FAQs

Price Rules

Q: Can you access Price rules on the phone app?

A: You can access Price Rules using Mobile browser, however not in the mobile app at this time.

Q: Roll out of price rules to Canada QBO ... as announced or later?

A; Price Rules is available for the US region only right now. We plan on adding to other regions very soon.

Q: When I receive a deposit from a credit card, it is less the cc fee. Why, when we enter the deposit, are we not able to net the two to show the correct amount deposit?

A: On the Bank Deposit screen there is section on the bottom that will soon say 'Add other funds to the deposit' – right now it says 'Add new deposits'. You can use this section to enter the credit card fee in the negative amount so it nets out to the total that comes in from your bank. The changes discussed today are the changes in text on the header labels.

Q: Will the price rule work for clients that use the billable time to invoice their customers? I.e. will the price rule apply when employees enter their time tracking?

A: Price Rules will not work with Billable time tracking automatically, however if the billable time service item is added to a rule it will allow you to override to the discounted price when creating the invoice. We'll check with our Product Development team to see if we can improve that experience. For now, you can select the discounted billable time rate from the rate drop down field on the transaction as long as that billable time item has been added to the rule.

Client listing - Grouping

Q: How can I get on this screen from my QBO?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: Client list for mobile...will it be available for the app as well?

A; No currently the mobile view is available only via your web browser on the mobile device

Q: How do you configure the client list to display the expanded details?

A: You cannot expand the row width – but you will be able to expand the column widths.

Q: will the mobile view also work in the app?

A: No currently the mobile view is available only via your web browser on the mobile device

Q: Should we have the same client view/options that are being demonstrated, or is it still being rolled out?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: When should we be seeing these updates?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: How do you see the view that Deepa is showing

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: Is the client group view on a PER USER basis, or do changes display for all users?

A: Great question. The client group view is at a firm level, so that when you create groups for your practice – your team members will be able to see, view, and refer to the same thing.

Q: Can a client be added to multiple groups?

A: No right now a client will be exclusive to only one group.

Q: can clients be in more than one group?

A: No right now a client will be exclusive to only one group.

Q: I currently use HighriseHq so I can blind copy the emails I send to clients for future reference. If Intuit built something like this it would be super helpful?

A: Thank you for that feedback, we will look into it.

Q: Can a client be added to more than one group? Like monthly and taxes?

A: No right now a client will be exclusive to only one group.

Q: Should we be able to see this new layout now or is it to be rolled out later? I don't see Actions, Manage Groups, etc.

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: Is the client grouping live now? How do we access?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: How do we get that create group button? I don't see it available in my QBOA

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: can a client be part of two groups? ex - client x is 'taxes' and 'monthly'

A: No right now a client will be exclusive to only one group.

Q: Can the client groups be customized by each person's log in?

A: No. The client group view is at a firm level, so that when you create groups for your practice – your team members will be able to see, view, refer to the same thing.

Q: When will the "create groups" be available for QBOA?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: When can we use manage groups?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: can you manage clients and group them as an employee at a firm? Would it affect anyone else's view?

A: The client group view is at a firm level, so that when you as an employee modify the group or its contents the changes will be reflected for everyone.

Q: can team members create their own groups?

A: Yes, as long as they have "client management access" found in the "Team" tab.

Q: Can clients be in multiple groups?

A: No right now a client will be exclusive to only one group.

Q: Can you create own client groups names? or is the current drop down items shown available?

A: All group names are customizable and you can create as many groups as you want.

Q: Can a client be in more than one group?

A: No right now a client will be exclusive to only one group.

Q: can a client be in multiple groups?

A: No right now a client will be exclusive to only one group.

Q: Can you put one client into multi groups?

A: No right now a client will be exclusive to only one group.

Q: When will we see those changes?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: Does the client groups affect the customer list in our books?

A: No, there will be no effects to the customer list in your firm's books.

Q: how do you get to manage groups?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: When is the Group feature being rolled out?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: the client list can be managed at user level?

A; No, the groups feature will be at a firm level to avoid any confusion

Q: I don't have a Manage Groups tab?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: reconfirming - GA is not final until end of January?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: I don't see the option to create or manage groups. Is this because I may not have access to do that?

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: In client grouping, if you have 25 people on your firm, can individuals have their own groups or is it firm wide?

A: No, the groups feature will be at a firm level to avoid any confusion

Q: Can you group the client list by team member? How are they assigned?

A: You can create group that are named for each team member, if that is what you want to do.

Q: how does this affect sub-clients?

A: Sub clients in your firm's QB books remain unaffected. In the client view in QBOA, you can use groups to group related customer entities

Q: Sub groups within groups?

A: Sub clients in your firm's QB books remain unaffected. In the client view in QBOA, you can use groups to group related customer entities

Q: Will our clients be able to group their clients or is this only for accountants?

A: This is a feature specific to QBOA only and not applicable to QBO yet.

Q: Is there a plan to expand the manage group to a client customer list so the client can group their customers?

A: We are always thinking of ways we can make QBO better, at this point this request has not been prioritized.

Q: Can you do subgroups under the main group?

A: No we do not offer that capability yet.

Q: Will you be able to change the default view for clients? i.e. Instead of ALL clients, have it just list your QBO clients?

