



Welcome to the  
**“In The Know”**  
QBO Monthly Update Webinar  
(US content)

Host – Wayne Daley

## Learning Objectives

May 30, 2018

- Identify recent updates to QuickBooks and QuickBooks Online.
- Accountants are aware of the upcoming Banking experience changes
- Understand recent updates to the Firm "Your Account" billing page

Identify recent updates to QuickBooks program features.



Accountant University



**Free Training Events**

- Basic to Advanced
- QuickBooks Online for Accounting Professionals
- Courses are designed and presented by Advanced Certified ProAdvisors
- Most include CPE

[www.qbtrainingevents.com](http://www.qbtrainingevents.com)

Webinars	In-Person Training Events	Virtual Conference Events
<p>Weekly webinars to help you grow your practice, and become a trusted advisor.</p> <p>Sample Topics:</p> <ul style="list-style-type: none"> <li>• Certification Training</li> <li>• Increase your Profitability with Schedule C Clients</li> <li>• Manage and Scale your Accounting &amp; Tax Firm</li> </ul>	<p>In-person training tour visiting many location across the U.S.</p> <ul style="list-style-type: none"> <li>• Coming in May 2018</li> </ul>	<p>Free training, CPE and networking with your peers and Intuit product experts.</p> <ul style="list-style-type: none"> <li>• Coming in March 2018</li> </ul>

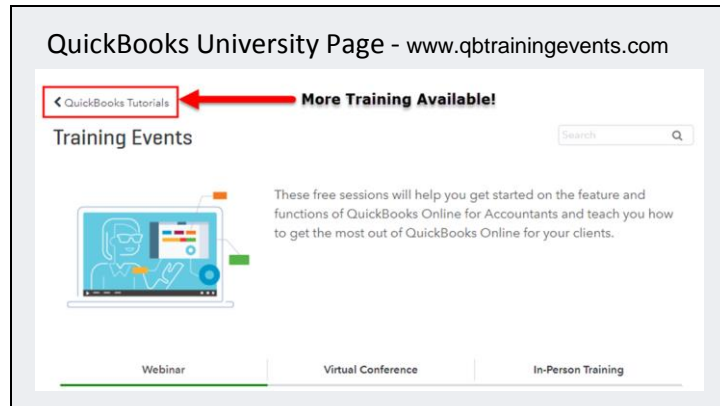
Excellent ProAdvisor Resource: QuickBooks University

- <https://www.qbtrainingevents.com>
- Free Training Events, many that provide CPE credits through
- Webinars
- Virtual Events
- and In Person Training

It will be worth your time to take a look to see what is available.

A link will be provided in the handout and in the follow up email

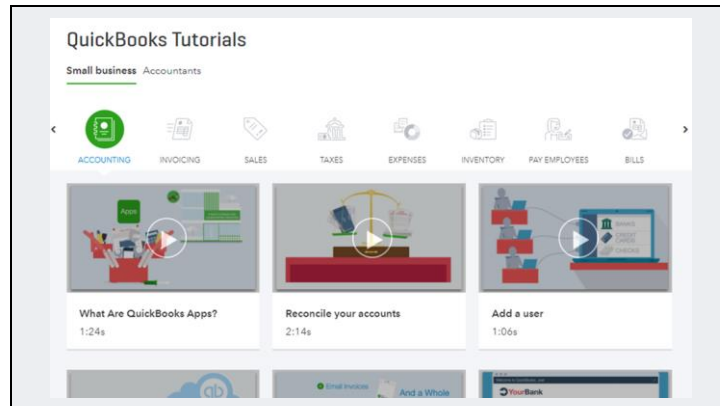
**Link:** <https://quickbooks.intuit.com/tutorials/accountant-webinars-events>



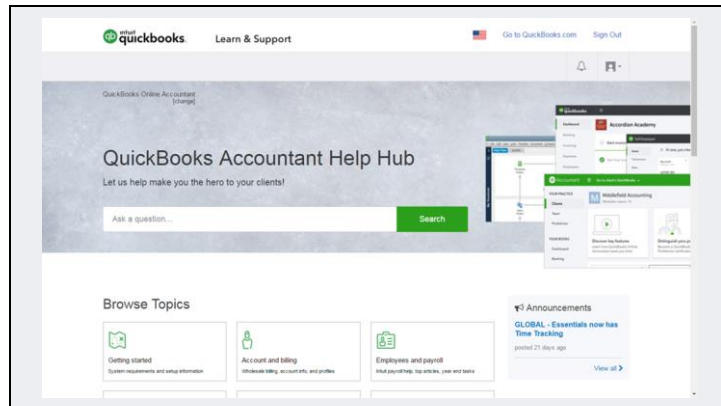
When viewing the Intuit Accountant University main page

