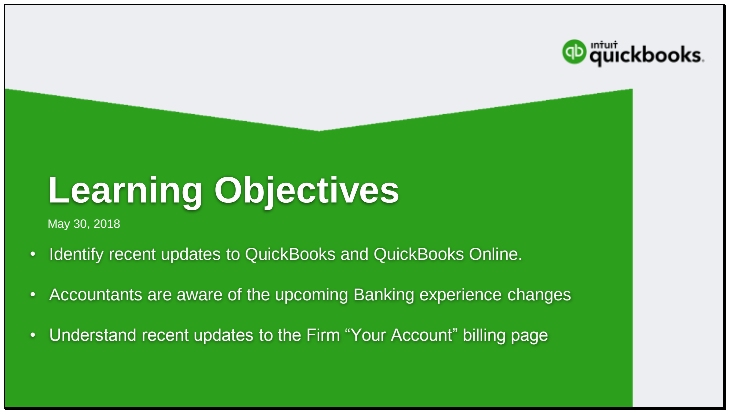
Welcome to the

"In The Know"

QBO Monthly Update Webinar
(US content)

Host – Wayne Daley



Identify recent updates to QuickBooks program features.

Excellent ProAdvisor Resource: QuickBooks University

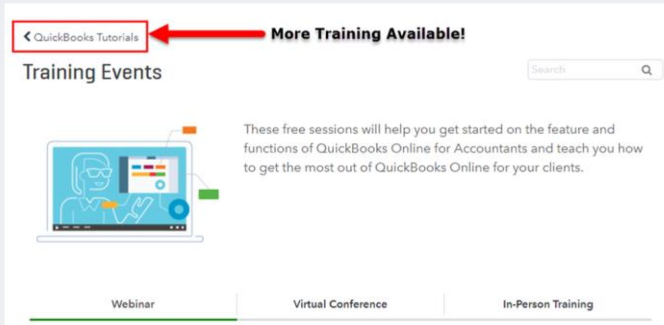
- https://www.qbtrainingevents.com
- Free Training Events, many that provide CPE credits through
- Webinars
- Virtual Events
- and In Person Training

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

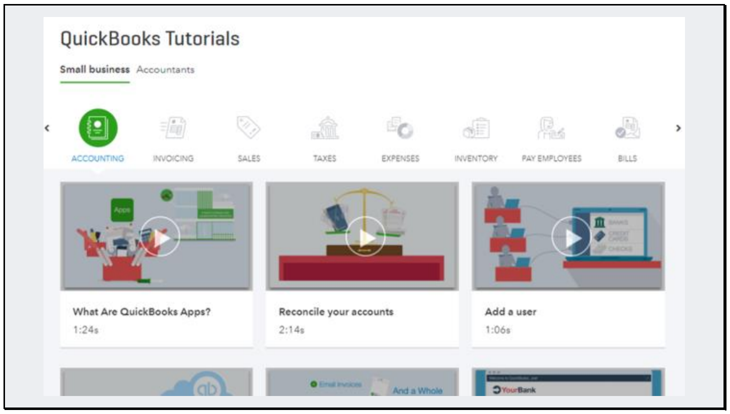
QuickBooks University Page - www.qbtrainingevents.com



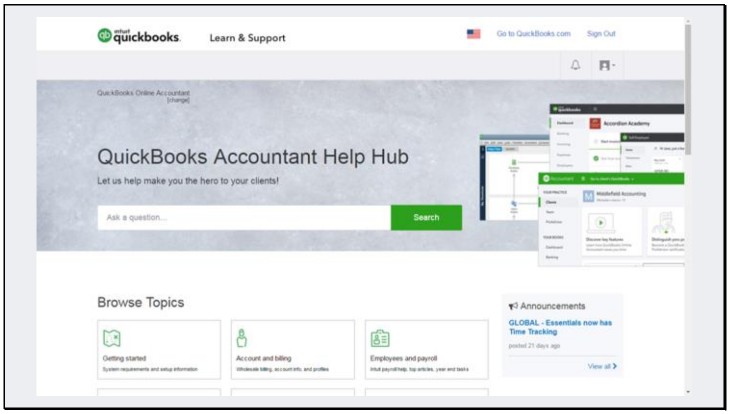
When viewing the Intuit Accountant University main page

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

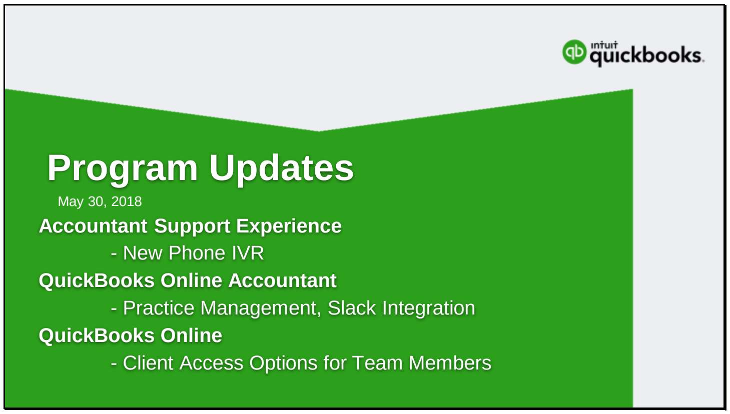


We also have a support site dedicated to providing the support articles you need fast – the Accountant Help Hub.