A: Yes we have that feature today. Simply click on the "Filter" window to choose QBO clients.

Q: Will the Clients listing include bank reconciliations, like instead of tax returns, can it show Reconciliations with last date of reconciled?

A: No, we will not support that. Although our teams are looking at other ways we can bring those insights to your attention. So stay tuned!

Q: Can you change the group names?

A: Yes, group names and the number groups you can create is entirely customizable.

Q: Not a big fan about the mutually exclusive. I think treating the groups more like "tags" would be beneficial IMO.

A: Thank you for that feedback, we may introduce “tags” at a later time to complement groups.

Q: Are this client list are my clients that have qbo true my firm ? How can I see which ones have QuickBooks?

A: You can group any of your clients regardless of whether they have QB. If you use the filter drop down – you can see all clients that have just QuickBooks.

Q: can you add service tab to clients that will show services provided? ie: payroll, sales tax, EOM, etc

A: That’s great feedback. We’ll definitely consider all requests.

Q: Is the grouping available in the Workflow?

A: Not right now, but we are working to make that available soon.

Q: How do you get to where Deepa was? My client list doesn't show that.

A: The new client list and groups have not been rolled out yet. It will start rolling out mid-December and will continue through till end of January.

Q: can each team member have their own groups for same clients? Or is it per QBOA realm? We have several team members working on the same client doing different tasks.

A: No, the groups feature will be at a firm level to avoid confusion

Requesting tax information from your clients

Q: Can this be used if you do not use Income Tax Pro?

A: No,

Q: So Link is part of PTO now?

A: Yes

Q: How much does it cost to use protax?

A: <https://proconnect.intuit.com/tax-online/>https://proconnect.intuit.com/tax-online/

Q: Our firm uses Ultra Tax currently. Do you convert data? I don't want to re-enter depreciation schedules?

A: We will convert the data from UltraTax.

Q: is ProConnect for just 1040s, or can we prepare business returns as well?

A: ProConnect can do business returns as well.

Q: If I don't use pro connect tax where can i find information on it?

A: <https://proconnect.intuit.com/tax-online/>https://proconnect.intuit.com/tax-online/

Q: This is my first year using ProConnect. I have used Pro-Series. So when I upload 2016 to 2017 ProConnect will I be able to send out email to my clients based on 2016 data?

A: Yes

Q: Will you have the ability to see a list of who you have requested docs from and what?

A: Yes

Q: Are the engagement/questionnaires/forms request features available for bookkeeping as well?

A: Yes

Q: Does the software have a tax projection feature? Linking that with real time QBO results would be powerful.

A: You can use trial balance to see the current tax liability. PTO will have a tax planner you can then use to do projections and cases.

Q: Is there a sample company where we can try this out?

A: Yes

Q: Some clients will accidentally submit duplicate forms, such as a downloaded 1098-Int plus the one they receive in the mail. Is there a way this will identify duplicate forms, similar to how QBO can identify duplicate check numbers?

A: Yes

Q: How did you request the info from the client in PTO?

A: Got to the Link tab and hit “request”.

Q: Is the review documents available now?

A: Yes

Q: how do you handle a scanned 1099-MISC and it is for a new Schedule C?

A: You can create a new sched c from the misc

Q: But will ProConnect notify you of a duplicate form?

A: Yes

Q: Is this included with the software or separate cost?

A: No additional charge

Q: Can you toggle back to the QBO of that tax client on the same screen?

A: Yes

Q: Does QBO connect to Lacerte also?

A: No

Q: If my client provides me with paper documents, can I scan it into ProConnect Tax Online and have the software pick up and input the appropriate data into the return?

A: We are working to have the available.

Q: Will the ProConnect help eliminate the organizers?

A: That is the goal

Q: What if you send the request and the traditional client mailed you the paper forms. How do the paper forms get in ProConnect?

A: You can scan and upload on their behalf

Q: How does the Client Portal get set up?

A: You just have to send an email request and the portal will be setup.

Q: What if program cannot scan picture because it is poor quality?

A: You can manually type the data in or request a better picture. PTO will take you to the screen it should go in, so it is easy to just type it in

Q: Is there a built in prep and review? Meaning if an intern does the initial data and marks a 1099-MISC to the wrong schedule C is there a way to see that the intern did the work but lets the manager/partner review it without having to keep track of what they have and haven't looked at?

A: This currently is not available. It would be a great add.

Q: Will 1099-B transactions be uploaded to tax return - Schedule D? If yes, can 3,000 line items be uploaded to Schedule D?

A: Yes and yes

Q: Brady, will you be adding a fixed-assets module to ProConnect for business taxpayers? I need to be able to print out book-basis and tax-basis reports of corporate fixed assets and depreciation?

A: Not planned for this year

Q: If the client scans or sends a photo, does the document get updated to an OCR that allows it to be posted to the ProConnect?

A: Correct

Q: Can ProConnect be used for 1040 clients that both have W2's and business income, 1099's etc.?

A: Yes

Q: Can data from QBO online or Enterprise be automatically imported into ProConnect Tax

A: Data from QBO can.

Q: When are all these changes going into effect?

A: Nov 30 the ability to request data was released. Import will be available at the start of tax season.

