

- Thank you for joining us today
 - ▶ ITK Webinar for March 27, 2018
 - ▶ ITK is an event which is entirely created and staffed by Intuit teams who are dedicated to customer success
 - Purpose of 'In The Know'
 - ▶ Why ITK? Our main focus is “What’s new in QuickBooks Online this month.”
 - ▶ To educate our Accountant Partners, allowing them to see new or updated features before you start receiving emails and phone calls from your clients
 - ▶ Allows you to be knowledgeable about feature questions, building confidence with your clients as a trusted resource for using QuickBooks
 - ▶ Also providing you a direct channel for getting your questions and feedback directly to the Project Managers putting your requests into action for QBO/QBOA
- ** Please remember to post your questions and comments in the Questions area for the event. We are listening to you. **
- ▶ The purpose is simple: QuickBooks is Backing You!


Slide 2

Host

Wayne Daley
Customer Care Agent

About Wayne

- National Accounts Care Team
- Passion for Improving Processes to Save Time
- 3.5 Years at Intuit
- Tucson, AZ

A portrait of Wayne Daley, a man with a beard and mustache, wearing a blue and white plaid shirt, set against an orange background.

► My name is Wayne Daley, and I will be your host for the next 60 minutes

On the National Accounts team assisting our Large Firm Diamond ProAdvisors

A passion for Improving processes or building new ones to improve workflow and save time

Supporting accountants and their clients 18 years, 10 of those with Intuit

I love living in Tucson, AZ and riding motorcycles with my bride

Agenda

CPE Credits & Learning Objectives

Announcements & QuickBooks Product Updates

Contractor Direct Deposit/Online Payroll Updates


Apps Program for Accountants

Downgrade & Cancel Payroll flow

(USA content focus –other regions may have some differences)

The agenda for this webinar

CPE Process



In order to receive CPE credit:

- You must answer all polling questions throughout the training
- This webinar is eligible for up to 1.0 hours of CPE
- CPE certificates are emailed directly to you within 3 weeks of the training date to the email address you used to register
- **TIP:** Add accountant_training@intuit.com to your approved email sender list. Or, check your SPAM folder.

Intuit Proprietary and Confidential

- CPE certificates are e-mailed directly to you within 3 weeks to the same email address used to register.

TIP: Add accountant_training@intuit.com to your approved email sender list. Or, check your SPAM folder.
- You must keep a copy for your records.

CPE – Learning Objectives

March 27, 2018

- Identify recent updates to QuickBooks program features.
- Ability to pay contract workers with direct deposit quickly & easily.
- Purchase discounted apps for clients in QuickBooks Online Accountant.
- Use the cancel and downgrade features in QuickBooks Online.



The slide features the Intuit QuickBooks logo at the top left. Below it is a dark grey header with the text "Accountant University". To the left of the main text is an illustration of a laptop displaying a person's face and various data points. The main text includes a section for "Free Training Events" with a bulleted list of course details. Below this is the website URL "www.qbtrainingevents.com". At the bottom, there is a table with three columns: "Webinars", "Virtual Conference Events", and "In-Person Training Events", each with a brief description and sample topics.

qb intuit **quickbooks.**

Accountant University

Free Training Events

- Basic to Advanced
- QuickBooks Online for Accounting Professionals
- Courses are designed and presented by Advanced Certified ProAdvisors
- Most include CPE

www.qbtrainingevents.com

Webinars	Virtual Conference Events	In-Person Training Events
<p>Weekly webinars to help you grow your practice, and become a trusted advisor:</p> <p><u>Sample Topics:</u></p> <ul style="list-style-type: none">- Certification Training- What's New in QuickBooks Online- Manage and Scale your Accounting & Tax Firm	<p>Free training, CPE and networking with your peers and Intuit product experts.</p> <ul style="list-style-type: none">- Coming April 2018	<p>In-person training tour visiting many location across the U.S.</p> <ul style="list-style-type: none">- Coming in May 2018

Excellent ProAdvisor Resource: Intuit Accountant University

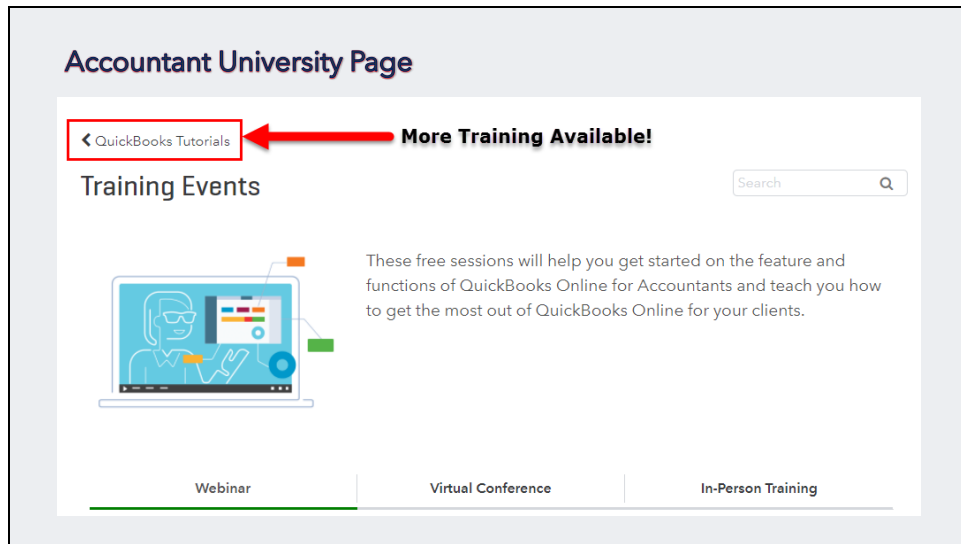
- <https://www.qbtrainingevents.com>
- Free Training Events, many that provide CPE credits through
 - Webinars
 - Virtual Events
 - and In Person Training

It will be worth your time to take a look to see what is available.

