

## **Contractor DD**

Q: Will the \$2 fee only apply to contractors whom have DD info input?

A: The fee will only apply to contractors who have been paid at least once in the month by direct deposit. Simply entering the bank information of a contractor does not result in a charge.

Q: Is there an additional charge to use direct deposit for payroll or contractors?

A: Yes there is a per-contractor charge to use direct deposit. The per-contractor charge will be the same as your current payroll per-employee charge when you have a payroll subscription.

Q: If the "category" is an expense account, why not call it what it really is?

A: The category field is indeed the expense account which the transaction will be recorded against in your GL.

Q: Will Class tracking be an option for contractor DD payments?

A: At this time we do not have the capability to support class tracking.

Q: Will it allow one person to be both an employee and contractor?

A: Technically yes, you will have to add a middle initial to either the employee or vendor information. You should not pay someone as an employee and a contractor in the same year.

Q: can you assign to a specific vendor bill?

A: At this time you cannot directly pay an existing vendor bill using contractor direct deposit. You would have to first make a direct deposit payment, and then record the bill as paid in QuickBooks.

Q: Will the entry be duplicated with the bank download?

A: When a contractor is paid it will reflect in the check register. When downloading transactions from your bank, we will attempt to match the transaction but there remains the possibility that if it is not matched a duplication could occur

Q: Is the fee only \$2/mo/contractor? Or do you have to pay the base of \$19.50 also?

A: Payroll subscribers will need to continue to pay the base payroll subscription fee in addition to the per-contractor fee to use direct deposit.

Q: Does the \$2.00 fee apply to all of a company's contractors regardless of whether they are paid via Direct Deposit, or does it apply only to those contractors that are paid via Direct Deposit?

A: The fee only applies to contractors who are paid with direct deposit. If you have some contractors to which you still write checks, you will not be charged for them.

Q: This contractor direct deposit option is nice, but it leaves the bookkeeper / accountant open to liability with having access to banking numbers. Why not send an invite to the contractor to set up their own banking info?

A: We have plans in the future to allow the contractor to enter their own banking information, but that feature is not yet available.

Q: Is there an option to invite existing Vendor/Contractors to create a login for W-9 entry as you can with "new" Contractors?

A: We are working a feature to invite existing Contractors, but we do have a work-around for the time

being. You can enable the opportunity to “invite” a contractor by going to Expenses> Vendors and select the individual to edit. On the Vendor Information screen, delete the City from the customer’s address and save. When you return back to Workers > Contractors, you should now see a prompt to Invite the contractor to add their 1099 tax info.

Q: Can contractor direct deposit be used to pay "bills" in AP?

A: Contractor direct deposit is only meant to pay contract workers for services performed or reimbursement of expenses incurred, and not to pay bills received from other vendors such as utility bills. If you have an open bill for a vendor who is a 1099 contract worker, you would have to first make a direct deposit payment, and then record the bill as paid in QuickBooks.

Q: Will you be able to edit the direct deposit after it is submitted for subcontractors?

A: You will be able to void the transaction if money has not yet been sent. If money has been sent, you may request a return or ask the recipient to send you back the money owed. If you wish to simply edit a field such as the Expense Account or Description on the transaction, you should make an adjusting journal entry in your QuickBooks.

Q: Can you use DD in the Accounts Payable pay bills function?

A: Contractor direct deposit is only meant to pay contract workers for services performed or reimbursement of expenses incurred, and not to pay bills received from other vendors such as utility bills.

Q: How do you signify what items are 1099 and which are not?

A: You can signify which items appear on the 1099 using the 1099 e-file wizard during tax filing season, starting in January of each year.

Q: Can this feature be used to send owner draws via direct deposit?

A: Contractor direct deposit is only meant to pay contract workers for services performed or reimbursement of expenses incurred.

Q: Will there be an indicator that shows the payment was made via direct deposit?

A: Yes, the Transaction No. field will display Direct Deposit on the expense record, if the transaction was made via direct deposit.

Q: Can this feature be used for international payments?

A: Contractor direct deposit can only be used to pay contractors in the United States at this time.

Q: Do you have to pay the contractors in sync with the payroll schedule?

A: You can pay contractors any time; you do not have to pay contractors at the same time you pay employees.

Q: Are employees able to setup recurring payments to a contractor?

A: No, employees are not able to make direct deposit payments to other workers using QuickBooks.

Q: If you make an employee inactive/terminated can you set them up as a subcontractor?

A: If you have the same individual as a contractor and Employee, you can add them into the system. You will need to differentiate the names in some way, perhaps by adding a middle name or initial to proceed.

Q: Can you attach a Document to Contractor Payment?

A: At this time you cannot attach a document to a Contractor direct deposit payment. This is a feature we want to enable in the future.

Q: Contractor and employee - can you not just vary the name slightly to pay as both?

A: If you have the same individual as a contractor and Employee, you can add them into the system. You will need to differentiate the names in some way, perhaps by adding a middle name or initial to proceed.

Q: Will this automatically create a 1099, or can you change this setting?

A: Contractor direct deposit will not automatically create a 1099. To create and file a 1099, use the 1099 e-file wizard available in January of each year.

