BILL'S HOME TECH
Home & Small Business Tech Solutions

BILL'S COMPLETE MANUALS

QuickBooks Online

Bank feeds, invoices, receipts and your accountant — explained in plain English, one step at a time

A plain-English guide for small local businesses

Take your time — you can't break it

Written for you by Bill — Bill's Home Tech

(330) 200-8042 · BillsHomeTech.com

For QuickBooks Online Simple Start, Essentials, Plus & Advanced · facts current November 2026

What's Inside

This is your guide to QuickBooks Online, the bookkeeping service many small businesses use to keep track of money coming in and going out. It's written for owners of small local businesses — a shop, a trade, a one-person service — and for the family members who help them keep the books. Read it in any order and at your own pace. Every feature comes with what it actually does *for you*, plus slow, step-by-step directions. Intuit, the company behind QuickBooks, changes its prices and screens from time to time, so wherever a number matters, this guide tells you where to double-check it.

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PART 1

Getting Started

What QuickBooks Online is, what it honestly costs, and how to start a company file or take over one that already exists. Start here, even if someone has already set QuickBooks up for you.

CHAPTER 1

A Note from Bill

Hello, and welcome. If you run a small business — a hardware store, a lawn-care service, a hair salon, a home-repair trade, a little shop on Main Street — you already know the paperwork never stops. Receipts pile up. Customers need bills. Your accountant asks for "the numbers" every spring. This guide is for **you**, and for the son, daughter or spouse who's been asked to "help with the QuickBooks."

I'm Bill. I've spent more than 30 years working with technology, and these days I help folks here in Portage County feel at home with theirs. I wrote this guide the way I'd explain QuickBooks sitting at your kitchen table: patiently, in plain English, and without trying to sell you anything. When a word like "reconcile" or "chart of accounts" comes up, I'll stop and explain it right then.

What this guide will do for you

- Explain what QuickBooks Online is, which plan you're on, and what it honestly costs.
- Walk you through connecting your bank and credit card accounts so most of the typing happens for you.
- Show you how to sort what comes in from the bank, a little at a time, so it never piles up.
- Help you send professional invoices, let customers pay online, and send polite reminders.
- Get your receipts out of the shoebox and into QuickBooks with your phone's camera.
- Invite your accountant and add helpers with only the access they need.
- Point out the scams aimed at QuickBooks users, and how to keep a copy of your books safe.

The big promise: you can't break it

You can't hurt anything by looking around QuickBooks. Opening a report, clicking through the menus or starting an invoice you never send changes nothing. Most mistakes — a transaction put in the wrong category, an invoice with a typo — can be edited or undone. The things that call for real care are the ones that touch money, your bank connection or your password, and I'll mark those clearly.

WHAT THIS DOES FOR YOU

Why this matters

Books that are kept up a little each week mean fewer surprises: you know who owes you, what you spent, and roughly how the year is going. And at tax time, your accountant gets clean records instead of a box of papers, which usually means less of their time to pay for.

GOOD TO KNOW

A word about money advice

I'm a technology helper, not an accountant, bookkeeper or tax preparer. This guide explains how QuickBooks works and where things are. Which category a purchase belongs in, what's deductible and what you owe are questions for your accountant, and I'll say so each time they come up.

And I'm only a phone call away

If anything in this guide leaves you unsure, call me at **(330) 200-8042**. There's no such thing as a silly question, especially when it's your business and your money.

So let's start with the simplest question: what *is* QuickBooks Online?

— Bill

CHAPTER 2

What QuickBooks Online Is (and Isn't)

QuickBooks Online is bookkeeping software from a company called **Intuit** (the same company that makes TurboTax). "Online" means it lives on the internet: you sign in through a web browser on a computer, or through the QuickBooks app on a phone or tablet. There's nothing to install on your computer, and your books are stored on Intuit's computers rather than yours.

The pieces, in plain words

Piece	What it means
Company file	Your business's set of books inside QuickBooks — every customer, invoice, expense and bank account. One subscription is one company.
Bank feed	A connection to your bank or card company that brings your transactions into QuickBooks automatically, so you don't type them in.
Category (account)	A label for where money came from or went, such as "Supplies" or "Sales." The full list is called the chart of accounts.
Invoice	A bill you send a customer for work done or goods sold. QuickBooks keeps track of whether it's been paid.
Reconcile	Checking that QuickBooks matches your bank statement, usually once a month.
Reports	Summaries such as Profit and Loss (are you making money?) and Balance Sheet (what you own and owe).
Intuit Account	The email and password you use to sign in. The same sign-in can work for other Intuit products.

What QuickBooks isn't

- **It isn't your bank.** QuickBooks *reads* your bank activity so it can record it. Your money stays at your bank.
- **It isn't your accountant.** It keeps the records; it doesn't decide how things should be taxed or file your return.
- **It isn't QuickBooks Desktop.** Desktop is an older, installed program with different menus. If your screens don't match this guide, check whether you're actually using Desktop.
- **It isn't magic.** The bank feed brings things in, but a person still needs to look them over and say what each one is. Chapter 9 makes that a quick weekly habit.

TIP

Is QuickBooks Online right for you?

It fits best when your business has a business bank account, sends invoices or pays bills regularly, and has an accountant who would like clean records. Many accountants already work in QuickBooks Online every day. Before you sign up, it's worth asking your accountant which software they prefer — some will steer you to a specific plan.

WHAT THIS DOES FOR YOU

What this does for you

Once you understand the handful of pieces above — company file, bank feed, categories, invoices and reports — the rest of QuickBooks stops feeling like a maze. Every other chapter hangs off one of them.

CHAPTER 3

The Plans and What They Cost

QuickBooks Online is a **subscription**: you pay every month for as long as you use it. There are four main plans. Each one includes everything in the plan below it, plus more. Here are Intuit's published U.S. list prices as of November 2026:

Plan	List price	Billed users	Good fit for
Simple Start	$38 a month	1	A one-person business with basic bookkeeping
Essentials	$85 a month	3	A small business where a few people need to sign in
Plus	$140 a month	5	Businesses that track inventory or projects
Advanced	$340 a month	25	Growing businesses with more staff and reporting needs

HEADS UP

Prices went up in August 2026

Intuit raised the prices of Essentials, Plus and Advanced for renewals on or after August 1, 2026 (Simple Start stayed the same). Before that, they were $75, $115 and $275 a month. Older articles and videos may still show the old numbers. Always check the **Pricing** page at quickbooks.intuit.com, which you reach by typing the address yourself.

