

## **TSheets**

Q: Where is the link for the free TSheet offer?

A: [Tsheets.com/pros](https://tsheets.com/pros)

Q: I wish you could approve single time entries for billing purposes (TSheets)

A: Thank you for the feedback. Currently, the TSheets integration with QB allows you to approve time entries by employee per day.

Q: Do I need to pay for TSheets and QBO payroll too?

A: Check out [tsheets.com/pros](https://tsheets.com/pros) to see if you are eligible for the TSheetsPRO program. You will receive a free version of our TSheets time tracking and scheduling software + discounts for your client's subscriptions. TSheets is a separate charge. Please reach out to [prosales@tsheets.com](mailto:prosales@tsheets.com) to learn more about the PRO program and the different billing options.

Q: I was looking into the TSheets self-certification and noticed that we need a code to sign up. No code was provided in the documents.

A: The Code is: `tsheetspro`

Q: When using TSheets, my employees were not able to punch in unless selecting a client. Can employees punch in without having to select a client?

A: Yes! Absolutely. Please call into 888-836-2720. The support team at TSheets will walk you through how to set this up.

Q: Can TSheets be exported from the IOP into QBO?

A: TSheets can integrate to both QBO and IOP, at the same time. Feel free to call into 888-836-2720 to learn more about this.

## **Merchant Services explains the new Statements**

Q: When do you expect payment statements to be available?

A: By the end of February payment statements should be available for all merchants

## **Redesigned Invoice Emails to get paid quicker**

Q: When will invoices come out for everyone?

A: Hopefully over the next month or so! It's live for about 70,000 US users right now, and we are monitoring for bugs before releasing the invoice emails to everyone.

Q: How does my client get the new improved invoicing?

A: Your clients will automatically receive the new improved invoice email once we have rolled them out. We are currently doing so in phases, so some of your clients could receive them before others.

Q: On the invoice, has it been tested with Hubdoc? Due to formatting, some email do not upload to Hubdoc.

A: Thanks for letting us know! However, we focus our testing on QuickBooks Online. We would recommend reaching out to Hubdoc to confirm.

Q: Invoice Email. Do you know if we'll be ever to add outside (other) attachments to it in the future? i.e. external file.

A: You can add attachments to invoices and invoice emails in QuickBooks Online currently. When you are creating an invoice, drag the attachment to the attachment box, or click on the attachment icon to add the file. After you do that, please make sure to check "Attach to email". Your invoice email will now include the file you attached.

Q: Is this responsive design? How does it look on different devices?

A: Yes, this is responsive design. The design and width of the invoice email will automatically adapt to your screen size. On a wider device, like a tablet in landscape mode, the fields and data in the email will flow over to make use of the wider space.

Q: How do you know if the client/customer viewed the email if all the detail is in the email itself?

A: When the client/customer opens the email that will automatically mark the invoice as "Viewed" in QuickBooks Online. However, mail clients that block images from automatically loading could prevent the "Viewed" status from being triggered. If so, if the client/customer clicks the link to open the invoice on our portal, that will also mark the invoice as "Viewed".

Q: If a customer does not like the new email. Is there a way to disable?

A: We would love to hear feedback on why your clients/customers don't like the new email so we can continue improving the experience for our users! Please do pass any feedback along. However, if your customer would really like to change it, from your client's Account and Settings, go to Sales, and then online delivery. The HTML or Plain text options are both different email options that you could choose instead of the new email.

Q: Does it require any invoice redesign?

A: There isn't any work needed to redesign your invoice. The new invoice emails automatically pull your preferences like color and content from your invoice template.

Q: Where do clients pick the email color? I know it will be first question my client asks

A: The email color will pull the color selected on your invoice template, so that your client's brand can be consistent across the email and the invoice. To change the color, pick a different color for the invoice template.

Q: So does the new invoice type remove the prior 3 options that existed or just the html version only?

A: The new invoice type replaces the "Online invoice". The other 2 options still exist and can be selected from Account and Settings > Sales > Online delivery.

Q: With all the security emphasis of not clicking on links in emails, why don't you have the links displayed so that people can see what the link is and then type it into their browser?

A: The links to our portal for customers to view the invoice online are encrypted, and therefore have a long URL that would make it challenging for customers to type in. But we value your help in making sure our emails are secure. If you see any emails from QuickBooks that look suspicious, please forward them to [spoofer@intuit.com](mailto:spoofer@intuit.com)

Q: Will this improved invoice functionality work with Microsoft Word imported styles?