Q: Who sends the contractor the 1099 if you have direct deposit for QBOP and QBOFSP? What if you start the service midyear? Then who sends the 1099 for the part not send through payroll  
Contractor direct deposit will not automatically create a 1099.

A: To create and file a 1099, use the 1099 e-file wizard available in January of each year. This service will prompt you to enter in all totals respective to compensation received for the calendar year.

Q: How would the contractor direct deposit integrate with accounts payable? The example given was direct to the expense account?

A: At this point we do not allow scheduling of future payments. Any direct deposit will be recorded as an expense, and processed the next business day.

Q: If the contractor has emailed you an invoice, how do you correlate the invoice to the payment?

A: At this point we do not support file attachments for direct deposit payments, but in the future working on the ability for employers to attach an invoice to a payment record.

Q: The fee of \$2/contractor/month is that based on how many contractors are listed or is it based on the number paid in the month. For instance, currently any active employee listed is a \$2 charge regardless if they receive a payment in that month?

A: The per-contractor fee is only charged if the contractor is paid with direct deposit.

Q: Can we add something to the name in order to have the same person listed as an employee and contractor? Sometimes we have one that switches in the year from EE to contractor or vice versa?

A: If you have the same individual as a contractor and Employee, you can add them into the system. You will need to differentiate the names in some way, perhaps by adding a middle name or initial to proceed.

Q: When will contractor Direct Deposit for QBOP be available?

A: We will be releasing this feature gradually over the next few months to customers.

Q: Is the \$2 contractor fee by the calendar month or based on your subscription billing?

A: The contractor fee will be added to your current payroll bill.

Q: Just to clarify, you must have the QBO payroll service to use direct deposit for contractors?

A: Yes, that is correct

Q: Can Bills be paid through Contractor Direct Deposit?

A: Not at this time. If you have an open bill for a vendor who is a 1099 contract worker, you would have to first make a direct deposit payment, and then record the bill as paid in QuickBooks.

Q: Can you enter a class and a customer when paying a contractor? Will the name show up in the contractor list?

A: We do not support that feature at this time.

Q: Will the direct deposit ever be available for accounts without payroll? What if you don't have any employees?

A: This is one of the features we are working on for the future.

Q: Can there be more than two line items per payment for contractor DD?

A: At this point you can only add two line items per direct deposit payment.

Q: If you don't pay a contractor in any one month, does the \$2.00 still get charged?

A: No, you will not be charged.

### **Apps Program for Accountants**

Q: What are the 8 apps that are discounted?

A: These are the first 8 apps in the program:

- Expensify
- Method: CRM
- TSheets
- Excel Transactions Importer & Deleter
- Float
- SOS Inventory
- ServiceM8, Circulus

We are constantly evaluating the top ProAdvisor recommended apps and considering them for the Accountant Apps Program. We are starting first with these 8 apps but will continue to add apps to the pipeline and expand the program.

Q: How is this different from syncing to QBO from within the app?

A: This new Accountant Apps Program allows you as a master admin accountant to purchase, provision, and manage apps for their clients all from within the QBOA Apps tab. You'll get preferred pricing on these apps at a 20% discount and simplified billing with a consolidated monthly invoice sent at the beginning of the month for all the apps you've purchased on behalf of your clients. You no longer have to keep track of different apps bills for different clients - everything can be done from QBOA Apps tab now.

Q: Can the lead accountant add apps for their clients?

A: With the new Accountant Apps Tab, the Master Admin of the firm can add any app to any of the firm's QBO clients. This applies to the 8 apps in the program, and any apps in our app store.

Q: I'm still uncertain how the billing works for the discount format.

A: If you choose to purchase and provision an app from this program on behalf of your client, you'll get a 20% discount and then get billed at the beginning of the following month. All your app purchases for any of your clients will be itemized and included in this one consolidated bill and can be accessed easily from the 'Manage app subscriptions' section under the QBOA's 'Your Account' settings.

Q: Can we update accts that already use the apps to get the once a month billing updated?

A: Some apps have an easy path to moving existing subscriptions to the new Accountant Apps Program; currently those are Expensify and Circulus. For the other apps, you will have to end your current subscription and purchase a new subscription through QBOA. Please see more about existing subscriptions [here](#).

Q: What if we already have an App subscription (both for ourselves & clients) for one of the participating apps? In our case, Expensify

A: Some apps have an easy path to moving existing subscriptions to the new Accountant Apps Program; currently those are Expensify and Circulus. For the other apps, you will have to end your current subscription and purchase a new subscription through QBOA. Please see more about existing subscriptions [here](#).

Q: Once you stop being master admin for the client QBO file will Intuit stop billing the accountant for the apps?

A: Before you stop being a Master Admin on the client QBO file, you should first cancel the app subscription to stop the billing. This allows the client to work with the app to overtake the billing.

Q: When I hover on app nothing happens

A: The new Accountant Apps Program is currently only rolled out to 50% of QuickBooks Online Accountant users. We are launching the program in waves and will roll out to 100% of users in the next couple of weeks. If you can't see it today, check again soon!