Introductory discounts

Intuit often offers new subscribers a discount for the first few months. In November 2026 the pricing page showed **50% off for three months** (for example, Simple Start at $19 a month for three months). After the discount ends, the full price is charged automatically. Write the date down so the change doesn't surprise you.

What "billed users" means

Each plan includes a set number of people who can sign in with their own name and password. Your **accountant doesn't count** against that number when you invite them the right way (Chapter 18), and neither do certain limited helpers, such as people who only enter their hours (Chapter 19).

Other costs to know about

- **Payment fees**, if you let customers pay invoices online by card or bank transfer (Chapter 14).
- **Payroll**, if you have employees, is a separate paid add-on with its own price.
- **Add-on apps** that connect to QuickBooks usually have their own subscriptions.
- **Your accountant's time**. Clean, up-to-date books generally make that time shorter.

TIP

A simple test for choosing a plan

Start with the smallest plan that does what you need today. You can move up later without starting over (Chapter 24). If your accountant recommends a particular plan, ask them why — it's often because of a specific feature, like tracking bills or inventory.

WHAT THIS DOES FOR YOU

What this does for you

Knowing the real monthly cost — and when a discount ends — lets you budget for it like any other bill, and keeps you from paying for a bigger plan than your business needs.

CHAPTER 4

Signing Up, or Taking Over an Existing Company

There are two common starting points. Either you're opening a brand-new QuickBooks Online company, or someone — a former bookkeeper, a partner, a family member — already set one up and you need to take it over. Both are manageable.

Starting a new company

1. On a computer, type **quickbooks.intuit.com** into the address bar yourself. Don't follow a link from an email or an ad.
2. Open the **Pricing** page and pick a plan. You can choose a free trial or the introductory discount.
3. Create your **Intuit Account** with an email address you check often and a strong password you don't use anywhere else.
4. Answer the setup questions about your business: its name, what kind of work you do, and how you get paid. You can change these answers later in Settings.
5. When QuickBooks offers to connect your bank, you can do it now or wait for Chapter 8.

> GOOD TO KNOW
>
> **The 30-day free trial**
>
> Intuit offers a 30-day free trial on the main plans, and its pricing page says phone support is included during the trial. A trial and the discount usually can't be combined, so decide which helps you more.

Who should own the account

The person who creates the company becomes the **primary admin** — the main owner of the account. That should be **the business owner**, not a helper or an outside bookkeeper. If someone else set it up, ask them to make you the primary admin before anything else (Chapter 19 explains the roles).

STAY SAFE

Never share one sign-in

Give each person their own user instead of sharing your email and password. Shared sign-ins make it impossible to see who changed what, and if a helper leaves, you'd have to change your password everywhere.

Taking over a company someone else set up

1. Ask the person who set it up to sign in and open **Settings** (the gear icon) > **Manage users**.
2. Have them add you as a user with full admin rights, or transfer the primary admin role to you.
3. Accept the email invitation, signing in with your own Intuit Account.
4. Once you're in, check who else has access and remove anyone who no longer needs it.
5. Write down which plan you're on and when it renews. You'll find this in the billing or subscription area of Settings.

HEADS UP

Lost access to an old company?

If the person who set up QuickBooks has passed away, left the business or can't be reached, contact Intuit directly through the official help site. Be ready to prove you own the business. Don't pay anyone online who promises to "recover" a QuickBooks account for you.

WHAT THIS DOES FOR YOU

What this does for you

When the owner holds the keys, the business never gets stuck because one helper changed jobs, forgot a password or moved away.

PART 2

Finding Your Way Around

A calm tour of the screen, your company settings and categories, and the QuickBooks app on your phone.

CHAPTER 5

A Tour of the Screen

The first time you sign in, QuickBooks can look busy. Don't worry about all of it. You'll use the same handful of places over and over. Intuit rearranges the screen from time to time, so the exact labels on yours may differ a little from what's here; the ideas stay the same.

Signing in

1. On a computer, type **quickbooks.intuit.com** into the address bar yourself, then choose **Sign in**.
2. Enter your Intuit Account email and password.
3. If asked, type the code QuickBooks sends to your phone or email. That's two-step verification doing its job (Chapter 21).
4. If you have more than one company, pick the one you want.

> **TIP**
>
> **Bookmark the real address**
>
> Once you're signed in, save the page as a bookmark (a favorite) in your web browser. From then on, use that bookmark instead of searching for "QuickBooks login" — search results sometimes show look-alike ads.

The places you'll use most

Where	What you'll find
The menu on the left	Your main sections — such as Transactions (bank feeds), Sales (invoices and customers), Expenses, Reports and more. On some screens it's collapsed into icons; hover over them to see the names.
The New or Create button	Near the top left. This is where you start a new invoice, expense, bill, customer and so on.
Settings (the gear icon)	Top right. Company settings, Manage users, Export data, the chart of accounts, and your subscription.
Search	The magnifying glass at the top. Type a customer name, an amount or an invoice number.
Help	A question mark or Help button. Opens Intuit's help articles and support options inside QuickBooks.

GOOD TO KNOW

Screens differ a little by plan

Higher plans add menu items like Projects or Inventory. If someone's instructions mention a menu you don't see, it may simply not be part of your plan.

The dashboard

The first page after you sign in is a **dashboard**: a summary with boxes showing things like your bank balances, money owed to you and recent spending. It's for glancing at, not for doing work. You can't change your books from the dashboard by accident.

WHAT THIS DOES FOR YOU

What this does for you

Knowing just these five places — the left menu, New, the gear, Search and Help — gets you to nearly everything in this guide. The rest you can ignore until you need it.

CHAPTER 6

Company Settings and Your Categories

Two things are worth looking at once, early on: your **company settings** (name, address, contact information that shows on invoices) and your **chart of accounts** (the list of categories QuickBooks uses to sort your money).

