Practice Management - Recurring Jobs

Q: Any idea when they are rolling out the mobile?

A: Practice Management currently works on mobile but recurring projects does not. The timeline is still TBD.

Q: Is there a way to create a master project or task that you can assign to each client (such as prepare 941s)?

A: Currently, there is no way to assign one project or task to multiple clients, but we can take that as feedback.

Q: Can we modify the statuses...customize them?

A: Unfortunately, the status cannot be customized.

Q: Are there plans to add non client tasks to project management? Specifically adding vendor tasks like bill payments would be awesome.

A: This is feedback we've received from users and is something we will look to address.

Q: The Status in the New Work Tab has several statuses. One of them is Blocked. What is that?

A: The "Blocked" status is used when there is something in the way of completing that project or task.

Q: What if you have a bi-weekly sync up with multiple clients? Can you copy a project from one client to another?

A: You can duplicate a recurring project and change the client that is assigned to that project.

Q: Does this give you a calendar view that you can view the entire month?

A: Unfortunately, right now we do not support a calendar view.

Q: Could I use this with all QB clients that are not QBO?

A: Yes! Any client you have added to your QBOA client list you can use this for which includes clients who don't use QBO.

Q: Will this link with Outlook in the future?

A: Great feedback! It is something that we can take into consideration.

Q: How do you create client requests with your internal staff only?

A: Unfortunately, Client Requests can only be created for a client. However, you could create a Project for your staff to create a Client Request.

Q: I don't see the repeat toggle in my projects.

A: The repeat toggle will appear in the Project drawer after clicking “Create Project”.

Q: Is it possible to email tasks into the QBO Accountant Work manager? We currently use Asana, and we would need email capability in order to replace that tool in our current workflows.

A: Currently you cannot, but this is great feedback and is something that we can take into consideration.

Q: Can more than one task be assigned to a project?

A: Yes! You can assign multiple tasks to a project.

Q: Are there any plans to add job and task time duration?

A: This is something we have heard feedback on and are taking into consideration.

Q: Will you be adding recurring workflows so that for example a client onboarding workset could be replicated for all new clients?

A: You can currently duplicate tasks and we are looking to build templates in the future.

Q: I set up a payroll task and assigned it to myself. My client rant the payroll on his own, so the payroll project was still sitting on the list, and the only option was "run payroll." How can I cancel a payroll project without running a payroll?

A: If you setup the project yourself, you will be able to delete that project. However, if it is a QuickBooks suggestion, it is something that you will need to turn off from the “From QuickBooks” toggle.

Q: Can we edit cards that QB creates? For example, it is adding review transactions once a month. I want to review it weekly on a specific date.

A: Unfortunately, you can’t currently edit the cards created by QuickBooks.

Q: Is there a limit on the number of clients you can have in the project management calander?

A: There is no limit to the number of clients the Work tab can support.

Q: This is only seen by us- not visible to client - correct?

A: Correct. Your “Work” tab is only seen by you and your employees in QBOA.

Q: Are any of the tasks or projects shareable with clients? how do you communicate these tasks with your clients?

A: You are able to send Client Requests that are shared with your client to collect documents from them.

Q: I would love be to see an integration with other apps like google calendar. Is that something we might see in the future?

A: Yes this is something we have received feedback on and have taken into consideration.

Q: Will the client be aware of the blocked status and the issue.

A: Nope. This is only viewable to you and your employees.

Q: We have several individuals working on any given client at a time (inters, data entry staff, bookkkeepers, accountant review) can't these task all be added to one project? Also can you reassign the task from one employee to another if need be?

A: Yes these tasks can be added to a project and they can be reassigned.

Q: Would be nice to be able to add notes to the tiles (reason for "blocked").

A: These is a description to projects that you can add notes to.

Q: If the status is cancelled, will it also disappear from the tile view?

A: Yes!

Q: Regarding status updates - Can you make a note on what part of the "in progress" status you are in?

A: You can add those notes to the Project description.

Q: Most firms already use a task manager.. what makes yours better?

A: It's integration with QBO means you are managing you clients and work all in one place with the opportunity to save work on managing your workload with improved QuickBooks Suggestions!

Q: Can you send a reminder to your client from the Work tab, like asking for a bank statement?

A: Yes, you can send a message to your client requesting certain info/docs.

Q: I'm not clear on which team members see what. Can you expand on this?

A: The team can see all of the work across any clients they have access to and can also drill down on specifically what work is assigned to them.

Q: Can you cancel a single date of a recurring project?

A: Yes you can cancel single occurrences.

Q: Are there plans to add the ability to add multiple Team members to Projects and Tasks?

A: It is feedback we have collected and are taking into consideration.

Q: What is "access to the work tab in clients books" mean?

A: It means the ability to see the work you need to do for a client while working in their books.

Q: How do you change/modify an existing recurring project (or task); say I want to change the recurring schedule and/or description.

A: You can do so by clicking on the task you have created. This will provide a space for you to edit that project.

Reconcile - Intelligence

Q: Love the cleared date column in Recons. Makes it so much easier!

A: Great to hear, thank you!

Q: Does the reconciliation report still show transactions past the statement date?

A: We recently added an option on the reconciliation report to hide uncleared transactions dated after the statement end date, check the Hide Additional Information at the top of the reconciliation report to hide these transactions.

Q: On reconciling screen, is it possible to be able to FILTER few more fields like memo and account?

A: Thank you for this suggestion, we will share it with the team for consideration as we release future enhancements.

Q: I've been waiting for the reconcile start screen to include fees and interest.

A: Connected bank accounts do not have the bank fees and interest earned fields because these are generally automatically downloaded from the bank. Only unconnected accounts have these fields.