Q: Is there a charge for the ProConnect Link option in ProSeries?

A: No charge

Sales tax - center / calculation

Q: I've been having with discounts and shipping... Will there be more options with these and reporting?

A: At this time, changes to discounts and/or shipping are not part of our immediate changes. Please contact the QuickBooks Support Team or the Feedback option within your account to provide more specific feedback on how we can improve this functionality.

Q: Multiple locations?

A: At this time, company location is determined by company address only. However, we are looking into ways to easily incorporate multiple locations at the transaction level to make the sales tax calculation easier to handle

Q: Is this available on the QuickBooks self-employed basic and essentials?

A: This is not available on QBSE, but is available for Simple Start, Essentials and Plus within QuickBooks Online.

Q: Can you change the frequency of filing after you set up?

A: Yes, you can edit the details for the tax agency by clicking "Sales Tax Settings" within the tax center, then Edit next to the affected agency.

Q: Do we need to do anything if we are already set up for sales tax?

A: Not at this time. When migrations for existing accounts begin, you'll receive a screen that walks you through any steps, if necessary.

Q: Are you able to set up both state and local?

A: Yes. For most states, you'll only set up the state agency and all applicable state, county and city taxes will be added to your transactions. Some other states (Colorado for example) will allow you to add the particular location for more accurate calculation.

Q: What about client that are have sales tax setup?

A: Migrations will begin for single tax agency accounts in 2018, then move into the more advanced tax situations after.

Q: What do you really do when QBO is not up-to-date and not auto-calculating the sales tax amount correctly? Also, when will you release Sales Tax breakdown rate report?

A: If you see a sales tax rate that you were not expecting on a transaction, please contact our support team. We have a team of Tax Experts who will be researching the rates based on the information your provide (Company Address, Customer Address, Items sold) and will make updates as needed to the rates within QuickBooks. The Tax liability report available in the tax center will give a breakdown of taxes by rate for the tax period of your choosing.

Q: Is use tax processed through the sales tax center?

A: Not at this time, but the sales tax team is looking into supporting use taxes in the future.

Q: When do these things start? Nothing looks like this in my QBOA

A: Existing customers will not begin seeing the changes to the tax center until 2018

Q: Each county has a different rate, will it ask county as well as state?

A: Yes. For most states, you'll only set up the state agency and all applicable state, county and city taxes will be added to your transactions. Some other states (Colorado for example) will allow you to add the particular location for more accurate calculation.

Q: When will the new sales tax tools/returns be available and is it available for all states?

A: Yes, this will be available for all 50 states. New Customers will already have the automated sales tax experience, with existing customers becoming available in 2018.

Q: Will the sales tax updates include auto adjustments for tax rates updates?

A: Yes, tax rate updates will occur. However, you'll also have the option to add manual adjustments as needed on the "View Return" screen.

Q: New York State has a lower sales tax for items below $100 per item. How would multiple sales tax rates for clothing.

A: Multiple rates will be broken out for you upon clicking the blue Sales Tax link on a transaction

Q: when is sales tax module coming?

A: Currently available for new customers, migrations begin early 2018

Q: How can existing sales tax clients be updated for the new sales tax updates?

A: Currently available for new customers, migrations begin early 2018

Q: Where do the tax categories come from? QBO user or QBO database by tax authority?

A: This list is compiled using the tax codes available through Exactor (a company who has mastered sales tax, which Intuit has recently acquired) and will be using their data base to calculate sales taxes. These tax codes are based on tax law across the 50 states.

Q: What does it base the correct sales tax rate on? The zip code? Because WV has city sales tax but the zip code for people who live in the county have the same zip code?

A: ales Tax rate is calculated at the street address level. If the street address level is not entered, it will default to city, state, zip. The more information you add into the QuickBooks, the more accurate of a calculation we can achieve.

Q: What if sale is exempt?

A: Simply mark the customer exempt in their set up page (if applicable), otherwise uncheck the “Tax” box on the line items of the transaction and no tax will be calculated.

Q: Does QBO set up the tax rates based on the state?

A: Yes tax rates are based on the current rate for state, county and city levels.

Q: Does it calculate the sales tax based on zip code?

A: Sales Tax rate is calculated at the street address level. If the street address is not entered, it will default to city, state, zip. The more information you add into the QuickBooks, the more accurate of a calculation we can achieve.

Q: Do you have to do Invoicing through QB in order to use this?

A: Transactions must be created or imported into QuickBooks for the sales tax to be reported

Q: In a restaurant or retail situation where income is input through Sales Receipt workflow is there a way for this to populate in the sales tax center?

A: Automated sales tax applies to all sales transactions, including Sales Receipt.

Q: I did this for two set up recently and they are not correct and I have several cases open with no resolution. It didn't allow collection as they clients needed based on where they sell and how they need to pay. The invoice also shows zero because it didn't have the county in the system on one client?

A: County agencies are not required in the set up flow. Based on the company location, customer’s location and items on a transaction, sales tax will be calculated for the right jurisdiction. This includes state, county and city.

Q: Is QBO now able to handle more than one tax rate per transaction? Such as 2 different rates for a sale that combines both food and other merchandise in one sales receipt?

