



# How to set up QuickBooks Online Payroll: Core

## Save 70% or try it free for 30 days\*

70% off  
For 3 months\*

Do it yourself - 70% off

Manage your own books and your business with QuickBooks.

LIVE

Discover QuickBooks Live Bookkeeping

Get a virtual expert to help manage your books.

New product

Buy now  
70% off for 3 months\*Free trial  
for 30 days

Click to get 70% off

## Small Business

## Simple Start

\$70/mo  
~\$4/employee/mo

Try it free

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles **NEW**
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Run general reports

## Essentials

\$85/mo  
~\$4/employee/mo

Try it free

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles **NEW**
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Run enhanced reports
- ✓ Manage bills
- ✓ Track time
- ✓ Includes 3 users

## MOST POPULAR

## Plus

\$115/mo  
~\$4/employee/mo

Try it free

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles **NEW**
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Run comprehensive reports
- ✓ Manage bills
- ✓ Track time
- ✓ Includes 5 users
- ✓ Track project profitability
- ✓ Track inventory

## Advanced

\$195/mo  
~\$4/employee/moCall for a product demo  
1-844-324-8623

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Maximize tax deductions
- ✓ Invoice & accept payments
- ✓ Track miles **NEW**
- ✓ Send estimates
- ✓ Track sales & sales tax
- ✓ Manage 1099 contractors
- ✓ Run most powerful reports
- ✓ Manage & pay bills
- ✓ Track time
- ✓ Includes 25 users
- ✓ Track project profitability
- ✓ Track inventory
- ✓ Business analytics & insights
- ✓ Import & send batch invoices<sup>2</sup>
- ✓ Customize access by role
- ✓ Dedicated account manager
- ✓ On-demand online training
- ✓ Enhanced custom fields **NEW**

## Freelancer

## Self-Employed

\$15/mo

Try it free

- ✓ Track income & expenses
- ✓ Capture & organize receipts
- ✓ Estimate quarterly taxes
- ✓ Invoice & accept payments
- ✓ Track miles
- ✓ Run basic reports

## Add-on QuickBooks Online Payroll - 70% off

## ✓ Core Payroll

Add \$45/mo  
~\$4/employee/mo

ON

Our simplest solution for reliable, automated payroll. Learn more

## ✓ Premium Payroll

Add \$75/mo  
~\$8/employee/mo

OFF

Our automated payroll solution with integrated time tracking and tools that help you grow. Learn more

## ✓ Elite Payroll

Add \$125/mo  
~\$10/employee/mo

OFF

Automated payroll backed by our guarantee<sup>2</sup>, with certified HR support to protect your business. Learn more

# Be sure you're getting a "Trial" version with Core payroll


<https://quickbooks.intuit.com/pricing/>

intuit

qb quickbooks ✓ turbotax

## Create an Intuit account to try QuickBooks for free

You can use this for all Intuit products.

 Sign up with Google

or

Email address (User ID)

Confirm email

Mobile number (Recommended)

Standard call, messaging or data rates may apply.

Password

 Sign Up With Email

By clicking to sign up, you agree to our [Terms of Service](#) and  
have read and acknowledge our [Privacy policy](#).

Free 30-day trial\* includes:

QuickBooks Online Plus

QuickBooks Online Payroll Core

You'll use this as your user ID

After trial, continue using:

QuickBooks Online Plus

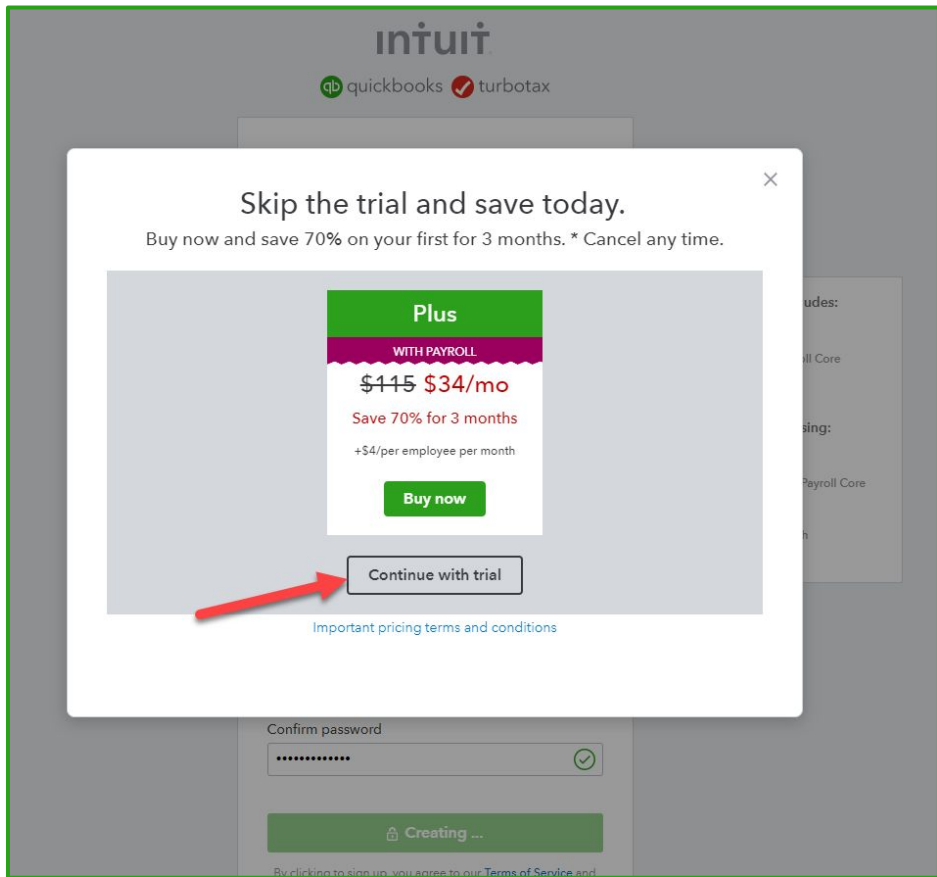
Plus QuickBooks Online Payroll Core

for \$115/month

+\$4/employee per month

Use your own email address or  
use a temporary one by using  
[@mailinator.com](#) [website](#)

Use your real mobile number



Be sure to "Continue with trial"

# 1. Set up your business.

Make up your own company name. Have it start with "SBGTEST\_"

Something a little different from QuickBooks. Let's get to know what you want to fit you. You can change your info anytime in Settings.

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.

Next

## 2. What would you like to do in QuickBooks?

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



Send and track  
invoices



Organize your  
expenses



Manage your  
inventory



Track your retail sales



Track your bills



Track your sales tax



Pay your employees



Track hours


Back


Next


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

Select anything

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.

Back

All set

qb intuit quickbooks

+ New

Dashboard

Banking >

Expenses >

Sales >

Projects

Workers >

Reports

Taxes >

Mileage

Accounting >

My Accountant

Apps

Live Bookkeeping

SBGTest\_ Something Something

+ LOGO SBGTest\_ Something Something

See how much you're making

Start invoicing

Connect with an accountant

Connect your bank

Overview

Employees

Contractors

Workers' Comp

Benefits **NEW**

Human Resources

\$0 INCOME

\$0 EXPENSES

Expenses \$0 LAST MONTH

Donut chart showing expenses for last month.

Select "Workers" -> "Overview"



+ New

Overview

Employees

Contractors

Workers' Comp

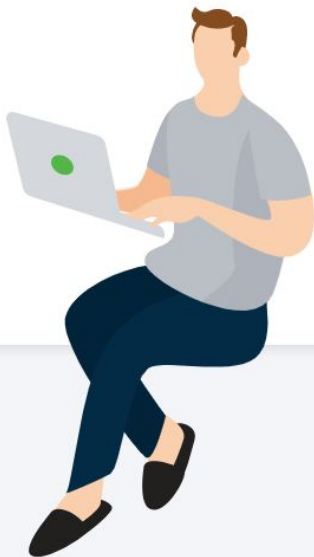
Benefits NEW

Human Resources

# Welcome to QuickBooks Payroll

Let's get acquainted. Just a few quick questions and you'll be on your way.

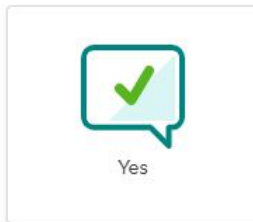
Get started



Select  
"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.



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.