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

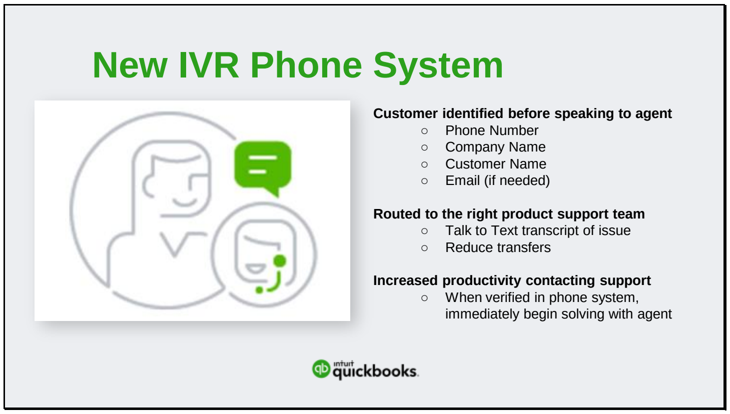
A few of the topics have been presented in prior 'In The Know' events

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



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.

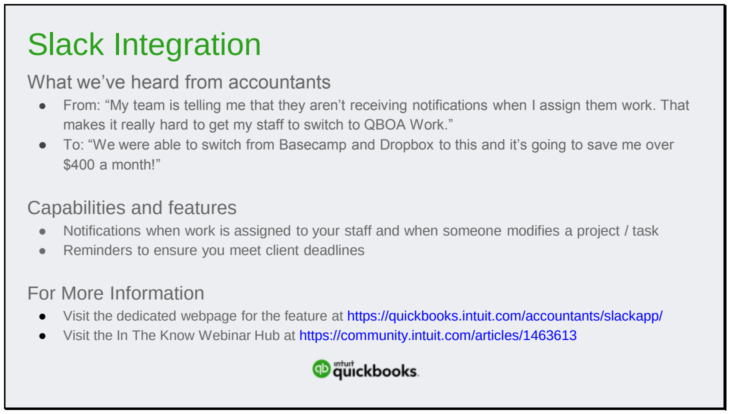
QuickBooks Online Accountant

Slack Integration

May 30, 2018

Practice Management; Team Communication App

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



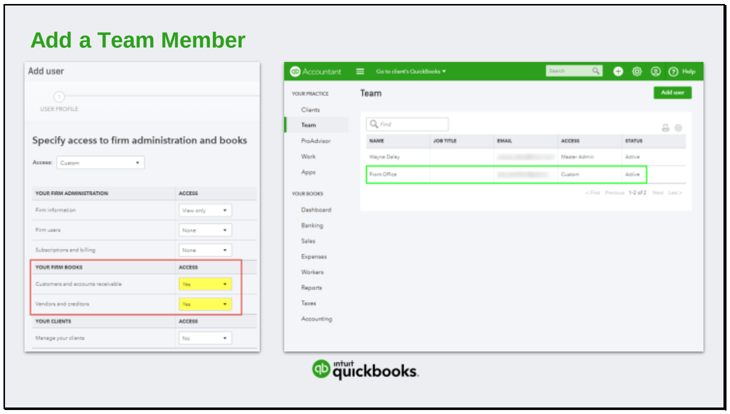
Dedicated webpage for the feature at https://quickbooks.intuit.com/accountants/slackapp/
In The Know Webinar Hub at https://community.intuit.com/articles/1463613

