



Your feedback is very important to the teams that present the information contained in this webinar event. Please use the Questions option during this event to provide your questions feedback for the presented topics.

Agenda

- Webinar Details
- Learning Objectives
- Accountant Resource Announcements
- QuickBooks Program & Support Updates
- QuickBooks Online
 - Improvements to Importing Lists
- QuickBooks Online Accountant
 - New Apps integration offering for Retail and Restaurant clients

NOTES:

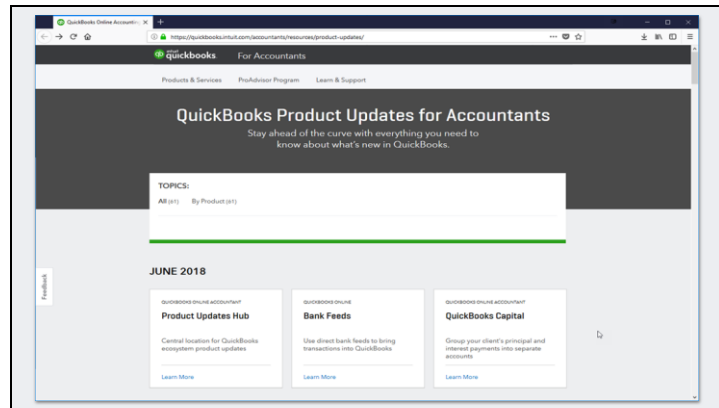
Learning Objectives

June 26, 2018



- Identify recent updates to QuickBooks and QuickBooks Online.
- Recognize multiple resources to maximize earning CPE credits available.
- Review improved method for Client App Management for Accountants.
- Examine an integrative offering with QuickBooks Online and Third Party Apps for Retail and Restaurant clients.
- Identify feature improvements for importing lists into QuickBooks Online to save time and reduce mistakes.

NOTES:



NEW RESOURCE For ACCOUNTANTS

Stay ahead of the curve with everything you need to know about what's new in QuickBooks.

Link: <https://quickbooks.intuit.com/accountants/resources/product-updates/>

NOTES:



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

| 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"> • Certification Training • Increase your Profitability with Schedule C Clients • Manage and Scale your Accounting & Tax Firm | <p>In-person training tour visiting many location across the U.S.</p> <ul style="list-style-type: none"> • Coming in May 2018 | <p>Free training, CPE and networking with your peers and Intuit product experts.</p> <ul style="list-style-type: none"> • Coming in March 2018 |

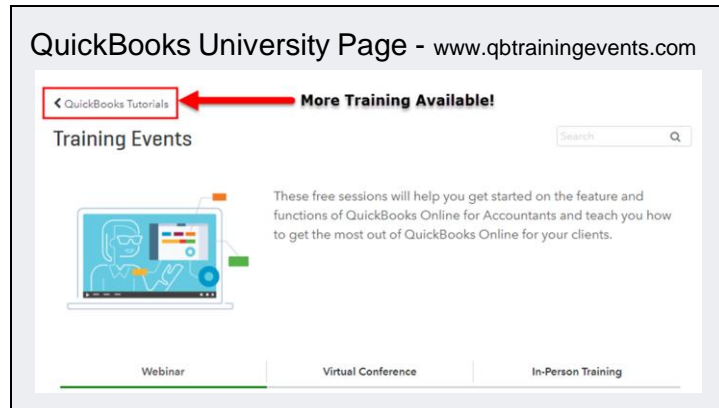
Excellent ProAdvisor Resource: QuickBooks University

- <https://www.qbtrainingevents.com>
- Free Training Events, many that provide CPE credits through
July 2 - What's New in QuickBooks Online offers 2.5 CPE
- 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

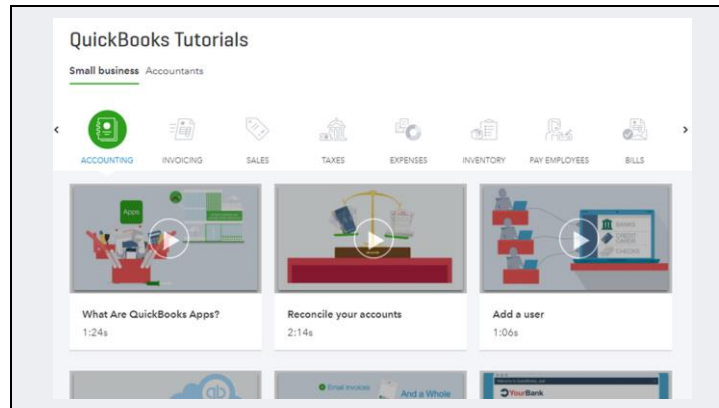
Link: <https://quickbooks.intuit.com/tutorials/accountant-webinars-events>