Next

**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.

< December 2019 >

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	<b>31</b>				

Previous

Done

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\_ Something Something

Business address\*

2535 Garcia Avenue

City\*

Mountain View

State\*

CA



ZIP code\*

94043

Next

**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\*

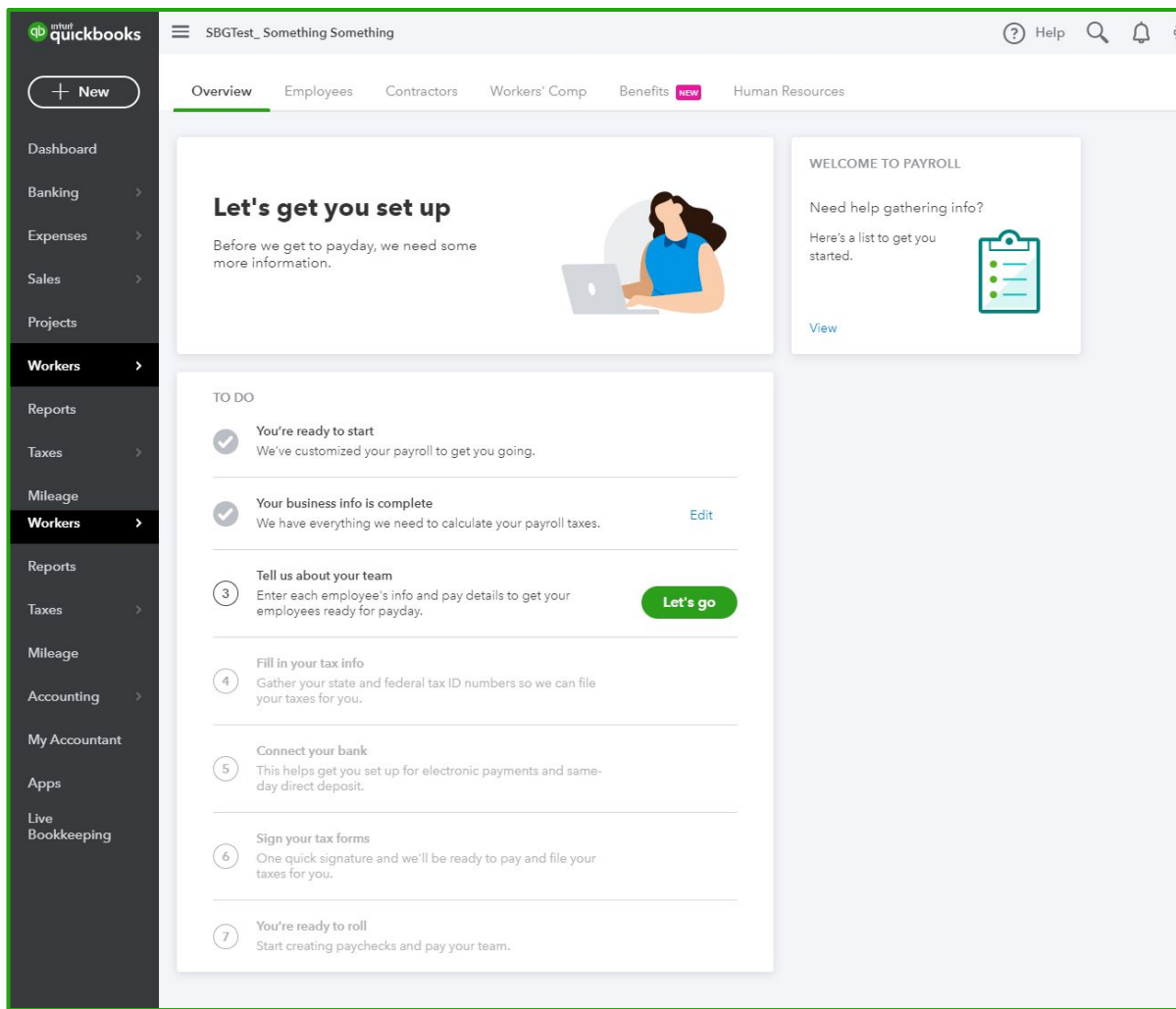
123412341234@mailinator.com

This phone  
can be fake

Previous

Done

Fill out your  
payroll contact  
info.



Keep selecting  
"Let's go" to  
continue setup.

First step is to set  
up your employees

Blase Iuliano

1

Add an employee

1

Personal info

First name\*

Blase

M.I.

Last name\*

Iuliano

Hire date

Why do we need this?

12/13/2019

Email

blase\_iuliano@nator.com

☐ Invite this employee to view their pay stubs and W-2s online. [Learn more](#)

2

How often do you pay Blase?

Enter a few details and we'll work out your company's payroll calendar. What is a pay schedule?

Every Month

starting 12/13/2019

3

How much do you pay Blase?

If your company offers additional pay types, add them here. These pay types show up when you run payroll. [Learn more about pay types](#)

Salary

\$ 45,000.00

per year

☐ Blase works part-time

[+ Add additional pay types \(like overtime, sick, and vacation pay\)](#)

4

Does Blase have any deductions? (Examples: retirement, health care)

Deductions may include healthcare or retirement plans. Garnishments and loan repayments can be added here too. [Learn more about deductions](#)

No deductions (most common)

[+ Add deductions](#)

5

What are Blase's withholdings?