A: Yes, tax rates will be applied based on Tax Category selected in the product/service.

Q: How to handle when payment by a Check on Customer Sales Tax?

A: You can Record the payment in the sales tax center, then create/print a check.

Q: If we are recording after the fact bookkeeping in QBO, do you have to enter an invoice to apply the sales tax and use that summary of sales tax?

A: You are not required to do so, however, if you don't add the transactions, QuickBooks will not be able to produce an accurate sales tax summary for the given tax period.

Q: what if you don't issue invoices but just import sales from PayPal or other merchant? In other words - the sale amount is already includes the Sales tax?

A: These imported transactions will still be reported in the sales tax center.

Q: When will the new sales tax center be available?

A: This is currently available for all new companies created in QuickBooks. Migration for existing companies will begin in January 2018.

Q: Will this automatically link up with Revel POS?

A: Automated sales tax experience will work with imported transactions.

Q: Is the calculation based on the billing address zip code? What if you ship to a different location than you bill the client?

A: Tax calculation is based on Shipping Address. You can set up the customer to include a separate shipping and billing address, or edit the shipping address at the transaction level.

Q: will you have the items taxed shown on the invoice sent to the customer so they know what was taxed?

A: Not at this time, but the sales tax team can look into the possibility of adding this option.

Q: Does this 'Sales Tax' feature work for meals tax as well?

A: Sales Tax center is currently supporting sales taxes only. However, we do have a tax category for Food 'for immediate consumption" which may be what you're looking for.

Q: what if the client doesn't utilize the inventory in QB, but needs to pay sales tax on their sales?

A: Completing sales tax set up will allow taxes to calculate on transactions that include Products or Services. If a line item is added as “taxable” by checking the “tax” box, sales tax will calculate at the standard rate for the location(s) provided.

Q: So if a new city adds a sales tax that wasn't there before, will these automatically just show up?

A: QuickBooks will be updated as soon as possible. Once added to our data base, they will begin being added to transactions in which this rate applies.

Q: Is this new sales tax function active for all users now?

A: Currently only active for new companies created. Existing companies will be migrated beginning in 2018

Q: I have a client in California who sells books at seminars at various locations throughout the state. Since CA has multiple tax rates depending on locations, how will this help with the sales taxes? Also, what happens when the sales tax rates change - will the systems automatically update the rates?

A: In this case, the “shipping” location can be updated to track the location in which the books are being sold and calculate sales tax based on that location. Yes, sales tax rates will be updated automatically within QuickBooks.

Q: Can tax rate be based on place of sale instead of customer address? Or delivery address instead of customer address?

A: Yes – Sales tax will calculate on the shipping/delivery address of your customer. If you do not add a shipping address for the customer selected, sales tax will default to your company location.

Q: Non tax sales would be VERY helpful!

A: You can expect this report early 2018!!

Q: Does QB know all of the tax rates for all locations across the U.S.? Or do you need to input those rates somewhere?

A: QuickBooks has you covered! No need to update this, QuickBooks will calculate taxes for you.

Q: Will we be able to link to our tax agencies site to file electronically?

A: Not yet! This is something that the QuickBooks team is working on and hope to have available to our customer in the next few months

Q: I have a customer where some products have more tax than others. Lodging tax has an extra 2% over products. I have to add this manually with each lodging sale. Will the new update handle this type of issue?

A: Yes, QuickBooks sales tax is working on handling these types of situations. The tax calculation will be based on the tax category chosen on your products/services. If the option you need is not available, please submit feedback so we can work on getting it added ASAP

Q: Huge concern ... can we fix that tax amount in the box?

A: Yes, you can override the amount calculated on a transaction, if needed.

Q: Can I pay the sales tax directly from QuickBooks?

A: Not yet! This is something that the QuickBooks team is working on and hope to have available to our customer in the next few months

Q: I thought sales tax rate is where the store is, not where the customer is located?

A: This is dependent on the locations. Some states are origin based, some are destination based when it comes to sales tax calculation. No worries, QuickBooks knows where the taxes should apply!

Q: Has this been implemented today? Will it CORRECT what is already in place?

A: This is only available for new companies created within QuickBooks, not existing companies yet. Existing companies can expect to see the new experience beginning in 2018.

Q: Here in HI we want the ability to be able to add the tax collected to the gross income- we are taxed on the tax collected.... Or the ability route the sales tax to an income account.

A: Thank you for your feedback! The sales tax team will take this into consideration for a future release.

Q: Is the sales tax functionality being shown today available in the "sample company" in our QBOA?

A: Not at this time.

Q: how does this update work for sales tax information already entered? Prior to this update you had to figure the rates and agency out so how does work now with new update? Will it correct any errors automatically where set up is concerned?

A: This is only available for new companies created within QuickBooks, not existing companies yet. Existing companies can expect to see the new experience beginning in 2018. Designs are still being finalized for existing companies being moved to the new tax experience. However, the sales tax team is striving to deliver an experience that requires minimal effort for our customers to migrate

Q: Will clients that have been using the current sales tax module be able to take advantage of the new automated sales tax platform without having to make a lot of changes to their QBO set up?