Checking your company information

1. Select **Settings** (the gear icon).
2. Choose **Account and settings**.
3. On the **Company** tab, check your business name, address, phone and email. These appear on invoices and receipts your customers see.
4. Add your logo if you'd like it on invoices.
5. Select **Save**, then **Done**.

What the chart of accounts is

The **chart of accounts** sounds technical, but it's simply the master list of categories. Each one is called an **account** — not a bank account, just a bucket. Some are for money coming in ("Sales"), some for money going out ("Supplies," "Utilities," "Vehicle expenses"), and some for things you own or owe (your checking account, a loan).

QuickBooks creates a starter list for you, based on the kind of business you said you run. You can find it under **Settings** > **Chart of accounts**.

GOOD TO KNOW

Let your accountant shape this list

How your categories are set up affects your tax reports. Before you add, rename or delete categories, ask your accountant. Many will happily tidy the list for you once you've invited them (Chapter 18), and it's usually a quick job for them.

HEADS UP

Delete carefully

QuickBooks won't let you simply erase a category that already has transactions in it; it asks you to make it inactive instead. That's a safety feature. If you're unsure, leave the list alone and ask.

Customers, vendors and products

QuickBooks also keeps three helpful lists: **customers** (people and businesses who pay you), **vendors** (people and businesses you pay — some screens say suppliers), and **products and services** (the things you sell, with prices). You don't have to fill these in all at once. They grow naturally as you send invoices and sort bank transactions.

WHAT THIS DOES FOR YOU

What this does for you

Correct company details make your invoices look professional and get paid faster. A tidy category list, set up with your accountant, means your reports actually mean something.

CHAPTER 7

The QuickBooks App on Your Phone

Intuit makes a free **QuickBooks** app for iPhone and Android phones and tablets. It uses the same sign-in and the same books as the website; it's just a smaller window into them. The app is handiest for jobs you do while you're out: snapping a receipt, checking who owes you, or sending a quick invoice.

Getting the app

1. On an iPhone, open the **App Store**. On an Android phone, open the **Google Play Store**.
2. Search for **QuickBooks**. Check that the maker listed is **Intuit** before you install.
3. Install it and open it.
4. Sign in with the same Intuit Account email and password you use on the computer.
5. Allow notifications if you'd like alerts when customers pay.

STAY SAFE

Only the real app

Look-alike apps sometimes appear in app stores. The genuine QuickBooks app is published by Intuit. If an app asks you to pay to "unlock" your QuickBooks, delete it.

What the app is good for

- **Receipts** — take a picture of a paper receipt right at the checkout counter (Chapter 16).
- **Quick invoices** — bill a customer before you leave their driveway.
- **Checking balances** — see your bank balances and who owes you.
- **Sorting bank transactions** — clear a few from the For review list while you wait somewhere.

What's better on a computer

Some jobs are only available, or much easier, on the website: inviting your accountant (Chapter 18), managing users, exporting a copy of your books, reconciling, and changing your subscription. Plan to use a computer for those.

TIP

A bigger screen helps

If small print on a phone is a strain, a tablet runs the same app with bigger buttons. Or do your weekly bookkeeping on a computer and keep the phone for receipts.

WHAT THIS DOES FOR YOU

What this does for you

Receipts get captured the moment you get them, before they fade or disappear in the truck. That alone saves many owners an evening of sorting at the end of the year.

PART 3

Your Bank and Card Accounts

Connecting your bank and credit cards, sorting what comes in, fixing a broken connection, and checking your books against the bank once a month.

CHAPTER 8

Connecting Your Bank and Credit Cards

This is the single most useful thing you can do in QuickBooks. Once your business bank account and business credit cards are connected, QuickBooks brings in each deposit and purchase on its own. This connection is called a **bank feed**. Instead of typing every transaction, you just look them over and say what each one is.

Before you start

- Your **online banking** username and password for the business account. If you don't use online banking yet, set it up with your bank first.
- Your phone nearby, in case the bank sends you a security code.
- About fifteen quiet minutes, on a computer.

Connecting an account, step by step

1. Sign in to QuickBooks on a computer.
2. Go to **Transactions** > **Bank transactions**.
3. Select **Connect account**. (If you've already connected one, the button says **Link account**.)
4. Search for your bank by name and pick it from the list. Check that it's the right bank — small banks and credit unions sometimes have similar names.
5. Sign in with your online banking username and password. This sign-in usually happens on a secure window run by your bank or a connection service, not by QuickBooks itself.
6. Choose which accounts to connect — for example, the business checking and the business credit card.
7. For each one, pick the matching account type in QuickBooks, and choose how far back to bring in transactions.
8. Select **Connect**. QuickBooks brings in recent activity, which can take a few minutes.

> **GOOD TO KNOW**
>
> **Your accountant can't do this part for you**
>
> For security, Intuit says accountants can't link a client's bank account. You, as the business, have to connect it, because it uses your own banking sign-in. Your accountant can help with everything after that.

STAY SAFE

Business only, please

Connect only your **business** accounts. Mixing personal spending into your business books creates a mess for you and your accountant to sort out. If you don't have a separate business account yet, ask your accountant whether you should.

HEADS UP

Pending purchases don't show yet

A purchase your bank still lists as "pending" won't come into QuickBooks until it finishes processing. If a recent charge is missing, give it a day or two.

WHAT THIS DOES FOR YOU

What this does for you

No more typing in every purchase from your statement. Transactions arrive on their own, with the date, amount and name already filled in, and nothing gets forgotten.

CHAPTER 9

The For Review List: Sorting What Comes In

Everything the bank feed brings in waits in a list called **For review**. Nothing goes into your books until you look at it and approve it. Think of it as an inbox for your money.

Sorting your transactions

1. Go to **Transactions** > **Bank transactions**.
2. At the top, choose the bank or card account you want to work on.
3. Open the **For review** tab.
4. Select a transaction to open it. QuickBooks often suggests a **category** and a payee.
5. If the suggestion is right, approve it. If it's wrong, choose a different category from the list.
6. If the transaction is a payment for an invoice or bill you already entered, QuickBooks may offer to **Match** it instead. Matching connects the bank record to the existing record so it isn't counted twice.
7. Work down the list. Approved items leave the For review list and go into your books.

Categorize or Match — which one?