You can find this info on this employee's W-4. What is a W-4?

Single, with no allowances

6

What are Blase's personal details?

Add employee's personal details.

Birth date

04/01/1990

7

How do you want to pay Blase?

In a rush? Choose paper check for now and come back to change this later. [Learn about ways to pay](#)

Paper check

Each time you run payroll, we'll create a paycheck that you can print and hand to Blase yourself.

Delete employee

Done

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.




Blase Iuliano

Done

Add Employee

**Add all your  
employees then  
select "Done"**



 **quickbooks**

+ New

Dashboard

Banking >

Expenses >

Sales >

Projects

**Workers** >

Reports

Taxes >

Mileage Workers >

Reports

Taxes >

Mileage

Accounting >

My Accountant


Apps


Live Bookkeeping


SBGTest\_ Something Something

?

 Help







Overview

Employees

Contractors


Workers' Comp

Benefits **NEW**

Human Resources

## Let's get you set up


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




### WELCOME TO PAYROLL


Need help gathering info?


Here's a list to get you started.

  
[View](#)

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. [Edit](#)

 **You're ready to pay your team**  
To add more employees or change their info, select Edit. [Edit](#)

4

**Fill in your tax info**  
Gather your state and federal tax ID numbers so we can file your taxes for you. [Let's go](#)

5

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

6

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

7

**You're ready to roll**  
Start creating paychecks and pay your team.

# Tax Information

## Payroll Taxes Setup and Compliance



### Business details

We use this info to fill out your payroll taxes and forms.

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

SBGTest\_ Something Something

What address do you use when filing tax forms (filing address)?

☒ Same as business address: 2535 Garcia Avenue, Mountain View, CA, 94043

When will you first be running payroll with QuickBooks Online Payroll?

(We'll help you with tax payments and filings starting with the first quarter in which you run payroll.)

☒ Before Jan 1, 2020

☐ On or after Jan 1, 2020

Did you hire your first employee within the last six months?

☒ Yes

☐ No

Did you buy your business from a previous owner?

☐ Yes

☒ No

Workers' comp insurance is required in California

Our partner AP Intego can find a policy that integrates with your payroll. You'll pay only what's needed, whenever you run payroll. [Learn more](#)

Would you like to continue?

Cancel

Continue

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
- ☐ 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
- ☐ No, I haven't received it yet, or I don't have it handy

Back

Continue

**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\_ Something Something

What address do you use when filing tax forms (filing address)?

☒ 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?](#)

Done

Most of this is  
filled out already

 SBGTest\_ Something Something? Help   

New

Dashboard

Banking >

Expenses >

Sales >

Projects

Workers >

Reports

Taxes >

Workers >

Reports

Taxes >

Mileage

Accounting >

My Accountant

Apps

Live Bookkeeping

Overview

Employees

Contractors


Workers' Comp

Benefits new

Human Resources

Let's get you set up


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



WELCOME TO PAYROLL

Need help gathering info?

Here's a list to get you started.



[View](#)

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.

[Edit](#)

You're ready to pay your team

To add more employees or change their info, select Edit.

[Edit](#)

Your tax info looks good

We're all set to file your taxes for you.

[Edit](#)

5

Connect your bank

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

Let's go

6

Sign your tax forms

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

7

You're ready to roll

Start creating paychecks and pay your team.

# Connect your bank

## 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.

Get started

### Connect your bank to



Send money with QuickBooks



Pay your workforce with direct deposit



E-file and e-pay your taxes

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

[Review](#)



### Principal officer

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

[Review](#)



### Bank account

Either sign-in info, or routing and account numbers

[Review](#)

By selecting **Accept and Submit**, I agree to the Intuit [Privacy Statement](#).

**Accept and Submit**

**You must "Review"  
each step**

## Business

We'll use this information to verify your business.

Business type

Limited liability company



Email

123412341234@mailinator.com

Legal business name

SBGTest\_ Something Something

Tax ID number (EIN)

12-1324567

Business address

2535 Garcia Ave

Apt/Ste/Unit

ZIP

94043-1111

City

Mountain View

State

California



Business phone number

(650) 555-1234

Industry category

Schools, Charities & Orgs.



Industry

Colleges, Universities, Professio...



Next

**You must use a valid address,  
but everything else can be  
fake.**

**Then select "Next"... which is  
current gray but is clickable**



## Principal officer

Tell us about the main person associated with your business's bank account

Owner's first name

Owner's last name

☐ Same as business address

Owner address

Apt/Ste/Unit

ZIP

[Enter city and state instead](#)

Owner's date of birth

Mobile phone number

Last 4 digits of SSN

Next

**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

Next

## Add a new bank

Enter bank name or sign-in URL



Or select from popular ones:



[Enter bank info manually \(might take a few days to connect\)](#)

Select the link on the bottom to "Enter bank information manually..."



