Related links and information

Restricted File Uploads

https://community.intuit.com/articles/1389858-using-attachments-in-quickbooks#Specific

Improved Firm Functionality

Lead Assignment Audit log Custom report sharing

https://community.intuit.com/articles/1469036-client-leads-in-quickbooks-online-accountant

Audit Log

https://community.intuit.com/articles/1548171-quickbooks-online-accountant-how-viewing-the-audit-log-differs-between-accountants-and-clients

Custom report sharing

https://community.intuit.com/articles/1556409-firm-level-report-sharing-defaults-in-quickbooks-online-accountant

Payroll Self Setup

Rolling out to 16 states (AK, CA, FL, ID, NE, NH, NM, NV, RI, SC, SD, TN, TX, UT, WA, WY) to start, eventually covering all states for QBOP and QBFSP.

FAQs

Improved Firm Functionality

Q: Is there a way to initially set up a team lead without removing access?

A: When the new functionality is turned on for your firm, the person who's currently connected with the client, will become the team lead.

Q: Will it show the specific team member of the firm in the Audit log?

A: Yes. When firm user views client's audit log via QBOA, they'll see team members name next to relevant activity.

Q: If one of my employees works on two or three clients, can I view this from one place, not just on the audit log belonging to each client?

A: Thanks for the feedback. We'll consider that as a subsequent improvement.

Q: If you invite a new user to QBO they don't have access to the reports that were saved as ALL?

A: Correct, the reporting team is aware of this behavior. When firm user views client's audit log via QBOA, they'll see team members name next to relevant activity.

Q: Will inviting another accountant team member from the client's QBO, mean a qualified user access is used up for the client's QBO subscription?

A: No, it won't. You can add team members and grant client access from QBOA.

Partial Purchase Orders

Q: Please add Sales Orders asap, allowing for multiple invoicing.

A: Thanks for the feedback! We'll note that for future releases.

Q Is there currently, or plans to add, Partial Invoices - i.e. ability to recognize A/R per invoice line item?

A: Thanks for the feedback. We are currently in the process of building progress invoicing in QuickBooks Online and are looking to release it by the end of the calendar year. Please stay tuned!

Q: Can you have multiple POs on one Bill?

A: Yes, you'll be able to link multiple POs to one bill, one check, or one expense.

Q: When will the new PO processes be available? How will we know?

A: We are in the process of rolling out the feature to our US users. Right now, about 5,000 users have access to it. If you don't have it yet, you will get access within the next 2 weeks or so. You'll know if you see a new "Open Purchase Orders Detail" report, or if you open a saved purchase order, and you see the new "Received" and "Close" columns.

Q: Is there a limit the number of bills that can be used to close a purchase order qty?

A: No, there isn't. You can link multiple bills, and when the total quantity across all bills is equal to the quantity on the purchase order, the purchase order will automatically close.

Q: Can you go back and re-open the line item that you manually closed?

A: Yes, you can. To do so, please open the purchase order, manually uncheck the checkbox under the "Closed" column. The line item will now be marked as open. If the overall purchase order was previously closed, the purchase order will now also automatically be marked as open.

Q: Is there a backorder report available?

A: There is a new report, "Open purchase orders detail" report. Please refer to the "BACKORDERED QTY" column for more details on the backorder quantities by product/service.

Q: Can you show attaching PO to Check payment?

A: When partial purchase orders is live for you, please create a PO, then create a Check. On the Check, set the Payor as the Vendor on the purchase order you'd like to link to, and a drawer will automatically open on the right for you to add a purchase order to your check. Click add, then feel free to edit the quantity and/or the lines you'd like you'd like added to the check to partially link a purchase order to the check, and save the check to link the check with the purchase order.

Q: Is this currently available to everyone or being rolled out over time?

A: We are in the process of rolling out the feature to our US users. Right now, about 5,000 users have access to it. If you don't have it yet, you will get access within the next 2 weeks or so. You'll know if you see a new "Open Purchase Orders Detail" report, or if you open a saved purchase order, and you see the new "Received" and "Close" columns.

Q: Do you also have CLOSED purchase order detail report?

A: Thanks for the feedback. We don't have a closed purchase order detail report, but we'll keep this request in mind for future improvements to purchase orders.

Q: The only QB Company I can't see using in QBO is a construction company using completed contract or percentage of completion. Can this be done here?

A: Thanks for the feedback. We are currently in the process of building progress invoicing in QuickBooks Online and are looking to release it by the end of the calendar year. Please stay tuned!

