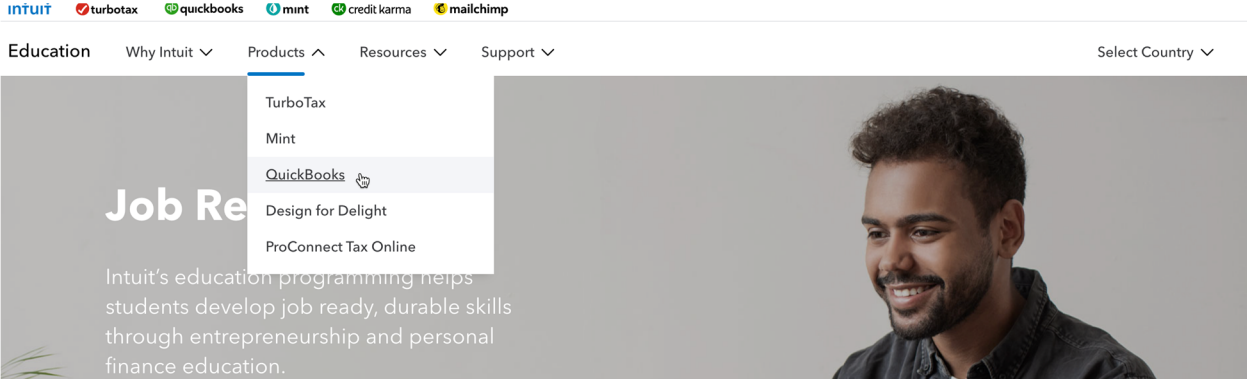


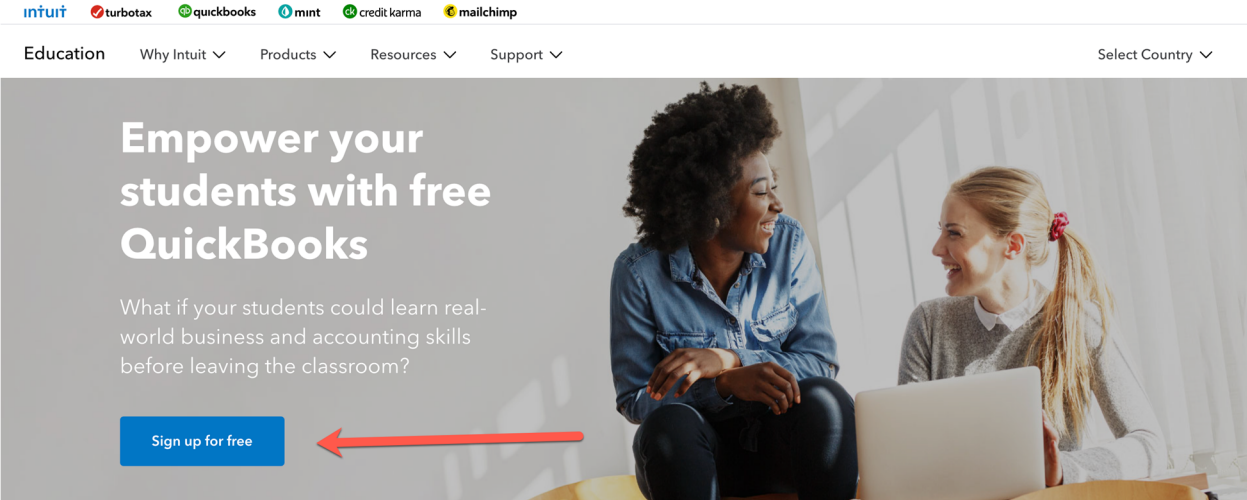
Intuit Educator Portal – Instructor Account Setup, Class Setup/Management, and Working Through the Textbook with Demo Companies

PART I - Set Up Your Intuit Educator Portal Account

- 1. Go to intuiteducation.com
- 2. Click on **Products** and select **QuickBooks**



- 3. Select **Sign Up for Free** button



Fill out the form with your information and select **Verify and Continue**.

1 of 2 options will happen....either you get approved right away and follow the steps to get into the portal:



Welcome, Emily!

We have successfully verified your educator credentials and your account is ready!