Choice	When to use it
Categorize	Use this for a new transaction that isn't already in QuickBooks — a gas fill-up, a supply run, a deposit from a cash sale.
Match	Use this when the transaction is a payment for something already in QuickBooks, such as an invoice a customer paid or a bill you entered and paid. Matching avoids counting it twice.

TIP

If it says Match but shouldn't

Sometimes QuickBooks guesses a match that isn't right. Intuit's help says you can switch the choice from **Match** to **Categorize** and pick the category yourself.

GOOD TO KNOW

Unsure what category to use?

That's a question for your accountant, and a perfectly normal one. A simple approach: put anything you're unsure about into a category your accountant suggests for "ask later," and make a list of questions for your next conversation.

Make it a weekly habit

Ten minutes once a week is far easier than three hours once a quarter. While the week is fresh, you remember what that $48.12 at the hardware store was for. Pick a regular time — Monday morning coffee, Friday afternoon — and clear the list.

WHAT THIS DOES FOR YOU

What this does for you

A short weekly sort keeps your books current, so you can answer "How's business?" with real numbers and hand your accountant a tidy year.

CHAPTER 10

Suggestions, Rules and Duplicates

After you've sorted a few weeks of transactions, QuickBooks starts learning. If you always put the electric company under "Utilities," it begins suggesting that for you. This chapter covers how to keep those suggestions helpful, and what to do about duplicates.

Turning suggestions on or off

On the **Bank transactions** page there's a **Settings** option for the bank feed. Intuit's help describes settings there to stop QuickBooks from automatically adding new vendors (payees), and to turn off suggested categories if you'd rather sort everything yourself.

1. Go to **Transactions** > **Bank transactions**.
2. Look for the small **Settings** gear or menu on that page (not the main Settings gear at the top).
3. Review the options, such as automatically adding new vendors and suggested categorization.
4. Turn off anything that's making more work than it saves.

Rules, in plain words

A **rule** tells QuickBooks, "Whenever you see a transaction like this, sort it this way." For example: anything from your phone company goes under "Telephone." Rules save time with bills that repeat every month. Start with only one or two, for the most regular bills, and check the results for a month or two before adding more.

> **HEADS UP**
>
> **A rule can be wrong over and over**
>
> A rule that's set up wrong will quietly put many transactions in the wrong place. If your reports look strange, ask your accountant to look over your rules.

When something shows up twice

Duplicates usually happen when you type a transaction in by hand *and* the bank feed brings it in, or when the same account is connected twice. In the For review list, don't approve the second copy — **match** it to the one you entered, or **exclude** it. Excluding sets it aside without deleting anything, so you can bring it back if you change your mind.

WHAT THIS DOES FOR YOU

What this does for you

Good suggestions turn a weekly sort into a few quick approvals. Handling duplicates right keeps your totals honest, so you're not counting the same sale or bill twice.

CHAPTER 11

When the Bank Connection Stops Working

Bank connections break now and then. It's rarely anything you did. Banks change their sign-in systems, ask for a fresh security check, or you change your online banking password and forget that QuickBooks was using the old one.

Signs the feed has stopped

- No new transactions for several days on an account that's normally busy.
- A warning or error message next to the account on the Bank transactions page.
- A note asking you to update your sign-in or reconnect.

What to try, in order

1. Wait a day. Sometimes the bank's system is simply down.
2. On the **Bank transactions** page, look for an update or refresh option for that account and try it.
3. If you recently changed your online banking password, update it in QuickBooks when asked.
4. If the bank asks for a security code, have your phone ready and type it in.
5. Still stuck? Disconnect and reconnect the account. Talk to your accountant first if you've already reconciled that account, so nothing gets entered twice.
6. As a last resort, most banks let you download a transaction file you can upload to QuickBooks.

SCAM ALERT

QuickBooks never calls to "fix your bank feed"

A real error message shows up *inside* QuickBooks after you sign in. If someone calls, texts or emails saying your bank connection is broken and asks for your banking password, a code or remote access to your computer, hang up. Sign in yourself and look.

WHAT THIS DOES FOR YOU

What this does for you

Knowing that broken connections are normal — and fixable — keeps you calm when it happens, and keeps your books from quietly falling weeks behind.

CHAPTER 12

Reconciling Once a Month

Reconciling means checking that QuickBooks agrees with your bank or card statement. It's the same idea as balancing a checkbook. Done monthly, it catches missing, doubled or mistyped transactions while they're still easy to fix.

What you'll need

- Your bank or card **statement** for the month, on paper or as a PDF from online banking.
- Everything from that month already sorted in the For review list (Chapter 9).

Reconciling, step by step

1. Select **Settings** (the gear icon) and choose **Reconcile**. On some screens it's under **Accounting** > **Reconcile** in the left menu.
2. Pick the account that matches your statement.
3. Check that the **beginning balance** in QuickBooks matches your statement's starting balance.
4. Type in the **ending balance** and **ending date** from your statement. Some banks call it the new balance or closing balance.
5. Select the button to start reconciling.
6. Tick each transaction that appears on your statement.
7. Watch the **Difference** figure. When it reaches **$0.00**, select **Finish now**, then **Done**.

When the difference isn't zero

Intuit lists a few common reasons:

- The ending balance or date was typed in wrong. Use **Edit info** to fix it.
- A transaction in QuickBooks hasn't cleared the bank yet — leave it unticked.
- A transaction is missing or entered twice.

HEADS UP

Don't force it

If you can't find the difference, stop and save your progress rather than adjusting numbers to make it fit. A forced reconciliation hides a real problem. Your accountant can usually spot it quickly.

GOOD TO KNOW

Your record is saved

Each finished reconciliation is saved as a report. You can find past ones under the Reconcile area's **History by account**, which is handy when your accountant asks.

WHAT THIS DOES FOR YOU

What this does for you

A monthly check means you can trust your numbers. And if a bank error or an unfamiliar charge slips through, you'll spot it within weeks instead of at tax time.

PART 4

Getting Paid

Adding customers, sending your first invoice, letting customers pay online, sending reminders and recording payments that arrive by check or cash.

CHAPTER 13

Customers and Your First Invoice

An **invoice** is a bill you send a customer. QuickBooks fills in your business details, adds up the total, keeps a copy, and tracks whether it's been paid. You can email it, print it, or both.

