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

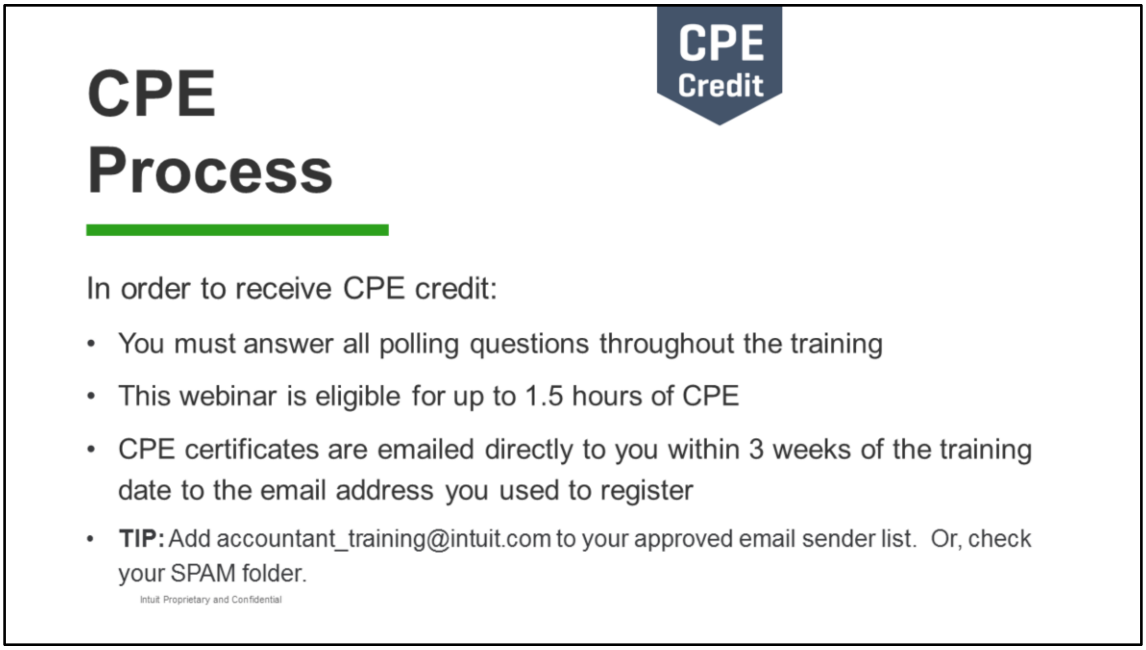
Find-a-ProAdvisor Updates

Payroll Updates

QuickBooks Capital

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

CPE Credit & Learning objectives……..



Need to insert a CPE keyword slide in this deck

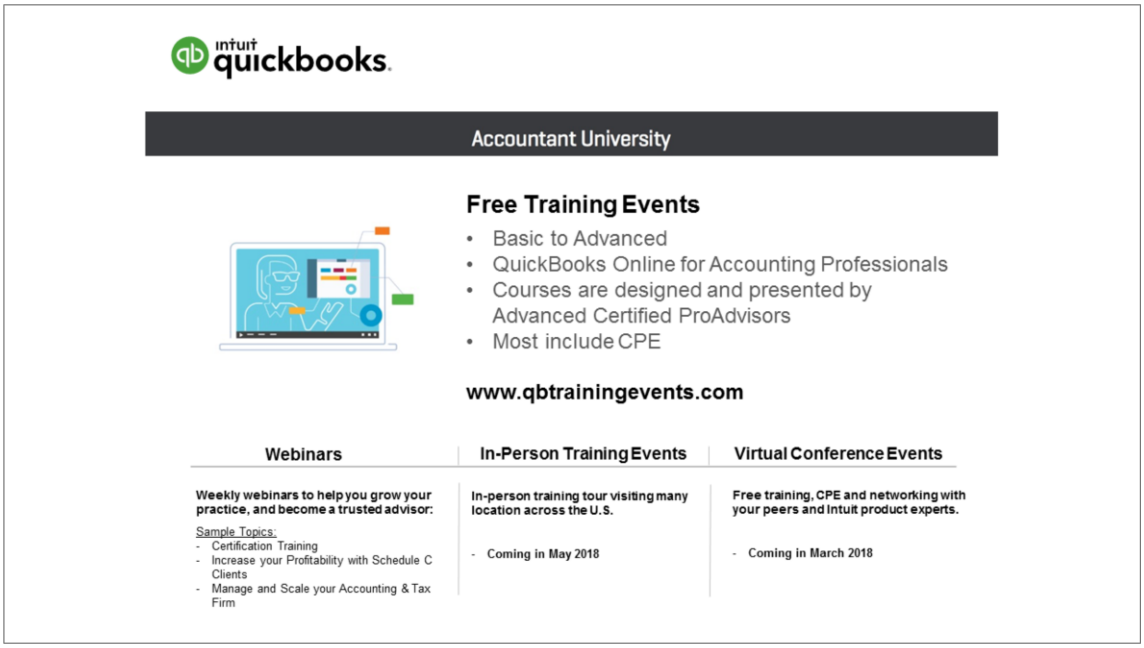
[Read the bullets, then add these tips]