When viewing the Intuit Accountant University main page

You have access to additional training opportunities

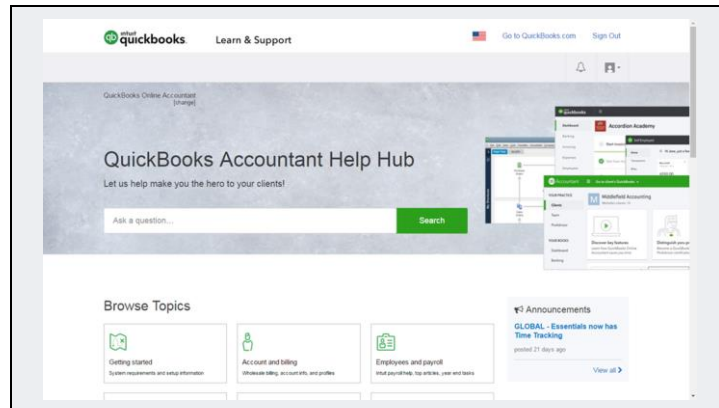
To view these, click the QuickBooks Tutorial link



- 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**'
 - They are also displayed by topic to allow you to quickly find what you need

Link: <https://quickbooks.intuit.com/tutorials/>

NOTES:



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>

NOTES:

Program Updates

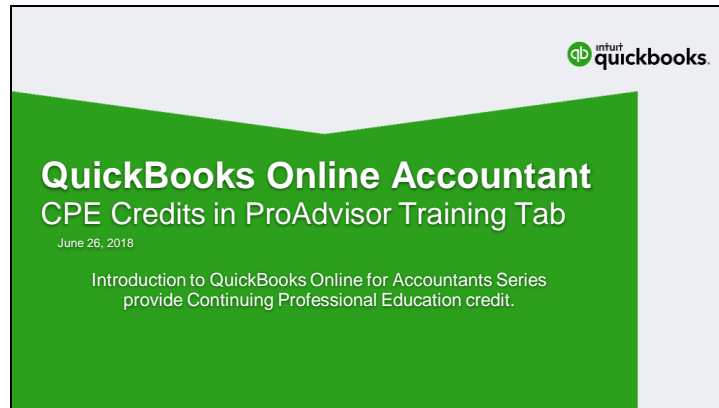
June 26, 2018

- QuickBooks Online Accountant**
 - CPE Credits in ProAdvisor Training Tab
- QuickBooks Online Accountant**
 - Client App Management Update
- QuickBooks Online**
 - 'Report Only' User Experience

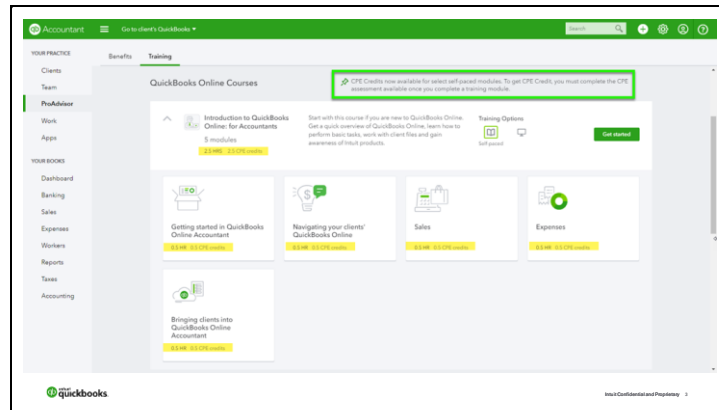


Recent updates to QuickBooks program features.

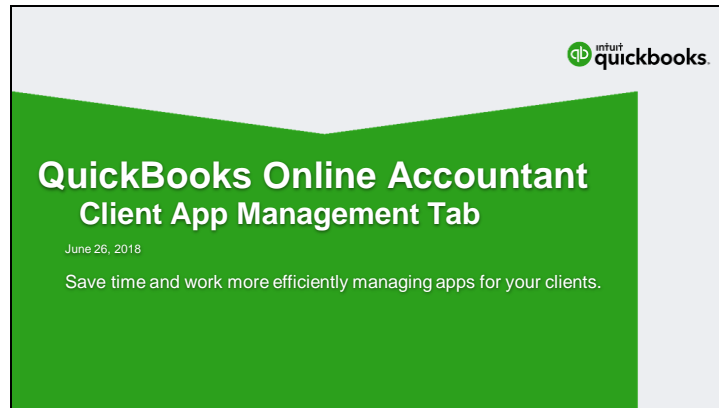
NOTES:



Added CPE Credits to the ProAdvisor Training Tab in QuickBooks Online Accountant

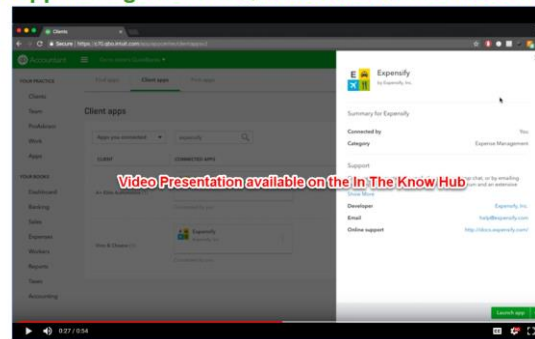


NOTES:



Update to the Client App Management for Accountants

Client App Management in QuickBooks Online Accountant



NOTES:



Changes to the “Reports Only” user in QuickBooks Online

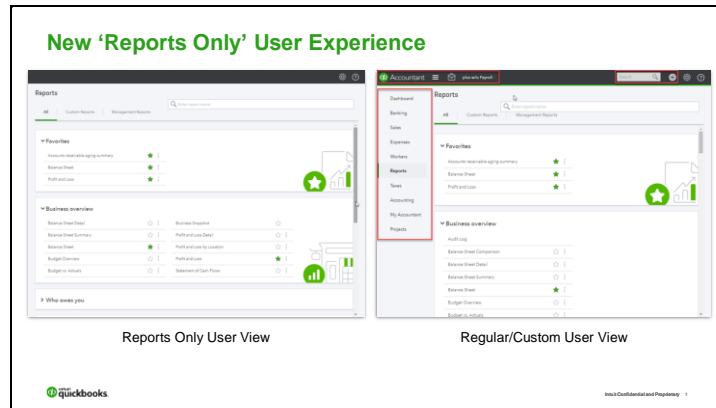
Previous 'Reports Only' User Experience

Report Only users in QuickBooks Online would have an old user interface experience when logging in to run reports.

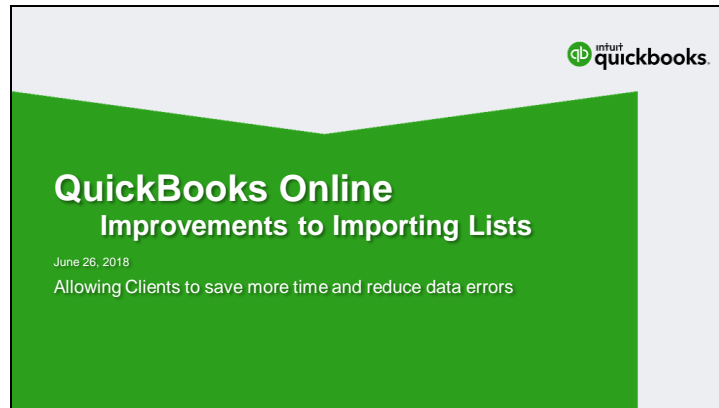
With the recent change, they now have the ability to take full advantage of the Reports tab function in QuickBooks Online.