Adding a customer

You can add a customer ahead of time from the **Sales** (or Customers) area, or right from the invoice as you type their name. Include an **email address** if you'd like to send invoices and reminders by email.

Creating an invoice, step by step

1. Select the **New** (or **Create**) button and choose **Invoice**.
2. Choose the customer from the list, or type a new name and add them.
3. Check that the customer's email address is filled in.
4. Check the **invoice date** and **due date**. The due date often comes from your payment terms, such as "Net 30" (due in 30 days).
5. On each line, choose a product or service, the quantity and the price. QuickBooks adds it up.
6. If you'd like customers to pay online, turn on the payment methods under **Payment options** (Chapter 14).
7. Look it over. Most screens offer a **Preview** so you can see exactly what the customer will see.
8. Choose to **send** it by email now, or save it to send later.

> **TIP**
>
> **Set up your products and services once**
>
> If you charge the same things over and over — a service call, an hour of labor, a standard item — add them to your **products and services** list with their usual price. Then each invoice takes seconds.

GOOD TO KNOW

Sales tax is a question for your accountant

QuickBooks can add sales tax to invoices, but whether you need to charge it, and at what rate, depends on what you sell and where. Ask your accountant before turning it on.

Seeing who owes you

In the **Sales** area, the list of invoices shows each one's status — such as due, overdue or paid. Overdue invoices stand out, so you know who to follow up with.

WHAT THIS DOES FOR YOU

What this does for you

Professional-looking invoices tend to get paid on time, and you always know exactly who still owes you — no more trying to remember who said they'd "catch you next week."

CHAPTER 14

Letting Customers Pay Online

If you turn on **QuickBooks Payments**, your invoices include a button so customers can pay right from the email — by card or by bank transfer. The money goes to your bank, and QuickBooks marks the invoice paid on its own.

What it costs

QuickBooks Payments has no monthly fee; Intuit takes a small slice of each online payment. These are Intuit's published U.S. pay-as-you-go rates for invoices and payment links, as of November 2026:

How the customer pays	Fee	Fee on a $500 invoice
Bank transfer (ACH)	1%	$5.00
Credit or debit card, or a digital wallet	2.99%	$14.95
A card issued outside the U.S.	An extra 1%	$5.00 more

HEADS UP

Check the bank-transfer cap yourself

Intuit's pages don't all agree on whether there's a maximum fee for bank transfers. Before you rely on it for large invoices, check the current fee page inside QuickBooks or at quickbooks.intuit.com.

Turning it on

1. Open an invoice and look for **Payment options**, or look in **Settings** for the payments section.
2. Follow the prompts to apply for QuickBooks Payments. You'll be asked for business details and the bank account where money should go.
3. Once approved, choose which payment methods to offer: bank transfer, cards, or both.

TIP

Bank transfer is the cheaper option

Offering bank transfer (ACH) costs you less than cards on most invoices. Some owners offer both and let the customer choose. Whether to pass fees on to customers is a business decision worth asking your accountant about.

WHAT THIS DOES FOR YOU

What this does for you

Customers who can pay with one click often pay sooner. And because QuickBooks records the payment and matches it to the invoice, there's less for you to sort later.

CHAPTER 15

Reminders and Recording Payments

Nobody enjoys asking for money twice. QuickBooks can send a polite reminder for you, automatically or whenever you choose. And when a customer pays by check or cash, you record it so the invoice shows as paid.

Turning on automatic reminders

1. Select **Settings** (the gear icon) > **Account and settings**.
2. Open the **Sales** tab.
3. Find the **Reminders** section and select **Edit**.
4. Turn on automatic reminders and choose when they go out. Intuit says reminders can be set up to 90 days before or after the due date.
5. Add a second or third reminder if you'd like.
6. Read over the wording of the message, then **Save**.

> GOOD TO KNOW
> **Reminders need an email address**
> Automatic reminders go by email, so the customer's email has to be filled in on the invoice.

Sending one reminder by hand

1. Go to **Sales** > **Invoices**.
2. Find the invoice.
3. In the **Action** column, open the small menu next to **Receive payment** and choose **Send reminder**.
4. Check the message and send it. QuickBooks adds "(Reminded)" to that invoice's status.

Recording a check or cash payment

1. Find the invoice in **Sales** > **Invoices** and select **Receive payment**.
2. Check the date and amount, and choose how it was paid (check or cash). Add the check number if you like.
3. Choose where the money is going. If you'll take several checks to the bank together, your accountant may suggest a holding account for undeposited money.

4. Save. The invoice now shows as paid.

HEADS UP

Don't count it twice

When that check later shows up in your bank feed as a deposit, **match** it to the payment you recorded (Chapter 9) rather than categorizing it as a new sale.

WHAT THIS DOES FOR YOU

What this does for you

Reminders do the awkward asking for you, politely and on time. Recording every payment keeps your "who owes me" list accurate, so you never chase someone who already paid.

PART 5

Spending and Receipts

Getting paper and emailed receipts into QuickBooks, and recording what the business spends — whether you paid on the spot or you have a bill to pay later.

CHAPTER 16

Snapping and Forwarding Receipts

A **receipt** is proof of what you bought. QuickBooks can keep a picture of each one attached to the purchase it belongs to, so the shoebox of faded slips can finally retire. There are two easy ways in: take a photo with the phone app, or forward an emailed receipt to a special QuickBooks email address.

Taking a picture with your phone

1. Open the **QuickBooks** app on your phone (Chapter 7) and sign in.
2. Tap the **Menu** icon and choose **Receipt snap**. On some versions it's a camera button or a **+** button marked Receipt.
3. Lay the receipt flat in good light and fill the screen with it.
4. Take the picture. QuickBooks reads the store, date and amount and starts a transaction for you.
5. Later, at a computer or in the app, open the receipt and check what QuickBooks filled in.

> TIP
> **Snap it before you leave the parking lot**
> Thermal paper receipts — the shiny kind from gas pumps and hardware stores — fade within months. A picture taken the same day stays readable for good.

Forwarding emailed receipts

Many stores and suppliers email receipts and bills. QuickBooks can give you a special email address just for receipts. Anything you forward to it lands in your Receipts list.

