# FAQs

**Mobile-Version of the Time Tracking**

Q: If a client was only using the plus version so that they could use time tracking, is it possible to downgrade to essentials?

A: It will be possible in the near future but that feature is not live yet.

Q: Will time sheet entry push the hours into payroll?

A: If the customer is using QuickBooks Online payroll, the time will flow in. We haven't yet implemented pay types to distinguish things like overtime or holiday hours, so they will all import as regular hours.

Q: How do you get to the timesheet again?

A: You can login at qbo.intuit.com through your computer or phone web browser. To see the mobile time tracking features covered today, you will have to login as a time tracking only user.

Q: Where do I find the time tracker option?

A: If you are a QBO essentials or plus subscriber, when you go to add users under the gear icon then select the manage users link, you can select time tracking only as the user type.

Q: Can employees log in and track their time without having access to the company's entire QuickBooks Company?

A: Yes, that is one of the benefits of the time tracking user type. They do not have access to the other areas of QuickBooks.

Q: Is this TSheets or separate? Additional charge?

A: These features are included if you are a QBO essentials or plus subscriber with no additional charge.

**Practice Management - Duplicate Projects**

Q: So, we need first duplicate and then make the necessary changes?

A: Correct, to duplicate a project and associated tasks: Open a saved project, click on the Duplicate button, then make any necessary changes and save the project.

Q: When is this available?

A: The option to duplicate a project was released on 5/23.

**Practice Management - Client Management tools**

Q: Currently I can't assign a task/project to my managing team member. Is there a setting that needs to be changed to be able to do that?

A: You can only assign tasks & projects to team members that have access to the client that the task / project is for.

Q: So when you initiate the request to the client, what happens on the client end? Do they have to open Work to see it? Or do they get a popup when the log in?

A: After creating a client request it puts the request in the clients My Accountant section of QuickBooks Online. You can notify the client via email by selecting the notify client option on the create request screen. There is not a notification in QBO that a request was created. You can refer to this KB: <https://community.intuit.com/articles/1580470-practice-management-how-to-use-the-work-tab-to-collaborate-with-your-client> Practice Management: How to use the Work tab to collaborate with your client

Q: Who can delete or remove notes?

A: Only team members who have access to manage your clients can remove notes.

Q: How do you get to the note section?

A: Once this feature is released, you will be able to access it by logging into QBO, click on 'Clients' within 'YOUR PRACTICE' and click on a client's name.

Q: If someone else updates the note, does the author stamp change or added to?

A: The author stamp will change to the last person who updated the note.

Q: What would the pin be for?

A: You can pin notes you deem important. It's easy to lose track of important notes when you've lost them amongst many other notes. Pin those notes you and your team don't want to lose focus of.

Q: Can you create an attachment within Client notes?

A: No. This is definitely something we're looking into.

Q: Does the My Accountant tab allows us to interact with our client directly in QBO, is that correct?

A: Yes, the My Accountant tab is how a client can interact with their Accountant. You can refer to this KB: <https://community.intuit.com/articles/1580470-practice-management-how-to-use-the-work-tab-to-collaborate-with-your-client> Practice Management: How to use the Work tab to collaborate with your client

Q: Can I create an open items list and deliver it to my client right in QBO?

A: Yes, as you create Client Requests under the Work Tab in your QuickBooks Online Accountant, they will show up under the My Accountant tab in your clients QuickBooks Online subscription. You can refer to this KB: You can refer to this KB: <https://community.intuit.com/articles/1580470-practice-management-how-to-use-the-work-tab-to-collaborate-with-your-client> Practice Management: How to use the Work tab to collaborate with your client

Q: Do the clients have to be a QBO client in order to enter a project?

A: No, your client does not have to have a QuickBooks Online subscription to create a project for them. They do have to be in your customer / client list. Your client does have to have a QuickBooks Online subscription in order to be able to create a Client Request.

Q: When you do the client request does it email the client?

A: If you check the option to 'notify client' it will email the client.

Q: Is this the same an assigning a sales rep to a client and then it shows up in the billing?

A: Projects and tasks do not flow back into QuickBooks Online and do not affect billing.

Q: Is the client notified when the accountant sends them a request with a badge or email or something?

A: If you check the option to 'notify client' it will email the client.

Q: How is the client notified that they have a client request?

A: If you select the option to notify client when creating the client request, it will email the client.

Q: If there are multiple users, how do you know who the "notified" client is?

A: The email defaults to the email address that is associated to the client. You can change this before sending the email, or add an email address if one does not exist on the client's profile.

Q: How well would this work for off-QBO items? For example, we use QBD for some clients, and there might be bill.com, Expensify, external review (excel), etc. We were looking into Karbon and was wondering how well this would work as a substitute? Or is it only for QBO tasks?

A: As long as the desktop client is in your customer / client list, this will work!

Q: If a team member creates the request to clients, does it show that it's from them or from me?

A: Client requests display as they come from the firm, not the individual team members.

Q: Can the client submit a request to their accountant?

A: Clients can not initiate a request. They can comment on a request that the Accountant initiated.

Q: Does this feature only work if your clients are "Wholesale" type clients?

A: No, you can use the Client request feature for all your QuickBooks online clients, wholesale or not, and you can create projects for all your clients on your client / customer lists regardless if they are using QuickBooks or not.

Q: If the client does not go to My Accountant, do he not see my request?

A: Correct, your client would need to go the My Accountant tab to see the request.

Q: From the client's view, do they get a visual notification showing on "My Accountant" in that left hand bar? Before clicking into "My Accountant"?

A: No, the only notification is the email option.

Q: Does the client see anything on the home screen to alert them to a pending accountant request? Like a red # of items? I don't think clients will look there unless they see an alert.

A: Currently only the email will notify them, but we will add this as feedback.

Q: Does it email the bookkeeper when they have uploaded files?

A: No, but it does display a notification on the card in the work tab.

Q: Is something sent that would notify them they had a request from the Accountant or would they just have to put it in their daily procedures to check

A: The client will receive an email if you select the notify client option.

Q: With Client Request, is there a history available like there would be in an email program?

A: From the work tab, go to the list view, select the show completed items and you can see old completed client requests along with tasks & projects. There is no way to see them if they have been deleted.

Q: Is there a way to send a list of uncategorized transactions to a client so that those transactions can be properly classified?

A: No, if you click on the review now, it will take you into the clients QuickBooks Online file to review & categorize them.

Q: For setting up projects, can you mass assign projects to clients?

A: No, not at this time.

Q: With Client Request, is there a history available like there would be in an email program?

A: No, not at this time.

**Invoice Tracker**

Q: Does it track reminder invoices?

A: It tracks if a customer has ever seen the invoice digitally, it doesn't distinguish between a customer clicking on the link and a customer viewing in the original email or reminder emails, and it also does not track if the invoice is printed out.

Q: Will it keep a record of the last 4 digits of the cc in that view?

A: It does show the last four digits if paid by credit card. Similar to how we show the last four digits for bank accounts.

Q: How are fees tracked on payments received?

A: Fees are tracked if you are using QB Payments.

Q: How do we access invoice tracking?

A: Invoice Tracker shows up when you view your list of invoices.

Q: Is this available for each of my clients? How will we get to this screen? When will this be available?

A: Invoice Tracker shows up when you view your list of invoices, some users are already seeing this. In the next few weeks we'll be doing a roll out to a wider audience.

Q: Are the invoices displayed based on a date range? Or do they disappear from the report after a certain amount of time?

A: The invoices are by default sorted by status, with overdue and due soon at the top. You can change the sorting by clicking on the column headers. Right now we are showing invoices from the last 365 days.