

Welcome to “In The Know” QBO Monthly Update Webinar (USA content)

Host – Wesley Booth

We will start at 11:00 am PT

Host

Wesley Booth

Customer Care Agent

About Wesley

- National Accounts Care Team
- Passion for Training the Team
- 4 Years at Intuit
- Tucson, AZ



Hello and Welcome, I am Wesley and I'll be your host today.

Welcome to the "In The Know" monthly webinar - our main focus is "What's new in QuickBooks Online this month."

I and have been taking your support calls for 4 years and am now part of the National Accounts team handling their support issues.

Agenda

Announcements – QBO/QBOA Updates

Redesigned invoice emails

Progress Invoicing

Find-a-ProAdvisor Updates

Payroll Updates

QuickBooks Capital

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

CPE Credit & Learning objectives.....

CPE Process

CPE
Credit

In order to receive CPE credit:

- You must answer all polling questions throughout the training
- This webinar is eligible for up to 1.5 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

Need to insert a CPE keyword slide in this deck

[Read the bullets, then add these tips]

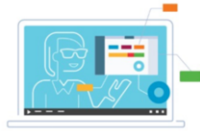
- CPE certificates are e-mailed directly to you within 3 weeks to the same email address used to register.
TIP: Add accountant_training@intuit.com to your approved email sender list. Or, check your SPAM folder.
- You must keep a copy for your records.

CPE – Learning Objectives

February 6, 2018

- Utilize the New Invoice Emails For Better Functionality and Impact
- Progress Invoicing – Using Estimates To Get Paid As The Job Progresses
- Understand The Proadvisor Enhancements To Better Highlight Your Tax Expertise.
- Payroll Impact Of Improved Time To Direct Deposit And User Id Changes
- QB Capital Offering Can Help Small Businesses Obtain Funding They Need.

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

Weekly webinars to help you grow your practice, and become a trusted advisor:

Sample Topics:

- Certification Training
- Increase your Profitability with Schedule C Clients
- Manage and Scale your Accounting & Tax Firm

In-Person Training Events

In-person training tour visiting many location across the U.S.

- Coming in May 2018

Virtual Conference Events

Free training, CPE and networking with your peers and Intuit product experts.

- Coming in March 2018

www.qbtrainingevents.com

Link in the webinar follow up email.

TSheets – Welcome to Intuit

Simple Timesheets

TSheets was acquired by Intuit January 11th 2018

Presenter

Dan Buckingham

TSheets Business Development | ProAdvisors

About Dan

- TSheets Time Tracking
- Passion: Helping Accountants Succeed
- 2.5 years at Intuit
- Boise, ID



TSheets was acquired by Intuit January 11th 2018

TSheets by QuickBooks: Modern Time Capture

- Time Capture and Scheduling
 - GPS Technology for the mobile employee
 - Embedded in QBO
 - Automate the payroll and billing/invoicing process from point of capture to point of pay
- Free Professional TSheets Account for all QuickBooks ProAdvisors
- New Certification



Sign up for your Free Account: <https://www.tsheets.com/pros>

Register for the Live Certification:
<https://register.gotowebinar.com/rt/8202679275436363523>

Complete the Self Study Certification: <https://tsheetspro.litmos.com/self-signup/>

QBO – Updates Classes & Preferred Vendors for Products & Services

More functionality for Products & Services

(Presentation done in the Dec 21 webinar)

The recording of the Dec 21 demo can be found here:

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

Classes can now be assigned to Items

The screenshot displays the QuickBooks interface. On the left, a table titled 'Products and Services' lists various items. The 'Dog House' item is highlighted. On the right, a 'Product/Service information' window is open for the 'Dog House' item. A blue arrow points to the 'Class' dropdown menu, which is currently set to 'Dallas'. The 'Inventory' section shows 'Quantity on hand' as 3 and 'Reorder point' as 4. A 'Save and close' button is visible at the bottom right of the window.

NAME	SKU	TYPE	SALES DESC
Dog Bed - Cuddle Up	7675678	Inventory	Cream an...
Striped cushion bed	675678567	Inventory	Striped c...
Deluxe Cat Tree	56546542	Inventory	Green - ...
Dog House	5435436	Inventory	Beige - m...
Pet Stairs	6546546	Inventory	Pet Stairs
Grooming		Service	Basic gro...
Hours		Service	

Product/Service information

Inventory

Dog House

SKU: 5435436

Category: Furniture

Class: Dallas

Quantity on hand: 3

Reorder point: 4

Save and close

We have added Class option to Products & Services item.

Preferred vendor added to Items

The screenshot displays the QuickBooks interface for editing a product. On the left, a table lists various products under the 'Products and Services' tab. The 'Dog House' product is selected, and its details are shown in a form on the right. The 'Preferred Vendor' dropdown menu is highlighted with a blue arrow, showing 'Pet Supplies R Us' as the selected vendor.

NAME	SKU	TYPE	SALES DESC
Beds			
Dog Bed - Cuddle Up	7675678	Inventory	Cream an...
Striped cushion bed	675678567	Inventory	Striped c...
Deluxe Cat Tree	56546542	Inventory	Green - ...
Dog House	5435436	Inventory	Beige - m...
Pet Stairs	6546546	Inventory	Pet Stairs
Grooming		Service	Basic gro...
Hours		Service	

Product Details:

- Name: Beige - model 454ret
- Sales price/rate: 109.95
- Income account: Sales of Product Income
- Is taxable
- Price rules: There are no price rules for this item
- Purchasing information: Dog House
- Cost: 28.25
- Expense account: Cost of Goods Sold
- Preferred Vendor: Pet Supplies R Us

We have added “Preferred Vendor” option to Products & Services.

Frozen Headers added to Products and Services

The screenshot shows the QuickBooks interface for a business named 'Grooming Time'. The 'Products and Services' section is active, displaying a table with the following columns: NAME, SKU, TYPE, SALES DESC, SALES PRICE, COST, TAXABLE, QTY ON HAND, REORDER POINT, and ACTION. The first row is 'Dog Grooming Package' (SKU: 4145599...). Below it, a section titled 'Furniture' contains a sub-section 'Beds' with items like 'Dog Bed - Cuddle Up', 'Striped cushion bed', 'Deluxe Cat Tree', 'Dog House', and 'Pet Stairs'. The 'Grooming' service is listed at the bottom. A blue arrow points to the 'NAME' header, which is highlighted as a 'Frozen Header'.

NAME	SKU	TYPE	SALES DESC	SALES PRICE	COST	TAXABLE	QTY ON HAI	REORDER PI	ACTION
Dog Grooming Package	4145599...	Bundle							Edit
Furniture									
Beds									
Dog Bed - Cuddle Up	7675678	Inventory	Cream an...	29.95	12.50	✓	0	12	Edit
Striped cushion bed	675678567	Inventory	Striped c...	24.95	6.42	✓	20	6	Edit
Deluxe Cat Tree	56546542	Inventory	Green - ...	129.95	42	✓	11	4	Edit
Dog House	5435436	Inventory	Beige - m...	109.95	28.25	✓	3	4	Edit
Pet Stairs	6546546	Inventory	Pet Stairs	52.95	22	✓	20	6	Edit
Grooming		Service	Basic gro...	30					Edit

The column titles have been frozen so when you scroll down on the Product page, you know what each column is.

Vendor auto-populates on PO during reorder when Preferred vendor has been assigned to the item

Purchase Order #1003

Pet Supplies R Us Email (Separate emails with a comma)

● Open Co/Bo

AMOUNT

\$28.25

PO no. 1003

Mailing address

Ship to Select customer for address Purchase Order date 11/30/2017

Shipping address Grooming Time
1205 Susan Way
Sunnyvale, CA 94087 US Ship via

▶ Account details

▼ Item details

#	PRODUCT/SERVICE	SKU	DESCRIPTIC	<input checked="" type="checkbox"/>		Dog House	5435436	Inventory	Beige - m...	109.95	28.25	✓	3	4	Edit
1	Furniture:Dog House	5435436	Dog House	<input type="checkbox"/>		Pet Stairs	6546546	Inventory	Pet Stairs	52.95	22	✓	20		<ul style="list-style-type: none"> Make inactive Run report Duplicate Adjust quantity Adjust starting value Reorder
			Grooming	<input type="checkbox"/>		Grooming		Service	Basic gro...	30					
			Hours	<input type="checkbox"/>		Hours		Service							

Cancel

Vendor auto-populated

Reorder will prefer the vendor on PO when preferred vendor is used

QBO – Updates Bank Deposit Screens

Clarifying the terminology on the Bank Deposit Screens.

Building: Bank Deposit - quick changes

Clarifying language and adding contextual Point-Of-Need help begins to guide users to properly record income using the Bank Deposit transaction while not disturbing existing users.

Previous state

The 'Deposit' form in the previous state features a search icon and the title 'Deposit'. Below the title is a section titled 'Select Existing Payments' containing a list of items with checkboxes and numerical values: 'RECEIVED FROM' (04), 'QuickBooks Team (deleted)' (11), 'Billy Bragg' (01), 'John D Rockabybaby' (02), 'Maggie Lasee' (03), and 'Maggie Lasee' (11). At the bottom of this list, it shows '1 - 5 of 5 results' and buttons for 'Select all' and 'Clear all'. Below this is an 'Add New Deposits' section with a table header containing 'RECEIVED FROM' and 'ACCOUNT', and a 'Cancel' button at the very bottom.

