Feb 27th ITK FAQs

ProAdvisor

Q: When is the update going to roll out?
A: The new screens will be available in the month of March.

Q: Are we notified if when we need to be re-certified?
A: Yes we will send out notifications if you are close to your expiry date and need to be re-certified.

Q: Where do I go to become a ProAdvisor?
A: You can go to the ProAdvisor tab on QuickBooks Online Accountant.

Q: If you're already certified can you take the new certification just to see how it works/refresher without messing up the system?
A: Yes, you will have the option to take the new certification even if you are certified.

Q: Can you become certified on Desktop?
A: Yes, you can get certified on Desktop by taking the QuickBooks Desktop certification.

Q: If I received my certification in 2017, I should be able to use the 2018 (shortened) re-cert correct?
A: Yes, that's right. You can take the shortened "What's new" exam to recertify.

Q: Does the new "What's New" re-certification option apply for Advanced Certified people too?
A: No. What's new is only for QuickBooks Online certification.

Q: So the current certifications will expire and then need to be retaken or is it defaulting to renewals of March every year?
A: With the new changes, everyone will have a common expiry date of July 31st. You can take the, "What's new" to maintain their certification.

Q: Has anything changed with reporting ACE courses completed?
A: No nothing is changing on reporting ACE courses.

Q: So is it advisable to wait for the new roll out before taking the certification?
A: You can take the certifications in the old experience. We will preserve the history of certifications. You can wait for the new enhanced experience.

Q: The advanced Certification is a test required or just the ACE?
A. An exam is required for advanced certifications.

Find-A-ProAdvisor

Q: Does the find a ProAdvisor search allow for global search, to find preparers located outside of the US?

A: Find-a-ProAdvisor is currently live in the US, Australia, Canada, and the UK.

Q: I recently noticed that on the google search - the site name has been changed from “Find-a-ProAdvisor” To “Find an Accountant”. Is this a permanent change? Personally, I like our ProAdvisor titles....as it displays our abilities to offer business advisory services.

A: The URL for Find-a-ProAdvisor currently contains the text ‘find-an-accountant’. This was not changed recently; however, we are considering changes to ensure consistency between the site name, the URL, and content displayed within search engines.

Q: Performance field notes how many people visited your profile but does not give you information as to who, email address or phone # as a follow up. Why? Seems to be useless to let me know # of views without the follow up information

A: The insights section of your Find-a-ProAdvisor profile provides information such as Profile Views, Leads, and Social Link views. If your profile receives many views or inquiries but not many leads, it may be an indication that the information in your public profile could be improved. This information can help inform whether changes to your ProAdvisor profile are being well-received by visitors to the site or make additional improvements.

Q: I don't see anything for Sales Tax preparation?[Diane Lane] [djlaccts@gmail.com] [Q: 12:30 PM]

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: On your example... when you hit Preview Profile, does 1099 now show up at the top of your Services list on the Profile? That's not helpful if it is a minor part of your offerings (in terms of what you're advertising on the ProAdvisor site).

A: If the user does not specify any “Services Provided” search criteria, the services will be shown in alphabetical order. When the user specifies any “Services Provided” in the search criteria, these services are surfaced to the top of your services list and shown in bold.

Q: what is the best way to get my profile to full strength bar reaching the excellent status? Right now, it shows strong - but looks like the green arrow can go higher.

A: The area titled “Improve your profile” to the right of the “Profile strength” section lists the next best thing you can do to improve your profile.

Q: Can you have more than one company you are affiliated with in your profile?

A: This is not currently supported; however, I will note this feedback for future enhancements.

Q: How do clients add a review in ProAdvisor?

A: We launched new functionality recently which makes it easier for you to solicit reviews. When your profile is published, a new section appears which provides the link to your public profile URL. You can send this link to your current clients to solicit additional reviews.