| QuickBooks Online Plus | | | | | | | | | |
|---|----|------------------------------------|--------|--|--------|--|--------|--|--|
| <div> <div> <div></div> <div> <div></div> <div></div> </div> </div> <div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> </div> | | | | | | | | | |
| Report List | | | | | | | | | |
| <div> <div> <div></div> <div> <div></div> <div></div> </div> </div> <div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> </div> | | | | | | | | | |
| Report Name | | | | | | | | | |
| Company (17) | | | | | | | | | |
| Profit | 60 | Profit and Loss | 30, 40 | Profit with Labor by Location | 30, 40 | Profit and Loss by Date | 30, 40 | | |
| Cost of Sales | 60 | Cost of Sales | 30, 40 | Cost of Sales by Location | 30, 40 | Balance Sheet Summary | 30, 40 | | |
| Balance Sheet | 60 | Balance Sheet | 30, 40 | Balance Sheet by Location | 30, 40 | Balance Sheet Summary | 30, 40 | | |
| Statement of Financial Position | 60 | Statement of Financial Position | 30, 40 | Statement of Financial Position by Location | 30, 40 | Statement of Financial Position Summary | 30, 40 | | |
| Income Statement | 60 | Income Statement | 30, 40 | Income Statement by Location | 30, 40 | Income Statement Summary | 30, 40 | | |
| Customers (17) | | | | | | | | | |
| A/R Aging Summary | 60 | A/R Aging Summary | 30, 40 | A/R Aging Detail | 30, 40 | A/R Aging Summary by Location | 30, 40 | | |
| Customer Balance Sheet | 60 | Customer Balance Sheet | 30, 40 | Customer Balance Sheet by Location | 30, 40 | Customer Balance Sheet Summary | 30, 40 | | |
| Customer Statement | 60 | Customer Statement | 30, 40 | Customer Statement by Location | 30, 40 | Customer Statement Summary | 30, 40 | | |
| Statement of Financial Position | 60 | Statement of Financial Position | 30, 40 | Statement of Financial Position by Location | 30, 40 | Statement of Financial Position Summary | 30, 40 | | |
| Income Statement | 60 | Income Statement | 30, 40 | Income Statement by Location | 30, 40 | Income Statement Summary | 30, 40 | | |
| Statement of Financial Position | 60 | Statement of Financial Position | 30, 40 | Statement of Financial Position by Location | 30, 40 | Statement of Financial Position Summary | 30, 40 | | |
| Items (1) | | | | | | | | | |
| Inventory by Customer Summary | 60 | Inventory by Customer Summary | 30, 40 | Inventory by Customer Summary by Location | 30, 40 | Inventory by Customer Summary Summary | 30, 40 | | |
| Inventory by Location Summary | 60 | Inventory by Location Summary | 30, 40 | Inventory by Location Summary by Location | 30, 40 | Inventory by Location Summary Summary | 30, 40 | | |
| Inventory by Item Summary | 60 | Inventory by Item Summary | 30, 40 | Inventory by Item Summary by Location | 30, 40 | Inventory by Item Summary Summary | 30, 40 | | |
| Vendors (1) | | | | | | | | | |
| A/P Aging Summary | 60 | A/P Aging Summary | 30, 40 | A/P Aging Detail | 30, 40 | A/P Aging Summary by Location | 30, 40 | | |
| Vendor Balance Sheet | 60 | Vendor Balance Sheet | 30, 40 | Vendor Balance Sheet by Location | 30, 40 | Vendor Balance Sheet Summary | 30, 40 | | |
| A/P Aging Detail | 60 | A/P Aging Detail | 30, 40 | A/P Aging Detail by Location | 30, 40 | A/P Aging Detail Summary | 30, 40 | | |
| Statement of Financial Position | 60 | Statement of Financial Position | 30, 40 | Statement of Financial Position by Location | 30, 40 | Statement of Financial Position Summary | 30, 40 | | |
| Employees (1) | | | | | | | | | |
| Payroll by Employee Summary | 60 | Payroll by Employee Summary | 30, 40 | Payroll by Employee Summary by Location | 30, 40 | Payroll by Employee Summary Summary | 30, 40 | | |
| Payroll by Location Summary | 60 | Payroll by Location Summary | 30, 40 | Payroll by Location Summary by Location | 30, 40 | Payroll by Location Summary Summary | 30, 40 | | |
| Billing (1) | | | | | | | | | |
| Time Allocation by Employee Detail | 60 | Time Allocation by Employee Detail | 30, 40 | Time Allocation by Employee Detail by Location | 30, 40 | Time Allocation by Employee Detail Summary | 30, 40 | | |

NOTES:



NOTES:



Presentation information only available in the June 2018 'In The Know' recording

Presenter

Joseph Lasee

Senior Product Manager

About Joseph

QuickBooks Online Team

Passion for making the complex simple.

12 years at Intuit

Madison, WI



QuickBooks Online: Improvements to Importing Lists
Allowing Clients to save more time and reduce data errors

NOTES:



Presentation information only available in the June 2018 'In The Know' recording

Presenter

Brandi Black

Senior Customer Experience Specialist

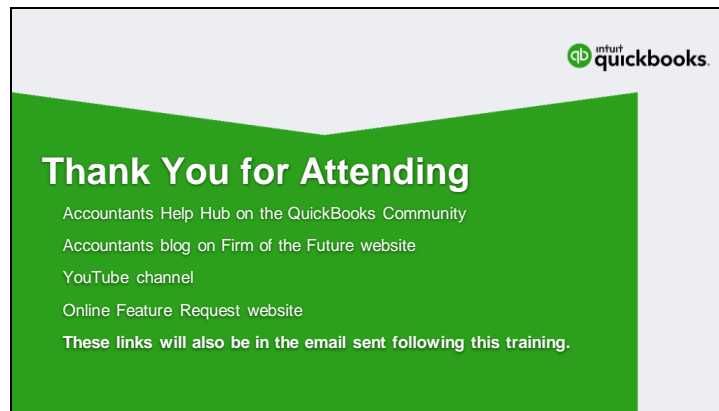
About Brandi

- Partners & Developers Team
- Passion for connecting our customers to an ecosystem of opportunities
- 6 years at Intuit
- Mountain View, CA



QuickBooks Online : Working with Lightspeed and Planday
An integrative Apps offering for Retail and Restaurant clients

NOTES:



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>