New State

The 'Bank Deposit' form in the new state includes a search icon, the title 'Bank Deposit', and a dropdown menu for 'PayPal Bank'. A table titled 'Select the payments included in this deposit' has columns for 'RECEIVED FROM', 'DATE', and 'TYPE', with one entry for 'Maggie Lasee' on '06/18/2015' of type 'Payment'. Below the table is a link 'Don't see a payment you're looking for?' and a section 'Add other funds to the deposit' with a table header for '#', 'RECEIVED FROM', and 'ACCOUNT'. The form also includes 'Add lines' and 'Clear all lines' buttons. Annotations in green text with orange arrows point to various elements: 'Released Dec 2017' points to the title; 'Released Feb 2018 - Removing Undeposited Funds, Inventory Asset account types from this dropdown' points to the bank dropdown; 'Released Dec 2017' points to the table title; 'Released Jan 2018' points to the 'Don't see a payment...' link; and 'Released Jan 2018' points to the 'Add other funds...' section.

Inhibit Confidential and Proprietary 16

Shows the release timing of these changes.

QBO – Updates Bank Download Screen

Clarifying the Bank Transaction Download Screen.

Banking Match label update

DATE	DESCRIPTION	PAYEE	CATEGORY ON MATCH	SPENT	RECEIVED	ACTION
12/11/2017	Amazon		Uncategorized Expense		\$89.99	Add
12/19/2017	Lera's Lamination		Uncategorized Expense	\$150.00		Add
11/27/2017	Squasky Klean Car Wash	Squasky Klean Car Wash	[1 record found]	\$19.99		View
11/29/2017	Bob's Burger	Bob's Burger Joint	[Recognized]	\$18.97		Match
11/29/2017	Squasky Klean Car Wash	Squasky Klean Car Wash	[1 record found]	\$19.99		View
11/15/2017	Norton Lumber And	Norton Lumber and Bul.	[Recognized] Bill Payment 1 11/15/2017 \$103.55 Norton Lumber and Building Materials	\$103.55		Match
11/09/2017	Tania's Nursery	Tania's Nursery	[Recognized] Expense 50 11/09/2017 \$82.45 Tania's Nursery	\$82.45		Match

- Solving for duplicates due to Add 1st workflow

1. More descriptive label to let customers new to the QBO understand what they are supposed to do with this workflow. BTW, we've changed this so now it's a blue dismissible box so it doesn't take up additional space.

2a. The solid green pill shape represents a single transaction match and customers can safely use batch action to match these with existing records.

2b. The white with green outline pill shape represents multiple transactions that make up the total that is coming in from the bank. These will need to be looked at in more detail.

Therefore,

3. encourages users to look at the multiple transactions to make sure they are the ones needed for the match. This will help prevent adding duplicate transactions to their books because this process will have more oversight instead of blindly adding/matching items.

Banking Match label update – View multiple records

The screenshot displays the QuickBooks Banking interface. The main area shows a table of transactions for review. A modal window is open for the transaction dated 11/27/2017, 'Squeaky Klean Car', with a value of \$19.99. The modal shows 'Records found' with two entries: 'CC Expense 11/27/2017 \$19.99 Squeaky Klean Car Wash' and 'CC Expense 11/20/2017 \$19.99 Squeaky Klean Car Wash'. A 'Match' button is visible in the modal. Below the modal, the main table shows other transactions with their respective match counts and actions.

DATE	DESCRIPTION	PAYEE	CATEGORY OR MATCH	SPENT	RECEIVED	ACTION
12/11/2017	Amazon		Uncategorized Expense		\$89.99	Add
12/10/2017	Lark's Lamination		Uncategorized Expense	\$150.00		Add
11/27/2017	Squeaky Klean Car	Squeaky Klean Car Wash	2 records found	\$19.99		View
11/20/2017	Bob's Burger	Bob's Burger Joint	1 record found CC Expense 11/20/2017 \$18.97 Bob's Burger Joint	\$18.97		Match
11/20/2017	Squeaky Klean Car	Squeaky Klean Car Wash	2 records found	\$19.99		View
11/15/2017	Norton Lumber And	Norton Lumber and Bull.	1 record found Bill Payment 1 11/15/2017 \$103.55 Norton Lumber and Building Materials	\$103.55		Match

The “View” shows more detailed options when the match shows multiple transactions.

QBOA – Updates New Client - Without QBO

Quickly add a New Client without QBO.

YOUR PRACTICE

n Numerus Accounting
Luca's clients (21)

Add client

- Clients
- Team
- ProAdvisor
- Work NEW
- Apps NEW
- YOUR BOOKS
- Dashboard
- Banking
- Sales
- Expenses
- Projects
- Employees
- Reports
- Taxes
- Accounting

Find a client All clients (21) ⚙️

CLIENTS		BOOKKEEPING		PAYROLL		TAX	
Name	Status	For Review	Status	Items Due	Trial Balance	Tax Return	
Bella Donna B... (408) 654-7652	qb Closed 07/31/2016	1 change to reconciled	qb Pay date 12/09/2016			2016: 1120 Waiti...	
Carlo's Cupcakes	qb						
Chicago Movin... (312) 556-1293	qb Closed 06/13/2017	4 changes to closed bo... 87 unaccepted transact...	qb Pay date 12/08/2017	10 taxes earliest 11/15/2016		2016: 2 tax returns	
Derek Duncan	qb						
Duque de Caxias	qb						
Fremont Tofu ... (510) 465-2388	qb Closed 03/31/2016	51 changes to closed b... 88 unaccepted transact...	qb				
Goncalense	qb						
Itaborai	qb						
Kathryn's hobb...	qb						

Add client ✕

Client contact information

Business Individual

Business name *
Rockcastle Construction

Email *
jennifer@rockcastleconstruction.com

Display name as
Rockcastle Construction

Mobile

[+ Add more info](#)

QuickBooks subscription [Compare](#)

Wholesale discount (firm is billed) Direct discount (client is billed) No subscription right now

Plus Most Popular

~~\$50/mo~~ 50% off for life of the subscription¹ **\$25/mo**

Essentials

~~\$35/mo~~ 50% off for life of **\$17.50/mo**

Wholesale discount

Grow your practice by bundling QuickBooks into the services you provide clients.

[Learn more](#) about the benefits of the wholesale discount.

Now you can easily add a new client that does not have QuickBooks Online.

Add client ✕

Client contact information

Business Individual

Business name * **Email ***

Display name as **Mobile**

[+ Add more info](#)

QuickBooks subscription [Compare](#) [?](#)

Wholesale discount (firm is billed) Direct discount (client is billed) No subscription right now

Team access

Select which team members in your firm can access your client.

Ray Choi
(Firm Master Admin)

D Watts

When choosing “No Subscription right now” the QBO product choices are not displayed, reducing confusion.

Merchant Payment Statements

Payment statements are now accessible in QBO for all U.S merchants

Presenter

Justin Saeian

Product Manager

About Justin

- Team: Payments
- Passion: Helping small businesses put their accounts receivable on auto-pilot
- 1st Years at Intuit
- Mountain View, CA



Payments Statements

- Shows a monthly overview of the transactions and fees applied to a merchants payment account
 - We will show up to two years of statements for all merchants inside of QBO
 - Statements from the previous month should be available by the 5th of the current month
 - There will be no statement generated for a particular month if no fees were applied to the QBO user's merchant account during that month
 - Accountants will have access to see their clients monthly statements



Payments Statement
 Statement Period: Nov 01 2017 to Nov 30 2017

Overall Summary		Sales		Refunds		Net Sales	
Count	Amount	Count	Amount	Count	Amount	Count	Amount
2	\$25.00	0	\$0.00	0	\$0.00	2	\$25.00

Fee Type	Count	Amount	Fee Amount
Payment Processing Fees	2	\$25.00	\$0.50
Monthly Service Fees	0	\$0.00	\$0.00
Chargeback Fees	0	\$0.00	\$0.00
Aggregated Fee Percentage			2.0%

Payment statements give a monthly overview of the transactions processed by QuickBooks merchants on a monthly basis.

- U.S Payments enabled QBO merchants can now access their statements within QBO regardless of which merchant they process with.
- In QBO we will go back two years back with payment statements
- This aggregated list of fees in a statement include...
 - Arbitration/Compliance Filing Fees
 - Equipment
 - Gift Card Order
 - Gift Card Statement Fees
 - Reject Fees
 - Shipping
 - Supplies
 - Termination Fee
 - Termination for Cause
 - Chargeback Fees
 - Chargeback Post
- Permissions
 - Any master admin, company admin, accountants and limited role with sales included will be able to view and access statements

Payments Statements

Account and Settings

Company

Billing & Subscription

Sales

Expenses

Payments

Advanced

Merchant details

Merchant ID 5247719913716313

Change bank deposit account

Run deposit reports

See transaction details

Manage account

Documents

Monthly Statements

December 2017 [View](#)

January 2018

December 2017

November 2017

October 2017

Chart of Accounts

Where do you want to record payments?

Where do you want to record processing fees?

