FAQs

New Reconcile

Q: When will this feature roll out?

 A: This feature is scheduled to be rolled out in the last half of April.

Q: Will the option to enter Service Charges and Interest Income be available for every account?

 A: If the account is set up to download transactions the interest income and service charges will be automatically reconciled, therefore not included in the reconcile workflow. If the account is not connected to downloaded transactions the option to enter the interest income and service charges will appear when you reconcile the account.

New Budgets

Q: When will this feature roll out?

 A: Engineering is currently working on the schedule for roll out.

Q: Can budgets be used for a custom timeframe?

 A: Currently budgets are based on either calendar or fiscal year (based on company settings) and do not provide a way to create a budget for a longer timeframe.

Q: Are cents now allowed in budgets?

 A: Yes, cents are now supported in the new budget interface.

Q: Will current budgets be available in the new interface?

 A: Yes, existing budgets will automatically be converted to the new budget interface.

Payroll – Tax Exempt Status change

Q: Does this new feature also work with FICA?

 A: If an employee is exempted from FICA we do not perform a "retroactive" recalculation – this takes effect at the time the box is checked and only works on future checks.

Q: Why does this new feature not work with Washington (WA)?

A: Due to an issue with how Washington tracks "exempt corporate officer" wages on their quarterly SUI reporting form. We are investigating supporting this in a future release. If there is an employee that needs to retroactively have Washington SUI calculations changed this can still be handled by customer care.

QBSE

Q: What is the cost of QBSE?

A: QB Self-Employed is $10/month, but (if you refer your clients or add them via QBOA) they get 60% off for the first year. QB Self-Employed is also available with wholesale pricing for $5/month.

Q: Is there a test drive available for QBSE?

A: There is both a test drive and a referral option available at http://quickbooks.intuit.com/accountants/self-employed/ You can also visit the ProAdvisor page in your QBOA account, visit the "discounts" section and access a free copy of QBSE for you to try out and use yourself.

Q: Will this be available in all version of QBO?

A: Receipt Scan is only offered to QuickBooks Self-Employed at this time. We've definitely heard the interest from QBO customers, thanks for the feedback.

Q: Can you upgrade QBSE to QBO (SS, ESS, or Plus)?

A: Currently we do not have an upgrade path available to go from QBSE to QBO.

Q: Can you downgrade from QBO to QBSE?

A: At this point, there is no 'downgrade' path to QuickBooks Self-Employed.

Q: Does QBSE integrate with Bill.com?

A: At this time, QBSE does not integrate with bill.com or any 3rd party apps.

Q: What happens if you add the receipt after the bank feed?

A: If you add the receipt after the bank feed, QuickBooks Self-Employed will match the receipt to the existing transaction.

Q: Will this receipt scanner be available to those using the app for QBO Plus?

A: Receipt Scan is only offered to QuickBooks Self-Employed at this time. We've definitely heard the interest from QBO customers as well, thanks for the feedback.

Q: With the Receipt Scanner, when does the transaction classification occur?

A: The classification would occur after the Receipt Scan transaction has been created. Customers can classify by swiping left for business or right for personal.

Q: Are you able to itemize the receipt if purchases made in various categories?

A: Customers can split a transaction that spans various categories. The itemized detail will not be extracted from the receipt though so it will be a manual process.

Q: Does the same work for the deposit side? If you take a picture of a deposit slip, it will attach in QuickBooks to the deposit?

A: Currently we do not offer this on the deposit side but it is something we may explore in the future.

Q: Will existing rules be applied to vendors?

A: Existing rules will be applied to Receipt Scan transactions if the user did not set the rule to "match exactly".

Q: After 30-day trial what happens to receipts if you choose not to continue.

A: If a customer chooses not to subscribe, they should manually download any receipts before their trial is over. We are aware of the need to export receipts and hope to offer it soon.