How to set up QuickBooks Online Payroll: Core
Be sure you’re getting a “Trial” version with Core payroll

https://quickbooks.intuit.com/pricing/
Use your own email address or use a temporary one by using @mailinator.com [website](https://mailinator.com)

Use your real mobile number
Be sure to “Continue with trial”
Make up your own company name. Have it start with “SBGTEST_”

What is the full, legal name of your business?

SBGTest_My Company

How would you describe what your business does?

Graphic design, plumbing, etc.

Start typing and select the industry that fits best.

I've been using QuickBooks Desktop and want to bring in my data.
2. What would you like to do in QuickBooks?

This is just to get you started. You can always do more later.

Select anything
3. What’s your role at your business?

We’ll use this info to help personalize your QuickBooks. You can always change it later in Settings.

- Accountant
- Owner
- Bookkeeper
- Employee
- It’s something else

Do you have an accountant or bookkeeper right now?

- Yes, someone helps me
- No, but I would like help
- No, I do it all myself

Great. We’ll be with you every step of the way.
Select “Workers” -> “Overview”
Welcome to QuickBooks Payroll
Let's get acquainted. Just a few quick questions and you'll be on your way.

Get started
Have you paid employees in 2019?

Answer yes if you, your accountant, or maybe even a previous owner of your business has paid employees.

No  I'm not sure  Yes

We're thrilled you're here! Since it looks like this is your first time paying employees in 2019, we'll help you set everyone up right.

Select “No” unless you want to train on how to enter prior payroll history.
When is your next payday?

Pick a date and we'll get things rolling on our end.

Select your next payroll run
Where is your business located?

Enter the street address where most of your employees work. This is also called your principal business address.

Business name*
SBGTest_SomethingSomething

Business address*
2535 Garcia Avenue

City* Mountain View
State* CA
ZIP code* 94043

Enter a valid address
Who's your payroll contact?

This helps us make sure that reminders and other important payroll info get to the right person.

First name*
123412341234@mailinator.com

Last name*
none

Business phone*
(408) 555-1234

Email address*
123412341234@mailinator.com

Fill out your payroll contact info.

This phone can be fake
Keep selecting “Let’s go” to continue setup.

First step is to set up your employees.
Enter all the employee information including the W-4 info which can all be fake data

Select to pay by paper check
Your employees

Now it's time for us to get to know your team. Gather your employees' tax and pay info to keep rolling.

Add all your employees then select “Done”
Tax Information
All of this should be automatically populated for you
Federal and state tax details

Is your business a 501(c)(3) non-profit?

- Yes, and I don’t pay federal unemployment taxes (FUTA)
- No (most common)

What is your Principal Officer Title? 🔄

- President

Do you know your federal Employer Identification Number (EIN)?

- Yes, it is 12-3456789
- No, I haven’t received it yet, or I don’t have it handy

I agree to share my information with Intuit partners for workers comp offers.

Do you know your California Employer Account Number?

- Yes, it is 123-1234.1
- No, I haven’t received it yet, or I don’t have it handy

All of this data can be fake, just don’t use the examples in the pop-up help text.
Federal tax info
To ensure your tax payments and form filings are accurate, we need your federal and state identification numbers. What are these?

What business name do you use when filing tax forms (filing name)?
SBGTest_SomethingSomething

What address do you use when filing tax forms (filing address)?
Yes Same as business address: 2535 Garcia Avenue, Mountain View CA, 94043

Company type
Limited Liability Company

Principal Officer Title
Owner

Federal EIN
12.1324567

I agree to share my information with Intuit partners for workers comp offers.

State tax info
CA Employer Account Number optional
123-1234-1

Don't have your federal or state tax numbers?

Most of this is filled out already
Let's get you set up

Before we get to payday, we need some more information.

TO DO

You’re ready to start
We've customized your payroll to get you going.

Your business info is complete
We have everything we need to calculate your payroll taxes.

You’re ready to pay your team
To add more employees or change their info, select Edit.

Your tax info looks good
We're all set to file your taxes for you.

Connect your bank
This helps get you set up for electronic payments and same-day direct deposit.

Let's go

Sign your tax forms
One quick signature and we'll be ready to pay and file your taxes for you.

You're ready to roll
Start creating paychecks and pay your team.
Connect your bank to send money with QuickBooks

To use direct deposit to pay your workforce as well as e-file and e-pay for your taxes, you need to connect your bank account. For your security, we need information that your principal officer will have.

Select “Get started”
Get set up to pay with direct deposit
You’ll be moving money so let’s double-check your info (this should take about 5 minutes)

Business
Contact info, website, tax ID

Principal officer
Contact info, date of birth, last 4 of Social Security number

Bank account
Either sign-in info, or routing and account numbers

You must “Review” each step

By selecting Accept and Submit, I agree to the Intuit Privacy Statement.
You must use a valid address, but everything else can be fake.

Then select “Next”... which is current gray but is clickable
All principal officer information can be fake.

You can also select to use the “Same as business address”

Then select the “Next”
Select to “Add a new bank account”

Bank account

Let us know which bank account you’d like to use.

Add new bank account
Select the link on the bottom to “Enter bank information manually…”
Use a valid Routing number, eg 322271627

You can fake the Account number

Then select “Save”
Select “Accept and Submit”
Enter in a fake SSN

Just be sure it ends in the same 4 digits you used earlier
Thank you, we're reviewing your information

We are currently in the process of reviewing the information you submitted. We will reach out to you in the next few days if we need anything else.

Select “Ok”
Sign your tax forms

*If you don’t see this as the next step, just refresh your page until you you.*

Pay attention to the instructions for the next step!
Be sure to select “Let’s do it later”
Congrats! Setup is complete so select “Done”

High five, 123412341234@mailinator.com!
We’ll start getting your account set up. Meanwhile, feel free to take a coffee break, you deserve it!

Here’s what happens next:

AS SOON AS YOU CAN
Sign legal forms. We’ll ask you to e-sign some legal forms so we can assume your payroll tax liability.
If you see a survey please close it by clicking on the “x”
You’re now ready to run payroll!

Select “Let’s go”
Have fun running your first payroll with this account!

Run Payroll: Every Month

Bank account

Pay period: 11/12/2019 to 12/11/2019

Pay date: 12/13/2019

TOTAL PAY: $3,750.00

<table>
<thead>
<tr>
<th>EMPLOYEE</th>
<th>PAY METHOD</th>
<th>SALARY</th>
<th>MEMO</th>
<th>TOTAL PAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>$45,000.00 / year</td>
<td>Paper check</td>
<td>$3,750.00</td>
<td></td>
<td>$3,750.00</td>
</tr>
</tbody>
</table>

TOTAL: $3,750.00

Add an employee

Cancel

Preview payroll