Work Management

Q: Can the work management send notifications to my phone
A: We currently have a beta in place for Notifications through Slack and we'll be supporting email notifications in the coming weeks. You'd be able to receive both on your phone. We're also considering a weekly "digest" that gives an overview of what was accomplished in the past week and what's important in the upcoming week.

Q: Can the work management send a list of things to be done today to my phone first thing in the morning? This would be similar to a daily agenda that calendar software can send
A: A weekly digest is what most accountants have asked for vs daily, but we're still in the process of learning and getting feedback to understand the best way to provide that benefit.

Q: If you select individual instead of business, is there an option to choose QBO Plus or QBSE?
A: You can choose to add any QBO or QBSE offering regardless of if you select individual or business. We need to know whether if it's a business or individual so we know what other data to collect to enable other functionality (e.g. if you prepare taxes for a client, that will determine if we need to collect SSN or EIN).

Q: Will they market our non QBOA clients since their e-mail address is required?
A: Absolutely not. The reason we ask for email address is because accountants told us they want to be able to send requests (through email) to their non-QBO clients for source documents. So, whenever you add a client inside of the Work tab (whether it be for creating a project or a client request), we ask for that data.

Q: By creating a client w/o subscription will Intuit send them ads & stuff?
A: Absolutely not. The reason we ask for email address is because accountants told us they want to be able to send requests (through email) to their non-QBO clients for source documents. So, whenever you add a client inside of the Work tab (whether it be for creating a project or a client request), we ask for that data.

Q: Adding the clients email, will there be any emails sent to the client email? Or only when a subscription has been activated?
A: Absolutely not. The reason we ask for email address is because accountants told us they want to be able to send requests (through email) to their non-QBO clients for source documents. So, whenever you add a client inside of the Work tab (whether it be for creating a project or a client request), we ask for that data.

Q: If we add a client to our QBOA, that will give us access to a QBO file that we will able to process their

bookkeeping monthly. Correct? And there will not be a cost to the client or to the accountant? Correct? What happens if they have payroll? How would we get them a payroll subscription?
A: Adding a client without QBO to your QBOA client list enables you to manage the client (client notes, shared documents, etc.) and manage and track the work you do to support them (projects, tasks, and client requests). It does not give you access to a QBO file.

Q: Regarding projects, is it possible to add multiple clients under one project, such as quarterly payroll returns?
A: No, you can only have one client per project today. We're working on templates and client groups soon which will enable you to apply a workflow to a group of clients with a few clicks.

Q: Can this integrate with Outlook?
A: We're just now starting to get into third party integrations and this one is near the top of the list.

Q: When will there be email notifications and reminders available inside projects?
A: We just built a Slack integration that provides both notifications and reminders and released the beta last week. Please sign up at bit.ly/QBOASlack if you would like to try it out. RE: email notifications, we're going to start working on that soon so you can expect to see it released in the next couple months.

Q: Are there any plans for organizing the clients list? If you have multiple projects for a client they all show individually and makes the client list messy.
A: I'm guessing you turned on "Projects" in QB Labs. We're working to make sure we resolve that issue before we enable project profitability tracking for QBOA outside of QB Labs. We're also working on a feature that will make it easier to organize your client list. Both of those features will be released in the next couple months.

Q: Is QuickBooks going to use client email addresses that are entered to project management?
A: Absolutely not. The reason we ask for email address is because accountants told us they want to be able to send requests (through email) to their non-QBO clients for source documents. So, whenever you add a client inside of the Work tab (whether it be for creating a project or a client request), we ask for that data.

Q: So you can manage the process of getting a client set up but not actually doing the accounting work yet in Management Accountant?
A: Adding a client without QBO to your QBOA client list enables you to manage the client (client notes, shared documents, etc.) and manage and track the work you do to support them (projects, tasks, and client requests). It does not give you access to a QBO file.

Q: can we also see the progress that our team is doing on the projects?
A: Yes, each project has a green status bar that fills up as the tasks get closed.

