you can **hide** graphics also you can hide all of them click **privacy**.
- **Three top buttons** in the **right upper corner**: click **setting** click **account setting** click **billing & Subscription** then you can see a lot of information, for example when the account **will be expire**, **Cancel your Trail**, **Downgrade** or **Upgrade**, **Company ID** and so on.
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The screenshot displays the QuickBooks Online interface for a user named Garcia Enterprises. The top navigation bar includes the QuickBooks logo, a hamburger menu, the company name, and utility icons for Priority Circle, My Experts, and a help icon. A 'PRIVACY' toggle is visible in the top right. The left sidebar contains a '+ New' button and a list of navigation options: Overview, Dashboard (highlighted), Transactions, Expenses, Sales, Projects, Workflows, Payroll, Reports, Taxes, Mileage, and Accounting. The main dashboard area features a 'Garcia Enterprises' header with a logo and a 'Hide' button. Below this is a grid of four cards: 'See how much you're making', 'Start invoicing', 'Connect with an accountant', and 'Add the finishing touches'. To the right of these cards are three larger icons with numbered steps: '1' (bank icon), '2' (donut chart icon), and '3' (report icon), with corresponding text: 'Connect your bank', 'Review your transactions', and 'See your profits'. At the bottom, a 'CASH FLOW' section is visible, featuring a 'SAMPLE' button and a legend for 'Money in' (green dot) and 'Money out' (blue dot). The text reads: 'Track how your money is doing' and 'Seeing how money flows over time can help you plan for the future. Link your bank account to get started.'

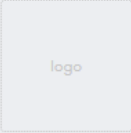
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Lesson 05. Put your Logo and Enter your Company Information

1. In the Dashboard click LOG+
2. Then read steps and change everything about your company information.

Account and Settings

Company	Company name		
Billing & Subscription	Company name	Horyaal Company	
Sales	Legal name	Same as company name	
Expenses	Business ID No.	99-1111110	
Advanced	Company type	Tax form	Not sure/Other/None
		Industry	Wholesale Trade
	Contact info	Company email	sahalsoftware5000@gmail.com
		Customer-facing email	Same as company email
		Company phone	+252 634496857
		Website	-

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Lesson 06. Creating or Changing Accounts - Chart of Accounts.

- Click Accounting Tab click chart of accounts or Setting Icon click Chart of accounts.

New Account:

- Click new Account – Enter Full information

Change Account Name, Type or Others:

- Click Account History and then select what you want.

Chart of Accounts Run Report New

[All Lists](#)

Curious about your Chart of Accounts?
It's an overview of all of your accounts, including: asset, liability, equity, revenue and expenses. Learn more below:
[Watch video \(4:18s\)](#) | [Read article](#)

Filter by name

NAME	TYPE	DETAIL TYPE	QUICKBOOKS BALANCE	BANK BALANCE	ACTION
Cash and cash equivalents	Cash and cash equivalents	Cash and cash equivalents	0.00		Account history ▼
Allowance for bad debt	Current assets	Allowance for bad debts	0.00		Account history ▼
Available for sale assets (short-	Current assets	Assets available for sale	0.00		Account history ▼
Inventory	Current assets	Inventory	0.00		Account history ▼

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Lesson 07. Delete or Recovery Delete Accounts.

Delete or Inactive Accounts:

- Select Account then click Account History then Delete or Inactive.

Recovery Delete Accounts:

- Select Setting Icon, Click Including Inactive then search deleted.

Lesson 08. Before - Inventory

Check

- Active Inventory Part – Go to Sales / Product and Service
- In your dashboard click New (+) (Upper side). Click Suppliers/check/Item
- Enter Full Information

Lesson 09. Before - AR and AP

Accounts Receivable

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Enter Full Information

Accounts Payable

- In your dashboard click New (+) (Upper side). Click Journal Entry.
 - Enter Full Information
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Lesson 10. Before - Fixed Asset and Cash On-Hand

Fixed Asset:

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Enter Full Information

Cash On-Hand:

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Enter Full Information

Lesson 11. Adjustment – Accounts

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Enter Full Information

Lesson 12. Edit Journal Entry and Open Balance Equity

Edit Journal Entry:

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Click Recent Journal Entries
- Enter Full Information

Open Balance Equity = Equity's Name:

- In your dashboard click New (+) (Upper side). Click Journal Entry.
 - Enter Full Information
-

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Lesson 13. Creating Investment (New Capital).

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Enter Full Information

Lesson 14. Purchases (By Cash or by AP)

Check

- In your dashboard click New (+) (Upper side). Click Suppliers/check/Item
- Enter Full Information

Bill

- In your dashboard click New (+) (Upper side). Click Suppliers/Bill/Item
- Enter Full Information

Pay Bills

- In your dashboard click New (+) (Upper side). Click Suppliers/Pay Bills
 - Enter Full Information
-

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Lesson 15. Transfer Money

- In your dashboard click New (+) (Upper side). Click Transfer.
- Enter Full Information

Lesson 16. Sales (By Cash or by Invoice)

Sales Receipt:

- In your dashboard click New (+) (Upper side). / Customers/Sales-Receipt
- Enter Full Information

Invoice:

- In your dashboard click New (+) (Upper side). / Customers/Invoice
- Enter Full Information

Receive Payment

- In your dashboard click New (+) / Customers / Receive Payment
 - Enter Full Information
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Lesson 17. Expenses

Expenses:

- In your dashboard click New (+) (Upper side). Click Suppliers/Expense/Category
- Enter Full Information

Lesson 18. Users Role – How to manage Users

- In your dashboard click Setting Icon (Right corner). Click Manage Users.
- Read steps.

Lesson 19. Profit Share – Net Income and Withdraw

- In your dashboard click New (+) (Upper side). Click Journal Entry.
- Enter Full Information

Support Team

QuickBooks Website = <https://quickbooks.intuit.com/>

Support Team = <https://help.quickbooks.intuit.com/prechats/offerings/QBO-ROW-CHAT/15008/view>

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