

Instructor Resource Guide

Teaching QuickBooks Online

to accompany

Computer Accounting with QuickBooks Online

Donna Kay

Materials reprinted with consent of author from *Technology and Software Training: The Perceived Effectiveness of Using Constructivism, the Pause Principle, and Teams Composed According to Psychological Type to Learn Computer Software Applications*.

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Computer Accounting with QuickBooks Online® is designed to streamline teaching QuickBooks Online (QBO). Using a hands-on approach, this text integrates understanding accounting with mastery of the financial app, QBO. All material is presented in a systematic, step-by-step fashion that makes learning QuickBooks easy. Each chapter builds on previous chapters as students progress from entering simple transactions to using the software's advanced features. However, the innovative design of Computer Accounting with QuickBooks Online doesn't carry student errors forward. Each chapter, exercise, and project is a silo that limits errors carrying forward to streamline grading.

Exciting features of this edition include:

- QuickBooks Online Access Code packaged with the text for student use.
- MHE Connect option for auto grading of student assignments and exams.
- QuickBooks Educator website with text updates and an online form to connect to me with questions, comments, and feedback.
- QuickBooks Student website, www.My-QuickBooksOnline.com, containing text updates, Help links, and links for video tutorials.

QuickBooks Educator website www.My-QuickBooks.com, select QB Educator > QB 2018 Educators.

If you have questions, suggestions, or would like to reach out, feel free to contact me at the QBO Educator website www.My-QuickBooksOnline.com, select QBO Educator. (Passwords available through the text's Instructor Online Learning Center. As a professional courtesy, please do not share the passcode with students.)

Best wishes for your continued success teaching QuickBooks Online!

Donna Kay

Your Wish Has Come True Again!

QuickBooks Autograded Homework with Connect

Computer Accounting with QuickBooks Online offers auto graded homework using the Connect option. Connect enhances your course with student homework entered online and autograded. Students complete assignments (exercises, projects, practice tests, and exams) using QBO and then enter selected answers in Connect accessed through a browser. Connect compares student answers to suggested solutions and provides interactive feedback to students. In addition, Connect enters the student scores into your gradebook.

Connect offers:

- Practice Tests
- Exercises
- Projects

So depending upon the best fit for length of your course, your learning objectives, and preferred pedagogy, Connect can be implemented using the following options.

Option 1:

- Assign Exercises for practice (ungraded)
- Assign Projects (graded)

Option 2:

- Assign Exercises (graded)
- Assign Projects (graded)

Option 3:

- Assign Practice Tests (ungraded)
- Assign Exercises (graded)
- Assign Projects (graded)

Option 4:

- Assign Practice Tests (graded)
- Assign Exercises (graded)
- Assign Projects (graded)

Using QuickBooks Online Accountant to View Your Students QBO Companies

When your students use QuickBooks Online Plus, then as an educator you can use QuickBooks Online Accountant to view your students' QBO companies. Basically, you will be using QBOA like an accountant to view their clients' QBO companies, except as an educator you will be viewing your students' QBO companies.

Note that Intuit provides only 1 student QBO access code per text which permits setting up 1 company. This code can be used for the QBO company used for Projects 1.1 through 10.1.

1. HOW STUDENTS LINK TO YOUR EDUCATOR QBOA ACCOUNT

For students to add you, the educator, to view their QBO company, the student should complete the following steps.

- 1 Log in to student QBO company
- 2 Select **Gear** icon
- 3 Select **Manage Users**
- 4 Select **Invite Accountant**, then enter the onscreen instructions to enter educator QBOA account information to link student QBO company to the educator's QBOA account.

Sign in

User ID

1

Password

.....

Sign in

[Sign in as a different user](#)

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Woofy

Your Company

Account and Settings

3 Manage Users

Custom Form Styles

Chart of Accounts

QuickBooks Labs

Lists

All Lists

Products and Services

Recurring Transactions

Attachments

Tools

Import Data

Import Desktop Data

Export Data

Reconcile

Budgeting

Audit Log

Order Checks ↗️

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User Profile

Feedback

Refer a Friend

Privacy

🔒 Sign Out

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Home

Customers

Vendors

Employees

Transactions

Reports

Sales Tax

Apps

Get Paid Faster

Manage Users

Contact Name	Email Address	Access Rights	Billable User?	Status
		Master Admin	Yes	Active

New

Edit

Delete

Activity

Accounting Firms

You can invite up to two accounting or bookkeeping firms to provide them, and any employees they may have authorized, access to your company data.