Q: We'd like the ability to attach documents to non-subscription Clients. Is that on the road map for this year?
A: Today, you can upload docs for your non-subscription clients. Just select the client name form the Clients tab and then select Documents. You can upload them there.

Q: I would love for the Practice Management feature to sync with my iPhone calendar
A: Calendar integration is one of the top requests that is bubbling up.

Q: How does it work when I have a new client who has online QB and I want to add this client QB? How does that notify the client?
A: Today, you can only connect to a client's QBO as an accountant user if you set it up or if they invite you. If you already have access (through user mgmt. or the client's credentials) you can just invite yourself. Something we're just starting to think about is a way for the accountant to trigger the connection to make it easier.

Q: How do you assign the work to a team member?
A: That's an option after you select Create project from the Work tab.

Q: Is there a way to see the completed tasks?
A: Yes, under the green Create projects button, there is a button to switch to the List view. From there you can see completed tasks or tasks far into the future.

Q: similar to an outlook calendar or task item where you can set reminders
A: Calendar integrations are starting to bubble up to the top of the list.

Q: In the Work Tab, how do you indicate you've completed the project?
A: You can mark it as, done, directly from the Work dashboard by clicking the little down arrow. Or you can open the project and do it from there.

Q: Is the shared document area secure?
A: Absolutely. We take data security and privacy very seriously.

Q: I don't have the third option for creating a new client on my QBO, but I do have the Create Client Request and Create Project. Will I be getting that other option?
A: We're in the process of rolling them both out now. If your QBOA account doesn't have them now, it will within a week.

Q: Can I assign a project to a co-worker?
A: Yes, unless you're set up as a "Basic" user at the firm.

Q: Where can I get more info on how the requests work? What does it look like to the client? Does it keep a history of requests and replies? Can it handle attachments?
A: The easiest way is to send a test request to a client. You can uncheck the box that sends the email so it doesn't get sent. Then you can go into your client's QBO and select the My Accountant tab on the left to see what the request looks like from the client's point of view.

Q: How does the client get the request?
A: They receive it in the My Accountant section of QBO (you can check it out yourself) and/or as an email. You can choose.

Q: My client sent me a message, he could see he sent me the message, I received an email telling me I have a message but I cannot find it.
A: Look at your client requests from the Work dashboard. The client and the accountant can collaborate through a thread on the client request. The email should have a link that takes you right there.

Q: Is it possible to create a work task that the client cannot see?
A: The client only sees the client requests you assign to them.

Sales Tax

Q: Is the sales tax what came with Exactor acquisition?
A: Yes, the new automated sales tax experience in QBO is powered by the Exactor data base.
Q: can you have more than one taxing agency?
A: Yes, you can add as many agencies as you need by accessing the Sales Tax Settings in your tax center.

Q: Should we turn off Automated Sales Tax if client is using SQUARE? This knowledge based article for Square Sync says to turn it "ON", but Tech Support said to turn it "OFF". Confusing!
A: You can have your automated sales tax feature turned on, even if you are using Square.

Q: I use Sales Tax for my Destin, FL vacation beach condo business. All tourist tax is based on location of condo, not the address of the customer. How will the new Sales Tax features affect vacation rental sales tax QBO clients?
A: At this time, QBO does not support the specific rental tax in FL, but we are looking to include this is in a future release. In the meantime, you can override the sales tax on your transaction by clicking the blue sales tax link.

Q: How are you handling the jurisdictional tax components of various states?
A: Sales Tax will be calculated based on your location, your ship to location on the transaction and the items being sold. These components are taken into account with the sales tax laws for the location(s) to determine the correct tax to be applied.

Q: If we don't have a sales tax customer yet, is there a way to get hands on look at this new sales tax experience? A demo? A practice client?
A: Any new QBO accounts have the automated sales tax feature enabled. Also, please see the prior webinars as a full demo was shown in the past!

