

Computerized Accounting using QuickBooks Online

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





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


Note: To avoid confusion between the company invitations we recommend that you send the Jackson Supply Company invitation when students are starting Chapter 4 and then send the Waren Sports Supply invitation later when students are ready to start Chapter 9. If you choose to send both invitations at the same time, it is very important that you follow the instructions to edit the email invitation and name the specific company (Jackson, Waren) in the email.

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/redirect/testdrive>*

Starting with Chapter 4, however, students will need to use companies that you will set up in *QuickBooks Online*. After adding all students to a class, you will prepare and send two invitation emails to all students: the first for Jackson Supply Company (for Chapters 4 through 8) and the second to Waren Sports Supply (Chapter 9).

 Send new company invitation		Remove from class
<input checked="" type="checkbox"/>	Student	Companies (maximum of 4 per student)
<input checked="" type="checkbox"/>	Student 1, Test teststudent1@adpub.com	 No companies

- ▶ Check the box to select all your students. If you have multiple pages of students, this will only select the page that you are currently on. You can click on the gear icon and select to show 30 per page.

 Send new company invitation

- ▶ Click *Send new company invitation*. This will open a window to name the company. For Chapters 4-8 you will be using Jackson Supply Company and for Chapter 9 you will be using Waren Sports Supply. You will need to send an invitation for both.

The company name cannot be changed once created.
Maximum of 4 companies per class.

Choose a name:

Next: Preview invitation

The company name cannot be changed once created.
Maximum of 4 companies per class.

Choose a name:

Next: Preview invitation

- ▶ *Name your company: Jackson Supply Company or Waren Sports Supply.*
- ▶ *Click Next: Preview Invitation. This will open the company invitation window.*

Send invitation to Test (Jackson Supply Com...)

Edit and send an email invitation for your students to create a new QuickBooks Online Plus company. (Valid for 1 year)

Edit email content

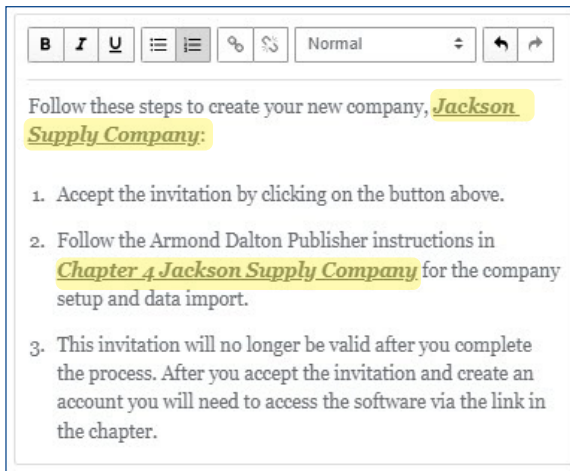
- ▶ *Click Edit email content. You will need to edit the content of the email. The default instructions given are Intuit's instructions and are not consistent with our student instructions.*
- ▶ *Add the company name(either Jackson Supply Company or Waren Sports Supply, depending on the invitation that you are sending) to the introduction section of the email template (see top part of illustration on the next page).*
- ▶ *Delete items 2 through the last item so that the only item remaining is the first item about accepting the invitation.*
- ▶ *Copy and paste the following information into the email. In step 2 make sure you are choosing either "4 for Jackson Supply Company" **OR** "9 for Waren Sports Supply", but not both.*

2. Follow the Armond Dalton Publisher instructions in Chapter **[4 for Jackson Supply Company or 9 for Waren Sports Supply]** for the company setup and data import.
3. NOTE: This invitation will no longer be valid after you complete the process. After you accept the invitation and create an account you will need to access the software via the link in the chapter.

See top of next page for illustrations of what your Jackson and Waren email invitations should look like before you send each of them.

► Once your screen is consistent with the following screenshot, click save email changes.

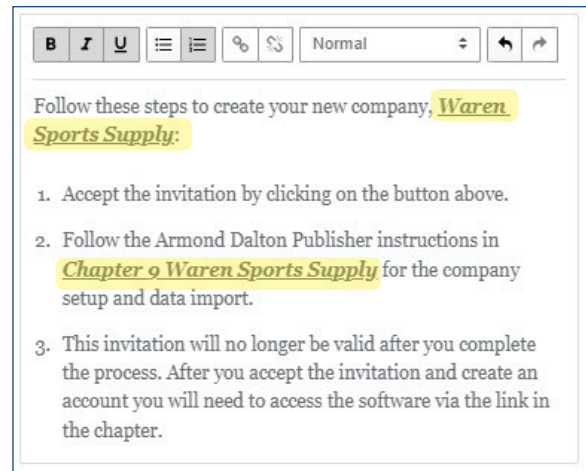
Jackson Email Template for Chapters 4-8



Follow these steps to create your new company, **Jackson Supply Company**:

1. Accept the invitation by clicking on the button above.
2. Follow the Armond Dalton Publisher instructions in **Chapter 4 Jackson Supply Company** for the company setup and data import.
3. This invitation will no longer be valid after you complete the process. After you accept the invitation and create an account you will need to access the software via the link in the chapter.