1. On a computer, go to the **Receipts** area. (Look under **Transactions** or **Expenses** in the left menu, or search for "Receipts.")
2. Choose **Forward from email**.
3. Follow the prompts to create your receipt address. QuickBooks shows the full address on screen.
4. Add the email addresses you'll forward from, so QuickBooks knows the receipts are really from you.
5. Save the receipt address as a contact in your email so it's easy to pick next time.

GOOD TO KNOW

Files QuickBooks accepts

Receipts can be photos or PDF files. If a receipt is a link to a website rather than an attachment, open it, save it as a PDF, and attach that instead.

Reviewing receipts

Receipts wait in a **For review** list of their own. Open each one, check the date, amount, payee and category, then choose **Create expense** — or, if the same purchase already came in through your bank feed, choose to **match** it so it isn't counted twice.

HEADS UP

One purchase, one record

Your card purchase shows up from the bank feed *and* from the receipt. That's normal. Match them together; don't add both.

WHAT THIS DOES FOR YOU

What this does for you

When your accountant asks "what was this $214 at the hardware store?" the answer is one click away, with the picture attached. And if a receipt is ever needed later, you won't be digging through boxes.

CHAPTER 17

Recording Expenses and Paying Bills

Most of your spending comes in through the bank feed, and you categorize it there (Chapter 9). This chapter covers the rest: purchases you need to enter by hand, and bills from suppliers that you'll pay later.

Expense or bill? The simple rule

Use	When
Expense	Something you've **already paid** for — with cash, a card or a check. Record it as an Expense (or a Check, if you wrote one).
Bill	Something you **owe and will pay later**, like a supplier's invoice due in 30 days. Record it as a Bill, then record the payment when you pay.

Entering an expense by hand

1. Select **New** (or **Create**) and choose **Expense**.
2. Choose the **payee** — the store or person you paid.
3. Choose the account it was paid from, such as your business checking or business credit card.
4. Check the date and payment method.
5. On the line below, choose a **category** and type the amount and a short description.
6. If you have the receipt, attach a picture of it.
7. Select **Save and close**.

HEADS UP

Paid with your personal card?

Sometimes a business purchase goes on a personal card by accident. Don't guess how to record it — ask your accountant. There's a proper way to handle it, and it's different from a normal expense.

Entering and paying bills

Bills are part of **Essentials** and the higher plans. If you don't see Bills on your screen, your plan may not include them; check your plan or ask your accountant whether you need them.

1. Go to **Expenses** > **Bills** (or select **New** > **Bill**).
2. Choose the supplier, the bill date and the due date.
3. Add the category and amount for each line, and attach the supplier's invoice if you have it.
4. Select **Save**. The bill now waits in your list of unpaid bills.
5. When you pay it, open the bill and choose to record or **schedule a payment**, or use **Pay bills** to pay several at once. Choose the account the money came from and the date.
6. If you paid the supplier some other way — say, by a check you wrote — mark the bill as paid so QuickBooks knows.

SCAM ALERT

A new bank account for a supplier? Call first

Scammers send emails that look like a regular supplier saying "we've changed banks — please send payment to this new account." Before you change where a payment goes, call the supplier at a phone number you already had, not one in the email. Chapter 22 has more.

WHAT THIS DOES FOR YOU

What this does for you

Bills you enter remind you what's coming due, so late fees stop sneaking up on you. And knowing what you owe, not just what you've spent, gives you a truer picture of how the business is doing.

PART 6

Your Accountant, Your Helpers and Your Reports

Inviting your accountant the right way, giving helpers just the access they need, taking access away when someone leaves, and the few reports worth knowing.

CHAPTER 18

Inviting Your Accountant

One of the best things about QuickBooks Online is that your accountant can sign in to the very same books from their office. No more carrying a flash drive or mailing a box of papers. There's a special way to invite an accountant, and it's worth using.

Why use the accountant invitation

- Accountants invited this way **don't count against your plan's user limit**.
- They sign in with their own professional QuickBooks account, so you never share your password.
- Their special tools let them make year-end adjustments and review your work.
- You can remove their access at any time.

Sending the invitation

1. On a computer, sign in as the primary admin or a company admin.
2. Select **Settings** (the gear icon) > **Manage users**.
3. Open the **Accounting firms** tab (on some screens it's called **Accountants**).
4. Select **Invite firm**.
5. Type your accountant's email address — or their firm's user ID if they gave you one — and send it.

Your accountant gets an email and accepts it. Their status on the Manage users page changes from **Invited** to **Active**. If they don't already use QuickBooks Online Accountant, the email explains how they can sign up for it.

> **TIP**
>
> **Ask your accountant before you invite**
>
> Call your accountant's office and ask which email address to send the invitation to. Firms often have a shared address for client invitations.

STAY SAFE

Only invite someone you already know

An email or caller asking you to "add us as your accountant" when you never hired them is a red flag. Only send invitations to people you chose and can reach at a number you already have.

WHAT THIS DOES FOR YOU

What this does for you

Your accountant can see everything they need, when they need it, without a single box of paper changing hands. That usually means faster answers and fewer back-and-forth questions at tax time.

CHAPTER 19

Adding Helpers, Choosing Roles, and Removing Access

A family member, an office helper or an outside bookkeeper may need to sign in too. Give each person their **own user** with only the access they need. Each user is given a **role**, which decides what they can see and do.

The roles, in plain words

Role	What it allows
Primary admin	The owner of the account. Only one. Controls billing, users and everything else. This should be the business owner.
Company admin	Can do almost everything the primary admin can, including adding users. Give this only to people you trust completely.
Standard user	Can work in some or all areas you choose — for example, sales and customers but not bank accounts. Counts as a billed user.
Reports only	Can run most reports but can't change anything. Available on Plus and higher plans.
Time tracking only	Can enter their own hours and nothing else. Doesn't count toward your user limit.

Adding a user

1. Select **Settings** > **Manage users**.
2. Select **Add user**.
3. Choose the role that fits. When in doubt, choose the smaller one — you can always give more later.
4. Type the person's name and email address.
5. Send the invitation. They accept it and create or sign in with their own Intuit Account.

GOOD TO KNOW

Running out of user spots?

Each plan includes a set number of billed users (Chapter 3). If you need more, you may have to move to a bigger plan (Chapter 24). Your accountant and time-tracking-only users don't use up spots.