A link will be provided in the handout and in the follow up email

Link: <https://quickbooks.intuit.com/tutorials/accountant-webinars-events>

Slide 7

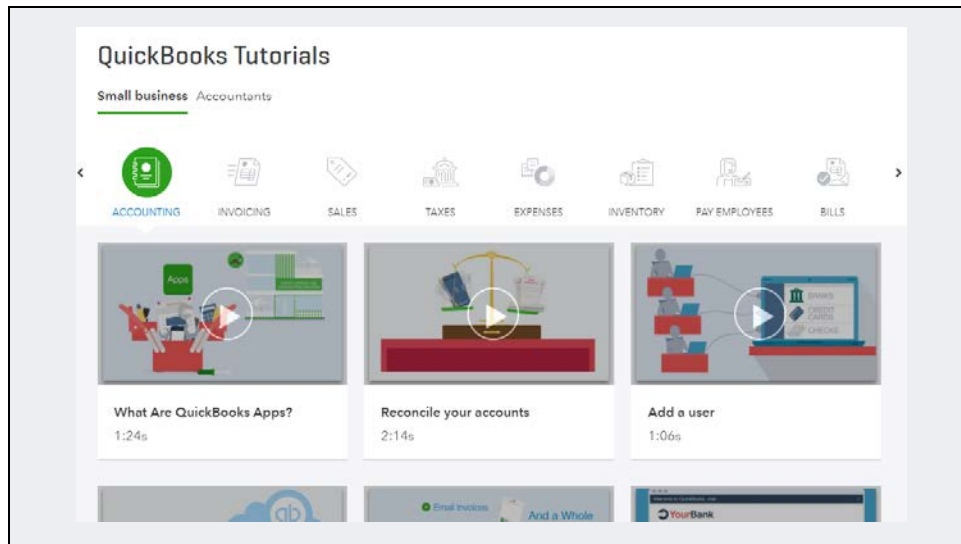


When viewing the Intuit Accountant University main page

You have access to additional training opportunities

To view these, click the QuickBooks Tutorial link

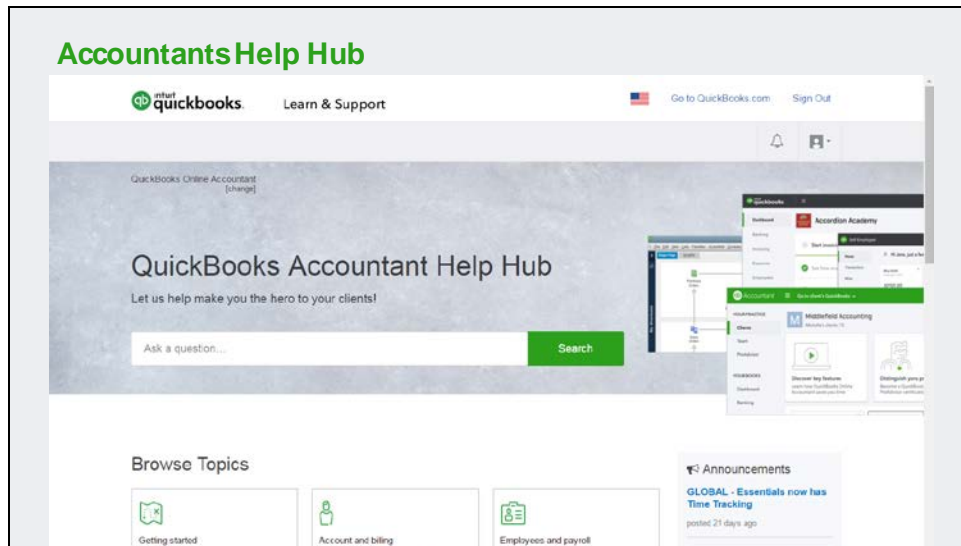
Slide 8



► QuickBooks Online and QuickBooks Online Accountant Tutorials

- More free training, not only for **you** ... but also for **your clients**
- Training topics are divided into '***Small Business***' and '**Accountants**'
- They are also displayed by topic to allow you to quickly find what you need

Slide 9




We also have a support site dedicated to providing the support articles you need fast – the Accountant Help Hub.

Please visit this page and save the link – we have designed this so you can get the answers you need fast.

The link will be provided in the handout and in the follow up email message you will receive at the end of this webinar.

A link is provided in the Handout and in the follow up email sent at the end of this webinar
Link: <https://community.intuit.com/quickbooks-accountant-us-en>

Slide 10



Program Updates

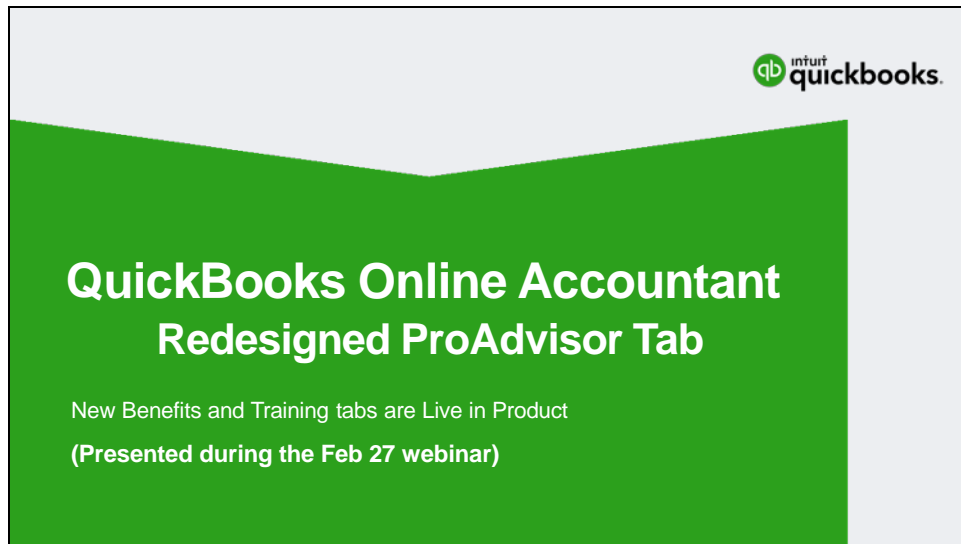
March 27, 2018

- QuickBooks Online Accountant** –Redesigned ProAdvisor Tab
- QuickBooks Online Accountant** –Search Team Members
- QuickBooks Online** –Progress Invoicing
- QuickBooks Online** –Sales Tax Information
- QuickBooks Desktop** –2015 Discontinuation Notice