A: Designs are still being finalized for existing companies being moved to the new tax experience. However, the sales tax team is striving to deliver an experience that requires minimal effort for our customers to migrate

Q: Sales tax payment due date - was it marked automatically?

A: Yes, based on your filing frequency selected, QuickBooks will keep track of due dates and send email reminders

Q: what about entering a sales tax adjustment, for example, IN allows a credit on collection if paid on time...

A: QuickBooks is equipped to handle these adjustments/discounts. However, you can also add a manual adjustment from the View Return screen.

Q: Is there any way to make adjustments to the calculated payment? Or edit the payment after submitting, instead of just deleting it?

Will CLASS be added to sales tax, and adjustments? A: Adjustments can be added from the View Return screen. At this time, the payment cannot be edited and class is not available, but these are things the sales tax team can look into for a future release. Thank you for your feedback!

Q: There is currently a problem with the sales tax due calculation due to items being taxable and non-taxable on the same invoice. Is this being fixed by this update?

A: Sales tax will only be calculated on items marked as taxable. The upcoming non-taxable sales report should help solve for this

Q: has that sales tax payment been recorded in the check register or no?

A: Yes, by choosing the account on the Record Payment screen, the payment will be recorded in the check register. The tax liability account(s) will also be offset to reflect the payment made.

Q: I have clients that sell through online retailers. Sometimes use tax is due on a sale. Does the new tax functionality calculate the use tax due?

A: At this time, use tax is not supported. However, it is being looked at for a future release (no timeframe available at this time)

Q: if we mark the sales tax paid, this is just for book purposes correct? Isn't it better to wait until the payment comes through the bank? Client would still need to pay at the state website correct?

A: Correct, at this time the payment must still be made at the state website. The payment can be recorded in QuickBooks, then matched via bank feeds. QuickBooks is also working on an electronic payment option that will help make this easier!

Q: How does it know that that the sweatshirt item is exempt?

A: QuickBooks is loaded with the tax laws of the location(s) on a transaction. In the example shown, QB knew that apparel less than $110 in NY is nontaxable.

Q: What is the difference using AVALARA?

A: Avalara is a third party app, which will still work with QuickBooks. The new automated experience is built in!

Q: How do you handle the multiple location codes for WA - all with different rates reported on different lines?

A: The sales tax liability report will provide a breakdown of each location’s tax amounts for the given period.

Q: Will sales tax be broken out by each county in the state of NY? I have a client who works in multiple counties with different sales tax rates?

A: The sales tax liability report will break out tax rates for each county/city/state

Q: Does it connect to the state to file the return or do we still go to the state to file the return?

A: Not yet, but electronic filing/payment is being considered for a future release!

Q: Will ever be able to Edit posted tax payments (like we can in Desktop) instead of having to Delete them and re-do?

A: this is definitely feedback we've heard before. At this time, there is no plan to change this, but could possibly be available in a future release.

Q: Will we have to add in all of the individual counties with each state for sales tax calculation? Will we have to know the county the customer is in when adding them?

A: No, QuickBooks will know the county based on the customer's address.

Q: Do we still have the ability to adjust the sales tax paid to account for rounding?

A: Yes you can override on the transaction by entering the amount of your choosing in the sales tax field. You can also add an adjustment for the tax period on the "View Return" screen

Q: if you start doing an invoice with a state not set up will it pull up the screen to enter on the fly?

Lauren – Not at this time, but definitely something being considered for a future release. Thanks for your feedback!

Q: Is there an additional fee to use the new sales tax feature, similar to utilizing payroll?

A: Automated sales tax calculation is free. No added subscription fees!

Q: Wow...I have contractors who work as subcontractors....WA has a different location about every few miles. They can work for the same client in a different location all the time. I now see we cannot change that location on the invoice...we have to do it in customer set up....I DO NOT LIKE THIS?

A: You can edit the customer's shipping address on an invoice by clicking the Shipping link

Q: When will this be active in QBO?

A: This is currently available for new companies created within QuickBooks. Existing companies can expect to see the new experience beginning in 2018.

Q: is the sales tax center included in all QBO files? or is it an additional cost to add to a QBO file?

A: This is currently available for new companies created within QuickBooks. Existing companies can expect to see the new experience beginning in 2018. No added subscription fees…. Automated sales tax calculation is included in your subscription fees.

Q: What happens if the client POS system manages taxes? How does this system integrate with that?

A: The sales tax team is working on integrating with third party apps. Most apps available in the QB app store are compatible, while others are still being worked on.

Q: Will QB be able to help adding deductions for Sales Tax? What are the the deductions that are valid for Sales Tax?

A: QuickBooks will handle adjustments for deductions/discounts on the View Return screen. You can also add a manual adjustment, if needed.

Q: in NYC, Tax rate for salon service is 4.5% and but products sales is 8.875%. How to differentiate? Can the go on the one invoices and calculated?

A: The rate applied will be based on the locations and the tax category you choose on the particular product/service. These can be added to the same transaction and calculated accurately!

Q: How will this work for Oregon where there is no sales tax, but there is lodging tax at the state and city level?

A: Lodging tax is not currently supported, but being considered for a future release.

Q: does the liability flow thru to the balance sheet?

A: Yes!

Q: how does QBO recognize the specific county taxes?