- 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

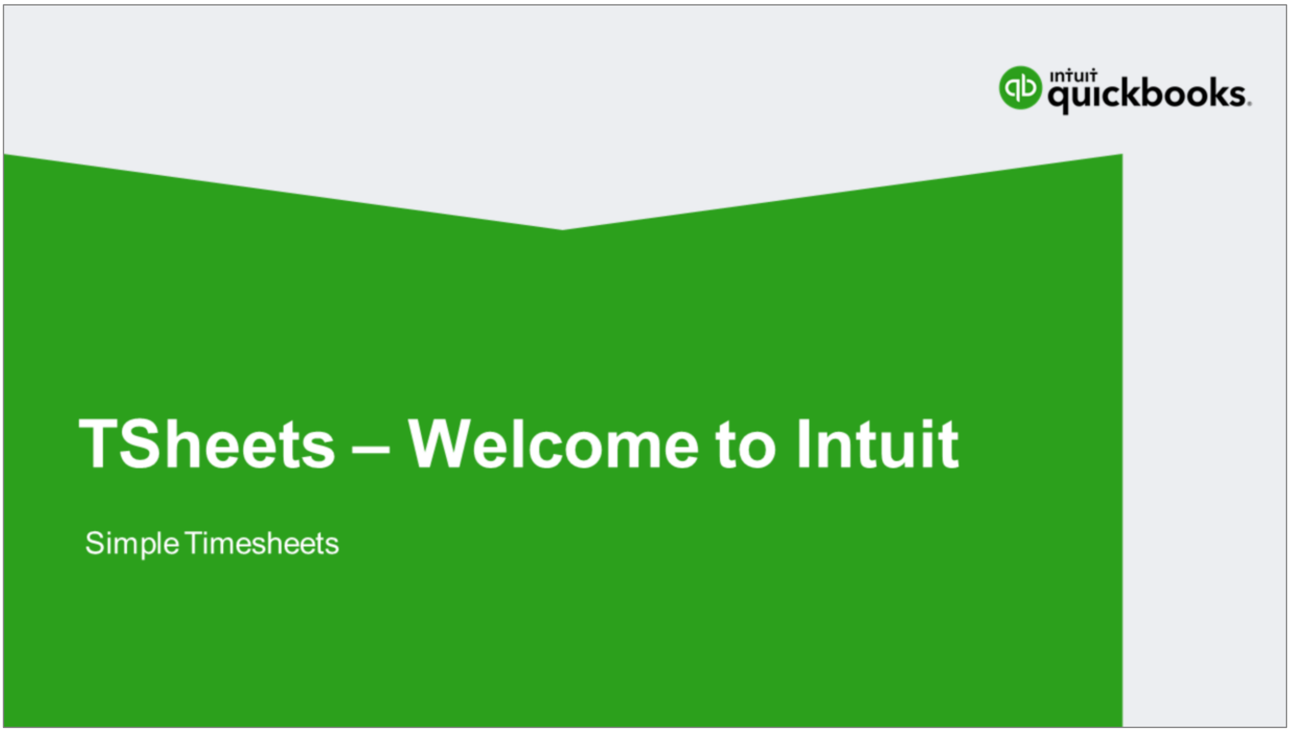
February 6, 2018

- 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.



www.qbtrainingevents.com

Link in the webinar follow up email.



TSheets was acquired by Intuit January 11^{th} 2018

Presenter

Dan Buckingham

TSheets Business Development I 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

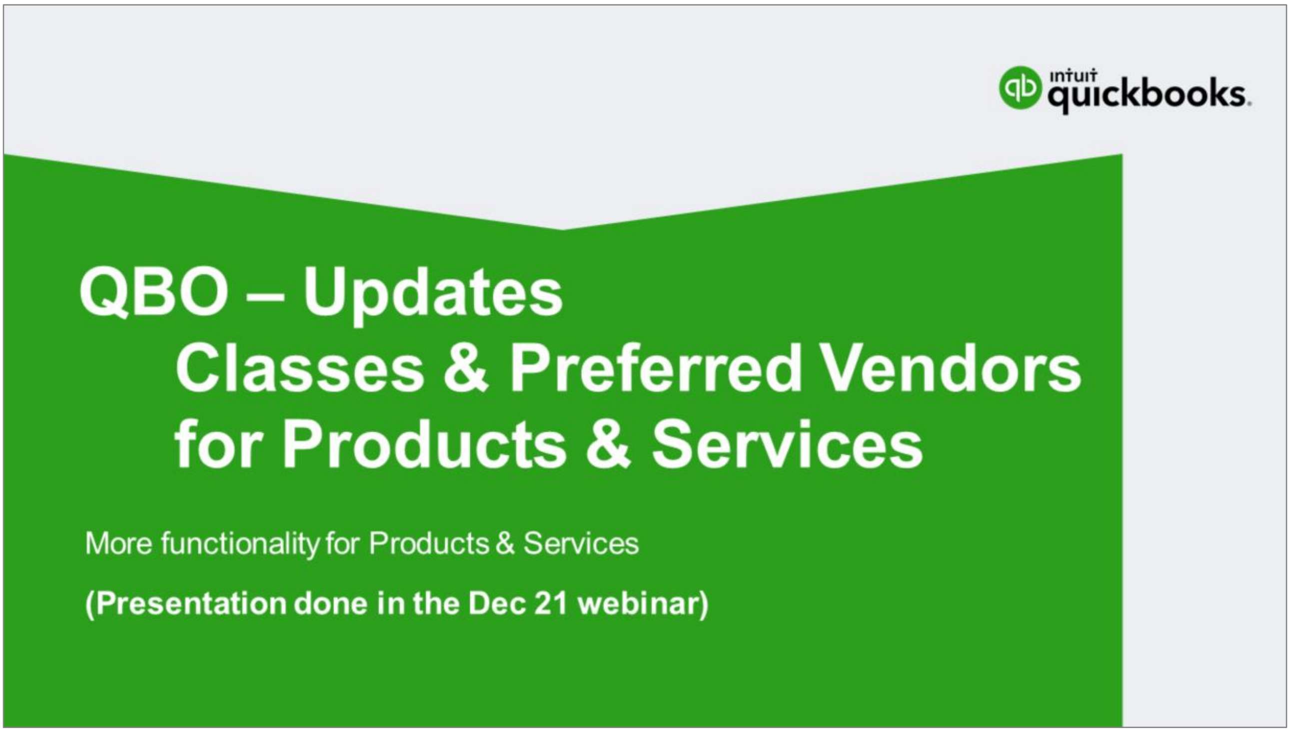
TSheets by QuickBooks: Modern Time Capture

