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Projects FAQ

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ProAdvisor – Reviews

<https://community.intuit.com/articles/1570617-find-a-proadvisor>

Price Rules

<https://community.intuit.com/articles/1597048-what-are-price-rules>

Smart Check

<https://community.intuit.com/articles/1602588-smartcheck-in-quickbooks-labs>

Banking and bank feeds center on community is very helpful and contains articles and KB's

<https://community.intuit.com/browse/quickbooks-online-banking>

## **FAQs**

### **ProAdvisor Reviews - Improved**

Q: Where is this review option found?

A: The Reviews are listed on the publically published ProAdvisor Profile near the bottom of the screen. When a customer is viewing your profile online they can view or submit a review by scrolling down to the bottom of the web page.

Q: How do I send my profile to my clients for a review?

A: You can send the URL / website address of your Profile to clients directly. To obtain the URL / website address of your profile, go to [www.FindAProAdvisor.com](http://www.FindAProAdvisor.com) and search by your Zip Code. Your profile should be listed in the search results and you will want to click on that listing. The page that loads will be your profile and you can copy the Web Address out of the Address bar in the Web browser and provide that to your clients.

Q: What happens to the old reviews?

A: Old reviews will still show on ProAdvisor Profiles.

### **Price Rules**

Q: Can this be used for services to charge different amounts based on which employee did the work?

A: Yes, you could use Price Rules for that.

Q: Can you tell QBO to record the discount to COGS - Discounts?

A: Price Rules is similar to how it is managed in Desktop, where the price change is not recorded as a discount. It is more akin to overriding the price. This is a great ask though.

Q: When will this come out?

A: The beta is rolling out in Sept.

Q: Does this work with inventory bundles?

A: Bundles today is just a grouping of items and does not have a price itself (it is just the sum of the items), so you cannot add it to a price rule. However, if you add the items that are in a bundle to a price rule and then add the bundle to an invoice it will show the price recommended by the price rule.

Q: Do we need to set up the accounting entries for these discounted items?

A: Price Rules today just overrides the rate, and so it does not log a discount (similar to Desktop Price Levels).

### **SmartScan**

Q: What if it is not a mistake and don't want it to keep showing up in SmartCheck?

A: Right now all issues will continue to show up every time you scan your file with SmartScan. There is no way to hide or ignore any issues. We know this can be annoying and are working on addressing it in a future release.

Q: Once you turn it on is it for the user only or anyone accessing that QBO file?

A: This will be for anyone accessing the QBO file

Q: How do we login to QB Labs?

A: Gear Menu > QB Labs (under the first column of options for Company)

Q: Are the labs specific to each company?

A: Yes

Q: Are Labs specific to user or is it global?

A: It is specific to a company.

Q: If I turn this on for a client, then it will be on when my client logs in?

A: Yes

Q: Can smartcheck check for inconsistent codings?

A: Assuming this question is asking if SmartScan can check for issues where transactions are inconsistently applied to accounts. For example, if an expense for Vendor A is assigned to Office Supplies Expense account and another expense for that same Vendor A is applied to Utilities. That's on our list

and should be available when you select the “Want More?” tab where you can vote for that as a new rule for us to scan for. Thanks for the feedback!

Q: Will it scan for orphaned transactions in Undeposited Funds that did not convert correctly from QuickBooks Desktop?

A: It does not do that right now, but we are looking for feedback like this as we continue to enhance SmartScan. Thank you for the feedback!

Q: Will this help find out why Accounts Receivable Subsidiary Ledger does not agree with General Ledger AR account?

A: It does not do that right now, but we are looking for feedback like this as we continue to enhance SmartScan. Thank you for the feedback!

Q: Will we be able to set up our own rules?

A: It does not do that right now, but we are always making SmartScan better and this feedback is something on our list. Please continue to give us more feedback on what types of rules you would like to be able to add yourself.

Q: Does this apply to all your clients?

A: Each QBO company will have to turn on this feature in QB Labs at this time. If in the future we decide to release this as a feature of QBO for all companies, it could be available for all of your clients.

Q: Could he repeat about to get to smart check?

A: You can enable SmartScan in QB Labs by going to the Gear Menu > Company > QB Labs. You can toggle on SmartScan and access SmartScan under the Gear Menu > Tools > SmartScan

Q: I use QBO for Accountants. Do I need to enable Smart Check for each client individually?

A: Yes, at this time it will need to be enabled for each QBO company that you would like to use it for. In the future, if this is offered as a feature of QBO it could be available for all your clients.

Q: Is this being offered across the board, or just to ProAdvisor accounts?

A: This is not specific to ProAdvisors, it is for QBO.

Q: Will Smartcheck warn us of possible 1099 vendor information (tax id or check box) being missing or unselected?

A: That's a great idea, one that we have on our list and you can vote for it by going to the "Want More?" tab and checking the box for 1099 vendors without tax info.

Q: Is there a way to give feedback instead of "vote"?

A: There is a survey link on the top of the SmartScan page where you can give us much more feedback

Q: How do you clear if no change is needed in smartscan?

A: Currently there is no way to clear or hide an issue that SmartScan detects. We have heard this feedback and know that it can be annoying to continually show issues that do not apply and we are working on it.

Q: Do customers have access to QB Labs? And do they have access to the report if we turn on SmartCheck?

A: Yes, any QBO user can access SmartScan and enable it through QB Labs. They then can access the results of the scan.

Q: Do you have to turn on the Smart Scan / QB Labs on a client-by-client basis?

A: Yes, SmartScan needs to be enabled for each QBO company that wants it, or that you want to enable it for.

## **Bank Feeds**

Q: Does it work with PayPal?

A: Yes, Bank Feeds works with PayPal and will download the gross sale amount and the fee associated with it. If there is a sale for \$10.00 on PayPal you will see a transaction for \$10.00 in Bank Feeds and another transactions for example \$0.75 for the PayPal fee associated with that sale.

Q: How can I know the fees a bank charges for connecting with QBO?

A: At this time, there are no charges or fees from a bank to connect an account to QuickBooks online. Banks, however may charge a fee to connect to QuickBooks desktop.

Q: Will the reconnect bank feed download the transaction twice (once under old account and once under new account)?

A: No, as the bank connection to the old account is removed during the process and the new account is connected.

Q: Does this work for bank change ie Bank of the Cascades is now First Interstate?

A: Yes, in QuickBooks online please search for Bank of the Cascades (Now First Interstate Bank) to add the bank account.