Steps to getting started:

1. [Create your QuickBooks Online Accountant account](#). When prompted to enter details about your "firm", use details about your educational institution.
2. [Login to the Intuit Educator Portal](#) using your new login credentials, and be sure to bookmark this page!
3. Check out the "How the Educator Portal Works" video on the Portal to learn how to set up your class(es), invite your students, and access resources.

If you have any questions, please visit our [support page](#).

Thanks!
The Intuit Team

Or you will be asked to provide additional documentation (once submitted can take up to 20 min and you will receive the same steps to set up like the above screen shot):

+ Upload Documentation

To complete verification, please submit any document that clearly shows your name and your specific teacher affiliation.

Important - Your document must display the following:

- Your full name (Barbara Lewis)
- Your affiliation (UNIVERSITY OF OREGON (LAW SCHOOL))

If your name or affiliation (shown above) are not correct, please [click here](#) to enter your information again.

Examples of acceptable documents are:

- ID Card
- Paystub
- Class Schedule
- Any official document that displays your full name, school name

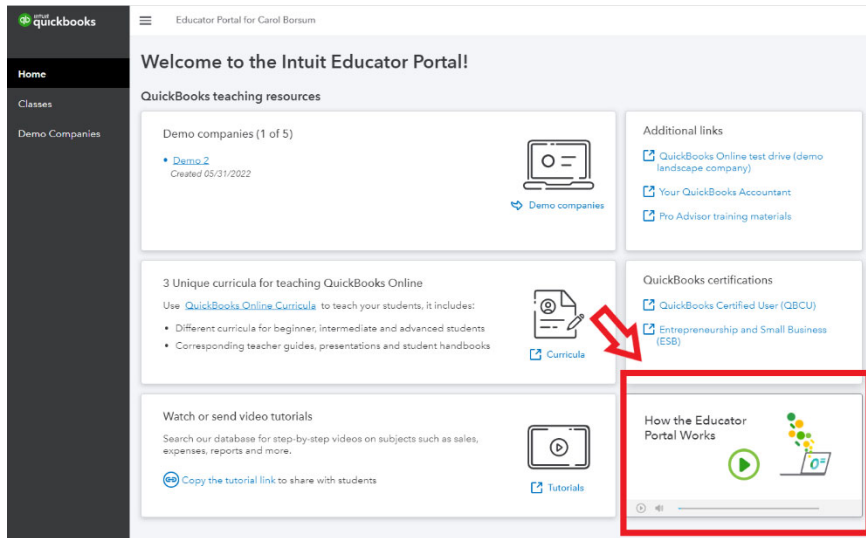
Acceptable file formats are: .bmp, .gif, .jpg, .png, or .pdf.

Choose File

Submit for review

PART II – Set Up Classes, Add Students to Classes, and Invite Students to Set Up their *QuickBooks Online* Companies

After you successfully set up your Intuit Educator Portal account, you can now set up your class(es), add students, and invite students via emails to set up the two *QuickBooks Online* companies they will need to complete the requirements of the textbook: Jackson Supply Company (Chapters 4 through 8, plus optional payroll Appendix) and Waren Sports Supply (Chapter 9). All these steps are detailed in a video available on the main portal page, as shown next:



Set Up a Class

Follow the instructions in the video to add your first class.

If your school often rejects emails from external senders, consider selecting the option shown on the following page and ask your students to use a non-school email address for setting up their *QuickBooks Online* companies. If you select this option, Intuit will verify that each student uses a non-school email address during the student account setup process. Note that if you select this option, any course roster that you upload (see next section) needs to include the students' non-school email addresses, not your typical course roster from your school.



If you plan for your students to use their school email addresses for accessing *QuickBooks Online*, ignore the screenshot/step at the top of the following page and move to the next section, "Add Students to a Class."

What is your class name?

Characters remaining: 66

Does your institution block emails from external senders?

Yes, my institution rejects emails from external senders.

  The portal will verify that students are listed with non-school email addresses. (eg. a gmail account)

Add Students to a Class

After successfully adding your class, follow the instructions in the video to add students to the class. You can upload a class list to expedite the process. Intuit provides a sample pre-formatted template that you can use to ensure proper format for the upload. If you selected “Yes, my institution rejects emails from external senders” in the previous section, make sure your uploaded file consists of non-school email addresses.