Q: Can you do batch enter transaction like desktop accountant version?

A: Thanks for the feedback. We don’t currently allow users to do this for partial purchase orders, but we’ll keep this request in mind for future improvements.

Projects

Q: Is the time on a time clock or just manual entry?

A: Right now, time is either entered as a clock or as time. You could have your timesheet pulled up, and enter the Project you are working on.

Q: What version will have projects?

A: QBO Plus

Q: When using the Time in projects, does that link to the payroll module?

A: Yes, time links to Payroll, but right now Payroll costs do not flow back into Projects. But this is an area we are working on over the next several months so in the future we can include these inside Projects.

Q: How do I turn on this feature?

A: When it comes to the US, Gear, and QuickBooks Labs.

Q: When is this rolling out?

A: Sometime next month.

Q: Is projects available in the QBO sample file (Craig's Design and Landscaping)? I didn’t not see the option in the Labs.

A: When Projects rolls out next month to US Customers in Labs, you will be able to turn it on there.

Q: So Projects is like Jobs in QBDT?

A: Yes, right now Projects is similar to Jobs in desktop and Classes, sub-Customers and Locations in QBO. QuickBooks is investing in the new feature Projects to make it more powerful for small businesses to organize and see their transaction information in one place. Right now, there may not seem like differences between class tracking and projects, but stay tuned, we’ll be aggressively working in projects over the next few months to make it even more powerful.

Q: Time Activity recorded by Vendor Contractor, will it also post to Vendor Bill?

A: Not currently, but I have given your feedback to our Engineers.

Q: Can you split an expense into two or more projects?

A: Yes, just enter one line for one Project, and you will have to fill in the Project column with the other, along with the amount.

Employee Self Setup

Q: What about multi-state employees?

A: In employee self-setup, we currently do not support employees who work and live in different states.

Q: This information is sent back to the company via email or is it entered into the companies' portal?

A: This information entered by employee will show up for the employer in their own company under the individual employee profile.

Q: Will you have a training video or material we can send to our clients with QBFSP for employee self-setup?

A: Thank you for your request. We currently do not have this but we will work on it.

Q: So Intuit online payroll is a different product than payroll within QBO?

A: Yes it is. This is payroll product attached with QBO.

Q: How about Form I-9?

A: We currently do not support filling of form I-9.

Q: Where does the employer get 6 digit security number?

A: When the employer sends the email to the employees, they receive a 6-digit security code on the screen and also via email. They can access this code again when they click on individual employee.

Q: Can the employer print the W-4's?

A: Employees need to print the filled W4s and give them to the employers.

Q: Will this work for all states or just specific states?

A: This feature is currently supported for 16 states only - AK, CA, FL, ID, NE, NH, NM, NV, RI, SC, SD, TN, TX, UT, WA, WY.

Q: Will this system handle online 1099 vendors also?

A: No just the employees.

Q: Can 1099ers be set up the way as the w2 employee?

A: This is currently for W2 employees only.

Q: So if an employee wants to update their information do you issue a new security code?

A: No we do not support employees being able to update the information. Employees have to reach out to the employers to update this information.

Q: Does the employer have access to the W-4?

A: The employees have access to save these forms before they submit.

Q: When is this feature rolling out?

A: This is available for 50% of the new QBO Online Payroll users and 100% of the QBO Payroll Full Service customers. We will do a full roll out in the next month.

Q: Do emails get emailed when new paystubs are uploaded to “viewmypaycheck”?

A: Yes there is a notification sent out to employees when their pay stubs are ready.

Q: How are you handling fraud for the W4?

A: We make sure the right employee is accessing our flow using the security code.

Q: Is there a time clock component?

A: No there is no time clock component, currently.

Q: Is there a way for the charged hours to be reviewed by either a project manager or their boss?

A: The employee self-setup flow doesn't allow entering any hours worked.

Q: Will the system realize out of state residents that have exemptions for withholding based on state agreements?

A: In employee self-setup, we currently do not support employees that live and work in different states.

Q: How is the city tax required handled?

A: We currently support states with no local taxes.

Q: Will this be available in Canada?

A: No this is only in US.

Q: If using self-set up who keeps W4 and I-9 for compliance?

A: Employers need to store those forms when employees provide them.

Q: Will the employee set up be in QB Labs?

A: This feature is available in the QB Online Payroll products when someone adds a new employee.