Payment Methods

Cards     

Bank Transfer

[Privacy](#) | [Security](#) | [Terms of Service](#)

Statements View



21215 Burbank Blvd 100
Woodland Hills, CA 91367
For statement help, please visit
<https://merchantcenter.intuit.com/statements>

TEST_US_APE-T1N_1_201709221506099533355
1103 MAIN ST
SALISBURY MA 01952
Merchant Account Number
5247719913716313

Statement Period
Dec 01 2017 to Dec 31 2017

Important Information

Overall Summary

\$25.00	\$0.00	=	\$25.00
<small>Gross Transaction Amount (includes sales & returns)</small>	<small>Total Fees Charged</small>		<small>Net Transaction Amount</small>

Activity Summary

Date	Sales		Returns		Fees Charged	Net Sales
	Count	Amount	Count	Amount		
06-Dec	2	\$25.00	0	\$0.00	\$0.25	\$24.75

Fee Summary

Fee Type	Count	Amount	Fee Amount
Sum of Fees Debited per Daily Deposit			\$0.00
Aggregated Fee Percentage			0.00%

Deposit Summary

Deposit Type	Sales		Returns		Gross	
	Count	Amount	Count	Amount	Count	Amount
Amex Direct	2	\$25.00	0	\$0.00	2	\$25.00

Redesigned invoice emails

New invoice emails that highlight your brand and make it easier for your clients to view and pay your invoice, anywhere, any time

Be aware of new invoice emails that are being rolled out in phases to US users starting in February, and benefits of these emails to small businesses.

1. Invoices designed to work well on all devices (laptops, tablets, and mobile devices)
2. Allows small businesses to better highlight their brand
3. Invoice details in the email to make it easier for customers to quickly review, pay, and search for their invoices

Presenter

Siya Yang

Product Manager

About Siya


- Payments team
- Passion for helping small businesses get paid faster
- 3 Years at Intuit
- Mountain View, CA




Current invoice emails

Invoice 3044 from Cya Later, Out Fishing

Cya Later, Out Fishing <quickbooks-email@intuit.com>
Yang, Siya; Yang, Siya
Thursday, February 1, 2018 at 1:25 AM
[Show Details](#)


 Invoice_3044_from_...
22.1 KB

[Download All](#) [Preview All](#)

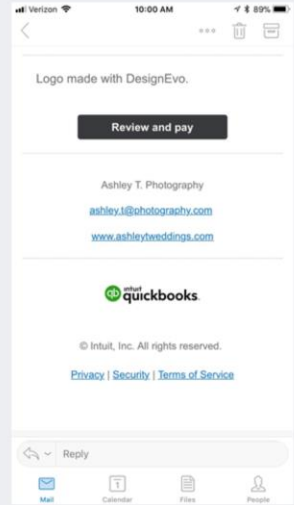
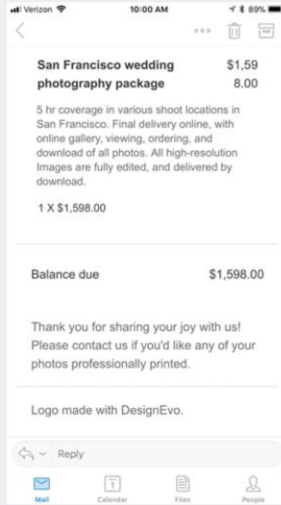
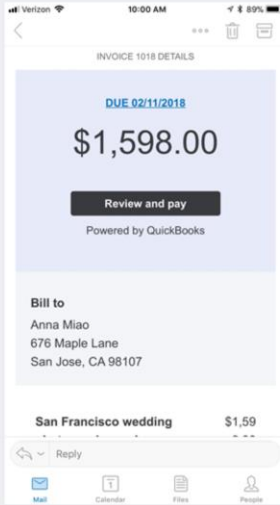
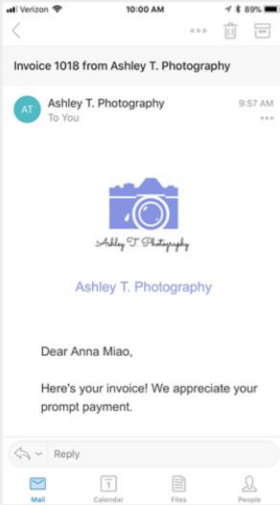
 **Cya Later, Out Fishing**

INVOICE	DUE DATE	BALANCE DUE	View invoice
3044	03/03/2018	\$792.00	

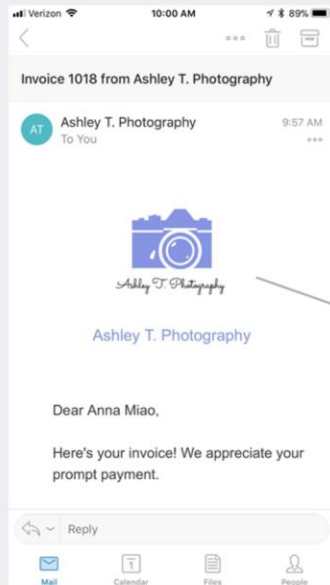
To: Joe Blog
Here's your invoice! We appreciate your prompt payment.
Thanks for your business!
Cya Later, Out Fishing

 © Intuit, Inc. All rights reserved. [Privacy](#) | [Security](#) | [Terms of Service](#)

New redesigned invoice emails



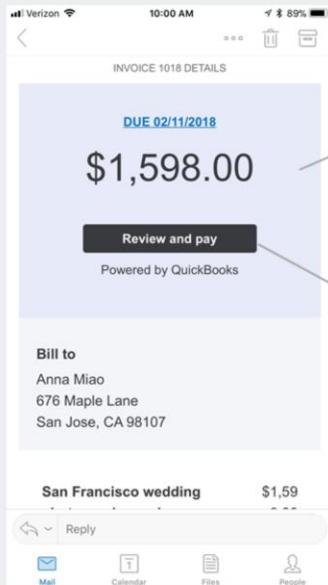
New redesigned invoice emails (1)



New invoice emails designed to look good wherever customers open them. On their laptops, tablets, or mobile devices!

Small business brand front and center of the invoice

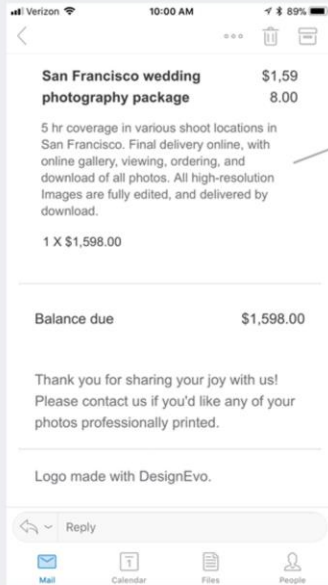
New redesigned invoice emails (2)



Customizable accent color on the invoice email to further emphasize your small business brand

Clear call-to-action to make it easier and quicker for customers to pay

New redesigned invoice emails (3)



Invoice details directly in the email, so customers can easily review the invoice and search for it at a later time in their email

New redesigned invoice emails – Roll out plan

- Currently live for ~250 users in the US
- Will be rolled out to more US users in phases starting February 8, 2018

Progress Invoicing

Invoice for your work in installments

Presenter

Pawandeep Singh

Product Manager

About Pawan

- QuickBooks Online Product Management
- Passionate about helping small businesses manage their business and books
- 3 years at Intuit
- Mountain View, CA



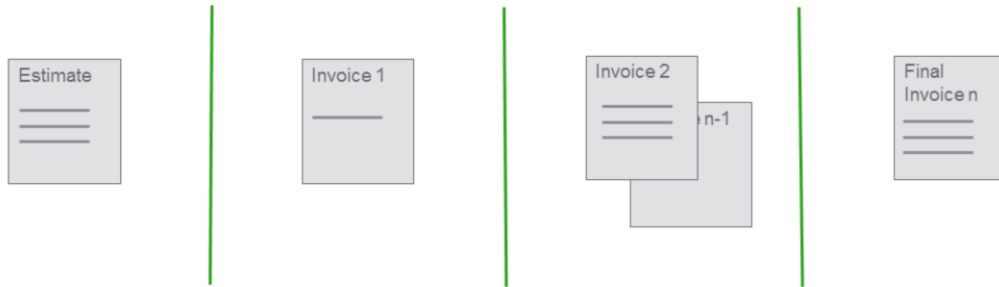
What is Progress Invoicing

Progress invoicing is the 'incremental' invoicing of work by small businesses.