A: Your business and invoice data will automatically be pulled into the invoice email if you are using imported styles. However, we are still working on some other preferences, like having your accent color automatically pulled from imported styles.

Q: It used to be that client had to open the invoice for it to register as ""viewed"". If all the details are in the email now, does that register as viewed if the email is opened?

A: With the new email, invoices will automatically be marked as "Viewed" when the client/customer opens the email.

Q: Can we still provide a pdf copy of the invoice in the email?

A: Yes! If you have selected to attach your invoice as a PDF to the email, they will still be automatically attached.

Q: Preview of Print invoice will be available? My client will be freak out when she see on the preview like this because she like to print invoice and mail out.

A: Your client will still be able to preview, print, and mail the print invoice. To do so, click Print or Preview on the bottom on the screen when she is creating the invoice. That will pull up the PDF that your client will be able to print and mail.

Q: Does the invoicing email still offer the choice whether the customer has to click on the button in order to see the invoice? If not, will the audit history reflect when it was opened?

A: Yes, the link will still exist for the user to click and access the invoice on our portal. However, with the new email, invoices will automatically be marked as “Viewed” when the client/customer opens the email.

Q: Do we have the option to hide the invoice details? What if there 100s of lines on the invoice?

A: Some mail clients will automatically truncate the email if it is too long. However, this is good feedback. We will investigate further on whether there is a larger need for a “summary” invoice email with less of the invoice details showing in the email.

## **Progress invoicing entering final beta stage for roll out soon**

Q: If a change order is done, does it show up here as well, or like a separate estimate?

A: You can either create a separate estimate, or you can edit the current estimate. If editing the current estimate, it will not show that there has been an addition, but you can begin progress invoicing with the changes.

Q: Is the beta on progressive invoicing for USA only?

A: No – it is for US, AU, CA, and UK.

Q: How are Accounts/users chosen for Beta Groups to get this experience?

A: If you email us at [progressinvoicingbeta@intuit.com](mailto:progressinvoicingbeta@intuit.com) we can help you get the beta experience.

Q: Any new reports for seeing progress invoicing status?

A: Not at the moment

Q: How does the progress invoice handle invoices that total greater than the original estimate amount? So far all the invoices show a portion of the total estimate. How do you handle this when the estimate is lower than actual?

A: You will get a warning stating that one line item is over the estimated amount. You can choose to “Go over” or Cancel.

Q: Does this require any invoice redesign?

A: No, it doesn't. Users of the new redesigned invoices get some enhanced features like the estimate summary shown on the invoice email but progress invoicing creation is available for everyone.

Q: In progress invoicing, do you have to do it through an estimate, or can you create it on an invoice?

A: Progress invoicing enables creation of invoices through estimates. So you may need to begin from the estimate.

Q: Can you just invoice a lump sum amount for the progress bill without the details per line?

A: You could invoice for just one line on the estimate progressively. That's possible.

Q: How do I know if my clients have access to progress invoicing?

A: At the moment, only a small set of users have access to progress invoicing. If you'd like to request access to progress invoicing for a client, please email their company ID to [progressinvoicingbeta@intuit.com](mailto:progressinvoicingbeta@intuit.com) to get enrolled in the beta.

Q: What happens with sales tax is the estimate if you have many invoices?

A: Sales tax is calculated on progress invoices, and depending on your sales tax setting, cash or accrual, will determine how sales tax shows on the reports.

Q: How do you bill by %, any area to input % of the total to bill?

A: You can choose to invoice all line items at a %, or select only certain line items. You can also change the % for each line item or phase of your project/job.

Q: What does it look like if by the time you send the second progress billing they have paid the first progress payment versus if when you send the second progress billing they have yet to pay the last progress bill?

A: Unless you have the Account Summary option selected, the second progress invoice will not show the amount due from the first invoice. At the moment, progress invoicing only helps track the invoiced amounts and not the paid amounts.

Q: How did you get to the screen showing the progress billing options?

A: By clicking on the 'Create Invoice' button on the estimate.

Q: How does the Progress Invoicing handle the Sales Tax calculation and billing?

A: We calculate sales tax using the same processes as a regular invoice.

Q: When we delete a line from an email, does it put that amount back into the Estimate?