Q: When will you expand Sales Tax Reports? You have recently introduced new automated sales tax feature but you can't run sales reports filtered by zip code, city, and state. Clients are desperately looking for these reports for the last couple of years.
A: Non-taxable sales report is coming soon, with more report improvements beings explored for future releases!

Q: Can you use the Sales Tax function to track taxes due on "purchases" too?
A: Currently sales tax is only tracked on sales transactions in QBO

Q: Which sales tax engine are you using to keep sales tax rates up to date in the new sales tax tool? Is it an Avalara or Vertex system?
A: We are using the Exactor data base, as Intuit has recently acquired the Exactor Company.

Q: I live in Utah and have two retail stores. They happen to have the same tax rate however they are due to the same state, different counties, and different cities. I am unable to add the same Tax authority "Utah" twice. Any movement here? Thankfully I am still on the older version but the new

version does not accommodate this workflow (for Utah as the tax agency at least).
A: You'll only need to add the agency once, the tax is being generated from the Company Address in QBO. This feedback will be provided to the sales tax team to hopefully enhance this experience

Q: Will this allow for "use tax" in states where the client is tax exempt but has to submit use tax for purchases?
A: At this time, QBO only supports Sales taxes, but Use Taxes are being explored for a future release

Q: Is this retroactively applied?
A: No, this will only affect transactions created AFTER the automated sales tax feature is turned on (unless you go back and edit an older transaction yourself)

Q: Can you manually add sales tax information for a client who uses a different system to account for sales?
A: No manual sales tax rates are available in the automated sales tax feature

Q: What if you're selling from multiple company locations? How do you differentiate between them for sales taxes?
A: At this time, the company address would need to be updated to account for the change location. However this feedback will be provided to the sales tax team to hopefully enhance this experience

Q: We use Shopify and download the sales receipts into QBO. Shopify handles all the sales tax calculations...do I need to use the new QBO sales tax center?
A: All customers will eventually be migrated to the automated sales tax. You'll need to have your sales tax set up, but no additional work will be required on your transactions that are imported from Shopify

Q: Does the Sales Tax (due date) reminder show up in WORK as per the last presentation?
A: Sales tax reminders will be sent via email at this time

Q: Is the Sales Tax calculated on the Cash or Accrual basis?
A: Currently, only Accrual basis is supported with the automated sales tax feature. No companies who have been set to Cash basis will be enrolled in this feature until cash basis support is available.

Q: Will there be a way to clear off the old data? It never matched the chart of accounts before and was always off.
A: Automated sales tax calculation will not be retroactive. You can record tax payments and/or journal entries to balance this.

Q: Can you have multiple shipping addresses for the same customer in order to calculate sales tax?
A: You can change the shipping address on a transaction basis.

Q: Can you turn it off at a later time after opting in? Like a try before you buy system
A: Once this is turned on, there is no way to disable.

Q: What if the client has multiple locations with different tax rates?
A: If you're shipping to different locations you can simply update the shipping address on the location. If this is multiple Ship From locations, at this time the only workaround is to change the company address in QBO. I will be providing this feedback to the sales tax team.

Q: Is there a way to track use tax?
A: Not at this time.

Q: I see customer is tax exempt under customer info. Is this a selection that needs to be made on each invoice or can a default be set on the customer?
A: The customer can be marked exempt under their set up page.

Q: Will QBO be able to tax different rates for different products? Example - lodging sales are 10% but product is only 8% for one of my clients. The extra 2% for lodging is imposed by the county my client is in.
A: This is tracked by the sales tax categories listed on the product/service. If you do not see the specific category you're looking for, please provide feedback. The team is looking to expand this list as needed.

Q: I want to opt out of the new sales tax, how do I do that?
A: Please contact our support team, they can gather additional information to be sent to the sales tax research department for review/updates.