Q: The apps are free for the firm? And, discount for the client?

A: The discounts available through the Accountant Apps Program are only available for apps purchased for a client and billed to the firm. Accountants get a free account to run their clients account. We currently do not have discounts or free versions of apps installed for the firm through the program, although some apps do offer a free version for accountants already.

Q: what if you already have clients using the app?

A: Some apps have an easy path to moving existing subscriptions to the new Accountant Apps Program; currently those are Expensify and Circulus. For the other apps, you will have to end your current subscription and purchase a new subscription through QBOA. Please see more about existing subscriptions [here](#).

Q: We have been told the firm can no longer be the Master Admin if the company has full service payroll; only the client can be the Master Admin. So how can we add any of these apps at the discount price if we cannot be the Master Admin?

A: With the new Accountant Apps Tab, the Master Admin on the QBOA firm account can attach apps to any of their QBO clients. You do not need to be the Master Admin on the QBO company.

Q: If client is on one of our 5 for 5\$ will the charge come to us?

A: If you are the Master Admin of the QBO client company, you will be able to purchase and provision any apps from this program for your clients.

Q: So, does this mean that a single client cannot have multiple app discounts? I'm confused because the Intuit bootcamp stressed we should not be the master admin for the apps, it should always be the client.

A: You can definitely purchase multiple apps in the Accountant Apps Program for your client; the current limitation is that you can't buy more than one app in a single checkout process. You can always go back to QBOA after you've purchased an app, choose another app, and purchase it for the same client.

Q: Could you do a trial for your client (billed to them) and then add them to the Firm billing for the discount if they choose to continue?

A: We don't currently offer a free trial + discount subscription. You could provision the free trial (billed to them) to test it out, and if they decide they want the app, you could purchase the app on behalf of your client and receive the 20% discount by selecting the 'firm is billed' option

Q: Can I move a client who already has one of these apps onto wholesale billing (through me) for the app, or is this only for new subscribers to the app?

A: Some apps have an easy path to moving existing subscriptions to the new Accountant Apps Program; currently those are Expensify and Circulus. For the other apps, you will have to end your current subscription and purchase a new subscription through QBOA. Please see more about existing subscriptions [here](#).

Q: Can the client cancel the app directly or must that request come through the accountant?

A: Because the accountant is being billed for the app, they must cancel the subscription. In the case that the relationship has been severed and the client wants to cancel the app, they can call QBO Support for assistance.

Q: What happens if client fails to inform you of expired credit card???

A: If you are purchasing an app for the client and billed to the firm (must choose this to receive the discount), you will be entering your own credit card since the firm will pay for the apps.

Q: Will each client be on a separate line for the monthly bill so that line can be marked billable to a client?

A: Yes! The monthly invoice is broken down by client at the first level, then broken down by each charge for each app for a single client. Except for taxes, you will be able to see all of the charges for a single client.

Q: Can you run a monthly consolidated bill by client for all apps and QBO charges?

A: The monthly consolidated bill will be broken down by client, and then by app. However, QBO charges will not be on the same bill. Only 3rd party app subscriptions will be on this bill.

Q: If a client leaves the accounting firm that they had the subscription under, would they be able to sign up and take data from the apps or will they lose it?

A: If you purchased the app on behalf of this client, you would need to cancel the subscription first. This would allow the client to work with the 3rd party app to overtake the billing and the account.

Q: How will I know when it is available in my QBOA?

A: Once rolled out to 100% of QBOA users, there will be a dot notification next to the 'Apps' tab on the left nav of QBOA signifying that the release is now live.

Q: Does the client receive an email from the app when you subscribe them to it?

A: Once you have purchased and connected the app on behalf of your client, you will need to invite any additional users from the client company from the 3rd party app itself. The 3rd party app will send corresponding emails to the invited client users.

Q: Is there a list of Apps that allow us to have a free account? Like Hubdoc

A: Every accountant who purchases an app from this program on behalf of their client would get a free user account as part of the client's company. The accountant's user account wouldn't count towards any of the 'included users' in the 3rd party apps.

Q: When looking at apps does QB give an analysis comparing 2 different Apps...such as Expensify vs. Receipt Bank?

A: We currently have a comparison page for some of our e-commerce/Point-of-Sale apps: Amazon, Shopify, eBay, Stripe, and multi-channel connector apps. We don't currently have a comparison chart for all of our apps but are working on this.

### **Cancel Downgrade**

Q: Can we downgrade if client is on wholesale billing?

A: Unfortunately at this time, we do not offer downgrade for wholesale billing clients. We are actively working to build out this feature, but do not have a timeframe. Clients must be migrated out, then downgraded and then migrated back in.

Q: Is this phone number only available for people with full service payroll & QB Payments? Did I hear that correctly?

A: It is available for customers with Quickbooks Online Payroll or Full Service Payroll or Payments. That is correct. We will be rolling this out in phases and this is our first phase.

Q: Will the client see a question mark icon on top right corner like the accountant to start the chat or see the customer service phone #?

A: The client will see a "Chat Now" button to start chat or the customer service phone # after they click the cancel button.