Contact Name	Email Address	Status

4 Invite Accountant

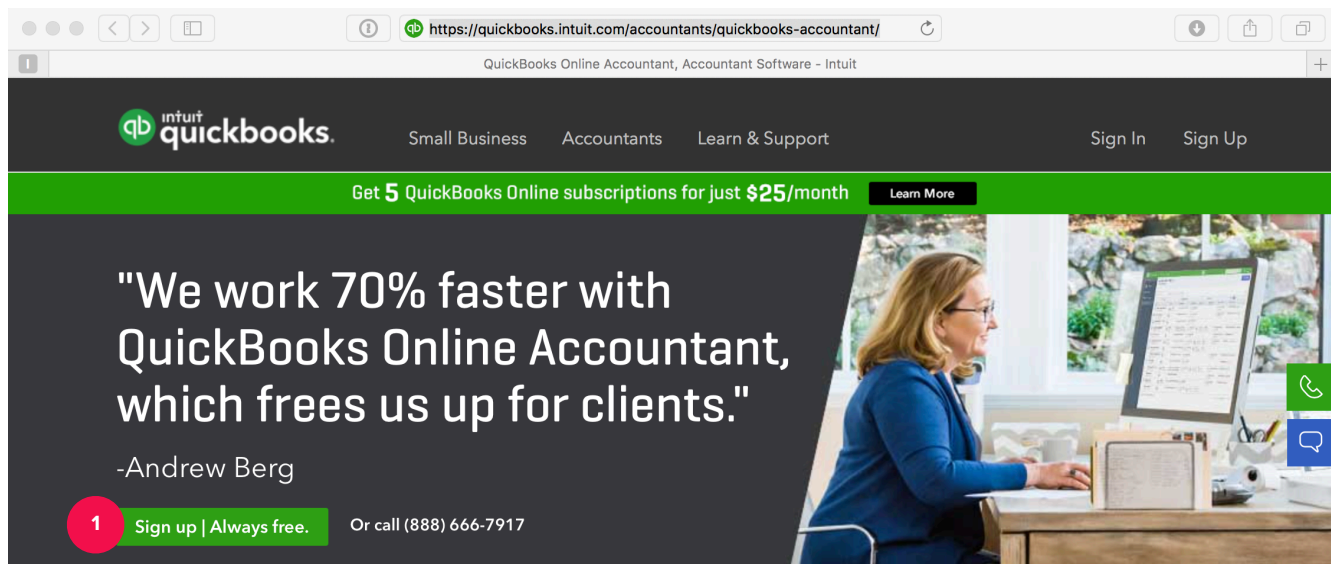
Edit

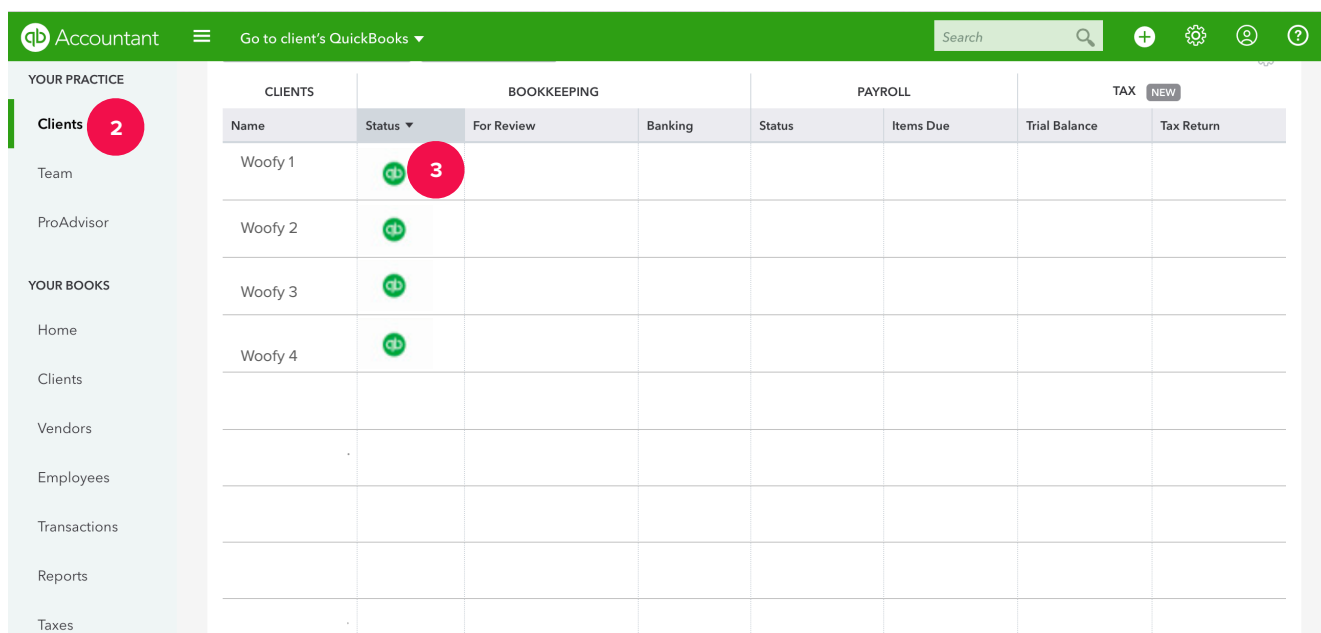
Delete

2. HOW TO USE YOUR EDUCATOR QBOA ACCOUNT TO VIEW STUDENT QBO COMPANIES

To use QBOA to view your student QBO companies:

- 1 **Set up** a QBOA account by going to: <https://quickbooks.intuit.com/accountants/quickbooks-accountant/>
- 2 After signing into your QBOA account, select **Clients** to view the Clients Page which will list all QBO companies linked to your QBOA account
- 3 Select the **QB Client Data** icon for the specific client company you would like to view





3. HOW TO USE THE AUDIT LOG TO VERIFY STUDENT QBO WORK

If you wish to verify student work in QBO, either in addition to Connect or in place of Connect, complete the following:

- 1 After selecting the student's QBO **Client** company as instructed previously, from with the student's QBO company select the **Gear** icon
- 2 Select **Audit Log**
- 3 Review **Audit Log Events**, such as log ins, log outs, and work completed.
- 4 For History, select **View** in **History** column.

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User Profile

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Import Data

Import Desktop Data

Export Data

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Budgeting

Audit Log

Order Checks

2

qb Accountant

📁

Craig's Design and Landscaping Services ▾

+

Search 🔍

⚙️ Sample Company

🔍 ? Help

Home

Customers

Vendors

Employees

Transactions

Reports

Sales Tax

Audit Log

Filter ▾

All

🖨️ ⚙️

DATE CHANGED	USER	EVENT	NAME	DATE	AMOUNT	HISTORY
