



Adding QuickBooks *Payments*

A step-by-step guide to adding QuickBooks merchant payment features to receive credit card payments and bank ACH's for some of the best processing rates around.

Why should you use QuickBooks Payments?

- Quick, efficient, and seamlessly integrated with your bookkeeping software
- Easily created online or via the QuickBooks mobile app
- Lower processing fees compared to Square, Stripe, and other providers
- Complete control over how your clients can pay you (enable bank ACH and/or credit card options with a click)
- You can send invoices to clients by email, a shared link for texting/messaging, or a QR code
- Quick deposit speeds
 - Funds deposited into a standard bank account within 24 hours
- Find out more and see the processing rates here:
<https://completebusinessgroup.com/payments/>

Quick Tip:

- You can use QuickBooks online to send invoices without applying for the merchant account (to collect payments).
 - You will simply receive payments in QuickBooks for cash/check's received.
- You only need to apply for the QuickBooks payments if you want to allow your clients to pay your invoices through a bank ACH and/or credit and debit cards.

How to sign up for QuickBooks payments:

- Use the following link for the best-discounted rates for QBO payments: <https://completebusinessgroup.com/palms-probooks-llc/>
- Scroll down and select “QuickBooks payments, e-invoicing & other options”
- For the product desired, select “QuickBooks payments for QBO”
- For the product billing option, select “pay as you go”
 - UNLESS you plan to invoice more than \$7,500 in credit card sales (not bank ACH). This option charges a flat monthly fee (\$16) to give you even lower processing rates
- Fill in your company information in the next section
 - Legal name, phone number, tax ID, filing status, and the goods/services you provide
 - Enter a rough estimate of your monthly processing volume
 - Enter your company ID for your QBO account
 - To pull this number:
 - Login to QuickBooks
 - Click the gear icon in the top right corner
 - Click subscriptions and billing
 - The company ID will be the first line on this new page with four sets of 4 numbers (xxxx xxxx xxxx xxxx)



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- Add your physical business address – no PO boxes
- Add the primary owner's information
 - Your personal address, social security number, date of birth, name, and email
- Add your bank information – where you want the funds to be deposited
- Ensure you see Palms ProBooks in the referred by section, then click "submit"

You should receive an email confirmation after you submit your application. You should receive an additional email with your approval in the next few days. At this point, your QuickBooks account will be set up and ready to start accepting payments from your customers