These invoice increments may be:

- Based on phases or stages of progress on the projects
- Declared as part of a pre-determined billing schedule or contract
- Or, based on progress against items cited in an estimate

Professional and field service businesses bill incrementally for their work



Estimate #1014

Daniel Lu | daniel.lu@intuit.com | Accepted | Send later | **Create invoice** | **\$4,000.00** AMOUNT

Billing address: Daniel Lu | Estimate date: 02/02/2018 | Expiration date: | Estimate no.: 1014

Shipping address: | Ship via: | Shipping date: | Tracking no.: | Sales rep name: |

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1		Design Audit	Design audit for Daniel's office	1	1,000	1,000.00	
2		Design	Design concepts for Daniel's office	1	2,500	2,500.00	
3		Consultation	Design consultation with Daniel's contractor	2	250	500.00	
4							

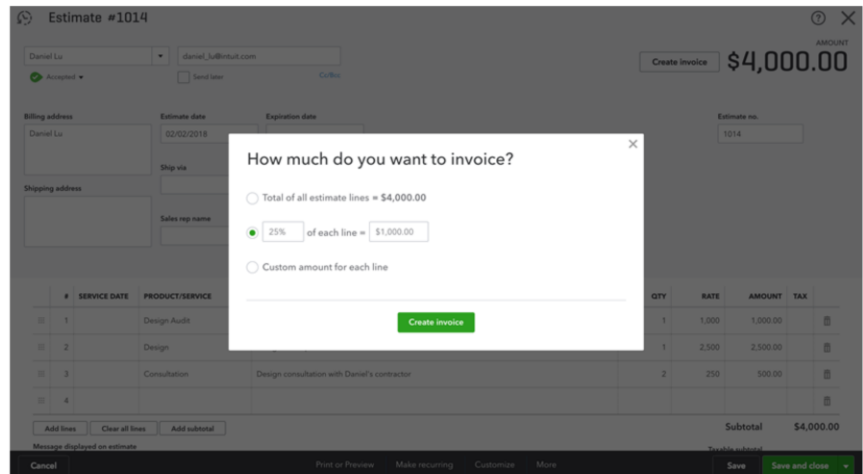
Cancel Revert Print or Preview Make recurring Customize More Save **Save and close**

QuickBooks Online supports progress invoicing starting from an estimate. Click on 'create invoice' to create the progress invoice.

QuickBooks Online supports progress invoicing starting from an estimate. Click on 'create invoice' to create the progress invoice.

On the modal asking how much to invoice, choose one of the options:

1. Total of all estimate lines – this helps you create a regular invoice that will be sent for the entire estimate
2. A partial amount or a partial percent of the estimate: On the invoice created from the estimate, this amount or percentage will be pre-filled for each line
3. Custom amount for each line – this will allow you to modify each line separately and no amount or percentage will be pre-filled on the invoice created



On the modal asking how much to invoice, choose one of the options:

1. Total of all estimate lines – this helps you create a regular invoice that will be sent for the entire estimate
2. A partial amount or a partial percent of the estimate: On the invoice created from the estimate, this amount or percentage will be pre-filled for each line
3. Custom amount for each line – this will allow you to modify each line separately and no amount or percentage will be pre-filled on the invoice created

Invoice #INV-20171149

BALANCE DUE **\$1,000.00**

1 linked transaction

Send later Cr/Rec

Online payments

Cards visa mc amex

Bank transfer ACH

Billing address: Daniel Lu

Terms: Net 30

Invoice date: 02/05/2018

Due date: 03/07/2018

Invoice no.: INV-20171149

Shipping address: [Empty]

Ship via: [Empty]

Shipping date: [Empty]

Tracking no.: [Empty]

Sales rep name: [Empty]

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUE	QTY	RATE	AMOUNT	TAX		
1		Design Audit	Design audit for Daniel's office	25% of 1,000.00	0.25	1,000	250.00			
2		Design	Design concepts for Daniel's office	25% of 2,500.00	0.25	2,500	625.00			
3		Consultation	Design consultation with Daniel's contractor	25% of 500.00	0.5	250	125.00			
4										

Add lines Clear all lines Add subtotal

Subtotal \$1,000.00

Cancel Clear Print or Preview Make recurring Customize Save Save and send

The 'Due' column in the line item table describes how much portion of each line item amount is being invoiced.

The 'Due' column in the line item table describes how much portion of each line item amount is being invoiced.

Invoice #INV-20171149

Daniel Lu | daniel_lu@intuit.com

1 linked transaction | Send later | Co/Btc

Online payments: Cards (vsa, visa, amex, mc) | Bank transfer (ACH)

BALANCE DUE: \$1,750.00

Invoice no.: INV-20171149

Billing address: Daniel Lu | Terms: Net 30 | Invoice date: 02/05/2018 | Due date: 03/07/2018

Shipping address: | Ship via: | Shipping date: | Tracking no.: | Sales rep name: |

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUE	QTY	RATE	AMOUNT	TAX
1		Design Audit	Design audit for Daniel's office	100% of 1,000.00	1	1,000	1,000.00	
2		Design	Design concepts for Daniel's office	Amount 625.00 of 2500.00	0.25	2500	625.00	
3		Consultation	Design consultation with Daniel's contractor	Percent	0.5	250	125.00	
4				Amount				

Subtotal: \$1,750.00

Buttons: Cancel, Clear, Print or Preview, Make recurring, Customize, Save, Save and send

You can change the amount or percentage on each line item by clicking within the due column on a line item. Options exist to switch between the percentage or the amount options.

You can change the amount or percentage on each line item by clicking within the due column on a line item. Options exist to switch between the percentage or the amount options.

Invoice #INV-20171149

1 linked transaction

Send later Co/BoC

Cards VISA M C B A
 Bank transfer ACH

\$1,625.00

Billing address: Daniel Lu
 Terms: Net 30
 Invoice date: 02/05/2018
 Due date: 03/07/2018
 Invoice no.: INV-20171149

Shipping address:
 Ship via:
 Shipping date:
 Tracking no.:
 Sales rep name:

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUE	QTY	RATE	AMOUNT	TAX		
1		Design Audit	Design audit for Daniel's office	100% of 1,000.00	1	1,000	1,000.00			
2		Design	Design concepts for Daniel's office	500.00 of 2,500.00	0.2	2,500	500.00			
3		Consultation	Design consultation with Daniel's contractor	25% of 500.00	0.5	250	125.00			
4										

Add lines | Clear all lines | Add subtotal

Subtotal **\$1,625.00**

Message displayed on invoice

Cancel | Clear | Print or Preview | Make recurring | Customize | Save | **Save and send**

You can also remove a line item using the 'trash' icon (see highlighted with blue arrow).

You can also remove a line item using the 'trash' icon.

Invoice #INV-20171149

Daniel Lu | @daniel_lu@intuit.com

1 linked transaction | Send later | Cards | Bank transfer

\$1,625.00

Billing address: Daniel Lu | Terms: Net 30 | Invoice date: 02/05/2018 | Due date: 03/07/2018 | Invoice no.: INV-20171149

Shipping address: | Ship via: | Shipping date: | Tracking no.: | Sales rep name: |

There are multiple lines for Estimate #1014. Would you like to remove this line from the invoice or unlink the whole transaction?

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUE	QTY	RATE	AMOUNT	TAX
1		Design Audit	Design audit for Daniel's office	100% of 1,000.00	1	1,000	1,000.00	
2		Design	Design concepts for Daniel's office	500.00 of 2,500.00	0.2	2,500	500.00	
3		Consultation	Design consultation with Daniel's contractor	25% of 500.00	0.5	250	125.00	
4								

Add lines | Clear all lines | Add subtotal

Subtotal: \$1,625.00

Message displayed on invoice:

Clicking on 'remove line' removes the line from the progress invoice that you might want to hide from the invoice (and your client).

Clicking on 'remove line' removes the line from the progress invoice that you might want to hide from the invoice (and your client).

Invoice #INV-20171149

Daniel Lu | daniel_lu@intuit.com

1 linked transaction | Send later | Co/Biz

Online payments: Cards (VISA, M/C, A/M, D/C) | Bank transfer (ACH)

BALANCE DUE: \$750.00

Invoice no.: INV-20171149

Invoice details: Billing address (Daniel Lu), Terms (Net 30), Invoice date (02/05/2018), Due date (03/07/2018), Shipping address, Ship via, Shipping date, Tracking no., Sales rep name.

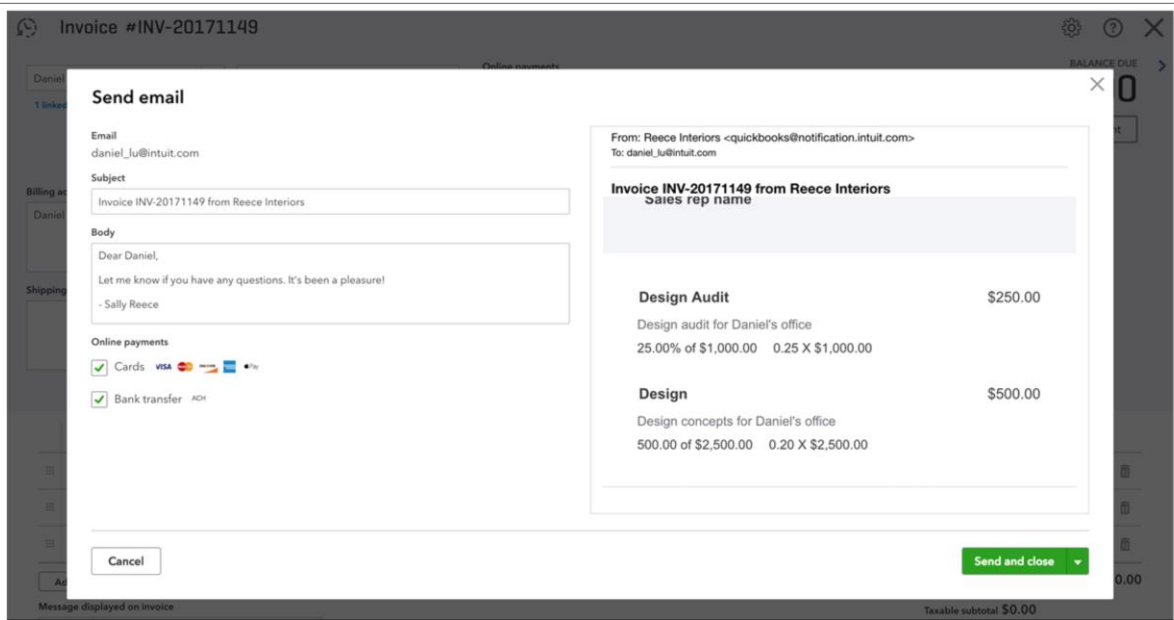
#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUE	QTY	RATE	AMOUNT	TAX
1	02/02/2018	Design Audit	Design audit for Daniel's office	25% of 1,000.00	0.25	1,000	250.00	
2	02/02/2018	Design	Design concepts for Daniel's office	500.00 of 2,500.00	0.2	2,500	500.00	
3								

