



1 SET-UP STEP 1

LET'S GET YOUR FILE SET UP!

CREATE A NEW COMPANY IN QB ONLINE™

Using the Quincy Bookstore core file from bsnsAtlas

After receiving your Invitation email from bsnsAtlas (or RJ Trucks), click the ACCEPT INVITATION button.

- If you have never had a QuickBooks Online account before, the “Create your account” window will open. Fill in the required information and select “Create Account”
- If you have had a QuickBooks Online account before, use your log in information.

QBO will take a few moments to create your blank company and then give you a “Welcome!” screen. Click the NEXT button.

Using the Quincy Bookstore core file from bsnsAtlas or your accountant company file:

Rename your business name to “[Your Name] Quincy Bookstore”, select “This is my legal business name”, and click NEXT.

Complete each screen using*...

- How have you been managing your finances? – *Nothing, I'm just getting started* and click NEXT
- What's your industry? – SKIP FOR NOW
- What kind of business is this? – *Sole proprietor* and click NEXT
- How does your business make money? – *Provides services **and** Sells products* and click NEXT
- What's your main role at Quincy Bookstore? – *Bookkeeper or accountant* and click NEXT
- Who works at this business? – *Only the owner* and click NEXT
- What apps do you use for your business? – SKIP FOR NOW
- Link your accounts and see everything in one place – SKIP FOR NOW



- What is everything you want to set up? – Select all of the following and click NEXT:
 - *Organize money in and out*
 - *Invoice customers*
 - *Track receipts and expenses*
 - *Track sales*
 - *Manage sales tax*
 - *Enter and pay bills*
- Click LET'S GO

Take a quick tour if you wish...

* for those using their own accountant company file, you may need to make these adjustments manually in your Account and Settings area