We're going to quickly cover some program updates

A few of the topics have been presented in prior 'In The Know' events

Links will be provided in the handout to these presentations



You can review this content through the QuickBooks In The Know Webinar Hub
Presented during the Feb 27 webinar

In The Know event link:

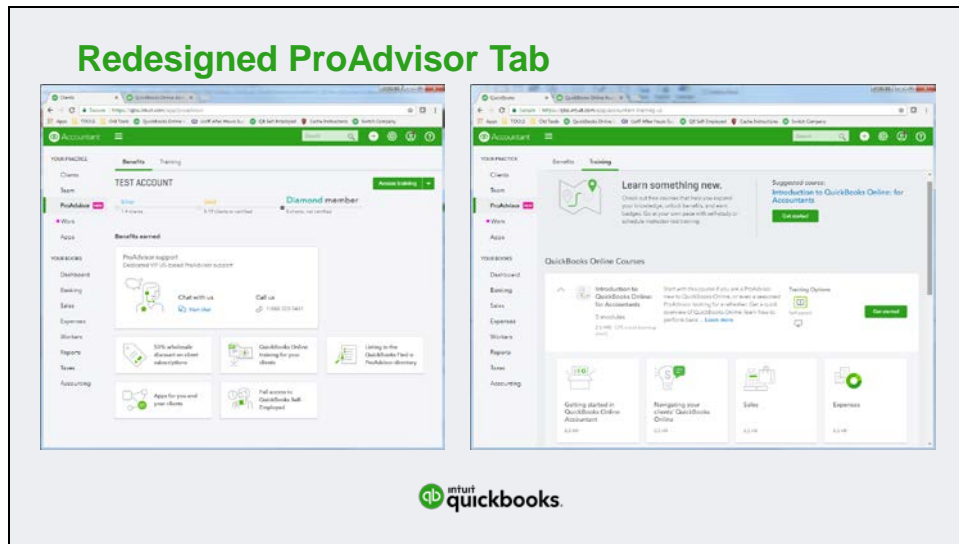
<https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub>

Webinar Presentation:

<https://www.youtube.com/embed/nYPj4yE4DdY?start=1180&end=1655&autoplay=1>

We'd love to have your feedback on the Redesigned ProAdvisor feature

Be sure to update us with your feedback and questions in the chat for this event



The update is now Live

- Benefits Tab
 - From the Benefits tab, you will find your ProAdvisor member tier and access to ProAdvisor support.
 - QuickBooks Desktop software downloads and training resources for QuickBooks Desktop clients.
 -
- Training Tab
 - All training and certification resources and exams are now available in the Training tab.
 - Improved Scenario-Based Learning Experience
 - "Introduction to QuickBooks Online for Accountants", CPE credits (Coming Soon)
 -
- Update Your Services
 - Additional services have been added to the ProAdvisor information page
 - If you have a published profile, be sure to review the services listed and update as appropriate.

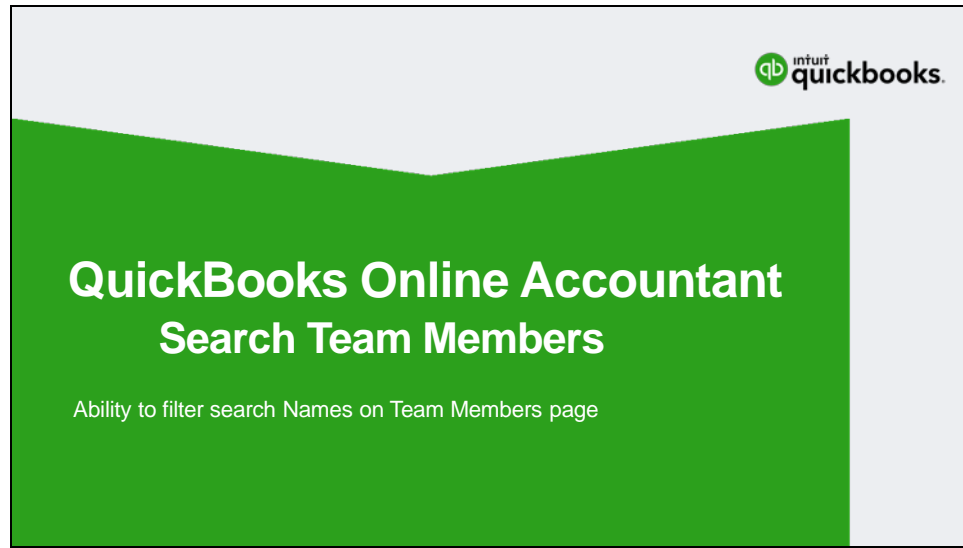
For additional details, please visit the In The Know webinar from Feb 27th

In The Know event link:

<https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub>

Presentation:

<https://www.youtube.com/embed/nYPj4yE4DdY?start=524&end=1180&autoplay=1>

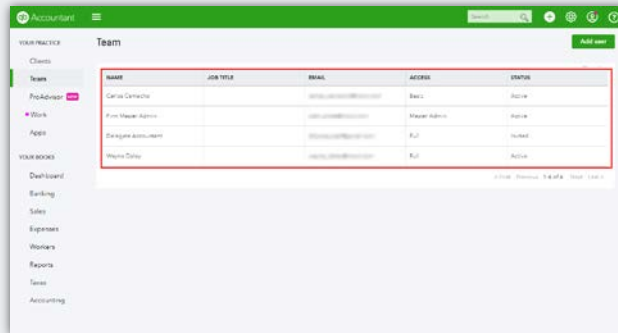


This feature was not covered in a prior In The Know

This feature came to be as a result of your feedback

Search Team Members

Accountants
Requested to have
the ability to search
for Team Members
by name on the
Team page.