Q: Based on company address setup, can you flag if the sales tax filing should be based on cash or accrual basis method?
A: Currently, only Accrual basis is supported with the automated sales tax feature. No companies who have been set to Cash basis will be enrolled in this feature until cash basis support is available.

Q: Illinois offers a discount on the sales tax due if I pay it before a certain date. How do I record that discount when I pay my sales tax due to the state?
A: QBO will automatically apply these discounts when you submit your return. You can also add an adjustment on the View Return page.

Q: Is the tax exempt customer specific? Could you do it by job rather than by customer?
A: You can mark the customer exempt, or mark items non-taxable, on a transactional basis

Q: I'm sorry if I missed this answer already, but is this being rolled out? I have a current client I just checked and it is still the standard Sales Tax Center
A: This is being rolled out only to existing customers who are currently using accrual basis and have one sales tax agency set up, in phases. Customers outside of these qualifications will be migrated soon.

Q: for sales tax calculation purpose, what about for companies located in one state but have the warehouse is in another state. Will QBO have any new function for that?
A: Currently, you would have to change the company address to account for different "ship from" address.

Q: Will we get notified if a jurisdiction has a rate change? Also is there a way to exempt nonprofits and other companies on a B2B transactions.
A: You can make your customers exempt by editing the tax info section of their profile. Rates will be updated automatically for you based on the information QBO receives from the tax agencies.

Q: How do we turn off sales tax if we do not charge sales tax?
A: Automated sales tax can be turned off if there are no transactions with sales tax calculated on them

in the account. Click Sales tax settings in the sales tax center to do so.

Q: Sales Taxes - since many use 3rd Party apps with the QBO invoices, we need the ability to have an over collected box due to having to pay the State those over collected amounts. We also need a Prepaid
A: Sales Tax box for those clients who don't resale all their materials, but charge the customer the straight receipt.
Thanks for the feedback, you can add an adjustment on the View Return page if needed.

Q: Regarding sales tax, is this linked up to an Avalara or something?
A: Exactor

Q: Will that support auto taxes with different layers but 1 agency?
A: Yes, local, city, county taxes will be applied based on the location(s) on the transaction

Q: How does this work with third party apps?
A: Transactions with sales tax imported from a third party app will not be changed, unless you make an edit to the transaction

Q: How do you get the prompt to set up tax agency?
A: Adding additional agencies can be done by clicking the Sales tax settings within the tax center

Q: Is this competing with Avalara as the go-to sales tax option?
A: You are still welcome to use the Avalara app for sales tax, this is just built into the QBO product for you.

Q: Will there be anything to handle use tax? When a vendor does not charge sales tax, can purchases be marked use taxable so we can self-assess?
A: At this time, use tax is not supported. This is being considered for a future release

Q: Is Washington State going to be one of the last states to have the new tax center?
A: The rollout is not done based on state, but by how many tax agencies are currently set up in the existing account.

Q: What about Franchise Tax?
A: Not supported at this time

Q: B & O Taxes, how do I track these taxes that I don't bill to customers?
A: Currently only sales tax is supported

Q: is this available sales tax feature for QB desktop?
A: QB Online only at this time

Q: What about special sales taxes such as lumber tax?
A: Sales tax categories on the products/services list will help account for special taxes on products. If you do not see the category you are looking for, please provide feedback as the team is looking to expand the available list.

Q: What about drop shipments?

A: Use tax is not currently supported

Q: How do I find the option to now have sales tax automated in QBO?
A: This will be a phased rollout. You'll see the option to move in your sales tax center once available for your specific account.

Q: I'm using Avalara for a client, will QBO be able to do the same?
A: Yes, QBO will calculate your taxes on your transactions. You are still welcome to use the Avalara app if you prefer, but our option will be built into your QBO account.

Q: When sales tax rates change, there doesn't seem to be a great way to track the effective date of the new rates etc. Will this new system handle that better?
A: Yes, QBO will know the effective date of rate changes and will assign the proper rate(s) based on the transaction date.