- **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

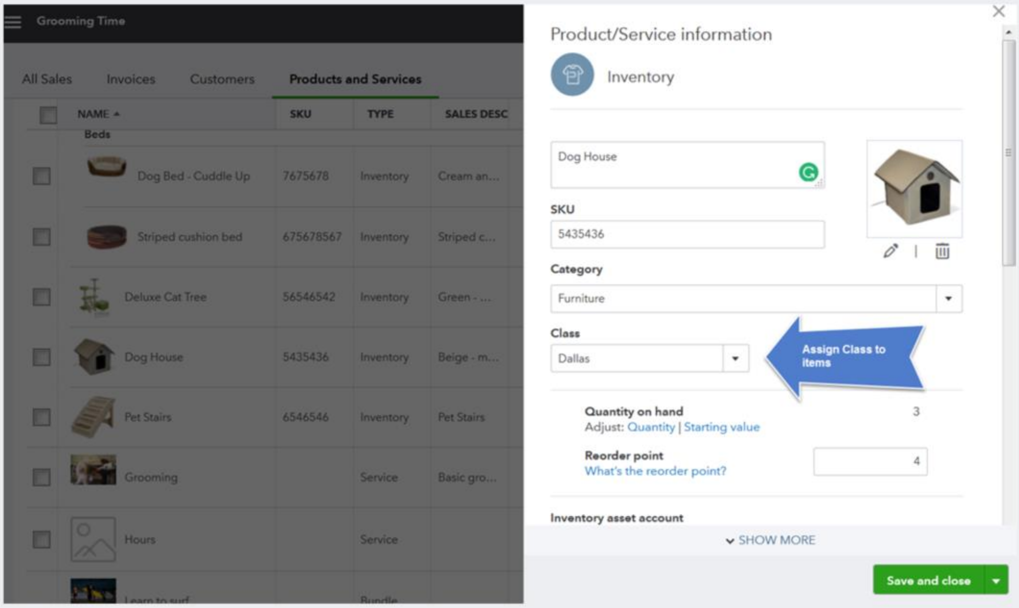
Register for the Live Certification:
https://register.gotowebinar.com/rt/8202679275436363523

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



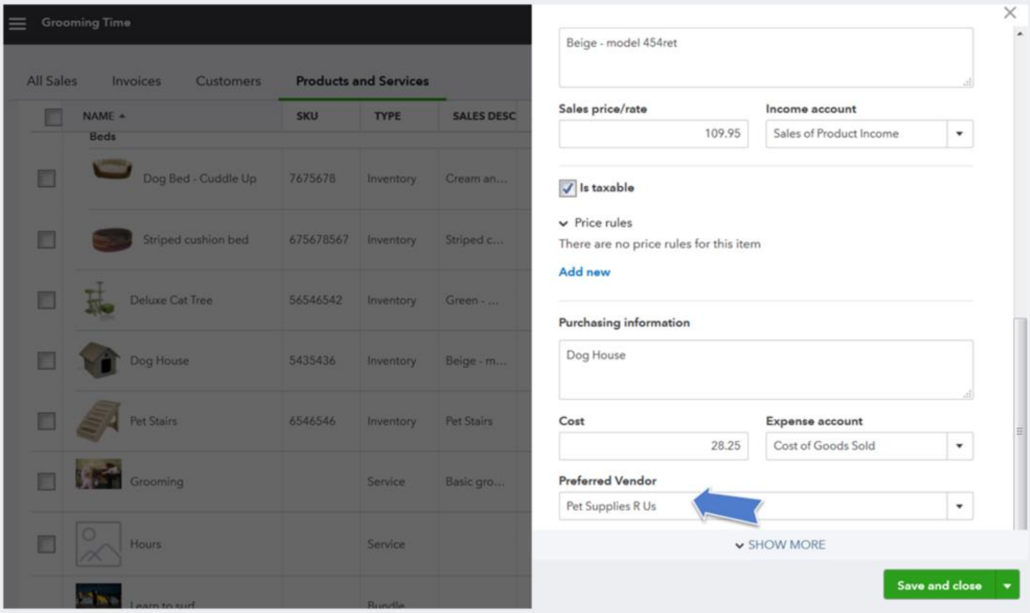
The recording of the Dec 21 demo can be found here:
https://community.intuit.com/articles/1463613-quickbooks-in-the-know-webinar-hub

Classes can now be assigned to Items



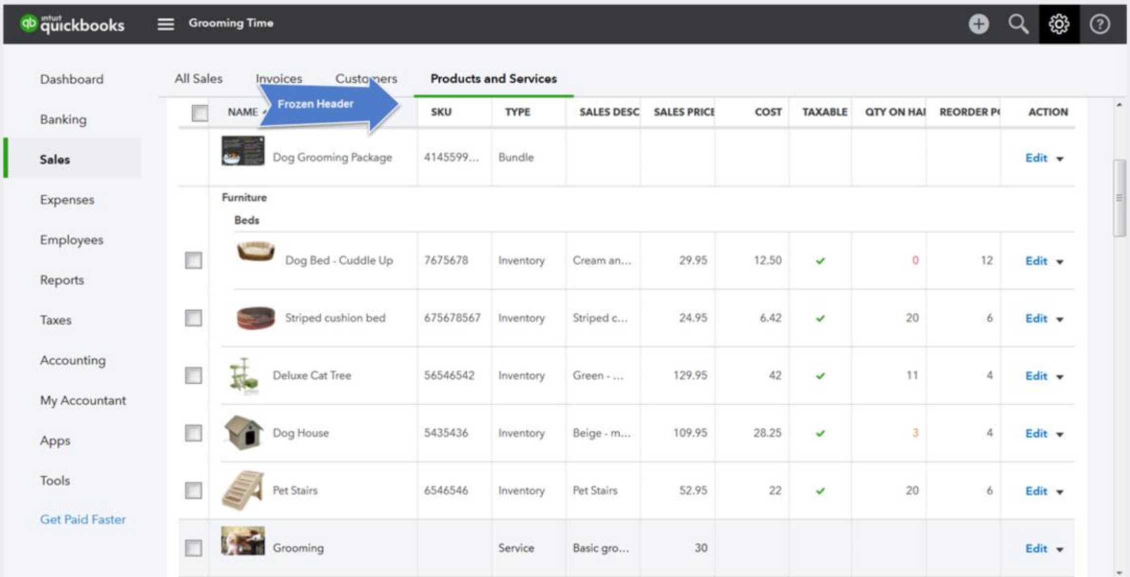
We have added Class option to Products & Services item.

