

FORCE

**Get up and running
with Quickbooks Online**

Welcome to your Quickbooks Package

As a tool for easy efficient Bookkeeping, informative easy to understand reporting and an efficient business tool that can also be used as a client and supplier database and helps make the day to day running of your business easier, we welcome you to your Quickbooks package.





We made the move over to Quickbooks which is a remarkable software and Force accounting now do all our bookkeeping. It freed my time up to concentrate on our business and know that our bookkeeping is in the best hands.



~ Sarah Mellor, Dimension Stoves and Stone Ltd

You have chosen the version of Quickbooks that best fits your needs and have added your logo and set up your financial dates and products. You are now ready to enter your data.

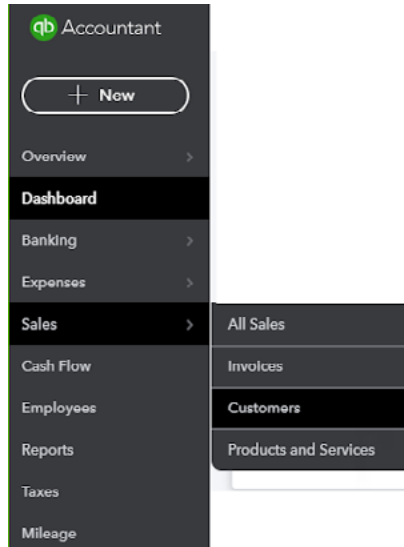
This guide will show you step by step how to:

-  Set up **customers** within Quickbooks Online
-  Set up **suppliers** within Quickbooks Online

How to set up **customers** within Quickbooks Online:

Step 1

From within the tool bar in the left-hand pane, hover your mouse over 'Sales' and then left mouse click on 'Customers'



Step 2

You will now be in the home screen of what will become your list of customers. For now, it is empty as you are just adding your first customer.

In the top right corner of this window you will see 'New customer' in green, select 'New customer'.



Step 3

At this point a 'Customer Information' text box will open and in there you can complete all your customers details. Don't forget to press **save** once you have entered everything.

Customer information

Title First name Middle name Last name Suffix Email

Company

* Display name as

Phone Mobile Fax

Other Website

Is sub-customer

Bill with parent

Address Notes Tax info Payment and billing Language Attachments

Billing address map Shipping address map Same as billing address

Street City/Town County Postcode

Street City/Town County Postcode

Cancel Print Save

Step 4

Once you have entered all the customer details and pressed **SAVE** you are now ready to raise your first invoice within Quickbooks Online.



The more information you can include, the better your database will be in QBO. You will not require a second database or diary to keep all customers details as you can include everything in one place.

If you do not have enough time to add all the details now you can add:

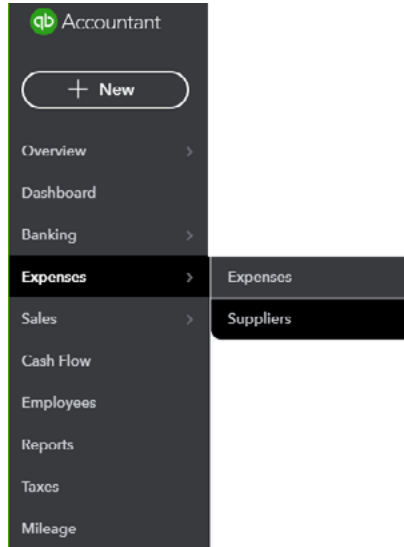
- ✓ Name
- ✓ Company name
- ✓ Billing Address
- ✓ Email

This will be enough to raise the invoice and email it to your client and then you can always return to this page later and complete further details when it is more convenient. Once your customer is set up in QBO you can create the invoice and with one press of a button, send the invoice by email to your customer.

How to set up **suppliers** within Quickbooks Online:

Step 1

From the tool bar in the left hand pane, hover your mouse over 'Expenses' and then left mouse click on 'Suppliers'.



Step 2

You will now be in the home screen of what will become your list of suppliers. For now, the screen is empty as we are just adding your first supplier.

In the top right corner of this window you will see 'New supplier' in green, select 'New supplier'.



Step 3

At this point a 'Supplier Information' text box will open and in here you can complete all your suppliers' details. Don't forget to press **save** once you have entered everything.

Supplier Information

Title First name Middle name Last name Suffix Email

Company Phone Mobile Fax

*Display name as Other Website

Address map Billing rate (/hr)

Street Terms

City/Town County Opening balance as of

Postcode Country

Notes

Attachments Maximum size: 20MB

Account no. Account is the memo of all payments

Default expense account Choose Account

Cancel Make Inactive Privacy Save

Step 4

Once you have entered all the supplier details and pressed **SAVE** you are now ready to include your first supplier bill within QBO.



The more information you can include, the better your database will be in QBO. You will not require a second database or diary to keep all supplier details as you can include everything in one place.

If you do not have enough time to add all the details now you can add:

- ✓ Name
- ✓ Company name
- ✓ Display name as
- ✓ Address
- ✓ Email

This will be enough to include the bill now and then you can always return to this page later and complete further details when it is more convenient.

You do not need to add every Customer and Supplier you have before you start raising sales invoices and including supplier bills. You can add a customer and supplier as and when you need to if you prefer.

We're here to help

If you would like any help with the setup of your Quickbooks package or you would like some Quickbooks training, please get in touch. We'd love to hear from you.



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