When someone leaves

When an employee or helper moves on, take away their access **the same day**. It's not personal; it's simply good practice.

1. Go to **Settings** > **Manage users**.
2. Find the person in the list.
3. Open the menu next to their name and choose **Delete** (or **Remove**).
4. Confirm. Their past work stays in your books; they just can't sign in anymore.

HEADS UP

If the person leaving was the primary admin

Move the primary admin role to the owner *before* they leave. If that can't happen — for example, after a death or a falling-out — contact Intuit through the official help site and be ready to prove you own the business.

WHAT THIS DOES FOR YOU

What this does for you

Everyone gets exactly the access they need and no more. If someone leaves, your books stay safe, and you can always see who did what.

CHAPTER 20

The Reports Worth Knowing

QuickBooks has dozens of reports. You need only a handful. Go to **Reports** in the left menu, or search for a report by name at the top of the Reports page.

Report	What it answers
Profit and Loss	Did the business make money over a period? Sales minus expenses.
Balance Sheet	What does the business own and owe on a given day?
Accounts receivable aging	Who owes you money, and how long has it been?
Accounts payable aging	Which bills do you still owe? (If you use Bills.)
Expenses by vendor	How much did you spend with each supplier?
Sales by customer	Who are your biggest customers?

Running a report

1. Go to **Reports**.
2. Select the report's name, for example **Profit and Loss**.
3. Choose the dates at the top — such as **This month**, **Last month** or **This year**.
4. Select **Run report** (or the report refreshes on its own).
5. Use the **print** or **export** buttons near the top right to print it or save it as a PDF or Excel file.

TIP

Make it a monthly habit

Once a month, after you reconcile (Chapter 12), run the Profit and Loss for last month and the receivables aging. Ten minutes tells you how the month went and who to call.

GOOD TO KNOW

Reports only mean as much as the books

If the For review list has months of unsorted transactions, the reports will be wrong. Keep the bank feed caught up and the reports take care of themselves. For what a number *means* for taxes, ask your accountant.

WHAT THIS DOES FOR YOU

What this does for you

Instead of guessing how the business is doing, you'll know — in plain numbers, any day you want to look.

PART 7

Keeping Your Books Safe

Protecting your sign-in, spotting the scams aimed at QuickBooks users, and keeping your own copy of your books.

CHAPTER 21

Protecting Your Sign-In

Your QuickBooks sign-in opens the door to your bank activity, your customers and your invoices. It's worth guarding like the keys to the shop. Intuit gives you two layers of protection on your **Intuit Account**.

Two kinds of codes

Layer	What it does
Multi-factor authentication	Always on. When you sign in on a new or unfamiliar computer or phone, Intuit sends a one-time code to check it's really you. You can't turn it off.
Two-step verification	Optional, and stronger. When it's on, Intuit asks for a code every time you sign in, on any device.

Checking your security settings

1. Sign in to QuickBooks.
2. Open your profile (your initials or the person icon near the top right) and choose **Manage your Intuit Account**.
3. Open **Sign in & security**.
4. Check that your **email** and **phone number** are current. These are how Intuit reaches you if you're locked out.
5. Turn on **two-step verification** if you'd like the extra protection.
6. If you're comfortable with it, set up an **authenticator app**, which makes codes on your phone without waiting for a text.

STAY SAFE

Never read a code to anyone

Intuit will never call and ask you to read back a verification code. Anyone who does is trying to get into your account. Hang up.

TIP

A password just for QuickBooks

Use a long password you don't use anywhere else. A password manager, or a notebook kept somewhere safe at home, beats reusing the same password on every site.

WHAT THIS DOES FOR YOU

What this does for you

Even if someone guesses or steals your password, they still can't get in without the code on your phone. Your books — and your bank connection — stay yours.

CHAPTER 22

QuickBooks Scams and How to Spot Them

Because so many businesses use QuickBooks, scammers send emails dressed up to look like QuickBooks. They're after your password, your money, or both. Knowing the common ones takes most of their power away.

The common ones

- **The fake invoice.** An email that looks like a QuickBooks invoice for something you never ordered — often software, security or "Geek Squad" renewals — with a phone number to call to "cancel." The number reaches the scammer.
- **"Payment received" or "payment waiting."** A message saying money is waiting for you, with a button that leads to a fake sign-in page.
- **"Your account is suspended."** Urgent warnings that you must sign in right now or lose access.
- **The changed bank account.** An email that seems to come from a supplier asking you to send payment to a new account (Chapter 17).
- **Fake support numbers.** Search ads and websites claiming to be "QuickBooks support" that are really paid-help sellers or scammers.

SCAM ALERT

The one rule that beats them all

Don't click buttons or call numbers in a surprise email. Instead, open your web browser, type **quickbooks.intuit.com** yourself (or use your bookmark) and sign in. If there's really a problem, you'll see it there.

Real QuickBooks emails can be misused too

Here's the tricky part: because anyone can send a QuickBooks invoice, a scammer can open their own account and send you a *real* QuickBooks invoice for something fake. The email truly comes from Intuit, but the person behind it is not your supplier. So ask yourself: **do I know this business, and did I buy this?** If not, don't pay and don't call the number in it.

Reporting a fake email

1. Don't click anything in it.
2. Forward it to **security@intuit.com**, Intuit's address for suspicious messages.
3. Delete it.
4. If you already clicked and typed your password, sign in the real way right away and change your password, then check **Manage users** for anyone you don't recognize.

HEADS UP

If money already went out

Call your bank right away using the number on your card or statement. The sooner the bank knows, the better the chance of stopping or getting back a payment. You can also report it to the FBI's Internet Crime Complaint Center at **ic3.gov**.

WHAT THIS DOES FOR YOU

What this does for you

A few seconds of suspicion — and the habit of typing the address yourself — protects your password, your bank connection and your customers' trust.

CHAPTER 23

Keeping Your Own Copy of Your Books

Your books live on Intuit's computers, which are well looked after. Still, it's wise to keep your own copy of the important reports — at year-end, before you change plans, and especially before you ever cancel.

