

# THE VIP CPA – QUICKBOOKS ONLINE SETUP GUIDE

1. Copy and paste the following link into your search bar:

<https://quickbooks.intuit.com/online/>

2. Scroll down to where you see the different types of plans and select Chose Plan under **Simple Start** (then select continue without payroll)

3. Under Create an Intuit Account, enter your email, create your own password, and enter your phone number.

4. Select One More Step to enter the 6-digit code that will be sent to your phone. Select Continue

5. Enter your credit card information, billing address, and make sure the 2 boxes are selected below. Select Subscribe

6. After the page loads, select Get started.

7. Enter your business name or your personal name if you are not yet incorporated. Click Next

8. Select Nothing, I'm new to this, and click Next.

9. Under industry, input the word 'insurance' and select Insurance Agencies and brokerages

10. Under business type, select the one that applies to you.

11. Under What's your role, select Owner.

12. Under How many employees, select Just the owner(s). Click Next

13. The next page (An expert can help you), select Skip for now on the bottom right

14. The next page (You nailed the basics. Let's keep going!), select Do this first where it says (Link a bank or credit card to start getting organized) on the right side of the page.

15. The next page (Now, let's get organized so you can get a clear picture of your business finances), select Skip for now

16. The next page (Snap and save receipts from anywhere), click Skip for now

17. The next page (set up to get paid online), click Skip for now

18. The next page (Anything here you'd like to do another time?) click Skip for now

19. Select Let's go and you will be taken to your main menu/dashboard screen.

20. Next you will want to link your bank(s) and credit card(s). Copy and paste the link below:

<https://www.youtube.com/watch?v=MmzFzqkSuDg>

If you are interest in accounting and tax preparation services, please see below...

Email Adam Ryan Zalka CPA EA @ [adam@zalkacpa.com](mailto:adam@zalkacpa.com) or visit [www.thevipcpa.com](http://www.thevipcpa.com) and submit your request by sending me a message under where it says Contact Us – Questions? on the Homepage. Thank you for the opportunity!