The screenshot shows the 'Accountant' interface with the 'Team' page selected. A search bar is visible at the top right of the page. Below it, a table lists team members with columns for NAME, JOB TITLE, EMAIL, ACCESS, and STATUS. The table contains four rows of data.

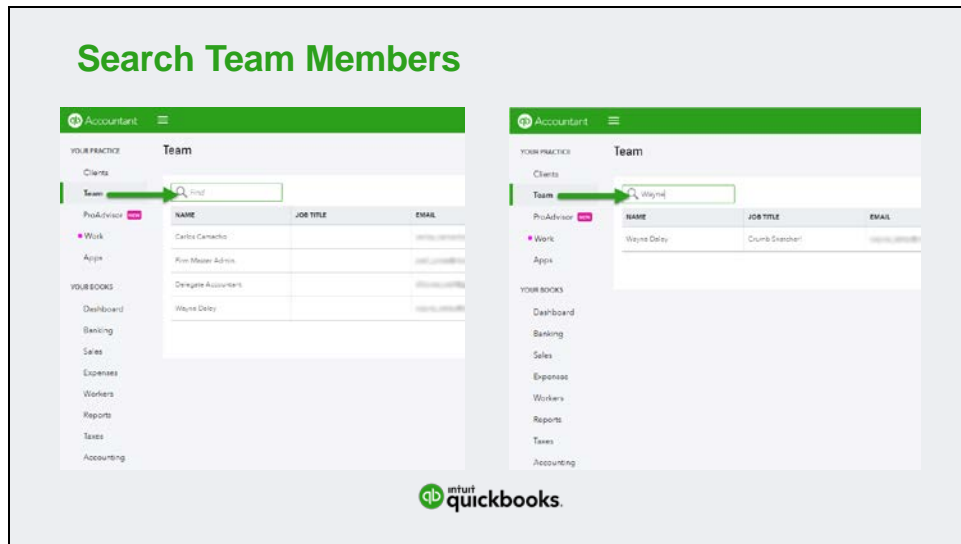
NAME	JOB TITLE	EMAIL	ACCESS	STATUS
Carla Daniels		carla.daniels@intuit.com	Basic	Active
Eric Hester Adams		eric.adams@intuit.com	Master Admin	Active
Stephanie Anderson		stephanie.anderson@intuit.com	Full	Inactive
Wanda Taylor		wanda.taylor@intuit.com	Full	Active



We now have the ability to search for team members on the QuickBooks Online Accountants – Team page

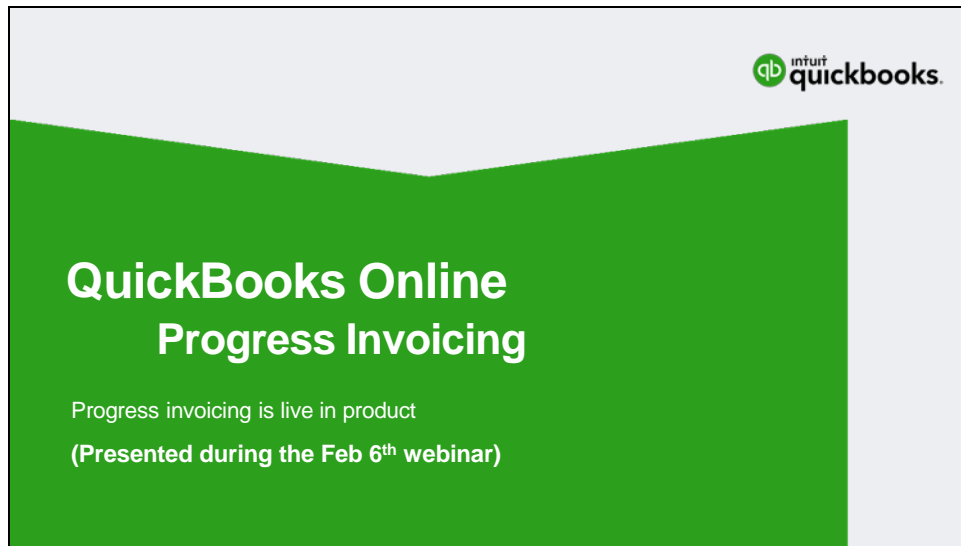
Prior to the feature update, the Team page would allow you to sort columns

Not very helpful if you are looking for Michael or Nancy



When entering text in the 'Find' field, the Team page will display matching results
You now have the ability to search by 'Name' or 'Job Title'

This feature was updated recently as a result of your feedback
Be sure to ask your questions and provide your feedback in the webinar chat
We're listening to you and driving for the change you are requesting



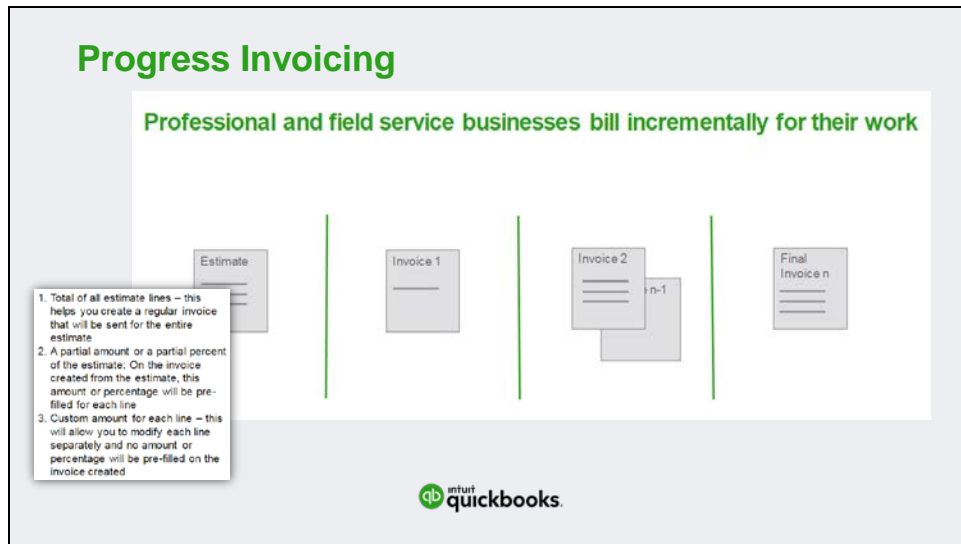
You can review the original presentation through the QuickBooks In The Know Webinar Hub Links are in the handout and in the follow up email