QuickBooks Online

Team Member Client Access

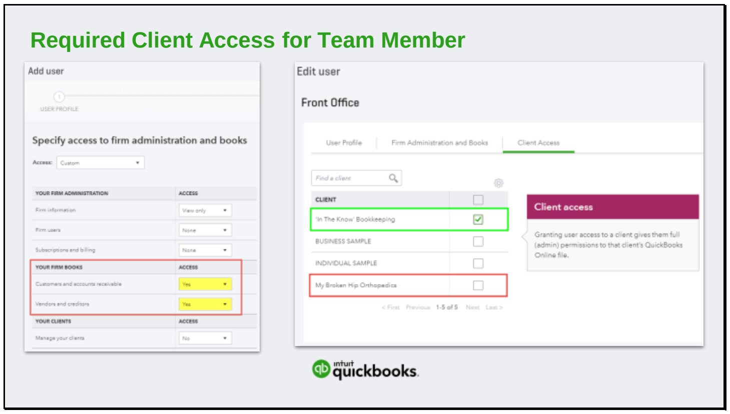
May 30, 2018

New Client Workflow Abilities for Team Members

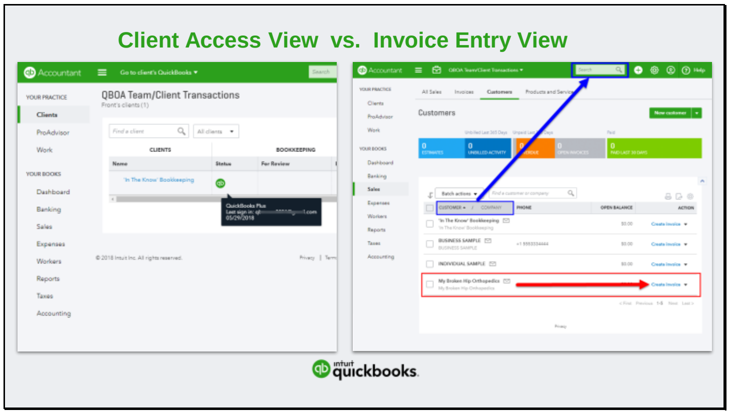


When adding a team member who will be creating invoices for clients without having access to their data, begin by granting permission to the client in the “Firm Books”.

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

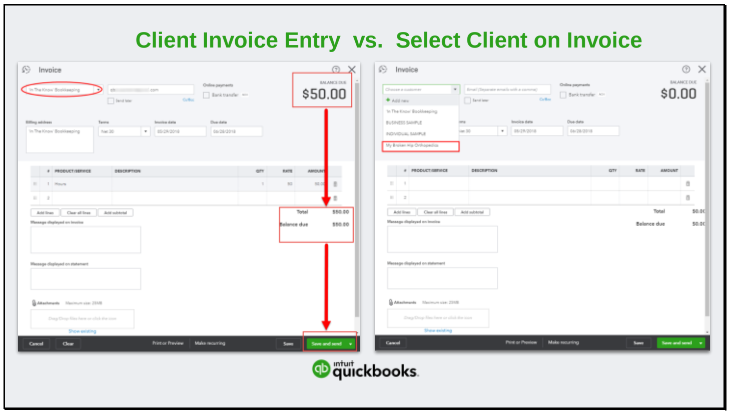


With the “Customers and Accounts Receivable” and “Vendors and Creditors” set to ‘Yes’, you are now ready to set the Client Access for the team member to only the companies you desire. The team member does not need access to any company to be able to enter transactions in the Firm Books.



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

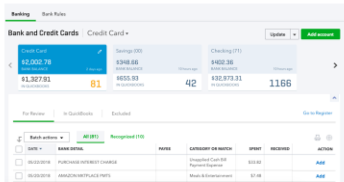
Sr Customer Experience Specialist

About Jason

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

Refreshed Banking UI

From



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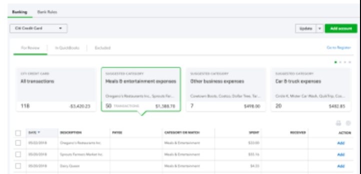


quickbooks

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

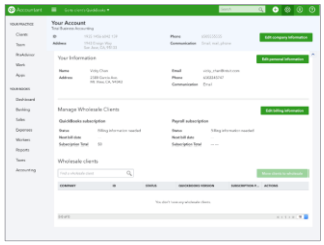
Customer pain point:

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



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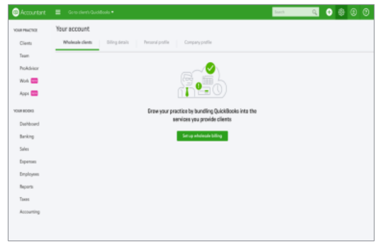

Clear and simple billing UI

Wholesale billing- Contextual UI example

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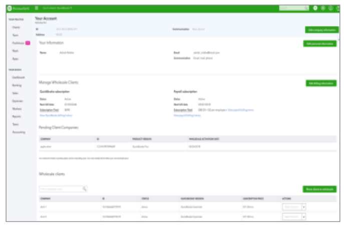

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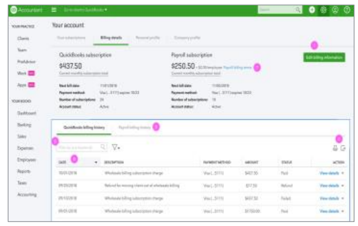