You have access to additional training opportunities

To view these, click the QuickBooks Tutorial link



- QuickBooks Online and QuickBooks Online Accountant Tutorials
  - More free training, not only for ***you*** ... but also for ***your clients***
  - Training topics are divided into '***Small Business***' and '***Accountants***'
  - Trainings are also displayed by topic to allow you to quickly find what you need

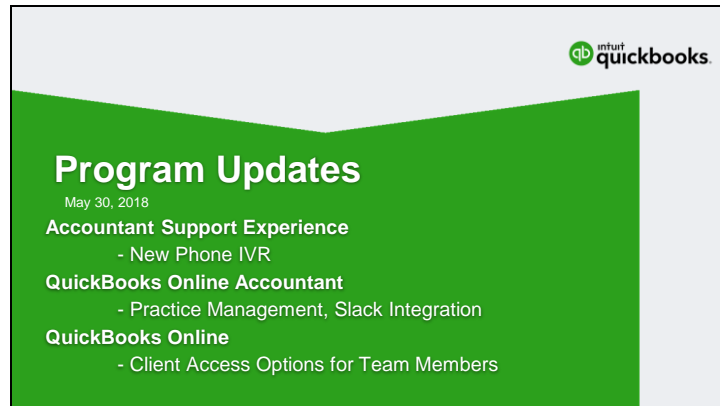


We also have a support site dedicated to providing the support articles you need fast – the Accountant Help Hub.

Please visit this page and save the link – this is a resource designed to help you find the answers you need fast.

The link will be provided in the handout and in the follow up email message you will receive at the end of this webinar.

**Link:** <https://community.intuit.com/quickbooks-accountant-us-en>



We're going to quickly cover some program updates

A few of the topics have been presented in prior 'In The Know' events

Links will be provided in the handout to these presentations




## Accountant Support Experience New IVR Phone System

May 30, 2018


Accountant experience change when calling customer support



## New IVR Phone System



- Customer identified before speaking to agent**
  - Phone Number
  - Company Name
  - Customer Name
  - Email (if needed)
- Routed to the right product support team**
  - Talk to Text transcript of issue
  - Reduce transfers
- Increased productivity contacting support**
  - When verified in phone system, immediately begin solving with agent

 intuit quickbooks

### Video Presentation: IVR Announcement

Beginning on May 11th to May 22nd, we will be using a new Intelligent Voice Recognition (IVR) system for accountants.

Customer identification will be completed during the IVR so that when you are connected to a support agent, you will be able to directly speak to the issue about which you are calling.



# QuickBooks Online Accountant Slack Integration

May 30, 2018

Practice Management; Team Communication App

*Feature presented in the April 26th 'In The Know' webinar*

## Slack Integration

### What we've heard from accountants

- From: "My team is telling me that they aren't receiving notifications when I assign them work. That makes it really hard to get my staff to switch to QBOA Work."
- To: "We were able to switch from Basecamp and Dropbox to this and it's going to save me over \$400 a month!"

### Capabilities and features

- Notifications when work is assigned to your staff and when someone modifies a project / task
- Reminders to ensure you meet client deadlines

### For More Information

- Visit the dedicated webpage for the feature at <https://quickbooks.intuit.com/accountants/slackapp/>
- Visit the In The Know Webinar Hub at <https://community.intuit.com/articles/1463613>



Dedicated webpage for the feature at <https://quickbooks.intuit.com/accountants/slackapp/>  
In The Know Webinar Hub at <https://community.intuit.com/articles/1463613>