Invite Students to Set Up Jackson Supply Company and Waren Sports Supply in *QuickBooks Online*

The earlier chapters in the textbook use Intuit’s test drive company, Craig’s Design and Landscaping Services. *You do not need to provide access to your students for the test drive company; anyone can access this at:*

<https://qbo.intuit.com/udir/testdrive>

Starting with Chapter 4, however, students will need to use companies that you specifically invite them via email to set up in *QuickBooks Online*. After adding all students to a class, follow the instructions in the Intuit video to prepare and send two invitation emails to all students: the first for Jackson Supply Company (for

Chapters 4 through 8 plus the optional payroll project Appendix) and the second to Waren Sports Supply (Chapter 9). You can edit the sample email template provided by Intuit if you want to give special instructions to students, such as how to name their companies/reports or to remind them of assignment due dates.

As fully described in the student eMaterials, when students open an email invitation from Intuit, they simply need to click on “Accept Invitation” to start the process of setting up a company. When a student has successfully set up both Jackson Supply Company and Waren Sports Supply, their information will appear as follows in your Intuit Educator Portal view:

The screenshot shows the Intuit Educator Portal interface. The top navigation bar includes the Intuit logo, the user name 'Educator Portal for Carol Borsum', and a link for 'FAQs and support'. The main content area is titled 'Classes' and displays a grid of class cards. Below this, there is a search bar and buttons for 'Send new company invitation' and 'Remove from class'. The primary table lists students with columns for 'Student', 'Companies (maximum of 4 per student)', and 'Actions'. The first student, 'Student 1, Waren', has two companies listed: 'Waren Sports Supply' and 'Jackson Supply Company', both shown as clickable links. A red box highlights these two links, and a red arrow points to them. Other students in the list have either one company or no companies, with some having 'Resend invitation' links. The bottom right corner of the table shows pagination controls: 'First Prev 1-5 of 5 Next Last'.

Notice in the preceding illustration that both of the student’s companies are shown as clickable links. This means that the student has accepted both invitations and has set up both companies. You can click on these links at any time to go directly to the student’s companies. This can be helpful for you to assist the student with any problems they are having, as well as for you to determine that the student is doing their own work.

Notice in the illustration that some of the students shown have company names without the clickable links. This means that they have not accepted your invitation(s). In that case, you can click the “Resend invitation” link to try again.

Make sure students check their spam/junk folder if they do not see something from intuit it in their inbox.



Warning: students cannot complete chapters 4 through 9 without receiving and accepting the Intuit email invitations for Jackson Supply Company and Waren Sports Supply. As the instructor, you need to initiate the process. We cannot help students with this step!

You are now ready to go! If you have other classes to set up, repeat the steps described in this document and in the portal video to set up other classes.

You can set up as many classes and students as you like. For example, if you have teaching/grading assistants for a class you can set up a “Teaching/Grading Assistant” class and add each assistant as a student in that class. Follow the procedures in this section for sending the assistants an invitation to set up Jackson Supply Company and Waren Sports Supply in QuickBooks online. You can also add yourself as a student to any class, using a non-school email address.

If you want to work through the textbook, all you need to do is download the company data from the instructor resources available on Armond Dalton Resources and then set up demo companies for both Jackson Supply Company and Waren Sports Supply. **(NOTE: THESE FILES ARE FOR INSTRUCTOR USE ONLY. DO NOT DISTRIBUTE TO STUDENTS. THIS IS A COPYRIGHT VIOLATION)**. See Part III for how to use the Demo Companies tab within the portal. This option is available only to instructors.

PART III - Working Through the Textbook Inside Your Educator Portal Account with Demo Companies

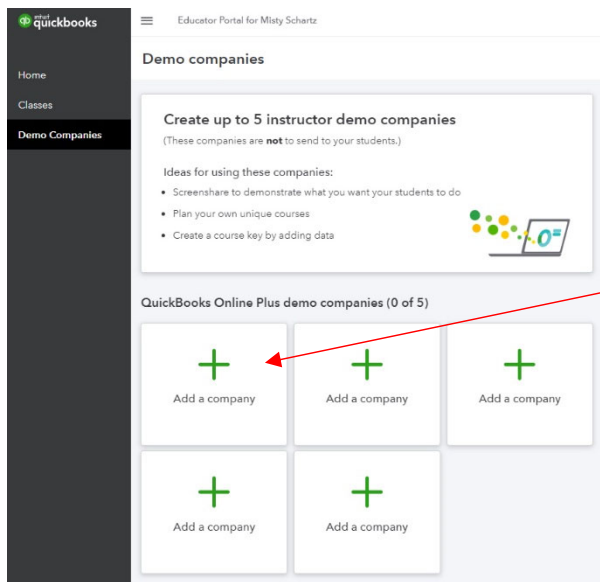
You can work through Chapters 2 and 3 using the test drive company link included on your main Intuit Educator Portal page. See the following illustration for the location of the test drive link on the portal Home page:

The screenshot shows the Intuit Educator Portal interface. On the left is a dark sidebar with navigation options: Home, Classes, and Demo Companies. The main content area has a header 'Welcome to the Intuit Educator Portal!' and a sub-header 'QuickBooks teaching resources'. A red arrow points to the 'Additional links' section, which contains a red-bordered box around the link 'QuickBooks Online test drive (demo landscape company)'. Other sections include 'Demo companies (1 of 5)' with a 'Demo 2' entry, '3 Unique curricula for teaching QuickBooks Online', 'Watch or send video tutorials', and 'QuickBooks certifications'.

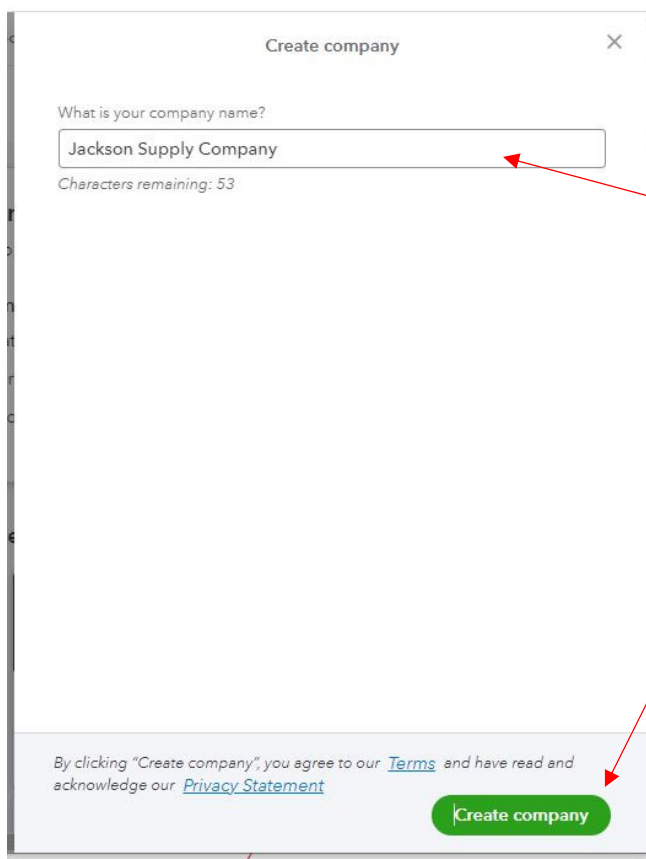
To work through Chapters 4 through 9, you will need two things:

1. **Company data files** – Data files for Jackson Supply Company and Waren Sports Supply are included in your instructor resources for this textbook on armonddaltonresources.com.
2. **Demo Companies** – The easiest way to work through Chapters 4 through 9 is to use two of the five demo companies available to you in the Demo Companies tab of the portal: one for Jackson Supply Company and one for Waren Sports Supply. Demo companies can also be used during class to demonstrate specific transaction and activities for Jackson Supply Company and Waren Sports Supply. Demo companies are not shareable with your students.
 Demo companies are active for one year after setup and can be reset at any time, providing a convenient way for you to start over again at any time you wish. When a demo company expires, it is replaced in the active Demo Companies area with a new invitation to set up a different demo company.

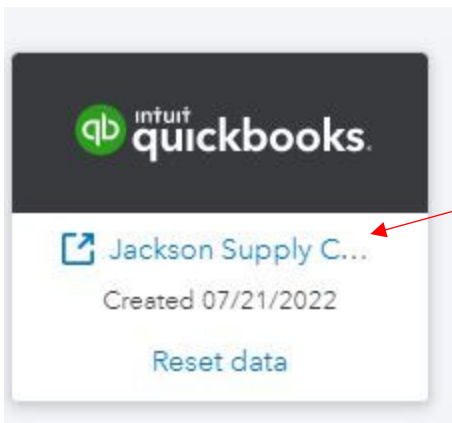
To set up your first demo company, open the Demo Companies page of the portal, shown next.