A: Each tax (city, county, state) will be calculated based on the company address and shipping address on a transaction.

Q: Also, if you have to account for use tax on purchases, how do you adjust this within the sales tax for the payment?

A: Use tax is not currently supported, but an adjustment can be made on the View Return screen.

Q: You set up a state, but I did not see where you were asked for the state ID#?

A: The state id is not currently required. It will be a requirement and prompted to enter when Electronic payment/filing becomes available. The team is hoping to have this option available in the first half of 2018

Q: Is the sales tax feature available now?

A: Yes for new US companies created, existing companies can expect to see the new experience in 2018

Q: When will we see the Non-Taxable show up on the report?

A: The team is targeting this to be available in the first quarter of 2018 (likely February)

Q: Texas offers timely filed discount for sales tax. Does QBO include such calculations in sales tax?

A: It does! These sort of discounts will be available on the view return screen.

Q: Will this allow for both state and local sales tax reporting?

A: yes

Q: Will these questions about the sales tax come to us or to our clients?

A: The option to move to the new sales tax experience will be on the client level

Q: Will sales tax invitation be sent to client? Will advisor account be notified if client accepts tax invitation?

A: The option to move to the new sales tax experience will be on the client level. The team is currently looking in to how the accountant will be notified.

Q: How does the affect our current clients over 30 states of sales tax?

A: Existing customers will be migrated to the new experience with the simplest tax situations first. Migration designs are still being finalized for existing companies with multiple rates, but the team will strive to make the change as easy as possible!

Q: WHEN WILL IT BE AVAILABLE TO ALL QBO USERS? NEXT SUMMER?

A: Existing customer migrations will begin in January 2018, the final rollout date has not yet been determined.

Q: When will this tool run out to current clients?

A: Existing customer migrations will begin in January 2018 and will have a staggered rollout throughout 2018

Q: Does the payment is made by QBO?

A: Electronic payment/filing is not currently supported, but is being considered for a future release

Q: Is Intuit compiling and maintaining the 'tax compliance' information, or acquiring that from some 3rd party tax compliance service?

A: Intuit recently acquired Exactor, which was a 3rd party tax service. Exactor's data bases are being used to maintain tax compliance information throughout QuickBooks Online.

Q: Will there be an option for tracking Use Tax?

A: Not at this time, but it is being considered for a future release

Q: Did not address Shipping and Discounts issues that exist already for sales tax. How are these being addressed?

A: At this time, changes to discounts and/or shipping are not part of our immediate changes. Please contact the QuickBooks Support Team or the Feedback option within your account to provide more specific feedback on how we can improve this functionality.

Q: Do you have to add each state individually?

A: Yes, each tax agency will be added individually

Q: Lauren is the sales tax expert, does she give out her email?

A: She does not! Please use the Feedback option in your account!

Q: In the payment process, what about adjustments for "Timely Payment" discounts, etc.?

A: QuickBooks will account for these! However, if the discount you are expecting is not listed, you can add a manual adjustment on your own!

Q: Does this function applies to all sales forms, i.e. sales receipts?

A: Yes!

Q: Does this give you an actual return for the state?

A: No, it will provide a summary for the given period. You'll still need to fill in the info on the state website at this time. However, electronic filing is being considered for a future release

Q: How does the new sales tax affect our current clients with over 30 states of sales tax?

A: Existing customers will be migrated to the new experience with the simplest tax situations first. Migration designs are still being finalized for existing companies with multiple rates, but the team will strive to make the change as easy as possible!

Q: When will it switch over for existing clients?

A: Migration for existing companies will begin in January 2018 and have a staggered rollout throughout 2018.

Q: So QBO now knows all the sales tax rules across the US and utilizes that on invoices?

A: Yes

Q: I didn't see a field to record any sales tax discounts while recording the sales tax payment?

A: QuickBooks will account for these automatically! However, If the discount you are expecting is not listed, you can add a manual adjustment on your own!

Q: Do you only choose a state as the agency? Will it automatically setup the sub jurisdictions?

A: For most states, yes. Some states (home rule states, Colorado for example) will provide the counties/sub jurisdictions in the drop down menu when setting up the agency

Q: For what you refer to as bills, when you a vendor that does not properly charge sales tax, is there a method in the bill payment system to accommodate the accrual and payment of use tax for an applicable state?

A: Use tax is not currently supported, but being considered for a future release

Q: If a client changes something in a period that has already had the sales tax paid, is it easy to locate what changed?

Lauren – The View Return screen will give you a breakdown of payments made and tax still due/overpaid.

Q: It was pretty confusing making adjustments the first time. Any tips?

A: the new tax experience makes adjustments easy on the View Return page. Enter an adjustment with a few easy clicks!

Q: Maybe you showed it and I missed it, but how do you do an adjustment on sales tax in the new module?

A: the new tax experience makes adjustments easy on the View Return page. Enter an adjustment with a few easy clicks!

Q: What happens when there is a charge back and need to reverse the sales? How is the tax reversal tracked?

A: Changing the transaction will automatically adjust the sales tax calculations.

Q: Is the sales tax reporting available without customer using qbol?

For instance, I have a few clients who just give me their numbers and I enter these numbers to prepare reports....would this module help with that? A: his experience is for QBO customers only at this time.