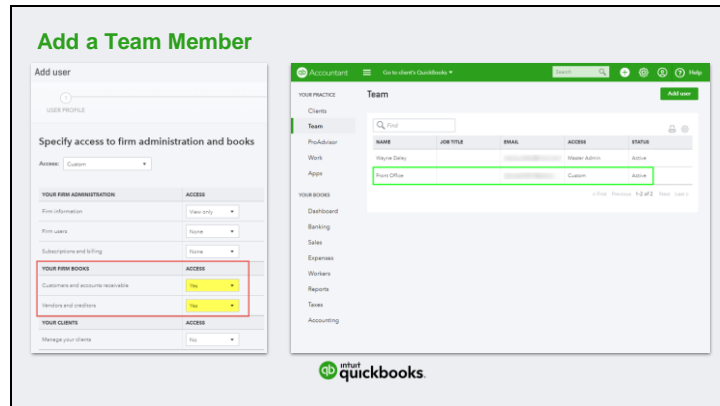


# QuickBooks Online

## Team Member Client Access

May 30, 2018

New Client Workflow Abilities for Team Members



When adding a team member who will be creating invoices for clients without having access to their data, begin by granting permission to the client in the “Firm Books”.

Here, we have a Team Member named “Front Office”.

### Required Client Access for Team Member

#### Add user

USER PROFILE

Specify access to firm administration and books

Access: Custom

YOUR FIRM ADMINISTRATION	ACCESS
Firm information	View only
Firm users	None
Subscriptions and billing	None
<b>YOUR FIRM BOOKS</b>	<b>ACCESS</b>
Customers and accounts receivable	Yes
Vendors and creditors	Yes
<b>YOUR CLIENTS</b>	<b>ACCESS</b>
Manage your clients	No

#### Edit user

Front Office

User Profile | Firm Administration and Books | **Client Access**

Find a client

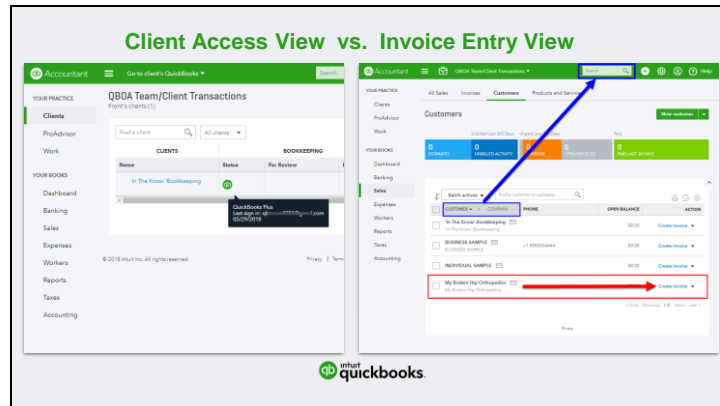
CLIENT	
In The Know Bookkeeping	<input checked="" type="checkbox"/>
BUSINESS SAMPLE	<input type="checkbox"/>
INDIVIDUAL SAMPLE	<input type="checkbox"/>
My Broken Hip Orthopedics	<input type="checkbox"/>

**Client access**

Granting user access to a client gives them full admin permissions to that client's QuickBooks Online file.

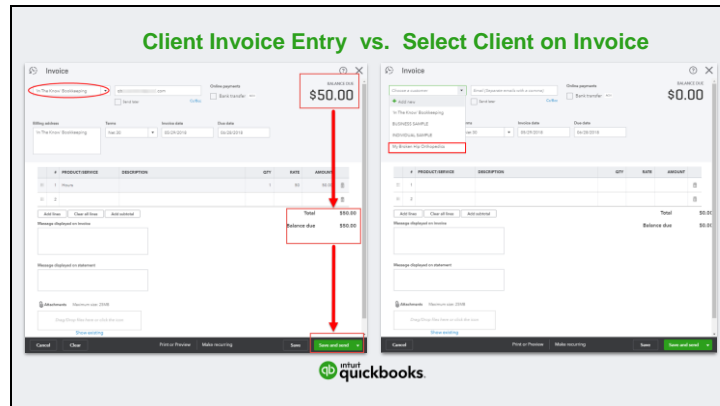
mtul quickbooks

With the “Customers and Accounts Receivable” and “Vendors and Creditors” set to ‘Yes’, you are now ready to set the Client Access for the team member to only the companies you desire. The team member does not need access to any company to be able to enter transactions in the Firm Books.