Click the first available "+ Add a company" box



Type the company name and then click Create company

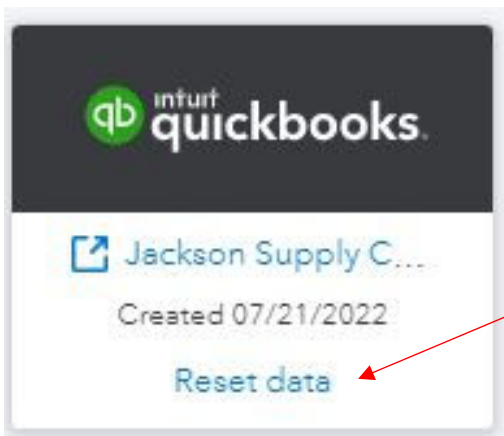


Click the company name link to open the new demo company

Follow the instructions in the student eMaterials on pages E-12 through E-19 to finish creating Jackson Supply Company in preparation for your work in Chapters 4 through 8. Then repeat this process to set up Waren Sports Supply in preparation for your work in Chapter 9. For your convenience, the applicable student eMaterials pages are duplicated at the end of this document. These are the same steps that your students will do after you send them the two company invitation emails described in Part II of this document.

As mentioned earlier, demo companies expire one year after you create them. You can also reset a demo company at any time, which will remove any posted transactions in the company's dataset.

To reset a demo company after you have created it:



Click "Reset data" to reset the demo company



Click "Yes, reset" to permanently reset the company, which removes all transactions and records except the chart of accounts.

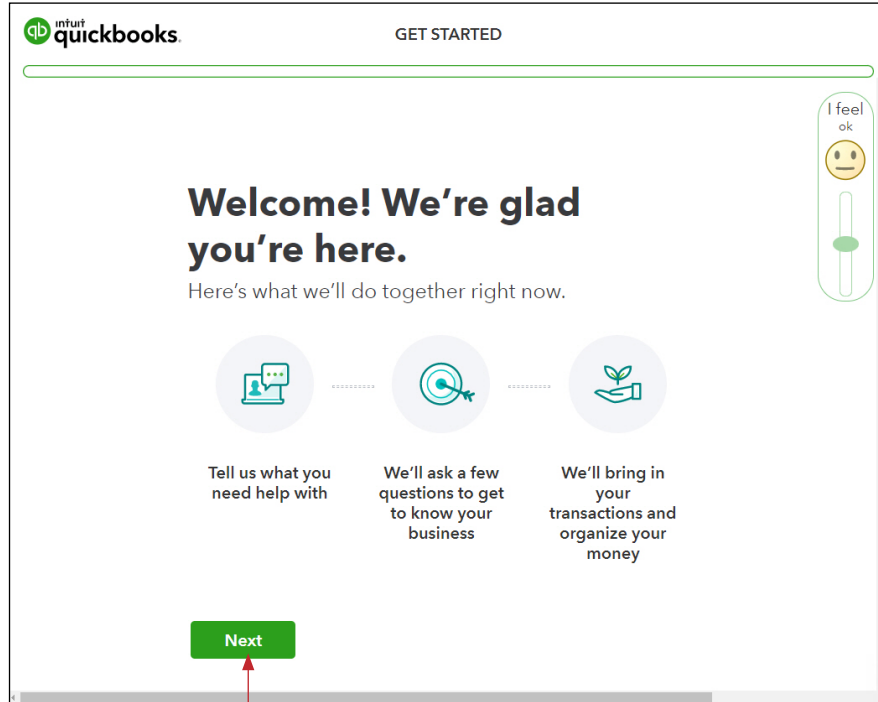
If you reset a demo company:

- **You do not need to redo the procedures described on pages E-12 through E-19 of the student eMaterials again.** Intuit retains the basic company information from the selections you made when you first set up the company as a demo company.
- **Account and Settings Page** – The way that Intuit has handled the resetting process, some of the changes you previously made for a demo company in the Account and Settings page will reset, while others remain. It's best to check the Account and Settings page after resetting a demo company. Check the settings against the recommended changes for Jackson Supply Company (see Chapter 4 pages 4-3 through 4-7) and Waren Sports Supply (see first 2:38 of the Company Setup and Data Import Instructional Video). Change and save any settings that did not remain after the demo reset process.
- **You do not have to reimport a chart of accounts.** The last known version of the chart of accounts, *including any edits you may have made to account names and/or account numbers*, will remain in the reset demo company. For Jackson Supply Company, skip the "Import the Chart of Accounts" section procedures described on pages 4-7 through 4-12 when using a reset demo version of the company. For Waren Sports Supply, skip the chart of accounts steps shown in the video from 2:30 through 5:54 when using a reset demo version of the company.