In The Know event link:

<https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub>

Presentation:

<https://www.youtube.com/embed/31Ky2kUDknA?start=1758&end=2728&autoplay=1>



Progress Invoicing in QuickBooks Online is now live

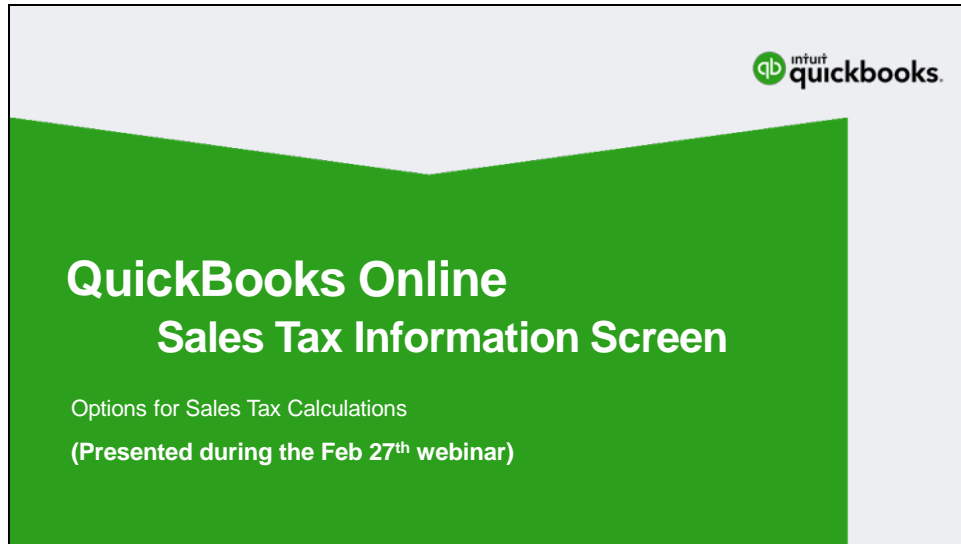
Ability to have a fixed billing amount or percentage of total on each line item.

The option to switch between a percentage or fixed amount option is available on each line independently

Users can remove lines from invoices that are not yet ready to be billed

Progress information by line is available through the Estimate Summary inside the email sent to customers

For additional details, please visit the In The Know webinar from Feb 6th
Links to the presentation are provided in the handout



You can review the original presentation through the QuickBooks In The Know Webinar Hub

Website Link:

<https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub>

Presentation:

<https://www.youtube.com/embed/nYPj4yE4DdY?start=2907&end=3823&autoplay=1>

Sales Tax Info Screen Update

QTY	RATE	AMOUNT	TAX	CLASS
1	100.00	100.00	✓	

Subtotal: \$100.00
Taxable subtotal: \$100.00
Sales tax: \$7.50
Shipping: \$0.00
Tax on shipping: \$0.00
Total: \$107.50

Tax Description	Invoice total	Rate	Tax total
State Sales	\$100.00	8.75%	\$8.75
County (Blue Haven Authority (Exempt))	\$100.00	8.75%	\$8.75
County (Blue Haven Authority (Exempt))	\$100.00	8.75%	\$8.75
Total sales tax:			\$7.50

intuit quickbooks

You now have the ability to manually adjust Sales Tax amounts on transactions in QuickBooks Online.

Clicking on the blue Sales Tax link on your sales transactions will allow you to view the updated **Sales tax info** screen!

Sales Tax Info Screen Update

The new sales tax info screen will provide dynamic sales tax information on each of your transactions.

- Breakdown of Tax Rates, taxable sales amounts and total tax dollar amounts.
- Override the sales tax amounts
- Make edits that may have an effect on the sales tax calculation, including Customer Exempt status, Shipping preferences and Sales Tax categories on your products and services being sold (these help calculate for special tax scenarios)



Sales tax info

We calculate sales tax for you based on where you are and what you sell. If you ship, we account for that, too.

Tax description	Invoice total	Rate	Tax total
Arizona (State)	\$50.00	5.6%	\$2.80
Pima (County)	\$50.00	0.5%	\$0.25
Tucson (City)	\$50.00	2.6%	\$1.30
Total sales tax			\$4.35

[Override this amount](#)

How we calculate sales tax

Your business address
2500 E Commerce Center Pl
Tucson, AZ 85706

Customer info
 This customer is tax exempt
 I'm shipping to this customer

Shipping address
123 Main Street
Tucson, AZ 85706

Rates may change based on where you ship.

How each item is taxed

Involved Item	Tax Category	
Book	Books	edit
Consulting Service	Interior design consulting	edit
General Retail Item	Taxable Retail Items	edit

A breakdown of the Sales Tax information for the transaction is displayed
You have the ability to edit the Sales Tax by clicking the 'Override This Amount' link in Sales Tax Info

Slide 21

Sales Tax Override Update

Sales tax info

We calculate sales tax for you based on where you are and what you sell, if you ship, we account for that, too.

Tax description	Invoice total	Rate	Tax total
Arizona (State)	\$50.00	5.6%	\$2.80
Pima (County)	\$50.00	0.5%	\$0.25
Tucson (City)	\$50.00	2.6%	\$1.30
Total sales tax			\$4.35

[Override this amount](#)

Sales tax info

We calculate sales tax for you based on where you are and what you sell, if you ship, we account for that, too.