May 19, 7:48 pm EDT	Craig Carlson	Logged out.				
May 19, 7:46 pm EDT	Craig Carlson	Logged in.				
May 19, 7:39 pm EDT	Craig Carlson	Logged in.				
May 19, 4:51 pm EDT	Craig Carlson	Logged out.				
May 19, 4:49 pm EDT	Craig Carlson	Edited Product or Service: Design : Rocks				View
May 19, 4:49 pm EDT	Craig Carlson	Edited Product or Service: Design : Lighting				View
May 19, 4:49 pm EDT	Craig Carlson	Edited Product or Service: Design : Services				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Pest Control : Pest Control				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Sprinklers : Sprinkler Pipes				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Sprinklers : Sprinkler Heads				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Trimming				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Soil				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Sod				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Maintenance & Repair				View
May 19, 4:48 pm EDT	Craig Carlson	Edited Product or Service: Landscaping : Installation				View

3

4

Note: The Audit Log displayed is based upon email login and password. So the Audit Log confirms that the work has been completed by someone using the email login and password that corresponds to the Audit Log. However, it does not confirm that the person logging in is the actual student in your course.

Pedagogy: The Art & Science

of Teaching and Learning QuickBooks Online

This text is based on sound pedagogy for teaching software effectively using constructivist instructional design and action research on effective learning.