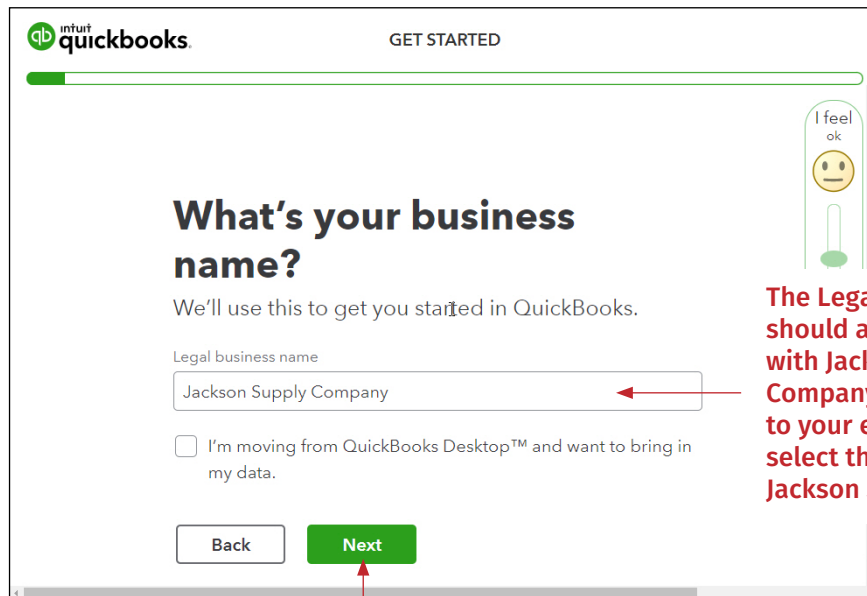
*****pages E-12 through E-19 excerpted from Student eMaterials*****

Set Up Your QuickBooks Online Companies

After setting up your Intuit account, the next windows will guide you through setting up your company in QuickBooks Online.



Click Next




Click Next

intuit quickbooks GET STARTED


I feel ok

How do you manage your business finances today?


No matter where you're coming from, we're here to help




QuickBooks Desktop™




Other bookkeeping software



Spreadsheets or pen & paper



Other



Nothing, I'm just getting started

Select Other

Click Next

What's your industry?

Start typing and select the option that fits best. You can always change it later.

Industry

Service establishment equipment and supplies merchant wholesalers.

Click Next



intuit quickbooks GET STARTED

I feel ok

What kind of business is this?

Tell us about your business structure. We use this to help categorize your transactions.

Sole proprietor	Partnership
Non-profit organization	S Corp
<input checked="" type="checkbox"/> C Corp	I'm not sure

Back Next

Select C Corp

Click Next

intuit quickbooks GET STARTED

I feel ok

How does your business make money?

We tailor your accounting categories based on your answer. Select all that apply.

<input type="checkbox"/> Provides services	<input checked="" type="checkbox"/> Sells products
<input checked="" type="checkbox"/> Something else	

Back Next

Select:
Sell products
Something else

Click Next



intuit quickbooks. GET STARTED

I feel ok

What's your main role at Jackson Supply Company?

We'll customize QuickBooks based on your answer.

Owner or partner

Employee

Bookkeeper or accountant

Other

Back Next

Select: Bookkeeper or accountant

Click Next

intuit quickbooks. GET STARTED

I feel ok

Who works at this business?

Help us understand who's on your team. Select all that apply.

Only the owner

Employees

Contractors

A few partners and owners

We plan to hire in the future

Back Next

Select: Employees

Click Next




intuit quickbooks GET STARTED

I feel ok

The effortless way to pay your team

Free 30 day trial of QuickBooks Payroll

- Breeze through payday with direct deposit
- Payroll taxes are calculated and paid automatically
- 24/7 expert support provides step-by-step help
- Payroll syncs with QuickBooks so your books are always up-to-date



Want to add QuickBooks Online Payroll Premium?