Subtotal: \$750.00 | Taxable subtotal: \$0.00

Buttons: Add lines, Clear all lines, Add subtotal, Cancel, Clear, Print or Preview, Make recurring, Customize, Save, Save and send

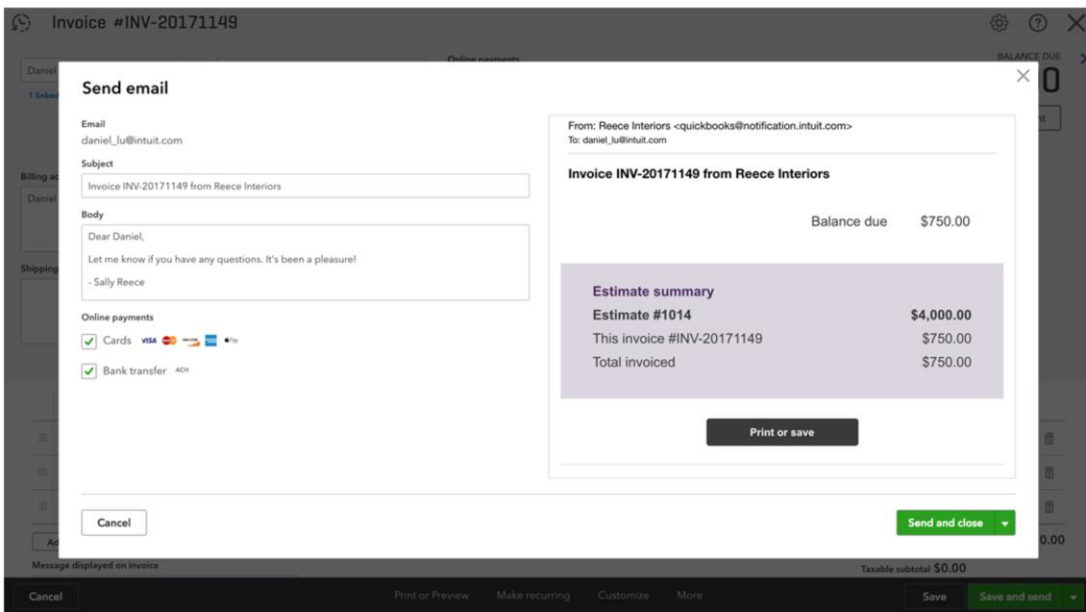
You can mix presentation formats of line items on the invoice. For instance, some items can be percentage based vs. some items can be based on dollar amounts.

You can mix presentation formats of line items on the invoice. For instance, some items can be percentage based vs. some items can be based on dollar amounts.



Once your invoice is ready, you can check out how the progress information (partial percentage or partial amounts) is displayed in the email preview experience.

Once your invoice is ready, you can check out how the progress information (partial percentage or partial amounts) is displayed in the email preview experience.



Another handy feature inside the email preview is the ability to share the 'Estimate Summary' with the client so they know how much they have been invoiced for so far.

Another handy feature inside the email experience is the ability to share the 'Estimate Summary' with the client so they know how much they have been invoiced for so far.

Estimate #1014

AMOUNT **\$4,000.00**

Create invoice

Accepted 1 linked transaction

Type	Date	Amount
Invoice	02/05/2018	\$750.00

Billing address: Daniel Lu

Estimate date: 02/02/2018

Expiration date: []

Estimate no.: 1014

Shipping address: []

Ship via: []

Shipping date: []

Tracking no.: []

Sales rep name: []

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX	REMAINING	INVOICED	CLOSED
1		Design Audit	Design audit for Daniel's office	1	1,000	1,000.00		750.00	250.00	
2		Design	Design concepts for Daniel's office	1	2,500	2,500.00		2,000.00	500.00	
3		Consultation	Design consultation with Daniel's contractor	2	250	500.00		500.00	0.00	
4										

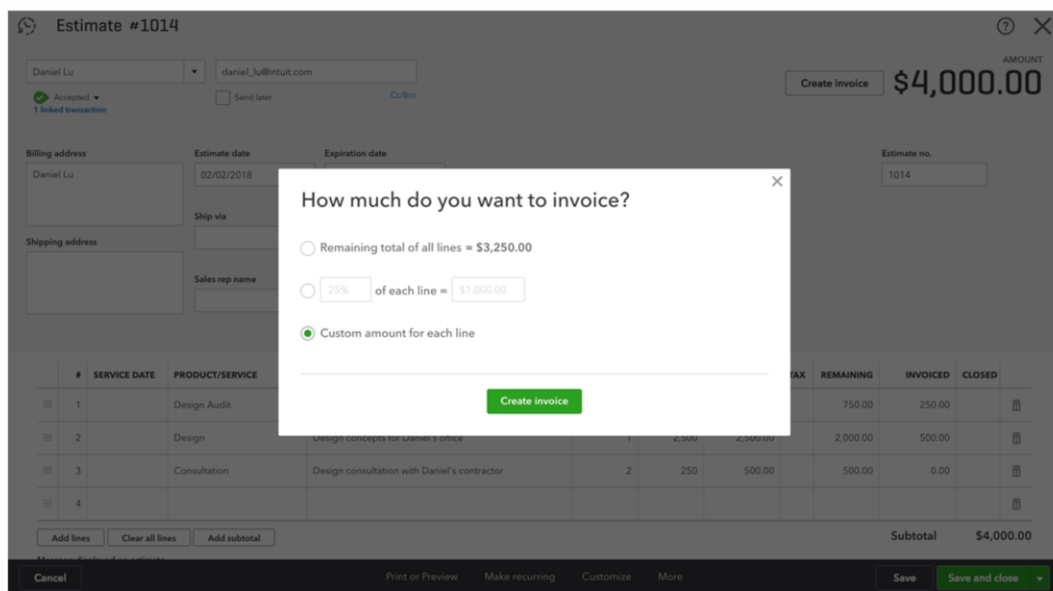
Add lines Clear all lines Add subtotal

Subtotal \$4,000.00

Cancel Print or Preview Make recurring Customize More Save Save and close

All progress invoices get linked to the estimate so you can check what has been invoiced so far and date information. You can also review from the estimate how far each line item has been invoiced.

All progress invoices get linked to the estimate so you can check what has been invoiced so far and date information. You can also review from the estimate how far each line item has been invoiced.



Creating a custom amount for each line means the created invoice will not pre-fill any partial amount or percentage

Creating a custom amount for each line means the created invoice will not pre-fill any partial amount or percentage

Invoice #INV-20171150

Daniel Lu | daniel_lu@intuit.com

Online payments: Cards Bank transfer

BALANCE DUE: \$0.00

1 linked transaction | Send later

Invoice no.: INV-20171150

Terms: Net 30 | Invoice date: 02/05/2018 | Due date: 03/07/2018

Shipping address: [Empty]

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	DUE	Estimate	Amount	Invoiced	Remaining
1		Design Audit	Design audit for Daniel's office	0.00 of 1,000.00	Estimate #1014	\$1,000.00	\$250.00	\$750.00
2		Design	Design concepts for Daniel's office	0.00 of 2,500.00				
3		Consultation	Design consultation with Daniel's contractor	0.00 of 500.00		0.00	250	0.00
4								
5								

Buttons: Cancel, Clear, Print or Preview, Make recurring, Customize, Save, Save and send

When you click on the link icon next to each line on the invoice, it shows how far that line item has been invoiced and how much remains so that you don't have to go back to an estimate to look up that info.

When you click on the link icon next to each line on the invoice, it shows how far that line item has been invoiced and how much remains so that you don't have to go back to an estimate to look up that info.

Edit invoices that turn heads and open wallets

Date

Product/Service
 Include description here
 Category

Description
 Include Quantity and Rate

Quantity

Rate

Amount

SKU

Hide activity options

Group activity by

~~Show progress on line items~~

Show progress on line items (email only)

~~Show mark-up/open/calculate expenses~~

Show billable time
 Include employee name
 Include hours and rate

01/03/2018 FedEx 12345678

SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
Item name	Description of the item	2	225.00	450.00
Item name	Description of the item	1	225.00	225.00

SUBTOTAL	675.00
DISCOUNT P/L	-15.00
TOTAL TAX	10.25
SHIPPING	5.00
DEPOSIT	10.00
TOTAL	675.25
BALANCE DUE	675.25

Preview PDF Done

To show progress information on the line items inside the emailed invoice, you'll have to enable ' Show progress on line items' when you customize your invoices. This feature is only supported over email right now.

To show progress information on the line items inside the emailed invoice, you'll have to enable ' Show progress on line items' when you customize your invoices. This feature is only supported over email right now.

Edit invoices that turn heads and open wallets

Design **Content** Emails Payments

Everything saves automatically for invoices, estimates, and sales receipts.