Q: Several of my clients have to pay sales tax to numerous jurisdictions in NY. County specific. How do we set this up as the rates can all be different?

A: QuickBooks will automatically track this based on the customer's address.

Q: Wish list: seeing the non-taxable on the report, easier way to clean up PAST sales tax issues?

A: Coming soon!

Q: When will this go live for all existing users? I have a client who has sales reps in five states and in different cities/counties with numerous rates we have to look up all the time and split each tax rate. This would ensure that we have no incorrect tax rates and they do not have to calculate either. If they are using SOS to enter invoices and that syncs to QBO will it be correct in SOS or will it adjust in QBO?

A: Existing customer migration will begin in January 2018, with a staggered rollout throughout the following months.

Q: We have a client that has different taxes in the state, county and city, in other words Town, County, CO could have two different rates depending on your address. How does it know which to use?

A: QuickBooks calculates taxes based on the customer's address.

Q: Regarding the new sales tax module, it's important to me to be able to reconcile taxable sales and nontaxable sales to total sales?

A: Non-taxable sales report coming soon!

Q: WHEN THE SALES TAX CHANGES WILL THIS AUTOMATICALLY BE UPDATED?

A: Yes

Q: 2 questions - will QBO also file the report directly with the agency? Also I have one client that is famous for making a change to an invoice after I file the sales tax report. Is there any way to have an alert pop up to ask if he really wants to change it because the sales tax report has already been filed?

A: Electronic payment/filing are being considered for a future release! Thank you for your feedback on the pop-up, the sales tax team will look into this!

Q: Can the ship from location be changed for online retailers where goods are shipped from distributions centers in different locations?

A: Yes, the ship to location can be changed on the transaction level

Q: Will the sales tax function be able to calculate use tax and exempt sales?

A: Use tax is not currently supported.

Q: Describe workflow for Restaurant using daily sales receipt to capture sales tax info?

A: Sales tax will calculate on sales receipt based on your company location. Same workflow being currently used, except QB will calculate for you.

Q: Regarding Sales Tax, in Illinois we need to file reports in addition to paying. Will QBO be able to file the report?

A: Not at this time, but looking into this for a future release

Q: Is there any work being done with Square sync and sales tax updating?

A: Yes, the sales tax team is working to integrate this feature with all third party apps.

Q: What about clients that don't use invoicing but cash basis, is there a way for the system to calculate sales taxes on total sales?

A: The sales tax center is currently only available in accrual basis, however Cash Basis support will be available early next year!

Q: How does this new sales tax feature work with existing customer?

A: At this time the new sales tax experience is only available for new companies being created. The designs for moving our existing customers over are still being finalized, but will focus on making the transition as easy as possible. Existing customers will begin moving to the new experience starting in early 2018!

Q: To explain ... for out of state, we may collect to pay, but another company does the figures and reports. So, we are just getting the amount collected into the Sales Tax box only?

A: For now, the new tax experience will be automated calculation. Stay tuned in the next few months for more features!

Q: Can the shipping address determine the tax rate separate from the billing address?

A: QuickBooks will uses the shipping address available for your customers when calculating sales tax due to tax law. In destination-based locations, sales tax is collected based on where items are received or work is performed.

Q: If the customer uses Shopify or PayPal can it be set up to come thru the tax liability correctly?

A: The sales tax team is working on integrating the new sales tax experience with most third party apps. For now, it is compatible with most apps available in the QB App Center

Q: WA is destination based....where you perform the work. Contractors can have the customer with one location, contractor in another location, but work in another location.....this will require a lot of set up where before we could just change the tax item?

A: In a situation like this, you can change the shipping address (on the transaction level) to the address where work is being performed. QuickBooks will use the address on the transaction when calculating the sales tax.

Q: What if shipping address is different from Billing Address? For Sales Tax?

A: QuickBooks will uses the shipping address available for your customers when calculating sales tax due to tax law. In destination-based locations, sales tax is collected based on where items are received or work is performed.

Q: How is sales tax center going to handle multiple locations?

A: At this time, company location is determined by company address only. However, we are looking into ways to easily incorporate multiple locations at the transaction level to make the sales tax calculation easier to handle

Q: Lauren, It would be helpful to have a second adjustment line on the sales tax payment. MO has a timely payment discount, then a fee to pay online. Those amounts really need to go to different GL accounts. I have a client that consistently adds a payment from his download, creating a mess for me to clean up if I entered a journal entry for the fee. Same applies to state withholding?

A: Thank you for your feedback! I will share this with the product team and see if this is something we can build for a future release.

Q: What if the client picks it up at your location, it is not shipped? How will it know to tax at the shop rate and not the client home address?

A: You can simply remove the shipping location from the transaction. If no shipping address is listed, QuickBooks will default sales tax calculation to the company address you have listed within your account.

Q: Did you mention anything about the destination based sales tax? Was there a delivery location included or does this just go by mailing address?

A: Customer's shipping address will be used to help determine the tax calculation in a destination based tax jurisdiction.

Q: Will the actual sales tax payment process ever be automated from QBO to the State authority?

A: Not yet, but the team is working on building an e-file option to be available in 2018

Q: Can you manually change the sales tax calculated on an invoice if necessary?