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Tucson (City)	\$50.00	2.6%	\$1.30
Total sales tax			\$4.35


[Override this amount](#)

Override sales tax

If our total doesn't seem right, make sure the info in your tax profile is up-to-date. Or if you prefer, you can enter your sales tax calculations.

Rate	Amount	Reason	
10	<input type="checkbox"/> % <input checked="" type="checkbox"/> \$	5.00	<input type="text" value="Item isn't taxable"/>

Just so you know, that's **-0.05** less than our calculations.



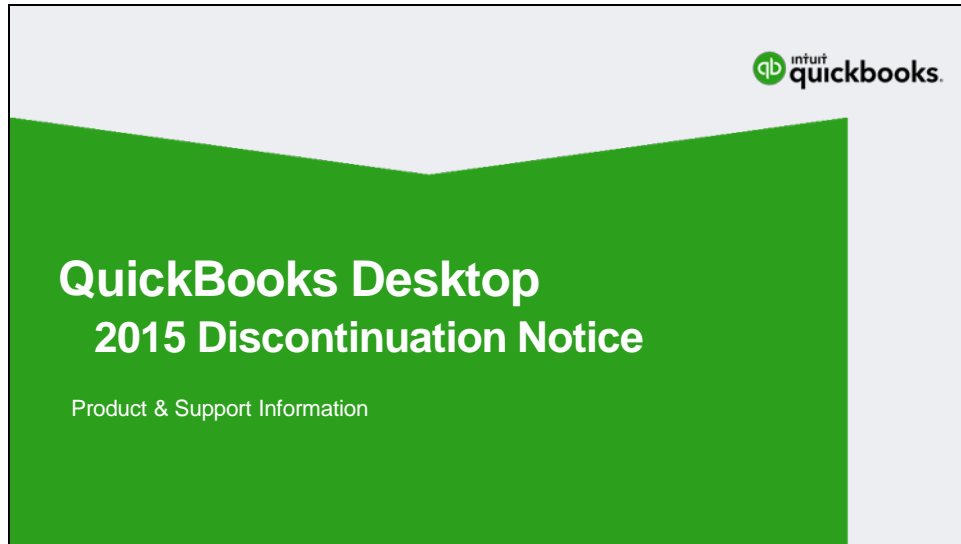
The automated sales tax center previously only allowed tax amounts to be overridden with dollar amount.

In the new sales tax info screen, you can override tax amounts either with a percentage rate or dollar amount!

We've heard your feedback!

Leave us your comments and questions in the event chat.

The project managers want to hear your voice about these features.



Access to add-on services for the 2015 Desktop versions of QuickBooks will be discontinued as of May 31st, 2018

2015 Desktop Discontinuation Notice

- Add-On Services access to all QuickBooks Desktop 2015 software will be discontinued after May 31, 2018.
 - QuickBooks Pro or Premier (Windows and Mac)
 - QuickBooks Desktop Accountant
 - QuickBooks Enterprise Solutions



Clients using QuickBooks 2015 desktop products will begin to see messaging about their product. Access to “**Add-On Services**” will be discontinued as of **May 31, 2018**.

This Product Discontinuation includes all version of QuickBooks desktop

After May 31, 2018, the current supported versions of QuickBooks Desktop will include 2016, 2017, and 2018

Link:

<https://community.intuit.com/articles/1501193-quickbooks-desktop-service-discontinuation-discontinuation-policy-and-upgrade-information>

2015 Desktop Discontinuation Notice

- If your clients *do not use any of the add-on services* in QuickBooks Desktop 2015, their product will continue to work. They will not be able to subscribe to live technical support or use Intuit services that can be integrated with QuickBooks Desktop after May 31, 2018.
 - **Desktop Payroll Services**
 - **Live Support**
 - **Online Backup**
 - **Online Banking**
 - **Accountant Copy File Transfer Service**
 - **Other Add-On Services**
- Additionally, users will no longer receive **critical security updates** starting June 1, 2018. If you receive any security updates before this date, your clients should install them.



- Desktop Payroll Services – Assisted, Basic, Standard, Enhanced, Workers Comp Payment Service, and ViewMyPaycheck
- Live Support – discontinuing Telephone and Chat support options
- Online Backup – Intuit Online automated backup service
- Online Banking – Ability to download Credit Card and Bank Transactions, Merchant Services, Automatic Credit Card Billing, ACH Check Processing
- Accountant Copy File Transfer Service
- Multicurrency/Exchange Rate
- Bill Pay / Intuit Payment Network

To ensure clients continue to benefit from QuickBooks 'Add-On Services', they should upgrade to a supported version of QuickBooks Desktop. If they are not using any add on services, 2015 will still provide basic function however, security updates will not be available starting June 1, 2018.



Online Payroll Updates


Contractor Direct Deposit in QuickBooks Online Payroll
and QuickBooks Full Service Payroll

Presenter

Leif Linden
Product Manager

About Leif

- QuickBooks Online Payroll & Money Movement
- Passion: Helping small businesses!
- 2 years at Intuit
- Mountain View, CA

A head-and-shoulders portrait of Leif Linden, a man with short, light-colored hair, smiling broadly. He is wearing a light purple or lavender button-down shirt. The background is a plain, light color.

Role at Intuit.... product manager with the QuickBooks Online Payroll & Money Movement team.