Footer

Display

- Discount
- Deposit
- Estimate Summary (email and web only)

Message to customer on

Invoices and other sales forms

8pt

Add footer text

Enter any other text you'd like in the footer.

8pt

Centered

Reece Interiors
 36107 Reece Interiors
 www.reeceinteriors.com

INVOICE

BILL TO
 Smith Co.
 123 Main Street
 City, CA 12345

SHIP TO
 John Smith
 20627 Park Drive
 City, CA 12345

INVOICE# 12345
DATE 01/12/2015
DUE DATE 02/12/2015
TERMS NET 30

SHIP DATE 01/03/2015
SHIP VIA FedEx
TRACKING NO. 12345678

SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
Item name	Description of the Item	2	205.00	410.00
Item name	Description of the Item	1	205.00	205.00

SUBTOTAL 615.00
DISCOUNT 2% -13.50
TOTAL TAX 101.25
SHIPPING 3.50
DEPOSIT 10.00
TOTAL 876.25
BALANCE DUE 876.25

Preview PDF Done

To show 'estimate summary' to your clients on the email invoice or the web invoice please customize the footer of your invoice by enabling the 'estimate summary' in the footer section of invoice customization screen.

To show 'estimate summary' to your clients on the email invoice or the web invoice please customize the footer of your invoice by enabling the 'estimate summary' in the footer section of invoice customization screen.

Find-A-ProAdvisor

Matching for Tax

info

Presenter

Leah Wetzel

Product Manager

About Leah

- QuickBooks Online Accountant
- Passionate about connecting Small Businesses with their most trusted advisors!
- 1 year at Intuit
- Mountain View, CA



Matching for Tax

Visitors seeking tax help on the current Find-a-ProAdvisor experience feel like Find-a-ProAdvisor is not “meant for me”

Enhancements include:

- Prominent Display of Tax Related Credentials
- Free Consultation
- New “Services Provided”

The screenshot shows the 'Find a ProAdvisor' search interface. At the top, there are filters for 'Location' (Middlefield, CA), 'Industry served' (Lawn care / Landscaping), 'Services provided' (What services do you need?), and 'Product supported' (QuickBooks Online). Below these filters, it indicates 'Distance within 10 miles' and '176 accountants found near Middlefield, CA'. The search results are sorted by 'Best match'. The first result is for William Hansen, CPA, an Advanced ProAdvisor with 38 reviews. His profile includes a photo, a star rating, and a list of services: Audits / Reviews / Compilations, Bookkeeping, Income tax preparation / planning, and QuickBooks phone consultation. At the bottom of his profile, there are four QuickBooks logos: Online (Advanced), Desktop (Advanced), Enterprise, and Point of Sale. A blue button labeled 'OFFERS FREE CONSULTATION' is visible next to his name.

Visitors seeking tax help on the current Find-a-ProAdvisor experience feel like Find-a-ProAdvisor is not “meant for me”. Enhancements are being made to allow you to better highlight your expertise as it relates to tax and encourage engagement from visitors seeking tax help.

Enhancements include updates to the Find-a-ProAdvisor search experience, including a seasonal quick link which will perform a quick and easy tax-search and tweaks to the current “Send Message” text to reflect tax-related inquiries.

Additional enhancements include both changes to the Find-a-ProAdvisor Search Experience and the ProAdvisor Profile, including:

- Prominent Display of Tax Related Credentials (CPA, EA)
 - Remove Credentials from the “Name” field
 - Ensure your Credentials are up to date
- Free Consultation
 - Update the “Free Consultation” section if you offer a free consultation
- New “Services Provided”
 - Update the “Services” section of your profile

Matching for Tax

Update Your ProAdvisor Profile!

1. Remove Credentials from the “Name” fields
2. Ensure your Credentials are up to date
3. Update the “Free Consultation” section if you offer a free consultation
4. Update the “Services” section of your profile

The screenshot shows a QuickBooks ProAdvisor profile for William Hansen. The profile includes a navigation menu on the left with options like 'Clients', 'Team', 'ProAdvisor', 'Work', 'Apps', 'Dashboard', 'Banking', 'Sales', 'Expenses', 'Employees', 'Reports', 'Tools', and 'Accounting'. The main content area displays performance metrics (19 Profile points, 4 Leads and inquiries, 10 Social link views), a profile strength bar, and an 'Improve your profile' section with a 'Offer a free consultation' button. Below this is a 'Preview your public profile' section showing the public-facing profile for William Hansen, including contact information, a 'Certified expert in' section for QuickBooks Online and Desktop, an 'About me' bio, 'Years in business' (15), 'Services' (Audits, Bookkeeping, Income tax preparation), 'Consultation' (Offering a free consultation), 'Industries served' (Design, Property Management, Real Estate), and 'Languages'.

As a result of these enhancements, it is important that you review your ProAdvisor profile and ensure it is up-to-date. Pay special attention to the following:

1. Remove Credentials from the “Name” fields
2. Ensure your Credentials are up to date
3. Update the “Free Consultation” section if you offer a free consultation
4. Update the “Services” section of your profile

Matching for Tax

Why this matters:

- Most accountants who use QBOA provide multiple services for their clients, including tax
- 65% of an accountant's revenue comes from serving tax clients

Why this matters:

Most accountants who use QBOA provide multiple services for their clients, including tax.

65% of an accountant's revenue comes from serving tax clients.

Helpful article – <https://www.firmofthefuture.com/content/5-tips-to-maximize-your-new-find-a-proadvisor-profile/>

24 Hour Direct Deposit

Let your clients hold on to their cash for an extra day
and run payroll 24hrs before payday

Presenter

Amy Au

Customer Experience Specialist

About Amy

- Online Payroll Team
- Passion: Advocate for small business owners
- 13 years at Intuit
- Mountain View, CA



Instant Bank Account Connection with Online Payroll

Connect your Bank Account

1

Bank

2

Business

3

Owner

Choose your bank

We'll walk you through connecting the bank account that you'd like to use to send money with QuickBooks.

Or select one of the popular banks below



Instant Bank Account Connection with Online Payroll

Why this matters:

- Instant connect reduces set up time from average 4-5 days to less than 5 minutes.
- No need to wait for a test transaction amount.
- Works with 8 of the largest banks in the United States, covering ~55% of our customers.

Offered to QBOP and QBFSP currently.

- Launched to QBOP in Dec 2016
- Launched to QBFSP in Dec 2017.

Bank of America, Chase, Wells Fargo, Citi, TD, US Bank, BB&T and USAA

Instant connect enables a fast set up time in a secure manner. With this, employers can pay employees within 24 hours!

Same Day Direct Deposit for QuickBooks Full Service Payroll

New Feature:

QBSFP customers will soon have additional time to approve their direct deposit payroll checks.

- New cutoff of 7 am PST on the day of payroll.
- No additional cost to customers

Speedy Direct Deposit:

Intuit's 24 hour direct deposit allows both QuickBooks Online Payroll (QBOP) and QuickBooks Full Service Payroll (QBFSP) employers in good standing to approve direct deposit by 5 PM PST and still make payroll the next business day. This is an improvement from our previous 2 business day lead time.

As an additional benefit, Intuit's new same day direct deposit is available for QuickBooks Full Service Payroll customers only, allowing users even more time to run their payroll. Employers can approve payroll up to 7 AM PST on a business day for payday. Employees will see their funds post the same day but generally later in the day than payrolls approved one or more days in advance.

Same Day Direct Deposit for QuickBooks Full Service Payroll

Why this matters:

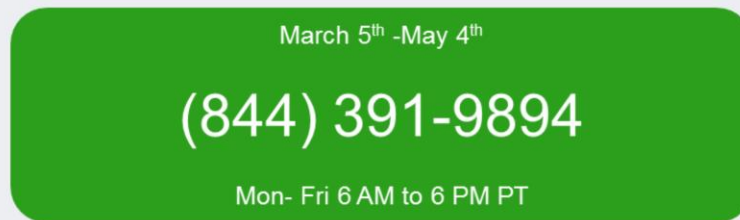
- Employees can be paid in the same day!
- Employers can hold onto money even longer and improve cash flow
- More options when paying employees in cases of emergencies or holidays

IOP4A User ID Changes

To increase security and better protect your client's sensitive data, Intuit Online Payroll for Accountants will resume User ID updates in March.

IOP4A accountant and client accounts will be moved to the Intuit central login credential system.

Dedicated support provided for you and your clients:



Our central authentication system has a single method for resetting passwords. We will use this same Intuit-branded flow for resetting Intuit Online Payroll for Accountant passwords

- Benefits include multi-factor authentication and monitoring of suspicious login activity

(844) 391-9894

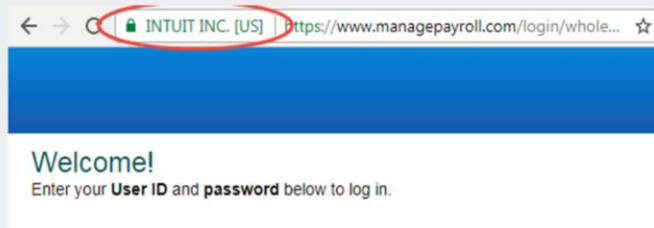
This toll-free phone number will be activated when migrations start on March 5th and will be monitored during our usual support hours, from 6 AM to 6 PM PT, Monday through Friday. If you wish, you may direct your clients to contact us at that phone number for login migration help. We will answer the phones as "Online Payroll" but there may be instances where we must inform your clients during the call that they are moving to Intuit credentials

IOP4A User ID Migrations

Users will be prompted to update their user IDs at login.