CONSTRUCTIVIST INSTRUCTIONAL DESIGN

Constructivist instructional methodology increasingly is recognized as an effective approach to technology training. The constructivist approach is student-directed using realistic, practical applications to aid learners in constructing a deeper understanding with improved retention. Students construct new meaning by connecting new material to their current understanding. Exercises and projects in Computer Accounting with QuickBooks Online focuses on scenarios that are concrete, specific examples that students can relate to.

XPM

Based on a constructivist instructional design, the text uses a three-step **XPM** approach:

- **eXplore** QuickBooks Online using the chapter with walk through screen captures. Don't worry about making mistakes while we eXplore, letting us focus on learning how to navigate and use QBO. Students can complete this phase individually or it can be completed in class led by the instructor. Instructional slides are provided to use in the eXplore phase.
- **Practice** entering information and transactions into QBO with end-of-chapter exercises. Again, students can complete this individually or it can be completed in an in-class lab environment. In a lab environment, the instructor's role can be to lead the practice session using the exercises or the instructor can float while students complete the exercises in the lab environment, coaching student completion of the exercises.
- **Master** QBO with QBO projects. The projects cover QBO tasks from setting up a new QBO company and entering transactions to generating QBO reports. Each project is designed as a separate silo so student errors don't carry forward to future projects, streamlining grading.

Accounting Essentials

Accounting Essentials are included at the end of each chapter to summarize important accounting content that might prove useful to student understanding of QuickBooks Online. The Accounting Essentials are included at the end of the chapter in order to not impeded the flow of learning QuickBooks Online. If preferred, instructors have the option of integrating the Accounting Essentials content throughout the chapter.

QBO SatNav

QBO SatNav provides a satellite navigation system for QuickBooks Online. Unlike the QuickBooks Desktop version that has a Home Page with a flowchart of transactions, QuickBooks Online does not. So a QBO SatNav is provided in each chapter to assist in guiding the student in zooming out to see the big picture QBO before drilling down to the details.

1 QBO SETTINGS

CHAPTERS 1,2

Company Settings

- LEGAL ENTITY
- TAX RETURN

Chart of Accounts

- COA & TAX RETURN
ALIGNED

2 QBO TRANSACTIONS

CHAPTERS 3,4,5,6,7,8

> *Money in* *Money out* >

Banking

Sales

Expenses

3 QBO REPORTS

CHAPTERS 9,10

Reports

- FINANCIAL STATEMENTS
- TAX REPORTS
- MANAGEMENT REPORTS

Sample Syllabus

For instructor convenience, an example syllabus appears on the following pages.

SYLLABUS
COMPUTER ACCOUNTING WITH QUICKBOOKS ONLINE
(10 WEEK FORMAT)

INSTRUCTOR:	
Email:	
Phone:	
Office hours:	
 TEXTBOOK AND MATERIALS:	
<ul style="list-style-type: none">• <i>Computer Accounting with QuickBooks Online</i>, by Donna Kay, McGraw-Hill Education, 2018• <i>Connect</i> to accompany <i>Computer Accounting with QuickBooks Online</i>, by Donna Kay,• Website to accompany text: www.my-quickbooksonline.com	
 COURSE DESCRIPTION:	
<p>This course covers accounting for entrepreneurs using QuickBooks Online. Topics include setting up a new company in QuickBooks Online, creating a chart of accounts, recording customer and vendor transactions, using QBO inventory, tracking employee time, making adjusting entries, and generating reports.</p>	
 GRADING POLICY:	
<p>Your course grade will be determined as follows:</p>	
Exercises, chapters 1 - 10 @ 20 points each	200
Projects 1.1 - 10.1 @ 40 points each	400

Practice test 1 - 10	100
Exam	300
Total	1000

Session	Chapter	Assignment
1	Chapter 1	Practice Test 1 Chapter 1 Exercises Project 1.1
2	Chapter 2	Practice Test 2 Chapter 2 Exercises Project 2.1
3	Chapter 3	Practice Test 3 Chapter 3 Exercises Project 3.1
4	Chapter 4	Practice Test 4 Chapter 4 Exercises Project 4.1
5	Chapter 5	Practice Test 5 Chapter 5 Exercises Project 5.1
6	Chapter 6	Practice Test 6 Chapter 6 Exercises Project 6.1
7	Chapter 7	Practice Test 7 Chapter 7 Exercises Project 7.1
8	Chapter 8 Chapter 9	Practice Test 8 Chapter 8 Exercises Project 8.1 Practice Test 9 Chapter 9 Exercises Project 9.1
9	Chapter 10 Review	Practice Test 10 Chapter 10 Exercises Project 10.1
10	Final Exam	

