

A woman with long brown hair is seen from the side, wearing a beige knitted sweater. She is sitting at a wooden desk, looking at a laptop. On the desk, there are several yellow and green sticky notes. The background is a bright, out-of-focus office space with a window.

Get *QuickBooks* Online

A step-by-step guide to creating a QuickBooks online account with a 30-day free trial and 30% off your first year!

How to sign up for QuickBooks Online:

- Go to <https://completebusinessgroup.com/palms-probooks-llc/>
- Scroll down and click the drop down for “QuickBooks Software & Hosting Options”
- Select the following options:
 - Product to begin = QuickBooks Online
 - Product desired = QBO Subscription new
 - Options:
 - **Simple start** – this is a very basic/entry level version. It works for brand new business owners, but has limited features. If you are using QuickBooks for invoicing, I highly recommend choosing Essentials
 - **Essentials** – this is the best plan for most business owners. It has great reports and works well for most bookkeeping needs. 90% of my clients use this plan
 - **Plus** – a higher level plan for better, more advanced reporting. Get features like budgeting, cash flow tracking, project/class tracking, and more
- Product version = leave as filled
- Product period = monthly
- QBO email address used for sign in = enter your email that is tied to your business
- Customer details = enter all of your personal information here
- Billing address = your company address

CONTINUED

- Add payments or payroll
 - Select no for payroll – I highly recommend using Gusto instead
 - Select no for payments -- UNLESS you want to allow customers to pay your QuickBooks invoices through bank ACH and/or credit cards. The processing fees for this platform beat out stripe, square, and others.
- Were you referred by a CBG partner? = Yes, please fill in Drezden Palms and Palms ProBooks
- Ready to place your order? = order now
- Payment information = use your card information for the monthly subscription
- Click “I agree” & “submit”
- You will get an email when your account is ready (generally takes a day or two). Follow the email instructions to login to your new account.