Preferred vendor added to Items



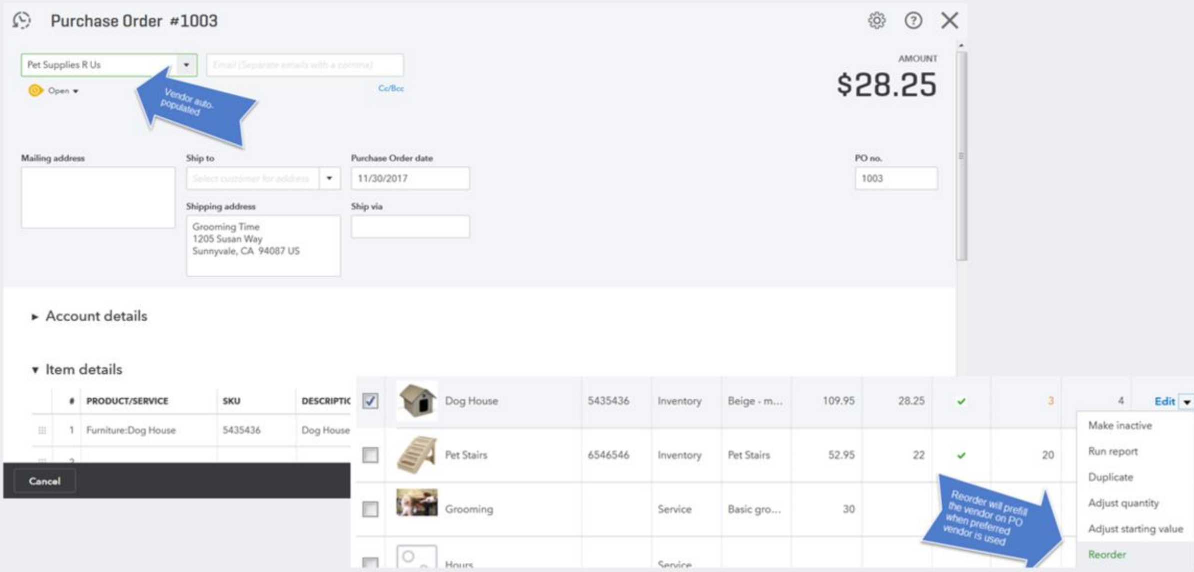
We have added "Preferred Vendor" option to Products & Services.

Frozen Headers added to Products and Services



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



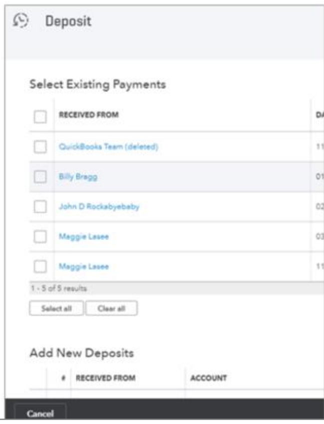
QBO – Updates
Bank Deposit Screens

Clarifying the terminology on the Bank Deposit Screens.

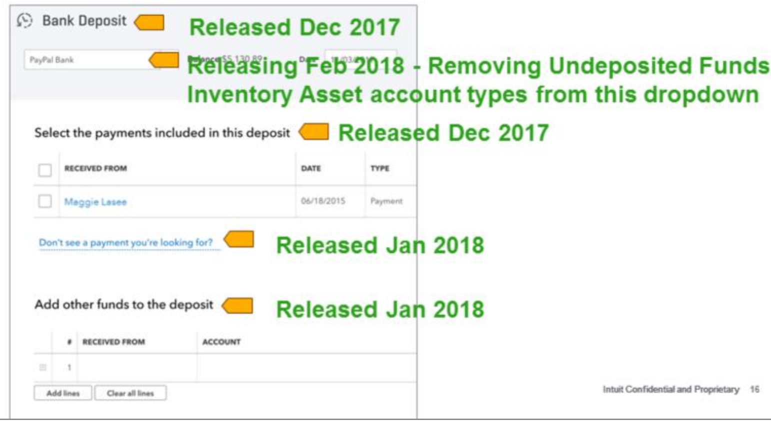
Building: Bank Deposit - quick changes

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



New State

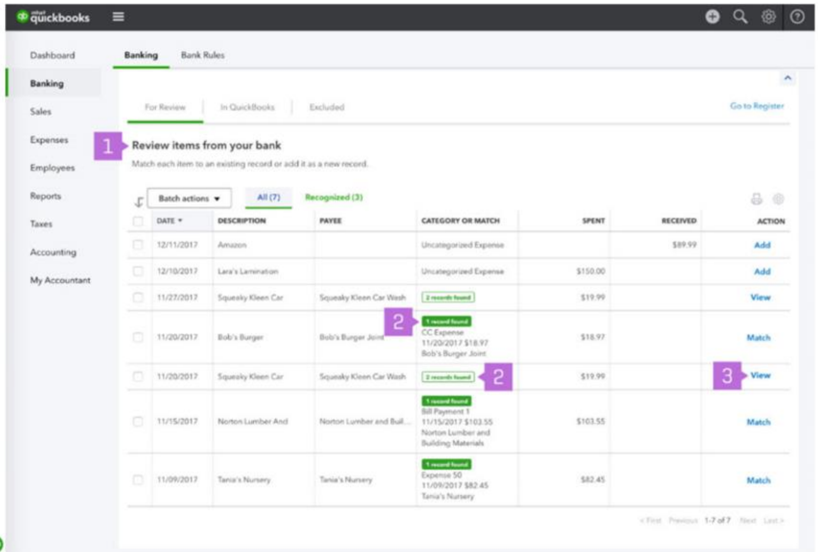


Shows the release timing of these changes.