There will be times when the Intuit brand is exposed:

- Self service password resets
- Browser security certificate



QuickBooks Community Help Article: Intuit Online Payroll for Accountants: Changes to accountant and client online payroll logins

Legal Privacy Security
© 2017 Intuit, Inc. All rights reserved. Intuit, QuickBooks, QB, TurboTax, ProConnect and Mint are registered trademarks of Intuit, Inc. Terms and conditions, features, support, pricing, and service options subject to change without notice.

<https://community.intuit.com/articles/1599012-intuit-online-payroll-for-accountants-changes-to-accountant-and-client-online-payroll-logins>

QuickBooks Capital

Funding Small Businesses

Presenter

Jacob Chappell

Product Manager

About Jacob

- QuickBooks Capital
- Passion: Solving Problems
- 3.5 years at Intuit
- Mountain View, CA

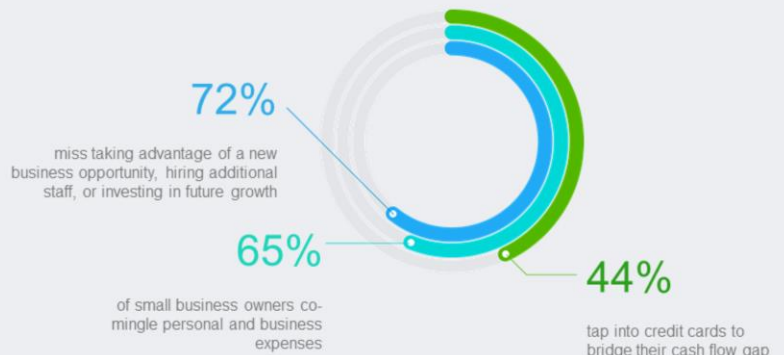


Owners very often experience cash shortages while running their businesses

More than half of small business owners don't feel knowledgeable about their financing options.

Even when they do apply, 2 out of 3 businesses with less than \$1M in revenue don't receive the full amount that they needed.

When they don't get fully funded:



- Half of SMBs go out of business within their first couple of years of operation
- Cash flow is a huge issue, but banks don't want to lend to new companies with no credit background, and alternative lenders can be expensive and not as transparent
- When Customers cannot get funded, they may miss taking advantage of growth opportunities, mingle personal and business expenses, and tap into their personal credit cards to bridge the cash flow gap.
- We aim to lend to small businesses who use QBO

QB Capital: Loan Product Summary

What can you do with up to \$35,000 from QuickBooks Capital?
See what's possible without affecting your personal credit.

Loan amount
\$5,000 ————— \$35,000

Loan purpose
Working Capital

Term
6 months

Credit profile
Fair Average Great

Apply now

Your loan estimate

Amount	\$15,000.00
Total loan cost	\$470.49
Interest	\$470.49
Fees	\$0.00
Total repayment	\$15,470.49

Repayments \$595.02 weekly
Term 26 weeks
Rate 3.14% (APR 12%) ⓘ

[More about our loans](#)

Application pre-filled with info from QuickBooks | Most loans fund in 2 business days | No prepayment penalty or origination fee

[See how it works](#) | [Understand our rates](#) | [Browse FAQs](#)

Loan Amount
\$5,000 - \$35,000

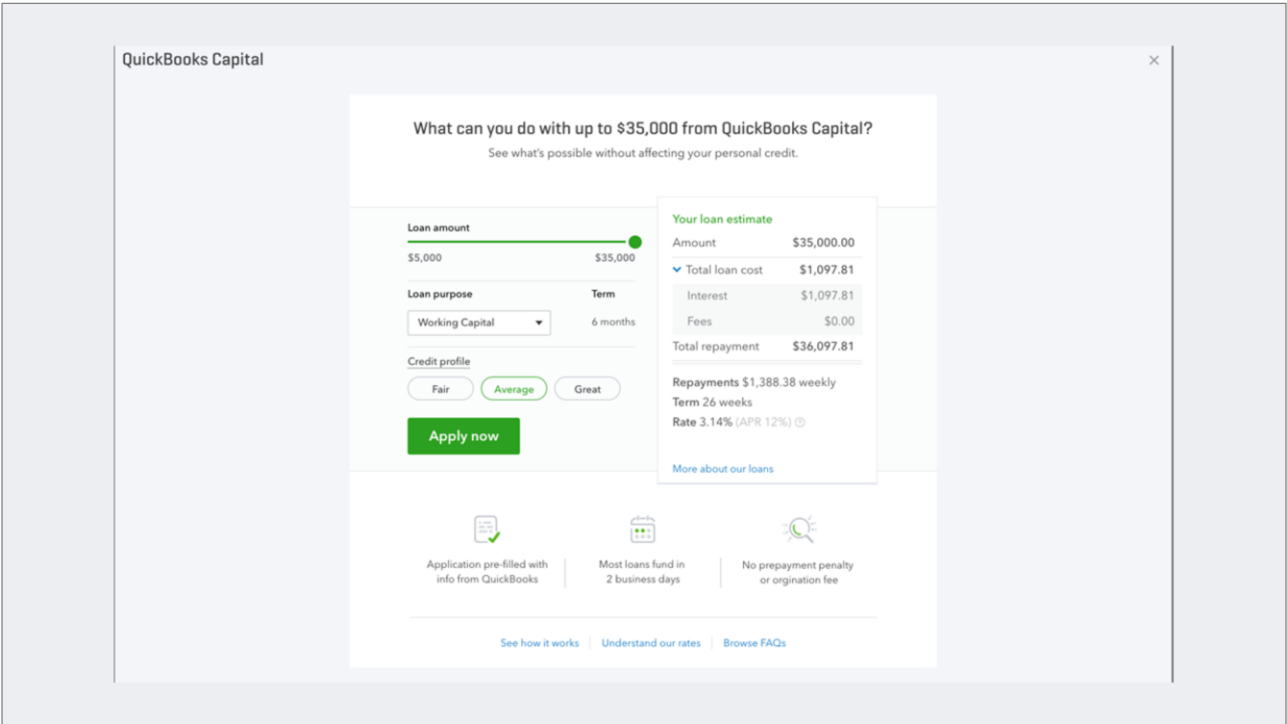
Term
6 Months

APR
10 - 18%

Loan Cost
\$130 - \$1,650

Payback
Weekly Repayment





This begins the application process.

1
Business

2
Owner

3
Bank

Confirm your business info

We'll use your QuickBooks data and these business details to prepare your application.

Legal business name

CHARLIE BROWNS OF TINTON FALLS INC

Phone

9440150988

Address

103 Main St

Apt/Ste/Unit

Apartment, suite, unit, etc.

ZIP code

01952-1110

City

Salisbury

State

MA - Massachusetts

Industry category

Automotive Services

Industry

Automotive Body Repair Shops

Business type

Limited Liability Company

Federal Tax ID (EIN)

112233445

When we underwrite, we'll use data about your company, including your [QuickBooks data](#).

Next

Want to talk? Call 844.832.2903 M-F, 8:00 AM to 7:00 PM, ET

Business

Owner

Bank

Enter your personal details

Our soft credit inquiry won't affect your personal credit score.

First name
Shavonne

Last name
Ferrell

Date of birth
7 - July 18 1946

Personal phone
9940150988

Full SSN **Why do we ask?**
656 - 09 - 0624

Title *optional*
Managing Member

Use business address

Home address
103 Main St

Apt/Ste/Unit
Apartment, suite, unit, etc.

ZIP code
01952-1110

City
Salisbury

State
MA - Massachusetts

By checking this box:

1. You certify that you're authorized to conduct this transaction on behalf of the business.
2. You're providing written instructions to Intuit Financing Inc. under the Fair Credit Reporting act to obtain your credit reports in connection with this application for commercial credit.
3. You've read and agree to the [Consent to Electronic Communications and Electronic Signature](#).
4. You agree that Intuit may pull a Small Business Credit Share Score and share your data (including info about your business and loan performance) with Experian. Experian may share such data with third parties in accordance with applicable laws and regulations. You may not opt out of this sharing. [Learn more](#)

Want to talk? Call 844.832.2903 M-F, 8:00 AM to 7:00 PM, ET

Business

Owner


Bank

Which business bank account should we use?

We'll deposit approved funds and withdraw automatic weekly payments using this account.

Bank routing number
322271627

Bank account number
3171366236



JPMORGAN CHASE
10430 HIGHLAND MANOR DRIVE
TAMPA FL 33610

Is your account info correct? Errors can delay loan deposits by several days.

By submitting my application, I certify that the bank account above is a business bank account, and I authorize Intuit to use my data to underwrite my business.

Married California residents may apply for separate accounts.

[Want to talk? Call 844.832.2903 M-F, 8:00 AM to 7:00 PM, ET](#)



We received your application.

You'll know our best offer by email within 2-4 days. We'll call if we need more info.