A: Yes, it puts it back on the original estimate.

## **Find-A-ProAdvisor – matching for tax**

Q: Will the services be expanded or can users create business specific services?

A: Below is the new list of services in the US. Services vary slightly for users in other countries. Users will not be allowed to create/add services not defined in the below list.

- 1099 Filing
- Accounting
- Audits
- Bankruptcy
- Book Cleanup
- Bookkeeping
- Business Budgeting and Forecasting
- Business Plans
- Consulting
- Cost Accounting
- Divorce Accounting
- Estate & Trust
- Expatriate (Non-resident) Tax Services
- Financial Planning
- Financial Reporting
- Financial Services
- Forensic
- In-House CFO
- Inventory Services
- IRS representation
- IT Consulting
- Payroll
- Personal Financial Planning
- Personal Tax
- QuickBooks Consulting
- QuickBooks Payroll
- QuickBooks Setup
- QuickBooks Training
- Self-Employed Schedule C Tax
- Small Business Tax
- Startup Consulting
- Sustainability Audit
- Tax Advice
- Tax Consulting Services
- Tax Planning
- Tax Preparation

- Tax Services
- Tax Setup

Q: They used to put us listed higher if we did free consult. Is that the same with the new ProAdvisor site?

A: Find-a-ProAdvisor looks at a rich set of signals to create more, better-matched leads. Below is an article which can help ensure you are making the most of your Find-a-ProAdvisor profile:

<https://www.firmofthefuture.com/content/5-tips-to-maximize-your-new-find-a-proadvisor-profile/>

Q: You limit the number of services a ProAdvisor can offer. Why?

A: ProAdvisors are limited by the pre-selected services listed within the Find-a-ProAdvisor profile. With these enhancements, the number of services is increasing from 14 to almost 40 services, generated based off extensive research of user search behavior and input from our ProAdvisor partners.. Find-a-ProAdvisor works to ensure that the services listed are well-understood by prospective clients to provide the best match.

Q: Can I offer my bookkeeping services as a ProAdvisor Profile or only Professional Accountants?

A: Absolutely, you can offer your bookkeeping services on Find-a-ProAdvisor - Find-a-ProAdvisor is open to accounting professionals who are also Certified ProAdvisors. Not yet certified? [Learn more](#) about our award-winning education and certification program, and get certified to take advantage of everything the free [ProAdvisor Program](#) has to offer.

Q: If you haven't already, could you add Forensic Services?

A: Forensic has been added as a new service as a part of this enhancement.

Q: I set up a client's QuickBooks online, why would I want to update my pro advisor, because my clients know what I offer.

A: [Find-a-ProAdvisor](#) is the world's largest network of small businesses who are looking for accounting experts like you; the site received 1 million visitors last year! If you are looking to grow your practice, Find-a-ProAdvisor is a great place to connect with prospective clients.

Q: Can we expand the service area now? Or is it still limited to one area?

A: These changes will go live on Friday, February 16th. You may update the services listed once the changes go live.

Q: Will you be adding the CFE (certified fraud examiner) credential to the listing in the ProAdvisor profiles?

A: We are not focusing on updating Credentials at this time; however, I will note this feedback for future enhancements.

Q: I believe you have a separate initiative where accountants can offer tax through you. Are you including that feature in the pro advisor profile, or will be kept separate?

A: This initiative is currently not incorporated in the Find-a-ProAdvisor profile; however, the enhanced list of services does have a more robust set of tax services listed to help connect you with prospective clients who are seeking tax help.

Q: The new ProAdvisor credentials section - will it include the professional designation for non-enrolled preparers issued by the IRS - Annual Filing Season Program participants?

ProAdvisor profile- Any chance you can add if someone has the AFSP Completion through the IRS?

A: We are not focusing on updating Credentials at this time; however, I will note this feedback for future enhancements.

Q: Will the credentials section also include CPB certified professional bookkeeper. I have put in that request in the past but do not see it added yet.

A: We are not focusing on updating Credentials at this time; however, I will note this feedback for future enhancements.

Q: Will the certification of CB be available?

A: We are not focusing on updating Credentials at this time; however, I will note this feedback for future enhancements.

Q: Add Non-profits to the services

A: Non-Profits are currently listed under the Industries section of the Find-a-ProAdvisor profile.

Q: Can we have a section for services where we can specify our niche?