The Client page shows only the company the Team Member has been provided access. The Sales > Customers page shows all of the QBOA Firm's clients with the Create Invoice in the Action column.

You also have the ability to use the Search field to locate clients by entering the Client name.



When you select the Create Invoice link in the Action column from the Sales > Customers page, the client will auto fill in the *Choose a Customer* field.

You also have the ability to select the from the *Choose a Customer* drop down menu from the Invoice window.





## QuickBooks Online Refreshed Banking User Experience

May 30 2018

Upcoming Banking experience changes in your clients QuickBooks Online subscriptions.

**Presenter**

**Jason Willoughby**

Sr Customer Experience Specialist



**About Jason**

Customer Experience Team - Data In  
Passion removing barriers to increase efficiency  
5 years at Intuit  
Tucson, AZ

To

The screenshot displays the QuickBooks Online dashboard. At the top, there are navigation tabs for 'Bank Feeds', 'Add New', 'Add Existing Card', 'Add New Card', 'Add Existing Card', 'Add New Card', 'Add Existing Card', 'Add New Card', 'Add Existing Card', 'Add New Card', 'Add Existing Card'. Below these, there are filters for 'All Accounts', 'All Transactions', and 'All Cards'. The main content area is divided into several sections: 'All Transactions' (showing 118 transactions), 'Personal Expenses' (showing 118 transactions), 'Business Expenses' (showing 118 transactions), 'Other Business Expenses' (showing 118 transactions), 'Car Expenses' (showing 118 transactions), and 'Card Transactions' (showing 118 transactions). A table at the bottom lists transactions with columns for Date, Description, Amount, Category, and Balance. The table contains three rows of data, each with a date, a description, an amount, and a balance.

DATE	DESCRIPTION	AMOUNT	CATEGORY	BALANCE
08/01/2019	Personal Expenses	\$100.00	Personal Expenses	\$100.00
08/01/2019	Business Expenses	\$100.00	Business Expenses	\$100.00
08/01/2019	Other Business Expenses	\$100.00	Other Business Expenses	\$100.00



## QuickBooks Online Accountant Accountant Billing Experience Redefined

May 30 2018

Reviewing updates to the QuickBooks Online  
Accountant Firm's "Your Account" Billing page

**Presenter**

## **Ashish Nirkhe**

I am a Product Manager on  
Quickbooks Online Billing team.  
Working at Intuit for ~4 years.

My passion is to create awesome  
and delightful user experience.



## Goal

1. Transparent billing - simple and understandable.
2. Higher productivity with speed.
3. Faster, transparent and accurate results.
4. Improved itemized invoicing.

## Transparent billing - simple and understandable

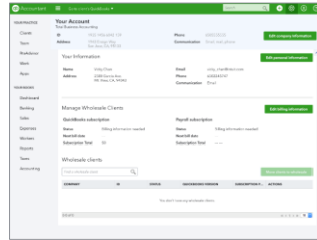
Customer pain point:

*As an accountant, invited to Quickbooks platform by my client, I am not clear on how to start offering wholesale pricing to my client.*

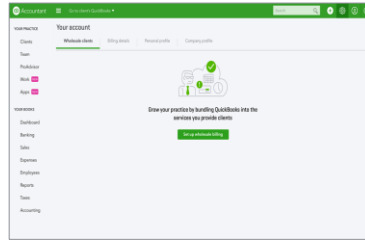
## Clear and simple billing UI

Wholesale billing-First Time Use example

From



To





## Clear and simple billing UI

Wholesale billing-Contextual UI example

From

The 'From' UI is a complex form with multiple sections and tabs. It includes a 'New Invoice' button, a 'Send Invoice' button, and a 'View Invoice' button. The form is divided into several sections, including 'Invoice Details', 'Product Details', 'Customer Details', and 'Payment Details'. The 'Invoice Details' section contains fields for 'Invoice Number', 'Invoice Date', and 'Invoice Period'. The 'Product Details' section contains fields for 'Product Name', 'Product Code', and 'Product Price'. The 'Customer Details' section contains fields for 'Customer Name', 'Customer Address', and 'Customer Phone'. The 'Payment Details' section contains fields for 'Payment Method', 'Payment Amount', and 'Payment Date'. The form is cluttered with many fields and buttons, making it difficult to navigate.