Done

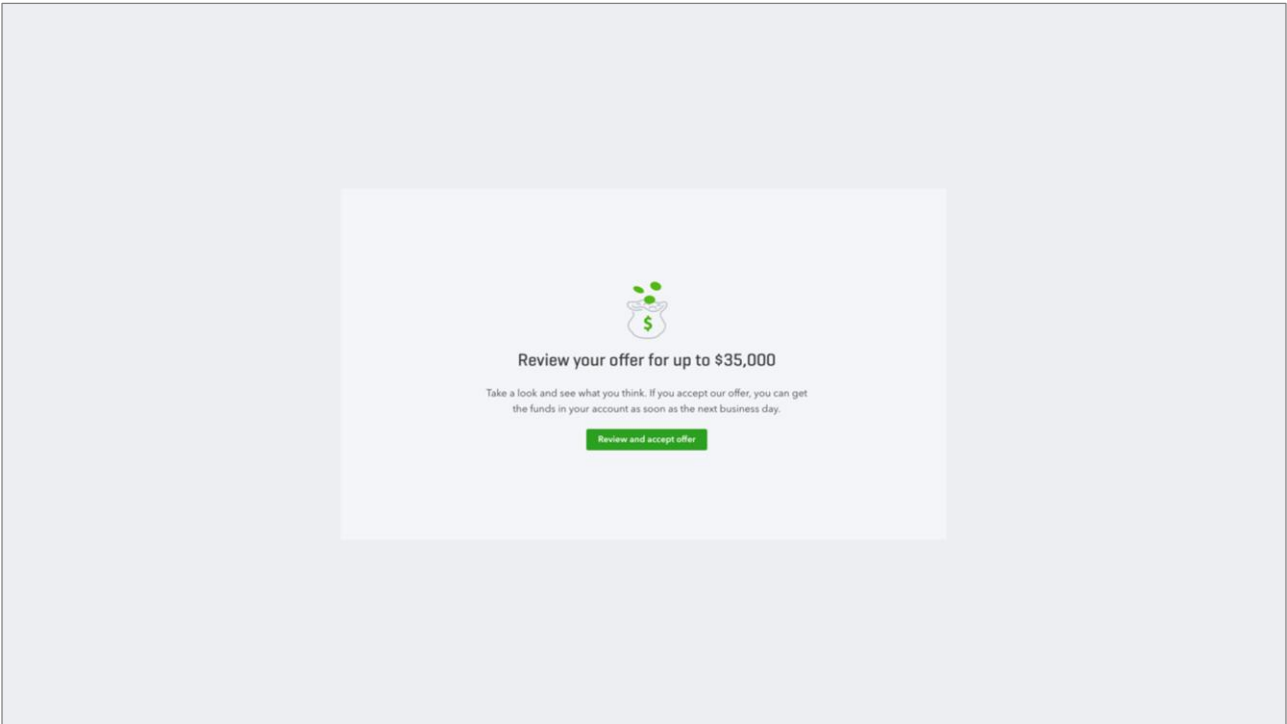
1614fd5fe2254cdaa3638be02ba5801d

All offers are subject to credit review and approval. This offer of credit is for a commercial loan only and is not transferrable. Offers are subject to change. *Fees may apply to missed payments.

Want to talk? Call 844.832.2903

[Privacy](#) | [Terms of Service](#)

QuickBooks Capital is licensed as Intuit Financing Inc. (NMLS # 1136148), a subsidiary of Intuit Inc.
In California, loans are made or arranged under CFL License #6054856



The start of the approval and acceptance process.

- 1 Confirm amount
- 2 Review loan agreement
- 3 Accept

Almost there! Borrow up to \$35,000 for 6 months

Confirm the amount you want




Your offer

Amount	\$35,000.00
▼ Total loan cost	\$1,097.81
Interest	\$1,097.81
Fees	\$0.00
Total repayment	\$36,097.81

Repayments \$1,388.38 weekly
Term 26 weeks
Rate 3.14% (APR 12%) ⓘ

[More about our loans](#)

- 

 Confirm amount
- 2

 Review loan agreement
- 3

 Accept

Review your loan agreement

[Download your agreement](#)

QuickBooks Business Loan Agreement

Agreement Once you've read and agreed to the terms we'll deposit the funds into the account listed below. You'll get 2 confirmation emails—one with a copy of the loan agreement and another when the funds are successfully deposited into your account.

Bank Account Chase Bank, Checking - x3479, Savings - x2499

Borrower: <BUSINESS NAME>
 Business Address: <ADDRESS>
 Owner Name: <OWNER NAME>
 Personal Guarantor: <GUARANTOR NAME>

Lender: <LENDER NAME>
 Mailing Address: <MAILING ADDRESS>
 Customer Service: <SERVICER'S TELEPHONE NUMBER>

Loan Amount: <AMOUNT>
 Interest Rate: <XX%>
 Late Fee: <AMOUNT>
 Returned Check Fee: <AMOUNT>
 Loan Term: <XX> <MONTHS/WEEKS>

Loan Account: <ACCOUNT NUMBER>
 Date: <DATE>
 <Weekly><Monthly> Payments (XX): <AMOUNT>
 Final Payment (1): <AMOUNT>

1. INTRODUCTION. This Business Loan Agreement ("Agreement") governs your QuickBooks Business Loan ("Loan"). Please read it and keep it for your reference. In this Agreement, the words "you," "your" and "Borrower" mean the borrower named above, its successor, and assigns and, includes, as appropriate, the owner named above. The word "Lender" means the Lender named above and its successors and assigns. The word "Guarantor" means each individual that provides a personal guaranty for this Loan as named above. This Agreement includes an Arbitration Agreement and California

Want to talk? Call 844.832.2903
 M-F, 6:00 AM to 4:00 PM, PT

- ✓ Confirm amount
- ✓ Review loan agreement
- ✓ Accept

Get ready to celebrate - the \$35,000 is almost yours

Loan Summary

Loan Amount	\$35,000.00	Term	6 Months
Total Interest Cost	\$1,097.81	Rate	3.14% (APR 12.00%)
Total Repayment	\$36,097.81	Weekly Payment	\$1,388.38

Just need your consent and it's official

- 1. You consent to be bound by the terms of the Loan Agreement which includes your consent to electronic communication signature and your rights in the event of a dispute.
- 2. You agree to be personally and unconditionally liable for this loan. You agree we may share your loan performance information with credit bureaus.

Back **Get Funded**

quickbooks


Need to get in touch? Call 844.832.2910

Capital

Your loan summary [Loan document](#) [Show details](#)

\$14,876.85 PAID **\$10,757.93** BALANCE

15 of 26 payments paid

Aug 2017  Feb 2018

Next auto-payment

Amount \$991.79
Date 02/12/2018
Frequency Weekly on Mondays

[Make a one-time payment](#)

Payment history Data is current as of the last 24 hours and assumes future payments are made on time.

DATE	PAYMENT	PRINCIPAL	INTEREST	BALANCE
11/27/2017	\$991.79	\$964.82	\$26.97	\$10,757.93
11/20/2017	\$991.79	\$962.61	\$29.18	\$11,722.75
11/13/2017	\$991.79	\$960.40	\$31.39	\$12,685.36
11/06/2017	\$991.79	\$958.19	\$33.60	\$13,645.76
10/30/2017	\$991.79	\$955.99	\$35.80	\$14,603.95
10/23/2017	\$991.79	\$953.80	\$37.99	\$15,559.94
10/16/2017	\$991.79	\$951.61	\$40.18	\$16,513.74
10/09/2017	\$991.79	\$949.42	\$42.37	\$17,465.35
10/02/2017	\$991.79	\$947.25	\$44.54	\$18,414.77
09/25/2017	\$991.79	\$945.07	\$46.72	\$19,362.02
09/18/2017	\$991.79	\$942.90	\$48.89	\$20,307.09
09/11/2017	\$991.79	\$940.74	\$51.05	\$21,249.99
09/04/2017	\$991.79	\$938.58	\$53.21	\$22,190.73
08/28/2017	\$991.79	\$936.42	\$55.37	\$23,129.31
08/21/2017	\$991.79	\$934.27	\$57.52	\$24,065.73
Total	\$14,876.85	\$14,242.07	\$634.78	

A couple of months after approval, tracking the loan payments.

The screenshot shows a mobile application interface. On the left is a dark sidebar with several icons: a blue gear, an orange hand with a lightning bolt, a grey hand, a grey question mark, and a grey document icon which is circled in red. The main content area has a light grey background. At the top right of this area is the text "Handouts - 1". Below this is a white square containing a blue square with a white letter "P". Underneath the square is the text "In_The_Know_...dout.pptx" and "7 MB".



Webinar Links

Find-A-ProAdvisor - <https://www.firmofthefuture.com/content/5-tips-to-maximize-your-new-find-a-proadvisor-profile/>

QuickBooks Training – www.qbtrainingevents.com

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

<https://quickbooks.intuit.com/> > Under: Learn & Support > QuickBooks Tutorials

Thanks for Attending

Accountants Help Hub

YouTube channel

Accountant blog

Online Feature Request website

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.

The links for these and other resources will be in the follow up email sent after the conclusion of this training.

This event has been recorded, and get the recording information out to you in few days when it becomes available.

Thank You for Attending Today!
Have a Wonderful Rest of Your Day.



Thank you for attending.
Please give us feedback regarding this training.
Let us know what you liked about this training.
Also please let us know what you would like to see in future “In The Know” update trainings.
We look forward to seeing you here with us next month.
Have fantastic rest of your day.
Good Bye.