Waren Email Template for Chapter 9



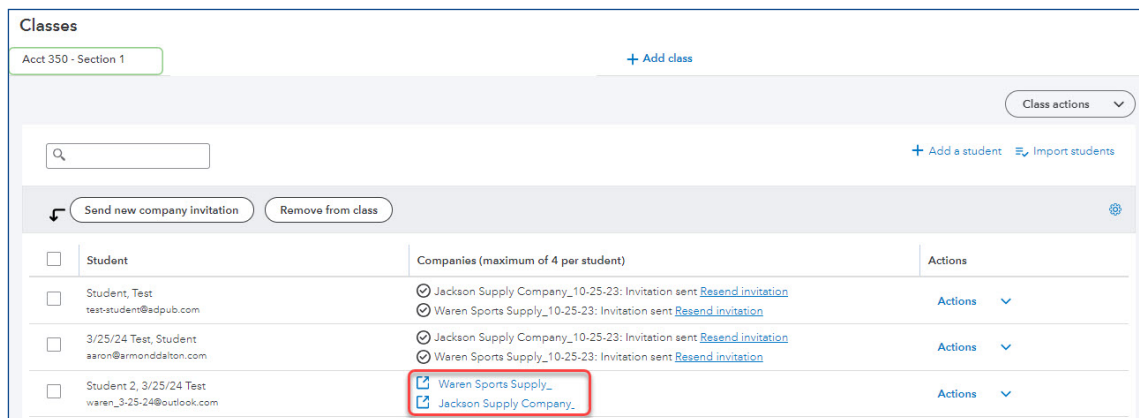
Follow these steps to create your new company, **Waren Sports Supply**:

1. Accept the invitation by clicking on the button above.
2. Follow the Armond Dalton Publisher instructions in **Chapter 9 Waren Sports Supply** for the company setup and data import.
3. This invitation will no longer be valid after you complete the process. After you accept the invitation and create an account you will need to access the software via the link in the chapter.

► After you save your changes, click send email in the bottom right corner.


View Your Student's Companies

As fully described in the Chapter 1, 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:



Student	Companies (maximum of 4 per student)	Actions
Student, Test test-student@adpub.com	<input checked="" type="checkbox"/> Jackson Supply Company_10-25-23: Invitation sent Resend invitation <input checked="" type="checkbox"/> Waren Sports Supply_10-25-23: Invitation sent Resend invitation	Actions ▼
3/25/24 Test, Student aaron@armondalton.com	<input checked="" type="checkbox"/> Jackson Supply Company_10-25-23: Invitation sent Resend invitation <input checked="" type="checkbox"/> Waren Sports Supply_10-25-23: Invitation sent Resend invitation	Actions ▼
Student 2, 3/25/24 Test waren_3-25-24@outlook.com	<input checked="" type="checkbox"/> Waren Sports Supply_ <input checked="" type="checkbox"/> Jackson Supply Company_	Actions ▼

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 each 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.

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. Alternatively, you can setup a demo company for your class, which is covered in the next section. We recommend working through the textbook either as a student or in a demo company to familiarize yourself with the text. This will better prepare you for questions that may arise.

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.

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

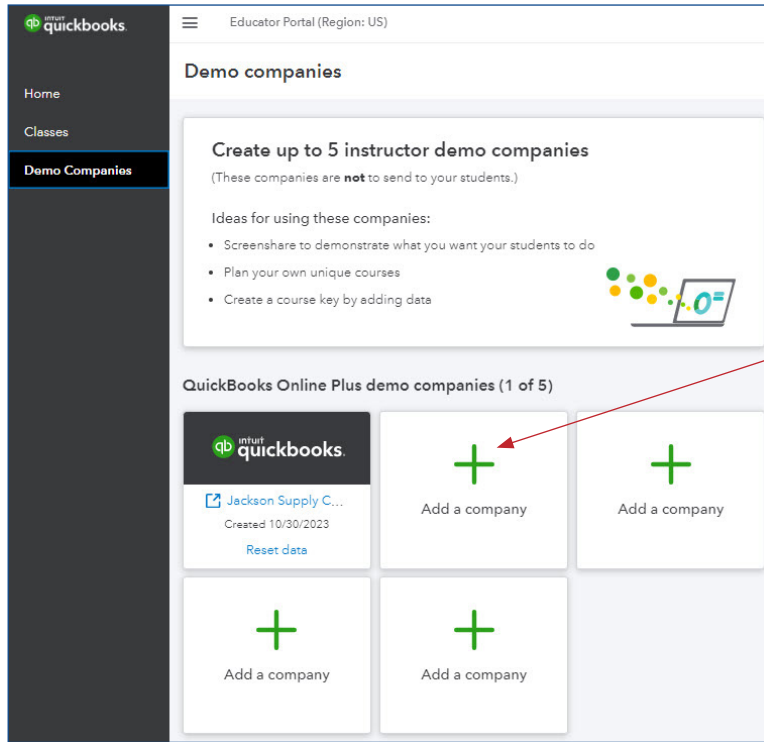
You can work through Chapters 2 and 3 using the test drive company by clicking on this link: <https://qbo.intuit.com/redirect/testdrive>