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

## Enter your bank account info manually

We may need a few days to get everything connected.

Routing number

Account number

1234

\$

000000001234 00000000529 1234

JPMORGAN CHASE  
10430 HIGHLAND MANOR DRIVE  
TAMPA FL 33610

[Sign into your bank and connect instantly](#)

Save

Accept and Submit

Use a valid  
Routing number,  
eg 322271627

You can fake the  
Account number

Then select  
"Save"

## 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

[Edit](#)



### Principal officer

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

[Edit](#)



### Bank account

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



JPMORGAN CHASE (...6789)



Add new bank account

Next

By selecting **Accept and Submit**, I agree to the Intuit [Privacy Statement](#).

**Accept and Submit**

# Select "Accept and Submit"

## Bank account

Let us know which bank account you'd like to use

### Let's make sure you're you

We'll need your complete Social Security number to help verify your information.

Confirm SSN ending in 1234

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.

OK

**Select "Ok"**

New

Dashboard

Banking

Expenses

Sales

Projects

Workers

Reports

Taxes

Projects

Workers

Reports

Taxes

Mileage

Accounting

My Accountant

Apps

Live Bookkeeping

Overview

Employees

Contractors

Workers' Comp


Benefits

NEW

Human Resources

Let's get you set up


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



WELCOME TO PAYROLL

Need help gathering info?

Here's a list to get you started.



[View](#)

TO DO

✓

You're ready to start

We've customized your payroll to get you going.

[Edit](#)

✓

Your business info is complete

We have everything we need to calculate your payroll taxes.

[Edit](#)

✓

You're ready to pay your team

To add more employees or change their info, select Edit.

[Edit](#)

✓

Your tax info looks good

We're all set to file your taxes for you.

[Edit](#)

✓

We're reviewing your bank info

We'll let you know when your bank is connected.

[Edit](#)

6

Sign your tax forms

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

Let's go

7

You're ready to roll

Start creating paychecks and pay your team.

## 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"

**Principal Officer** ×

## Verify and sign

We need your company's principal officer to review and e-sign a few important authorization forms. This allows us to begin reporting payroll taxes on behalf of your company.

Officer first and last name  
BOB SMITH

[Let's do it later](#) [Verify](#)

Pick this one!

**No!**

# 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.

Done

+ New

Dashboard

Banking

Expenses

Sales

Projects

Workers

Reports

Taxes

Mileage

Accounting

My Accountant

Apps

Live  
Bookkeeping

Overview

Employees

Contractors

Workers' Comp

Benefits **NEW**

Human Resources

## Let's get you set up

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



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[View](#)

### 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.

[Edit](#)



**You're ready to pay your team**

To add more employees or change their info, select Edit.

[Edit](#)



**Your tax info looks good**

We're all set to file your taxes for you.

[Edit](#)

How was your payroll setup?



If you see a survey please close it by clicking on the "X"

Your trial subscription ends soon [Subscribe Now](#)

**what quickbooks**

SBGTest\_ Something Something

Help

+ New

Overview Employees Contractors Workers' Comp Benefits **NEW** Human Resources

Dashboard

Banking >

Expenses >

Sales >

Projects

**Workers >**

Reports

Taxes >

**Workers >**

Reports

Taxes >

Mileage

Accounting >


My Accountant

Apps

Live Bookkeeping

### Let's get you set up


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



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[View](#)

#### TO DO

- ☒ You're ready to start  
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To add more employees or change their info, select Edit. [Edit](#)
- ☒ Your tax info looks good  
We're all set to file your taxes for you. [Edit](#)
- ☒ We're reviewing your bank info  
We'll let you know when your bank is connected. [Edit](#)
- ☒ You're all clear for Full Service Payroll  
Everything is set for us to pay and file your taxes. [Edit](#)
- ☐ 7 You're ready to roll  
Start creating paychecks and pay your team. [Let's go](#)

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

Pay date


TOTAL PAY

11/12/2019 to 12/11/2019 ▼

12/13/2019

\$3,750.00

⚙

<input checked="" type="checkbox"/> EMPLOYEE	PAY METHOD	SALARY	MEMO	TOTAL PAY
<input checked="" type="checkbox"/> <div>\$45,000.00 / year</div>	Paper check	\$3,750.00		\$3,750.00 
TOTAL		\$3,750.00		\$3,750.00

Add an employee

Cancel

Preview payroll ▼