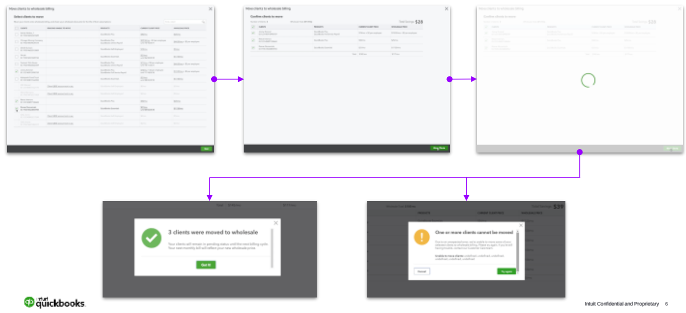
Higher productivity with speed

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.

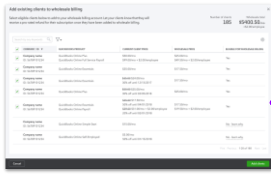
Client Migrate In

Current sync experience

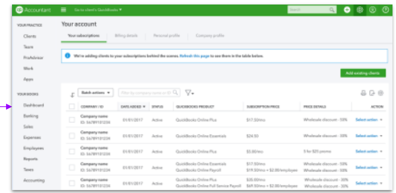


Async UI pattern

New async experience

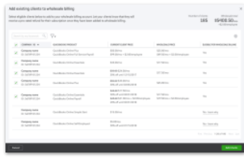


No wait time

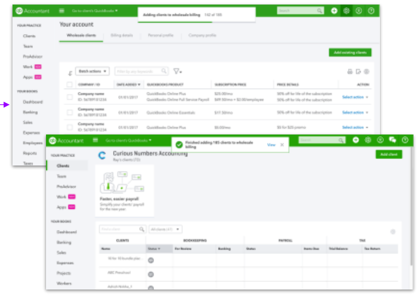


Async progress UI pattern - version 2

New async experience



No wait time



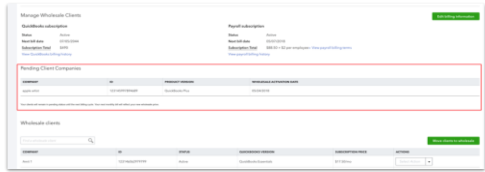
Faster, Transparent and Accurate results

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



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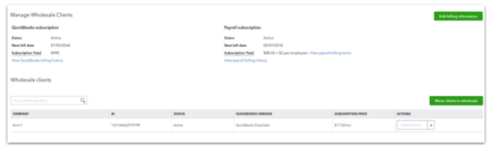


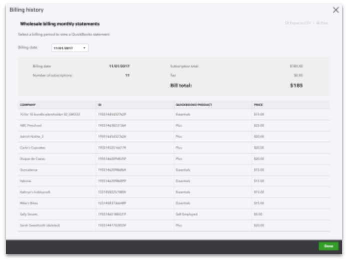
Improved itemized invoicing

Customer pain point:

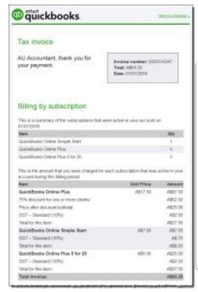
As an accountant with wholesale billing, I want to be able to view a breakdown of the cost by client, including which products each client had during the billing period. I am also not very clear on tax amount I am paying.

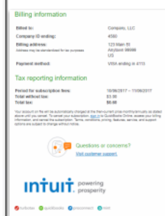
Firm’s invoice

Current experience



Upcoming experience





When is it coming?

Changes will start rolling out Aug through Nov.

Webinar Links

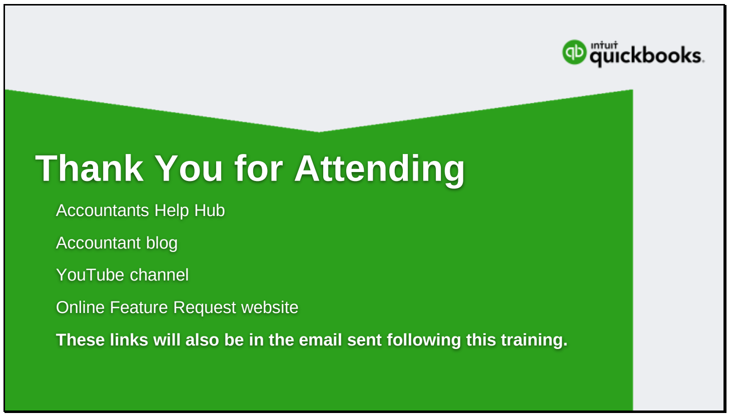
QuickBooks Training www.qbtrainingevents.com

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.
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.