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

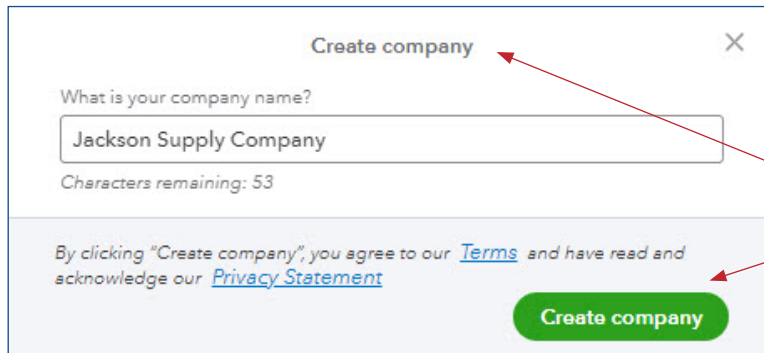
1. **Company data files** – Data files for Jackson Supply Company and Waren Sports Supply are included in links within Chapters 4 and 9 of the text.
2. **Demo Companies** – The easiest way to work through Chapters 4 through 9 is to use two of the five demo companies available to you in the Demo Companies 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.

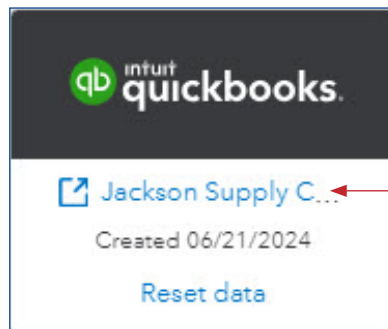
To set up your first demo company, open the Demo Companies page of the portal, shown next.



Click the first available "+ Add a company" box



Type the company name and then click Create company

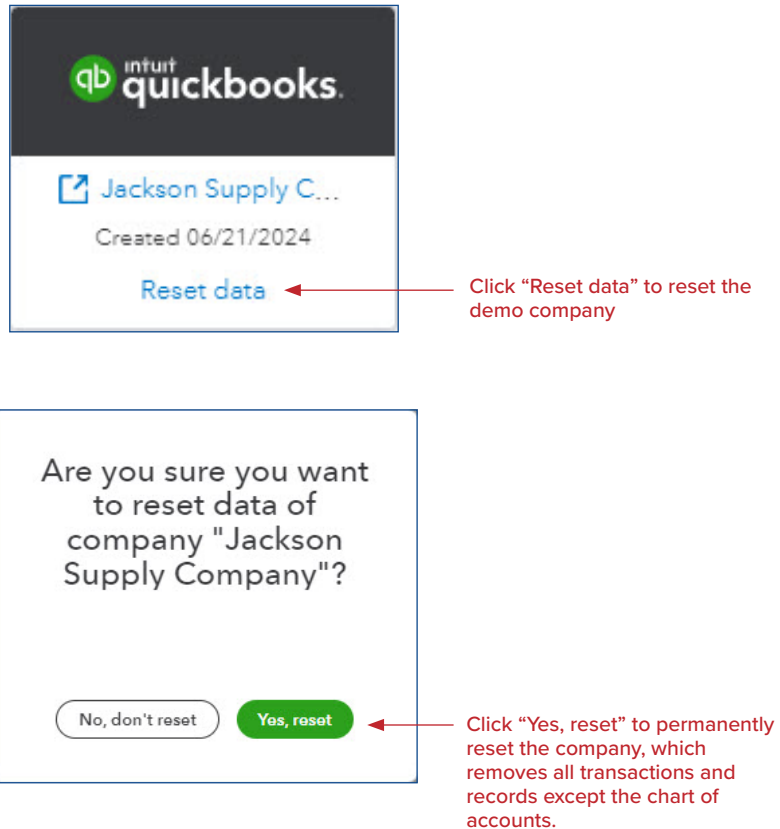


Click the company name link to open the new demo company

Follow the instructions in Chapter 4 for the Jackson Supply Company setup and Chapter 9 for the Waren Sports Supply setup.

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:



If you reset a demo company:

- **You do not need to redo initial setup the procedures described in the materials.** 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.
- **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.*