QBO – Updates
Bank Download Screen

Clarifying the Bank Transaction Download Screen.

Banking Match label update



- Solving for duplicates due to Add 1st workflow

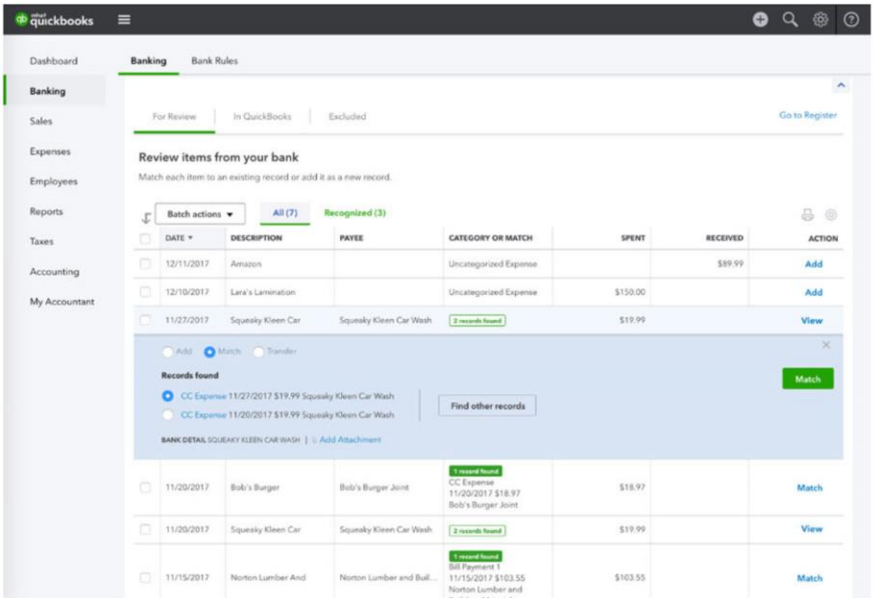
1. More descriptive label to let customers new to the QBO understand what they are supposed to do with this workflow. BTW, we've changed this so now it's a blue dismissible box so it doesn't take up additional space.