Yes, I want to add payroll

DO NOT SAY YES! Cancel anytime [Terms & conditions](#)

No, I don't want to add payroll

Select: No, I don't want to add payroll.









Click Next

intuit quickbooks GET STARTED

I feel ok

What apps do you use for your business?

We'll help you connect them later on to bring in your data.

 PayPal	 Square	 Bill.com	 Dext
 Fundbox	 Shopify	 Gusto	 Amazon Business

Start typing to select other apps you use

Search by app name...

Click Skip for Now



intuit quickbooks. GET STARTED

I feel ok

Link your accounts and see everything in one place

QuickBooks will automatically bring in transactions and save hours of manual entry.

- 1 Securely link your bank or credit card
- 2 Select the accounts you'd like to bring in
- 3 See what your cashflow looks like

CASH FLOW 6 months **\$10,000** Current cash balance

TODAY

Month	Money in	Money out
JUL	\$10K	\$10K
AUG	\$10K	\$10K
SEP	\$15K	\$10K
OCT	\$20K	\$10K
NOV	\$15K	\$10K
DEC	\$15K	\$10K

Back Link Accounts Skip for now

Click Skip for Now

intuit quickbooks. GET STARTED

I feel ok

What is everything you want to set up?

Your choices help personalize your setup. You can still use every part of QuickBooks.

<input type="checkbox"/> Accept online payments	<input checked="" type="checkbox"/> Invoice customers
<input checked="" type="checkbox"/> Enter and pay bills	<input checked="" type="checkbox"/> Track receipts & expenses
<input checked="" type="checkbox"/> Track time	<input checked="" type="checkbox"/> Pay employees or contractors
<input checked="" type="checkbox"/> Manage inventory	<input checked="" type="checkbox"/> Track sales
<input type="checkbox"/> Protect my business with insurance	<input type="checkbox"/> Manage sales tax

Back Next

Select:
Invoice customers,
Enter and pay bills,
Track receipts & expenses,
Track time
Pay employees or contractors
Manage inventory,
Track sales

Click Next



We're almost ready to dive in!

- Testing the waters ✓
- Creating transaction categories ✓
- Building your dashboard ✓

[Let's go](#)

Click Let's go

You have now completed the setup for Jackson Supply Company. You will now repeat the process for Waren Sports Supply, with a few minor differences. The repeat images will not be shown again. Instead, here you will be provided with a list of items to select.

- ▶ Go back to your email invitations and find the email invitation for Waren Sports Supply.
- ▶ Right-click on Accept Invitation and select "Open link in incognito window."

Because you have already registered using your email for Jackson Supply Company, you will need to "Sign In" instead of creating a new account.

intuit

qb quickbooks turbotax

Create your account

Already have an account? [Sign In](#)

Email address (will be used as your user ID)

*This user ID is already taken.
Sign in or recover your account*

Confirm email

Confirm email field does not match the email address field

[Sign In](#)

[Recover Your Account](#)

Choose a different user ID

Click Sign In

You will go through the same windows previously shown for Jackson Supply Company. Please select the following items as you click through the windows:

Window	Action
Welcome! We're glad your're here.	Click Next
What's your business name?	This should pre-filled with Waren Sports Supply. Click Next
How do you manage your business finances today?	Select Other → Click Next
What's your Industry?	Type: Sporting and recreational goods and supplies merchant wholesalers → Click Next
What kind of business is this?	Select C Corp → Click Next
How does your business make money?	Select Sells products and Something else → Click Next
What's your main role at Waren Sports Supply?	Select Bookkeeper or accountant → Click Next
Who works at this business?	Select Employees → Click Next
The effortless way to pay your team	This window is very important. Because you only have a free 30-day trial, it is important that you do not start this trial until it is needed. Select No, I don't want to add payroll → Click Next
What apps do you use for your business	Select Skip for now
Link your accounts and see everything in one place	Select Skip for now
What is everything you want to set up?	Select: <ul style="list-style-type: none"> • Invoice customers • Enter and pay bills • Track receipts & expenses • Track time • Pay employees or contractors • Manage inventory • Track sales Click Next
We're almost ready to dive in!	Click Let's go

You have now completed the setup of both Jackson Supply Company and Waren Sports Supply in *QuickBooks Online*.