A: Absolutely

Q: Can it handle Indiana's weird Food and Beverage tax application?

A: The tax categories chosen on the products/services should account for this

Q: Do you have DME as a category under health care for sales tax?

A: We actually have several Durable Medical Equipment categories. These are specific to a few factors: for home use or not, prescription or not, etc.

Q: Are the tax rates certified with the States/Cities? For example, Colorado has a certified database that can be used to verify the tax jurisdiction and rate for an address. If this database is used the vendor is then held harmless in an audit if the tax is wrong.

A: Sales tax calculation will run through QuickBooks and Exactor databases, which are indeed certified with the state of Colorado!

Q: Are you going to have all 300+ Rates and locations in WA??? I am scared this is not going to customable for my state?

A: You won't see a listing of the rates, but you will see the calculations on your transactions based on the location(s) used and product(s) sold. No need to worry!

Q: what if a client lives in a different state than the state they are physically present in while purchasing the product? How will QB know to charge sales tax based on the state they are present in while purchasing instead of their home address?

A: The shipping address will be used to calculate sales tax. So if you are required to collect tax in a different state than the billing address, simply update the shipping address on the transaction. Also, make sure you have the secondary state agency set up in your sales tax center!

Q: Is there a convenient way to add tax categories to Items without opening each one, if you already have a long item list?

A: We currently don't have a way to batch edit tax categories onto products/services, but that's great feedback. Thank you for sharing, the team will look into this!

Q: If we know the sales tax rate in QB is incorrect for a particular address, where should we send this feedback so it can be corrected?

A: Please contact our customer support team via phone or chat. We have a team of tax researchers who will review and then make updates in our back end as needed.

Q: line item sales tax adjustment?

A: Not at this time, but great feedback. We'll share this with the QuickBooks Sales Tax product team.

Q: Is there a audit report listing all the sales tax by local,etc?

A: The sales tax liability report will breakdown the tax amounts by rate, for the period selected.

Q: How will sales tax work for contractors that use a different rate?

A: Sales tax calculation is based on three main components: Your company address, the shipping address on a transaction and the tax categories chosen for the products/services you're selling.

Q: Apparel and Clothing in NY needs two. Clothing, footwear, and items used to make or repair exempt clothing sold for less than $110 per item or pair are exempt from the New York State 4% sales tax?

A: There are multiple clothing and apparel tax categories available within QuickBooks to account for the NY tax laws.

Q: If the system bases taxes on your location and client's location, what does it do if the event happens in a location other than either of those two locations?

A: You can update your shipping address on the transaction level to reflect where the event occurred.

Q: What about use tax?

A: At this time, QuickBooks Online will only support sales tax, but Use Tax is being looked at for support in a future release.

Q: How quickly will a tax rate change be incorporated - example - NJ has a tax rate change effective 1/1/18?

A: As soon as possible, after tax rate changes are announced.

Q: Will this link from the POS?

A: The sales tax team is working on integrating the new sales tax experience with most third party apps. For now, it is compatible with most apps available in the QB App Center.

Q: When does the new sales tax screens appear? I did not see them on the sample company so that I can walk through it hands on!

A: The new sales tax experience is currently available for all new US companies that have not yet set up sales tax. Migrations for existing customers with single tax agencies currently set up will begin in early 2018.

Q: I am asking about walk in customers where I get there address so they can be on a mailing list, but sell or ship the item to them. Is it a different rate it they take it with them rather than me shipping to them?

A: That is dependent on your specific location and the tax law of the land. In these scenarios, you can simply remove the shipping address from the transaction if you are not shipping/delivering. That way sales tax will be calculated based on your location only.

Q: will it be in the sample company?

A: Not at this time, but looking into getting it added,

Q: Why is the sales liability report so different from QBDT?

A: We’re looking into improving this report to provide more information, similar to the report available in QBDT

Q: Is the new sales tax platform for all QBO versions?

A: yes

Q: If a client changes an invoice after sales tax is filed with the amount due show up in the overdue area of sales tax?

A: Yes the tax amounts and return summary will be update to reflect the change in tax amounts

Q: Just wondering if the sales tax automation is available on all versions of QBO and can I file and pay the sales tax directly from the QuickBooks file?

A: Yes, available to all versions of QBO, but at this time electronic payment and filing is not available. We're working on it!

Q: I would really like to see a sales tax report that breaks down taxable and nontaxable sales and ties to our profit and loss sales figures?

A: Thank you for your feedback! We are looking into improving sales tax reports in the near future!

Q: what if have license for state but not city/local as no nexus and don't want to collect/remit for city/local?

A: Please contact our customer support team when the automated tax becomes available in your account. Our tax research team can look into the best solution for you and your business.

Q: Are there any plans to integrate the collection with Shopify sales or other eCommerce platforms? Planning on taking a piece of the Avalara, TaxJar, Taxify pie? Would love to have one option for eCommerce clients. It would be a game changer for QBO. The more sales tax integration, the less likely we can get clients away from Wave and other options. Very excited about the possibilities. Please take it to the limit.

A: Thanks for your feedback! The sales tax team is working on integrating the new sales tax experience with most third party apps. For now, it is compatible with most apps available in the QB App Center.