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



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


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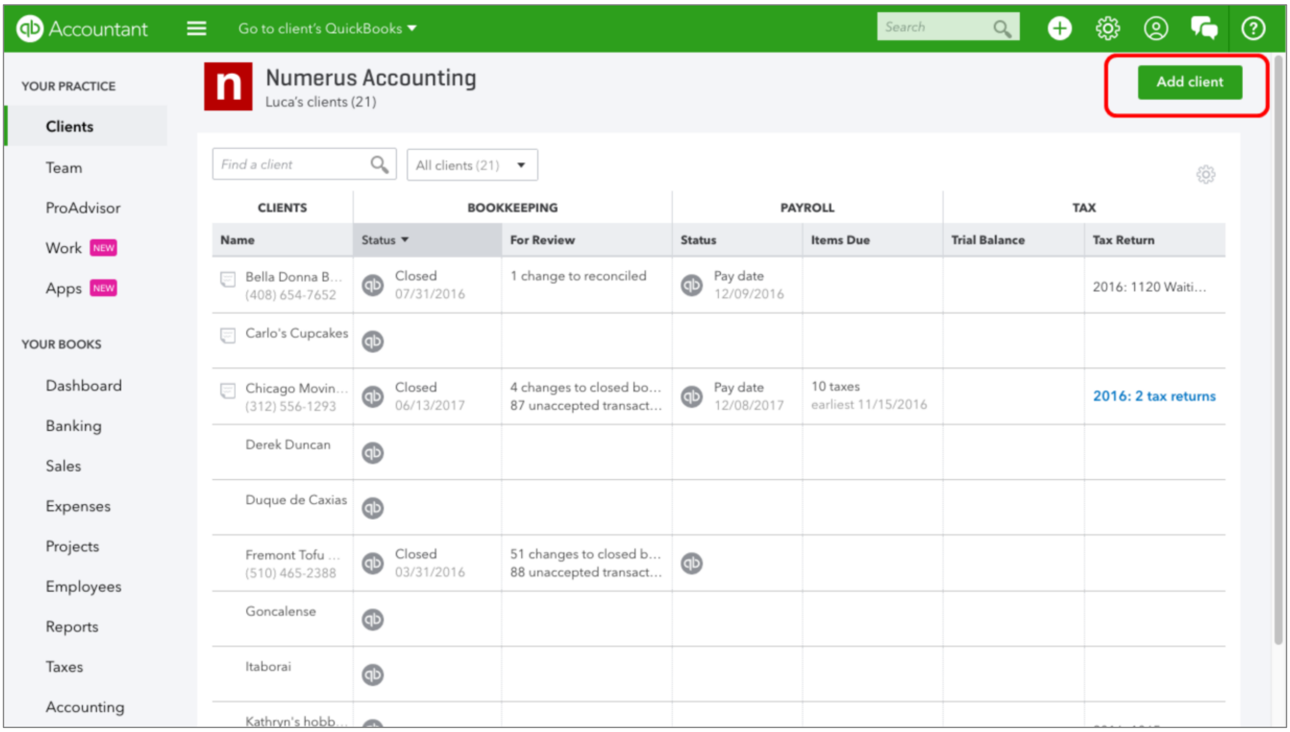
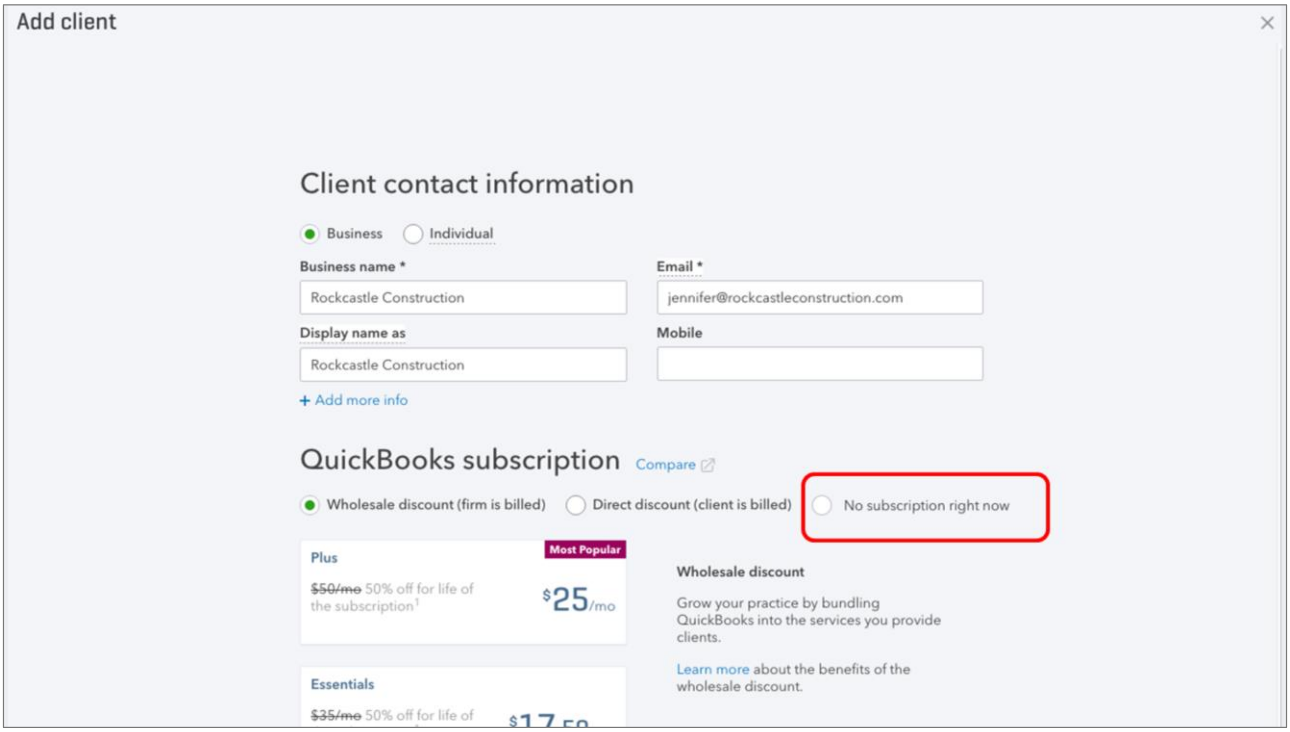
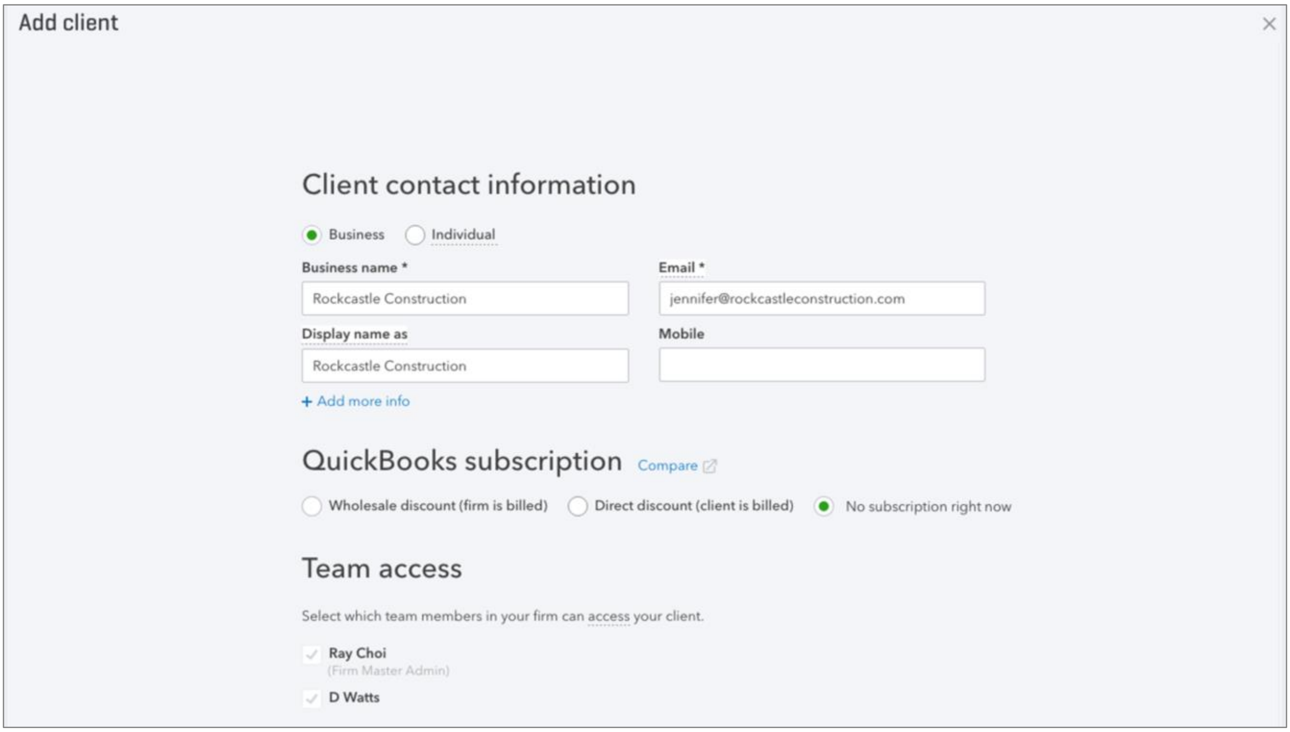
QBOA – Updates
New Client - Without QBO
Quickly add a New Client without QBO.


