

Getting started

with QuickBooks Online Accountant



Your success starts here.

Your ideal practice begins with the basics - from adding a client to finding your favorite tools. We'll walk through the steps and resources you need to get up and running, and preview the power that [QuickBooks Online Accountant](#) puts at your fingertips.

1 Sign up for QuickBooks Online Accountant

Discover why [moving to the cloud](#) will take it to the next level

Watch a short [introductory video](#) or attend an [on-demand introductory webinar](#)

[Sign Up or Sign In](#) - QuickBooks Online Accountant is free and so is [Firm Books](#)

Get comfortable with QuickBooks Online with [10 how-to tips from an expert](#)

2 Add your first client

See which of your clients are best [fit for the cloud](#)

Understand QuickBooks Online pricing and your [wholesale billing discount](#)

Learn how to [add any type of client](#) to your QuickBooks Online list

Migrate your [first QuickBooks Desktop client](#) in a few easy steps

3 Meet QuickBooks Online (and the rest of our family)

Take a [QuickBooks Online Test Drive](#) or watch a [short video](#)

Access self-paced or over-the-web [QuickBooks Online training](#) from the ProAdvisor Tab

Get your clients up to speed with [QuickBooks Online client training](#) and [tutorials](#).

Learn about our extended ecosystem of offerings: [Apps](#), [Payroll](#), [Payments](#), and [ProConnect Tax](#)

4 Fine-tune your workflow

Work on your clients' books with [accountant-only tools](#)

Manage any and all clients directly from the [Clients Tab](#)

Supervise your team's roles and permissions from the [Team Tab](#)

Create projects and tasks with 'Quickstart [project templates](#)' inside the [Work Tab](#)

Use these handy [shortcuts and hacks](#) to navigate like a pro

5 Grow your practice

See the rewards of being part of our [ProAdvisor Program](#)

[Get certified](#) to get your profile listed on "[Find a ProAdvisor](#)"

Use '[Client Overview](#)' to get up to speed on the state of prospect client's books

Build better relationships with [simplified client communication](#)

Have a question? We have answers.

Call [1.888.333.3451](tel:1.888.333.3451) for help setting up QuickBooks Online Accountant

Call [1.888.236.9501](tel:1.888.236.9501) to learn about how to make the most of QuickBooks Online Accountant

Visit the [QuickBooks Customer Service](#) page to connect with a QuickBooks expert