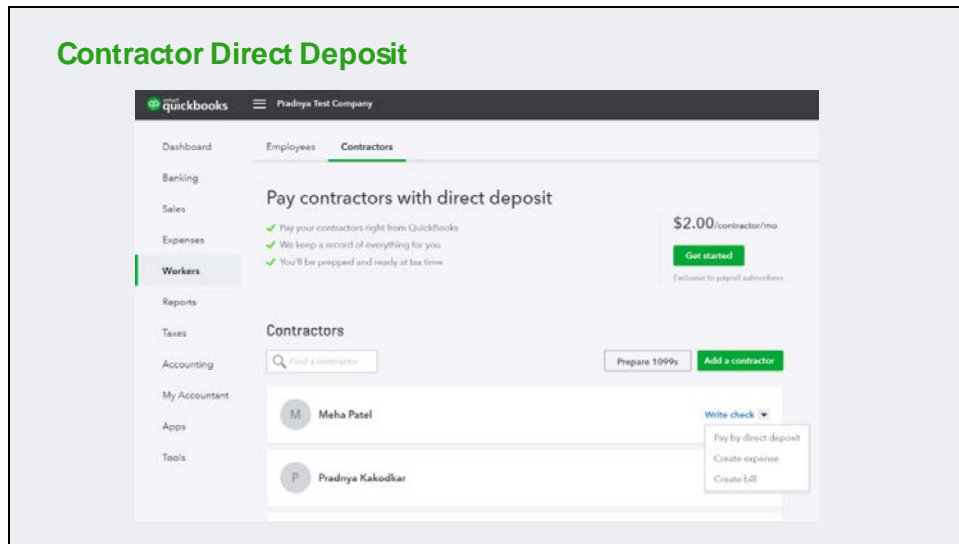
Intuit Passion..... Helping small businesses! In my past I've been a small business owner (selling print photography) and management consultant.

Personal interest item....

Contractor (1099) Direct Deposit

Why this matters

1. Contractor direct deposit is not currently available for QBOP and QBFSP and is the #1 user requested feature
2. Direct Deposit in QBOP/QBFSP makes it easier to pay your contract workers, and automatically records the payment right in QuickBooks
3. Employers can now manage payroll for both their W2 employees and 1099 contractors, all from the Workers button on the left-hand menu.



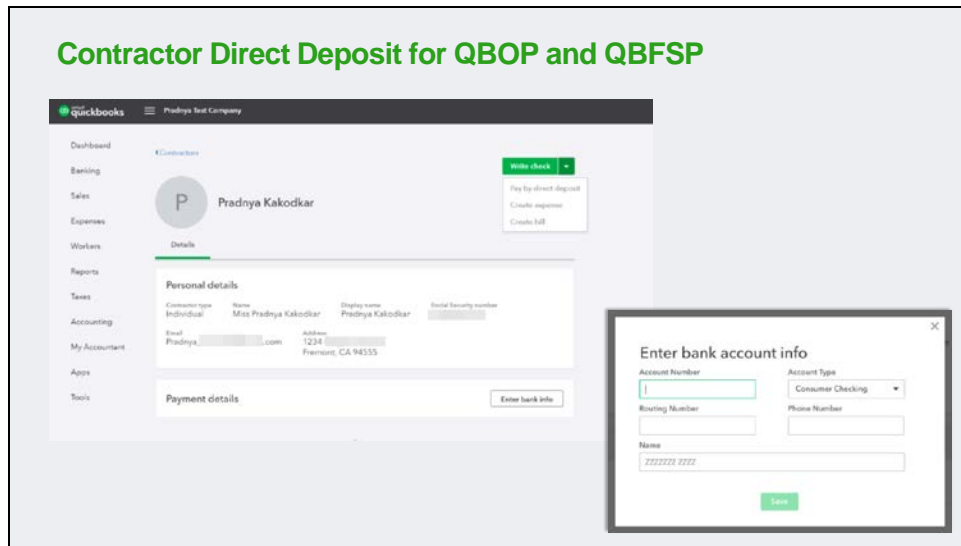
Contractor direct deposit is the #1 most requested feature within the online payroll segment.

This feature allows small business employers to now easily manage payroll for both W2 employees and 1099 contractors all from the Worker's tab.

This is the third offering in the Contractor Mission, a three legged cross-functional effort to support the 1099 Misc workforce. The other 2 legs of this project – Contractor Self Set Up/workers tab rebranding and 1099 Misc Efile and Epay – launched last December and January, respectively.

Requires an active US QBOP or QBFSB subscription. Launch is for US only.

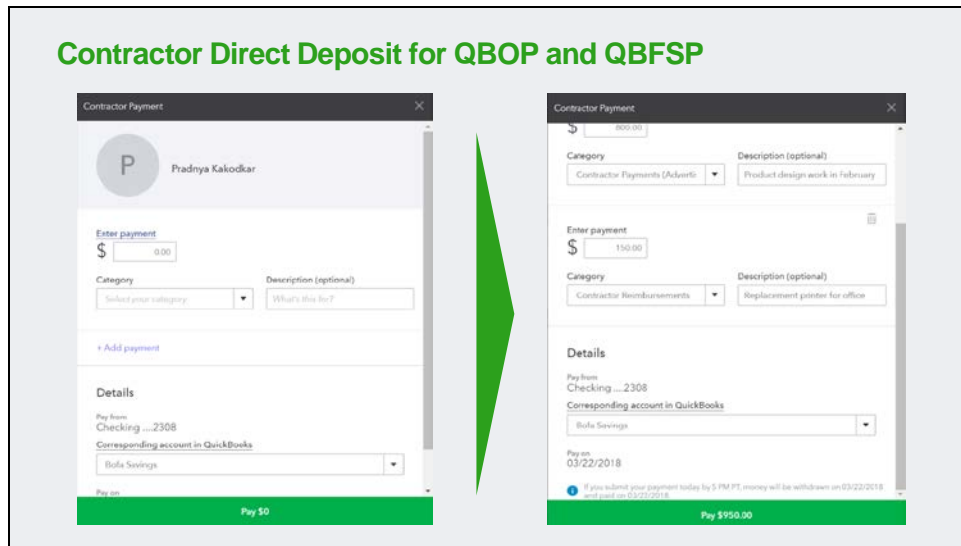
Contractor direct deposit fee is the same as the per employee surcharge.



Managing contractor details and getting ready to pay them.

When creating a payment, you can add important accounting details such as category and descriptions to better manage the payments.