A: ProAdvisors are currently limited to the pre-selected services listed within the Find-a-ProAdvisor profile. However, we are actively exploring ways to allow ProAdvisors to specify niche services/industries. I will note this feedback for future enhancements.

Q: What are the benefits to visiting the ProAdvisor site more than once a month?

A: The insights section of your Find-a-ProAdvisor profile provides information such as Profile Views, Leads, and Social Link views. This information can help inform whether changes to your ProAdvisor profile are being well-received by visitors to the site or make additional improvements. Updating your profile also allows you to highlight seasonal information that prospective clients may be looking for, such as tax season or quarterly taxes.

Q: Can you specify what a "Free Consultation" includes - for example time?

A: It is at the discretion of the ProAdvisor to control the time spent and output of the free consultation. We intentionally did not specify a time or deliverables to allow for flexibility for ProAdvisors offering free consultations.

Q: In the ProAdvisor profile, can the Industries served section be expanded also? For example, maybe add gyms/fitness, marinas, and maybe an "other" category where smaller niches can be noted.

A: We are not focusing on updating industries at this time; however, I will note this feedback for future enhancements.

Q: Do you list EA credentials?

A: Yes, Enrolled Agent is currently available as a Credential listed in the "Credentials" section of the ProAdvisor Profile

## **Payroll updates; quickly connect to bank account, same day Direct Deposit**

Q: Does the same day direct deposit for payroll also apply to vendor direct deposit?



A: No. QBFSP customers in good standing will have the option for same day direct deposit when paying W-2 employees. For contractor DD, the standard lead time will be next day direct deposit for QBOP and QBFSP accounts in good standing.

Q: Will Same Day DD be coming to QBO Payroll (not full service)?

A: Same Day DD will only be offered to our QuickBooks Full Service Payroll customers at this time.

Q: Plans for offering direct deposit payments to 1099 workers in QBO?

A: Stay tuned for exciting developments on the horizon!

Q: Is there any plan to offer employee self-onboarding, where an employee receives a link to fill out their W-4, direct deposit authorization, etc. onscreen? When do you expect to add employee self-service onboarding similar to what Gusto Payroll offers?

A: For QuickBooks Online Payroll and QuickBooks Full Service Payroll subscribers, employers can utilize a feature called Employee Self Set Up. This feature enables employers to invite their employees to enter in personal information, W-4 details and bank account information.

To learn more about how to invite employees to self-onboard, see [Use Employee Self Set Up \(EES\)](#)

Q: Does that same day deposit only work with the bank you mentioned?

A: Same Day Direct Deposit in QuickBooks Full Service Payroll will be available as long as a customer is in good standing with our banking services and not on a 5 day lead time. Employers can use any banking institution of their choice to fund their payroll related transactions.

Q: Re IOP4A user id migration. The last time we tried this it slowed down our system significantly and we were unable to get it fixed for months. How do we know it will work this time?

A: Improvements have been made regarding the performance and overall experience with user ID migration efforts. The team has been extensively testing and working to improve the customer experience.

Should you have any problems at the time of migration, please contact our dedicated support line at 844-391-9894. This line will be open from March 5<sup>th</sup> to May 4<sup>th</sup> Monday through Friday from 6 AM to 6 PM PST to assist you and your clients.

Q: Is the same day direct deposit available on desktop as well as online?

A: Same Day Direct Deposit will be offered to QuickBooks Full Service Payroll subscribers at this time only.

Q: Will 1099 vendors eventually be part of this so they can be paid by direct deposit like employees?

A: Stay tuned for exciting developments on the horizon!

Q: Will these new features ultimately be available in Intuit Online Payroll? Would be wonderful for customer cash flow.

A: At this time, the current plans are for offering Instant Bank Account Connection only for the QuickBooks Full Service Payroll and QuickBooks Online Payroll subscriptions. Same day direct deposit will only be offered to QuickBooks Full Service Payroll subscriptions.

Q: How does manage my payroll account differ from QBO online payroll?

A: ManagePayroll.com is a white label non-Intuit branded website that is a feature of the Intuit Online Payroll for Accountants (IOP4A) offering. An IOP4A AC can grant their wholesale client's access to process their own payroll. Wholesale clients are guided here to set up their account, run payroll or pay and file taxes.

QuickBooks Online Payroll is a payroll offering that is available with QuickBooks and requires an active QuickBooks accounting subscription. QuickBooks Online Payroll is completely integrated with accounting.