To

The 'To' UI is a simplified and more intuitive interface. It features a 'New Invoice' button, a 'Send Invoice' button, and a 'View Invoice' button. The form is divided into several sections, including 'Invoice Details', 'Product Details', 'Customer Details', and 'Payment Details'. The 'Invoice Details' section contains fields for 'Invoice Number', 'Invoice Date', and 'Invoice Period'. The 'Product Details' section contains fields for 'Product Name', 'Product Code', and 'Product Price'. The 'Customer Details' section contains fields for 'Customer Name', 'Customer Address', and 'Customer Phone'. The 'Payment Details' section contains fields for 'Payment Method', 'Payment Amount', and 'Payment Date'. The form is clean and easy to navigate, with a clear focus on the essential information needed to create and manage invoices.

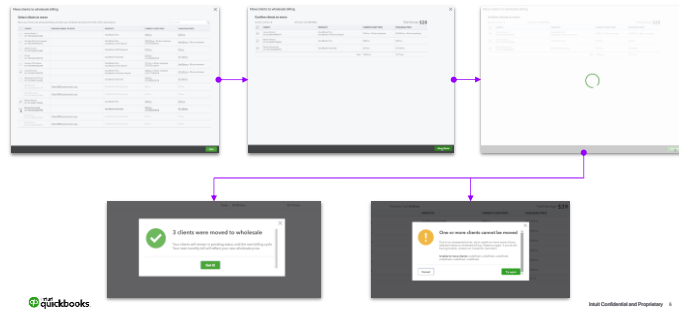
## Higher productivity with speed

Customer pain point:

*As an accountant, when I move a client to my wholesale billing, I have to wait until the product finishes the process. If I'm moving in many clients, the process takes longer resulting in longer wait time.*

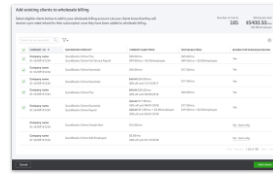
## Client Migrate In

Current sync experience

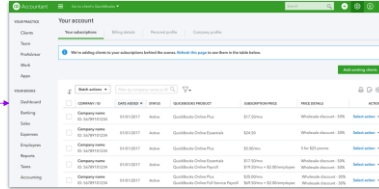


## Async UI pattern

New async experience



No wait time



## Async progress UI pattern - version 2

New async experience

No wait time

QuickBooks

QuickBooks

## Async progress UI pattern - version 2

New async experience

No wait time

QuickBooks

QuickBooks

## Async progress UI pattern - version 2

New async experience

No wait time

QuickBooks

QuickBooks

## Async progress UI pattern - version 2

New async experience

No wait time

QuickBooks

QuickBooks

## Async progress UI pattern - version 2

New async experience

No wait time

QuickBooks

QuickBooks

## Faster, Transparent and Accurate results

Customer pain point:

*As an accountant with wholesale billing, I want to be able to move clients in/out to/from firm's billing. Currently, I see some weird pending state and client is not immediately moved under firm's billing.*

## Async UI pattern

From

Manage Wholesale Clients

QuickBooks subscription

Name: John  
Email: john.doe@example.com  
Subscription Type: Basic

Report subscription

Name: John  
Email: john.doe@example.com  
Subscription Type: Basic

Pending Client Companies

NAME	STATUS	WHOLESALE CLIENTS DATE
John Doe	Pending Status	2023-01-01

No client companies found. Please check the filters or create a new client company.

Wholesale Clients

NAME

NAME	STATUS	WHOLESALE CLIENTS DATE	WHOLESALE CLIENTS DATE	STATUS
John	Pending Status	2023-01-01	2023-01-01	Pending

To

Manage Wholesale Clients

QuickBooks subscription

Name: John  
Email: john.doe@example.com  
Subscription Type: Basic

Report subscription

Name: John  
Email: john.doe@example.com  
Subscription Type: Basic

Wholesale Clients

NAME

NAME	STATUS	WHOLESALE CLIENTS DATE	WHOLESALE CLIENTS DATE	STATUS
John	Pending Status	2023-01-01	2023-01-01	Pending

## Improved itemized invoicing

Customer pain point:

*As an accountant with wholesale billing, I want to be able to view a breakdown of the cost by client, including which products each client had during the billing period. I am also not very clear on tax amount I am paying.*




### Firm's invoice

### Current experience

[illegible]

### Upcoming experience


QWS 123456789

### Tax invoice

All Accountant, thank you for your payment.