Accountant
Go to client's QuickBooks
Search
YOUR PRACTICE
Clients
Team
ProAdvisor
Work NEW
Apps NEW
YOUR BOOKS
Dashboard
Banking
Sales
Expenses
Projects
Employees
Reports
Taxes
Accounting
Numerus Accounting
Luca's clients (21)
Add client
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
Closed
07/31/2016
1 change to reconciled
Pay date
12/09/2016
2016: 1120 Waiti...
Carlo's Cupcakes
Chicago Movin...
(312) 556-1293
Closed
06/13/2017
4 changes to closed bo...
87 unaccepted transact...
Pay date
12/08/2017
10 taxes
earliest 11/15/2016
2016: 2 tax returns
Derek Duncan
Duque de Caxias
Fremont Tofu ...
(510) 465-2388
Closed
03/31/2016
51 changes to closed b...
88 unaccepted transact...
Goncalense
Itaborai
Kathryn's hobb...



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



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

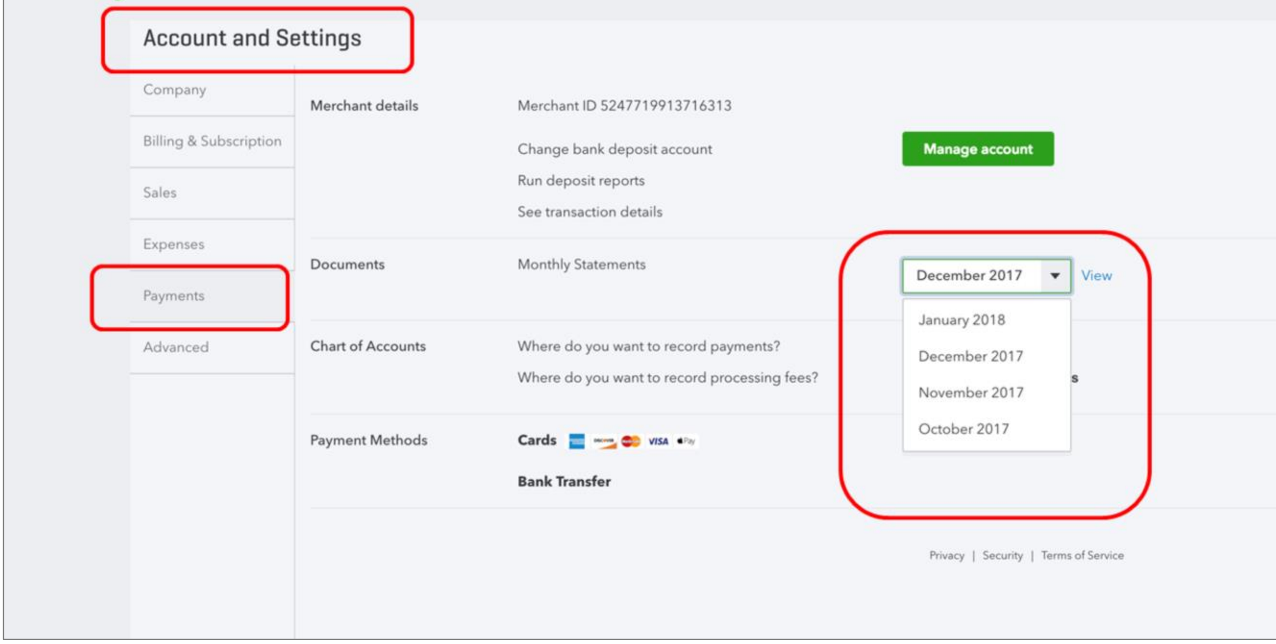
intuit quickbooks

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



Statements View

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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
Gross Transaction Amount (includes sales & returns)	Total Fees Charged		Net Transaction Amount

Activity Summary

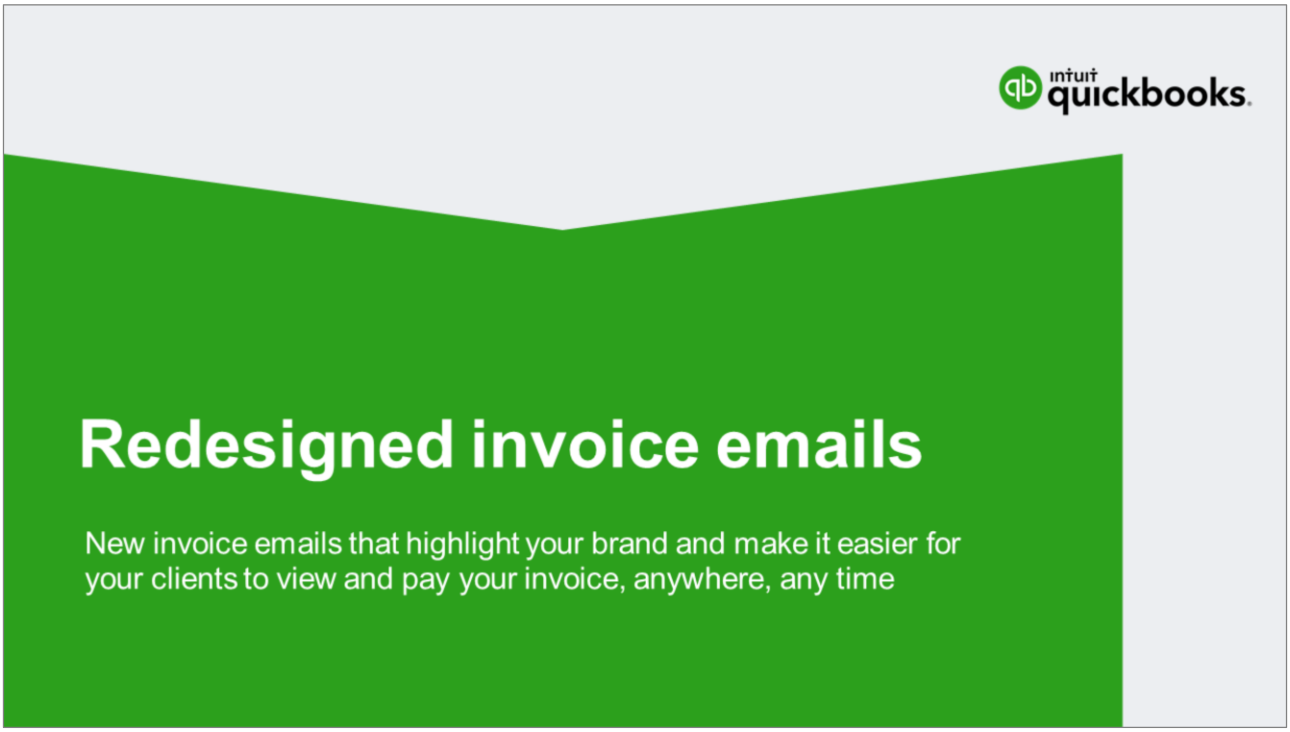
Date	Sales		Returns		Fees Charged	Net Sales
	Count	Amount	Count	Amount		
06-Dec	2	$25.00	0	$0.00	$0.25	$24.75