SYLLABUS
COMPUTER ACCOUNTING WITH QUICKBOOKS ONLINE
(16 WEEK FORMAT)

INSTRUCTOR:

Email:

Phone:

Office hours:

TEXTBOOK AND MATERIALS:

- *Computer Accounting with QuickBooks Online*, by Donna Kay, McGraw-Hill Education, 2018
- *Connect* to accompany *Computer Accounting with QuickBooks Online*, by Donna Kay,
- **Website to accompany text:** www.my-quickbooksonline.com

COURSE DESCRIPTION:

This course covers accounting for entrepreneurs using QuickBooks Online. Topics include setting up a new company in QuickBooks Online, creating a chart of accounts, recording customer and vendor transactions, using QBO inventory, tracking employee time, making adjusting entries, and generating reports.

GRADING POLICY:

Your course grade will be determined as follows:

Exercises, chapters 1 - 10 @ 20 points each	200
Projects 1.1 - 10.1 @ 40 points each	400
Practice test 1 - 10	100
Exam	300
Total	1000

Session	Chapter	Assignment
1	Chapter 1	Practice Test 1 Chapter 1 Exercises Project 1.1
2	Chapter 2	Practice Test 2 Chapter 2 Exercises Project 2.1
3	Chapter 3	Practice Test 3 Chapter 3 Exercises
4	Chapter 3 (continued)	Project 3.1
5	Chapter 4	Practice Test 4 Chapter 4 Exercises
6	Chapter 4 (continued)	Project 4.1
7	Chapter 5	Practice Test 5 Chapter 5 Exercises
8	Chapter 5 (continued)	Project 5.1
9	Chapter 6	Practice Test 6 Chapter 6 Exercises
10	Chapter 6 (continued)	Project 6.1
11	Chapter 7	Practice Test 7 Chapter 7 Exercises
12	Chapter 7 (continued)	Project 7.1
13	Chapter 8	Practice Test 8 Chapter 8 Exercises Project 8.1
14	Chapter 9	Practice Test 9 Chapter 9 Exercises Project 9.1
15	Chapter 10 Review	Practice Test 10 Chapter 10 Exercises Project 10.1
16	Final Exam	

Educator Text Resources

Other instructor resources to accompany Computer Accounting with QuickBooks Online include:

- **MHE Connect.** The Connect feature permits auto grading of student assignments, including exercises, projects, and exams. Connect has instructor preferences to permit student interactivity, providing student feedback when answers are not correct. In addition, Connect offers a grade book that summarizes student scores.
- **SmartBook.** Computer Accounting with QuickBooks Online is offered in a SmartBook format, an ebook with interactivity for learning. Key sections of the text are highlighted with accompanying questions to enhance student learning.
- **Presentation Slides.** Presentation slides summarizing key points are provided to students and instructors. In an online course, students can use the slides individually. Or the slides can be used by an instructor in class to promote and facilitate discussion.
- **Test Bank.** A test bank consisting of multiple choice and simulation questions is provided. If the Connect option is used, the test questions can be auto graded in Connect.

Intuit Educator Resources

Intuit offers educator resources including the following:

- **Intuit Education Program** at <http://www.intuiteducationprogram.com>
- Register for QuickBooks Educator access to **free QuickBooks Online Accountant** at <http://www.intuiteducationprogram.com/educators.php>
- **Support for QuickBooks Online** at <http://www.intuiteducationprogram.com/support.php>

Contact Donna Kay

If you are a QuickBooks Educator and have questions, suggestions, or would like to reach out, feel free to contact me at the QBO Educator website:

- 1 Go to **www.My-QuickBooksOnline.com**
- 2 Select **QBO Educator**
- 3 Enter password obtained from the text's Instructor Online Learning Center.
- 4 Enter your question or comments into the QBO Educator **online form**

As always, I am happy to assist QB Educators, but as a courtesy, please do not share my contact information with students.