Invoice number: **200510046**  
 Taxes: **001.15**  
 Date: **10/11/2005**

### Billing by subscription

This is a summary of the subscription fees when active at the end of each month.

Item	Qty	Rate
QuickBooks Online Simple Start	1	\$60.00
QuickBooks Online Plus	1	\$80.00
QuickBooks Online Plus 6 for 20	1	\$80.00

This is the amount that you were charged for each subscription that was active at the end of each month during this subscription.

Item	Unit Price	Amount
QuickBooks Online Plus	\$80.00	\$80.00
\$75.00 discount for my new clients (10% discount for my new clients)		-\$75.00
QuickBooks Online Simple Start		\$60.00
QuickBooks Online Plus		\$80.00
QuickBooks Online Simple Start	\$60.00	\$60.00
QuickBooks Online Plus 6 for 20	\$80.00	\$80.00
QuickBooks Online Plus		\$80.00
QuickBooks Online Plus 6 for 20		\$80.00
<b>Total Invoice</b>		<b>\$285.00</b>

Billing information	
Initial ID:	Company: 1234
Company ID ending:	4567
Billing address:	123 Main St Anytown 00000
Invoices may be downloaded for free purposes	
Payment method:	Virtual ending in 4578
Tax reporting information	
Period for subscription fees:	12/31/2017 - 1/31/2018
Total without tax:	\$3.00
Total tax:	\$0.40
<p>The fee is automatically generated for the period of your subscription. The fee is not subject to sales tax. If you are a non-resident of the United States, please email your account manager for more information. The fee is not subject to sales tax. If you are a non-resident of the United States, please email your account manager for more information. The fee is not subject to sales tax. If you are a non-resident of the United States, please email your account manager for more information.</p>	

### When is it coming?

Changes will start rolling out Aug through Nov.

### Webinar Links

QuickBooks Training [www.qbtrainingevents.com](http://www.qbtrainingevents.com)

In The Know Webinar

<https://community.intuit.com/articles/1463613>

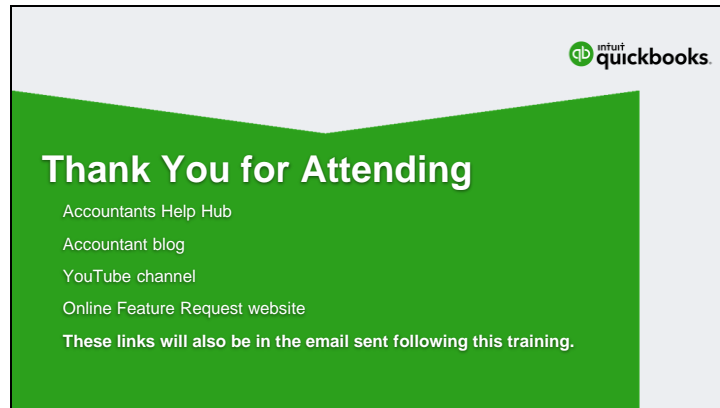
Accountant Help Hub

<https://community.intuit.com/quickbooks-accountant-us-en>

QuickBooks Online Feature Requests

<http://feedback.qbo.intuit.com/forums/168199-quickbooks-online-feature-requests>

<https://quickbooks.intuit.com/> > Under: Learn & Support > QuickBooks Tutorials



We have a number resources that will help provide information related to today's Training Session.

This event has been recorded, and the recording will be posted in about a week, here:  
<https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub>

Accountants Help Hub  
<https://community.intuit.com/quickbooks-accountant-us-en>

Accountant blog  
<https://www.firmofthefuture.com/>

YouTube channel  
<https://www.youtube.com/user/intuit>  
<https://www.youtube.com/user/Quickbooks>

Online Feature Request website  
<http://feedback.qbo.intuit.com/forums/168199-quickbooks-online-feature-requests>

Thank You for Attending Today!  
Have a Wonderful Rest of Your Day.



Thank you for attending.

Please provide us with your feedback regarding this training.

Also please let us know what you would like to see in future “In The Know” update trainings.

We look forward to seeing you here with us next month.

Have fantastic rest of your day.