Q: When will W2s be available for employees at paycheck records.com for IOP and Online payroll so that we do not have to print and mail?

A: Paycheckrecords.com does not currently support access to W2s for employees. You can guide IOP, IFSP, QBOP, and QBFSP employees to [www.ViewMyPaycheck.com](http://www.ViewMyPaycheck.com) to view their paystubs. We also provide the electronic copies of W2s here. Please see

Please also note that from a compliance perspective, employers should still sent W2s manually to all employees, even if employees have electronic access to their W2s.

Q: When I sent up a new user for IOP4A, can I use my Intuit account I log in with QBO too? Or do I need a new user/password.

A: With Intuit's central login credential system, you will be able to use the same user ID and password that you have for your Intuit login with QBO.

Q: When will this Direct Deposit be available for the new Workers feature within QBO?

A: Same Day Direct Deposit will be available on February 23 2018.

Q: Will Same Day Direct Deposit be offered for IOP or QBO payroll?

A: No, Same Day Direct Deposit is only offered with QuickBooks Full Service Payroll at this time.

Q: Any plans to support the R & D tax credit submission via Intuit payroll?

A: No, there are no current plans to support this. Please email [onlinepayrollfeedback@intuit.com](mailto:onlinepayrollfeedback@intuit.com) with any thoughts or comments with the Intuit Online Payroll product.

## **QB Capital**

Q: Is Prepayment possible?

A: Yes, and you only pay for the money while you have it, so if you prepay you will pay less interest. No penalties

Q: Is QB Capital available for the Accountant as well?

A: It is available if the accountant has their own QBO file for their accounting business, but an accountant cannot apply for a loan through their clients' QBO accounts

Q: Can it be used like a line of credit? So if you are approved for \$25,000 can you use \$10,000 now and then another \$15,000 later?

A: Not yet, but we are always working on new offerings so keep an eye out!

Q: Once approved and accepted, are the loan accounts automatically set up on the Chart of Accounts?

A: Not today, but very soon.

Q: How do we make the payments on the loan?

A: The payments are automatically withdrawn on a weekly basis from the bank account that the loan is funded into.

Q: With QB Capital, is there a way to repay monthly instead or weekly?

A: Not today, but we are working on monthly pay loans.

Q: Where do we get more info on QB capital?

A: You can learn more at [quickbookscapital.com](http://quickbookscapital.com)

Q: How will the rates compare to other Lenders.

A: Our rates are competitive with other small business lenders including traditional banks as well as online lenders.

Q: Which bank (or banks) is (are) actually underwriting the loan?

A: The loan is underwritten and funded by QuickBooks Capital, licensed as Intuit Financing Inc. no Bank is underwriting the loan.

Q: Can you work with the SBA for a guaranteed loan?

A: Alongside our Direct Lending Program at QuickBooks Capital, we also offer a marketplace where you can match with another lender who might provide different products than ours. This includes Celtic Bank, who can provide SBA loans, to learn more about our marketplace, please visit <https://quickbookscapital.intuit.com/marketplace>

Q: Where in QBO do you access the QB Capital application?

A: There is a capital tab on the left navigation bar. If it is not there, you can click "I'm Interested" on <https://quickbookscapital.com> to see if your business is eligible.

Q: How and when does QB Capital disclose that the PERSON who owns the business is liable for the loan?

A: Upfront before someone starts the loan application, in the loan application when the guarantor is entering their personal information, and once again before the customer accepts their loan. We think it is very important that our customers understand exactly what they are getting with QuickBooks Capital, and aim to be as transparent as possible within the product.

Q: What are the terms and conditions if you don't make the payment, let's say your account is over drafted or for any reason the money for payment is not provided to QB on time?

A: We understand that things don't always go as planned. If you miss a payment, interest continues to accrue on the unpaid principal at your normal interest rate. If you're unable to pay within 10 days of your payment date, you may be charged a late fee. Late fees will never be more than 5% of your missed payment amount, and they won't accrue interest.

Q: As accountants, are we able to see the agreement?

A: Only the user who applies for the loan is able to view the terms and accept the loan, however, the customer can download a copy of their loan document to share with any of their advisors prior to accepting.

Q: Can you get a loan if you don't keep your books up to date?

A: The more up to date your books are, the more likely you are to be eligible to apply for a loan from QuickBooks Capital