

This is a help article I wrote for Intuit. It explains to accountants, who are the end user, how to create an account for their client in the software, QuickBooks Online Accountant.

How to create a client in QuickBooks Online Accountant

You can quickly set up a client's account in QuickBooks Online Accountant (QBOA).

To add a client:

1. From the **Navigation** menu, select **Clients**, and choose **Add client**.
2. Choose whether the client is a **Business** or **Individual**.
3. Fill in the required fields: **Business name** and **Email**.
4. Under **QuickBooks subscription**, choose whether your firm (Wholesale Discount) or your client (Direct Discount) will pay for the subscription.
 - **Wholesale Discount.** Your firm is billed for this client's company, and you receive a steep discount for the lifetime of that subscription.
 - **Direct Discount.** Your client pays for their own company. They receive a discount for the first 12 months and then the company will bill at the normal rate.
5. Select **Compare**, to compare product pricing and options.
6. Select your product choice. (You can create QuickBooks Self-Employed client subscriptions through the **Add client** wizard.)
 - (Optional) If you want to own the company instead of your client, check **Make me the Master Admin of this client's QuickBooks company**. Otherwise, your client will become the Master Administrator once they accept the invitation.
 - (Optional) If you want to add payroll during company creation, select **+Add payroll**.
7. When the subscription is created, an email is sent to your client so they can set up a user account. (**Note:** Only one QuickBooks Self-Employed subscription can be tied to a client's email address. If the client already has a QuickBooks Self-Employed subscription tied to their email,

you will receive an error that an account already exists and the company creation will not complete.)

8. Under **Team Access**, select which team members in your firm can access the client. To show more team members than are currently displayed, select **+Show all team members**.
9. Select **Save**. If you select to add a client to Wholesale Billing, but you have not yet entered your credit card information for payment, you will be redirected to the **Wholesale Billing Information** screen, upon saving.)

Note

- Your client list and the customer list in Your Books are synchronized, meaning that whatever is created in one is also added to the other. To create a client with no attachment to a QBO company, add the individual as a customer in Your Books.
- Payroll function and QuickBooks Self-Employed are not available for Singapore and South Africa.

Now you know how to create a client in QBOA.

Was this helpful?

Yes