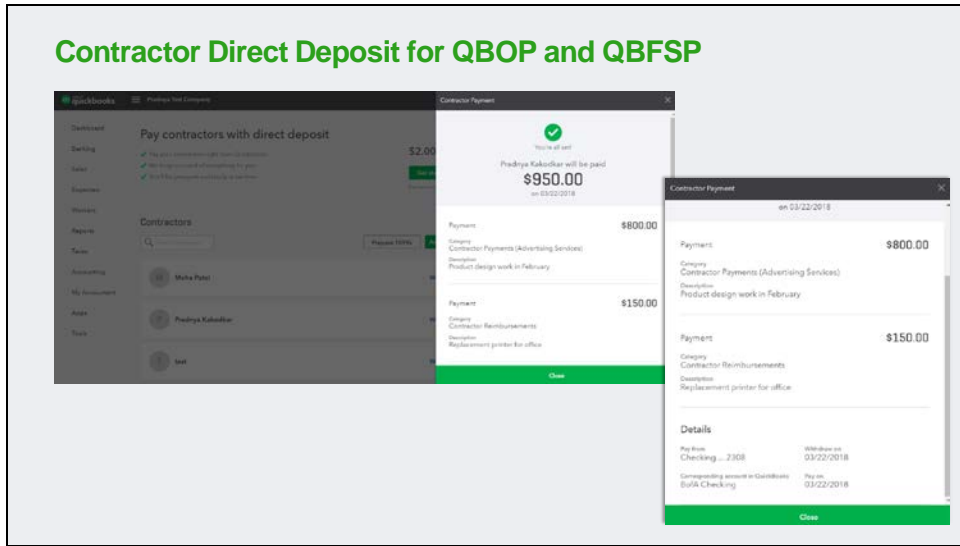
Contractors with banking info will default to **Pay with direct deposit** after the first direct deposit has been issued.



Managing contractor details and getting ready to pay them.

When creating a payment, you can add important accounting details such as category and descriptions to better manage the payments.

Contractors with banking info will default to **Pay with direct deposit** after the first direct deposit has been issued.



Contractors will receive their direct deposit payments on the next business day, provided the payments are created before the 5pm PST cutoff. Contractor Direct Deposit and W-2 Direct Deposit lead times are the same. For example, a 2 day lead time for employees is also a 2 day lead time for Contractors, etc.

Apps Program for Accountants

Enabling Accountants globally to provision apps for clients at a discounted price to drive their value pricing strategy.

Presenter

Brandi Black

Sr. Customer Experience Specialist

About Brandi

- **Team:** Partners & Developers
- **Passion:** Connecting our customers to an Ecosystem of opportunities
- **6 years at Intuit**
- **Tucson, AZ**



Role at Intuit....Sr. Customer Service Specialist

Intuit Passion.....Connecting our customers to an ecosystem of opportunities

New Apps Program for Accountants

- **Grow your business** –providing discounts on clients' app subscriptions will help you drive your value pricing strategy
- **Make a difference in your clients' lives** - save time for your clients by automating their workflows and saving them the trouble of adding/setting up the apps themselves



method:CRM



New Apps Program for Accountants community article:

<https://community.intuit.com/articles/1630576>

New Apps Program for Accountants

- Discounts **only** available for **client apps**
- Only the **Master Admin of the Firm** is able to provision apps for clients
- **One monthly app bill** for all client app subscriptions
- Currently, **8 app developers offer discounts**—continuing to grow the list
- **Single Sign-on** experience for apps—no need for additional login credentials



New Apps Program for Accountants community article:
<https://community.intuit.com/articles/1630576>


How Do I Know Which Apps Have Discounts?



Which apps have discounts?

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

To view discount information, hover over the app on the Apps screen in QuickBooks Online Accountant



Cancel Workflow Improvements

Use the cancel and downgrade features in QuickBooks Online.

Presenter

Brady Pemble

Product Manager

About Brady

- Team....QBO Billing Product Management
- Passion:Making the work of our customers easier and pain free
- 5 years at Intuit
- San Diego, CA

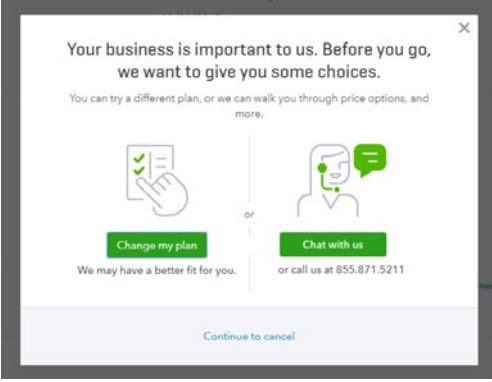


Role at Intuit....Quickbooks Online Billing User Interface Product Manager

Intuit Passion.....Taking on new challenges to help our customers

Personal interest item....I have three kids under five, and yes, I enjoy the chaos!

QBO Cancel & Downgrade Workflow Improvements



- Chat option now available for customers with attached Payroll or Payments
- Downgrade directly from the cancel flow for those that feel they can get better value from a different product
- Updated Customer Support number gives customers with Payroll or Payments direct access to a specialized help team; no longer have to call our generic help line.

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How Do Customers Access The Feature?

To access downgrade in product, the customer will need to click the “Cancel” hyperlink within QBO Billing and Subscription tab. Once the cancel hyperlink is clicked a modal will appear providing them options to self-serve on downgrade, contact support for further assistance by phone or chat or a click through to cancel.

To cancel within QBO please follow the steps below:

Log into **QBO**


Click the **Gear** Icon

Select **Account and Settings**

Click **Billing and Subscription** Tab

Click **Cancel** hyperlink

New Cancel Flow including **Change Plan** and Care options will be displayed



Thanks for Attending

- Accountants Help Hub
- Accountant blog
- Online Feature Request website
- YouTube channel

These links will also be in the email sent following this training.

We have a number resources that will help provide information related to today's Training Session.

QuickBooks Training www.qbtrainingevents.com

In The Know Webinar <https://community.intuit.com/articles/1463613>

Accountant Help Hub <https://community.intuit.com/quickbooks-accountant-us-en>

QuickBooks Online Feature Requests <http://feedback.qbo.intuit.com/forums/168199-quickbooks-online-feature-requests>

YouTube Channel <https://www.youtube.com/user/intuit>