Exporting your data

1. Select **Settings** (the gear icon) > **Export data**.
2. Choose the reports and lists you'd like — for example the **General Ledger**, **Profit and Loss**, **Balance Sheet**, **Customers** and **Vendors** (suppliers).
3. Choose the date range, such as all dates or last year.
4. Select **Export to Excel**. QuickBooks prepares a file, which you download to your computer.
5. Save the file somewhere safe and backed up, with a clear name like "QuickBooks export December 2026."

A simple year-end routine

- Reconcile every account through December 31 (Chapter 12).
- Run and save the year's **Profit and Loss** and **Balance Sheet** as PDFs.
- Export the data as above.
- Give your accountant access (Chapter 18) or send them what they ask for.
- Keep the files with your other business records for as long as your accountant recommends.

GOOD TO KNOW

Attachments are separate

Exported reports are numbers and lists. The receipt pictures you attached stay inside QuickBooks. If you're leaving QuickBooks for good, ask your accountant how much of that you need to keep, and plan time to download what matters.

WHAT THIS DOES FOR YOU

What this does for you

Whatever happens — a change of software, a canceled subscription or a question years from now — you have your own copy of the records that matter.

PART 8

Changing Plans, Getting Help & Your Cheat-Sheet

Moving up, moving down or canceling; an honest word about when a hand is worth it; and a one-page summary to keep with your business papers.

CHAPTER 24

Changing Your Plan, or Canceling

Businesses change, and so can your QuickBooks plan. Only the **primary admin** or a **company admin** can change it, and your payment information needs to be up to date first.

Upgrading or downgrading

1. On a computer, select **Settings** (the gear icon).
2. Choose **Subscriptions and billing** (some screens say **Billing & subscription**).
3. Select **Upgrade** or **Downgrade** next to your plan.
4. Choose the new plan and review the new price before you confirm.

HEADS UP

Before you downgrade

A smaller plan has fewer features and fewer users. QuickBooks may ask you to turn off features or remove users first. Downgrading also ends any discount you have on your current plan. Ask your accountant before you downgrade, in case they rely on a feature you'd lose.

Canceling

If you close the business or move to different software, you can cancel. Do it in this order:

1. Talk with your accountant first.
2. Export your data and save your key reports (Chapter 23).
3. If you use QuickBooks Payroll, cancel payroll first; it has its own steps.
4. Go to **Settings** > **Subscriptions and billing** and choose **Cancel**, then follow the prompts.

What happens after you cancel

After a paid subscription ends, your company stays available in **read-only** mode for **one year** from the cancellation date. You can look, print and export, but not change anything. After that year, Intuit deletes the data. If you sign up again within 12 months, your earlier books come back.

TIP

Write down the date

Put a reminder on your calendar about 11 months after you cancel: "Last chance to download QuickBooks records."

WHAT THIS DOES FOR YOU

What this does for you

You pay for only what you use, and you never lose your records by accident when it's time for a change.

CHAPTER 25

When to Call Bill

Most of what's in this guide you can do yourself, a little at a time. But part of being helpful is being honest about when a hand saves you time and worry. Here's my straight advice, with no pressure.

Times it's well worth a call

- **Getting set up** — signing up, connecting your bank and cards, and getting the phone app working.
- **Taking over a company** someone else set up, or sorting out who's the primary admin.
- **A bank connection that keeps breaking** and won't reconnect.
- **Inviting your accountant** and setting up helpers with the right roles.
- **Locking down your sign-in** with two-step verification and current recovery details.
- **A suspicious email or call** about QuickBooks — I'll help you check whether it's real.
- **Saving a full copy** of your books before a change or cancellation.

What I don't do

I'm a technology helper, not an accountant, bookkeeper or tax preparer. I'll help you with the screens, the connections and the safety side. Questions about categories, taxes, payroll or what you owe go to your accountant — and I'm happy to help you get them access so they can answer.

What working with me is like

I work at your pace, explain what I'm doing in plain words, and never talk down to anyone. I'll tell you honestly when something isn't worth your money. I've been doing this kind of work for more than 30 years, and I serve Portage County, Ohio, in person — at your home or your shop — and folks farther away by remote help.

FROM BILL

How to reach me

Call **(330) 200-8042** or book a time at **billshometech.com/book**. My help is **$49 remote · $99 in your home**. This guide is yours to keep for free; if you'd like a hand, I'm only a phone call away.

GOOD TO KNOW

You may meet Sophie first

When you call or visit billshometech.com, you might be greeted by **Sophie**, my AI receptionist. She can answer quick questions and help you book a time. A real person — me — does the actual help.

Thank you for taking the time to look after this part of your business. A little bookkeeping each week goes a long way.

— Bill

CHAPTER 26

Your QuickBooks Online Cheat-Sheet

Keep just this page with your business paperwork. The whole guide, boiled down.

The essentials

Topic	Remember
Where to sign in	Type **quickbooks.intuit.com** yourself, or use your bookmark. Never a link in an email.
Plans (Nov. 2026)	Simple Start $38, Essentials $85, Plus $140, Advanced $340 a month (list prices).
Bank feed	Transactions > Bank transactions > For review. Match what you already entered; categorize the rest.
Weekly habit	Clear the For review list and snap any receipts.
Monthly habit	Reconcile each account, then run Profit and Loss and who-owes-you.
Invoices	New > Invoice. Turn on online payment if you'd like (bank transfer costs less).
Your accountant	Settings > Manage users > Accounting firms > Invite firm. Doesn't use a user spot.
Helpers	Their own user, the smallest role that works. Remove them the day they leave.
Security	Two-step verification on. Never read a code to a caller.
Your own copy	Settings > Export data, at least once a year.
Canceling	Export first. Read-only for one year, then deleted.

Write it down once

Keep handy	
Intuit Account email (primary admin)	_____
Where the password is kept	_____
My plan and renewal date	_____
Accountant's name and phone	_____
Other users and their roles	_____
Accounts connected to the bank feed	_____
Date of last export	_____

When something's wrong, in order

1. Breathe. Almost anything in QuickBooks can be edited or undone.
2. Make sure you're signed in to the right company.
3. Bank feed stuck? Try the update option, then reconnect (Chapter 11).
4. Something counted twice? Look for a match you missed in For review.
5. A surprise email or call about QuickBooks? Don't click or call back. Sign in the real way.
6. A question about taxes or categories? Ask your accountant.
7. Still stuck? Call Bill at (330) 200-8042.