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



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

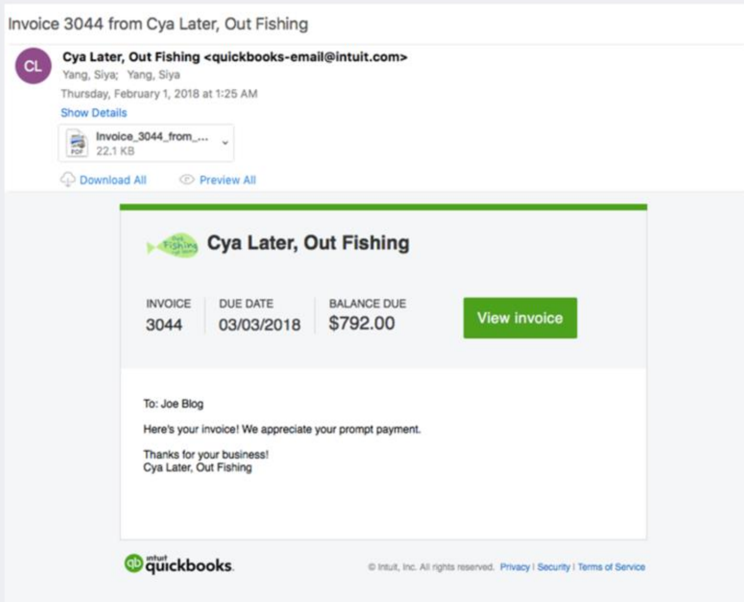
Siya Yang

Product Manager

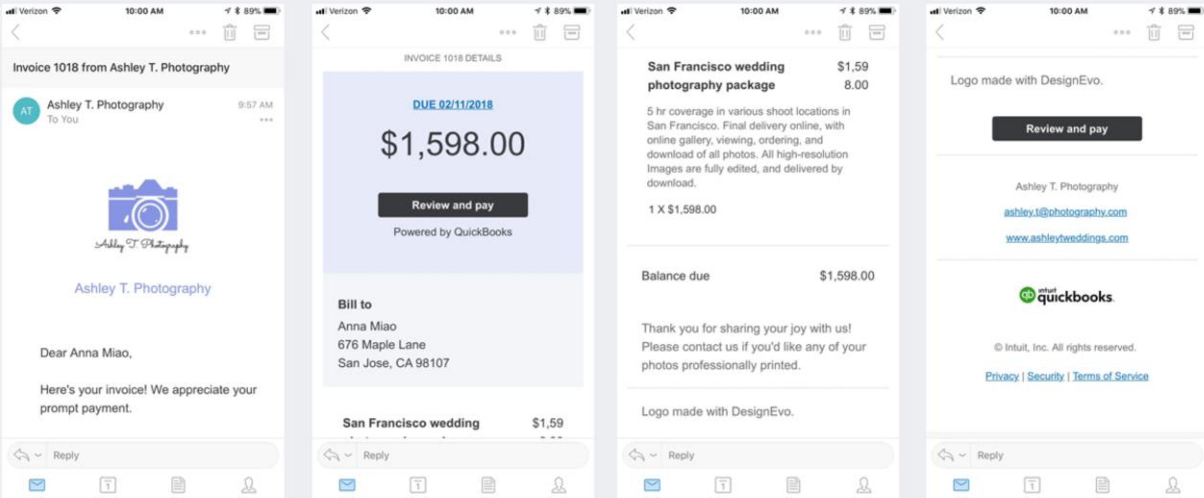
About Siya

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

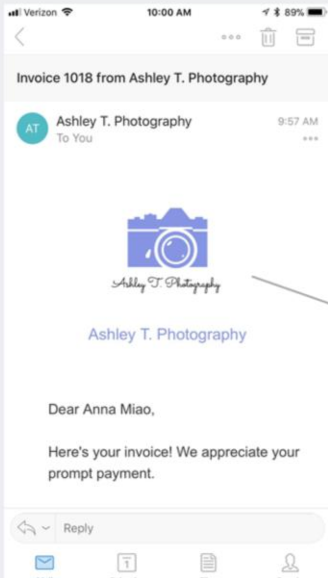
Current invoice emails



New redesigned invoice emails



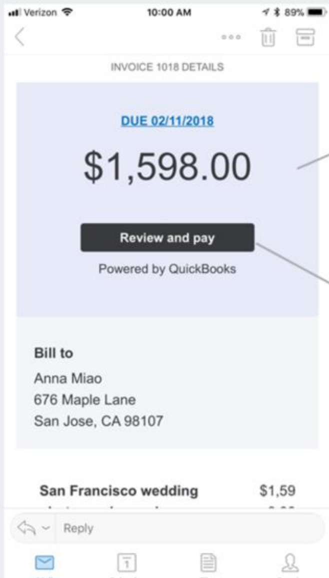
New redesigned invoice emails (1)



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

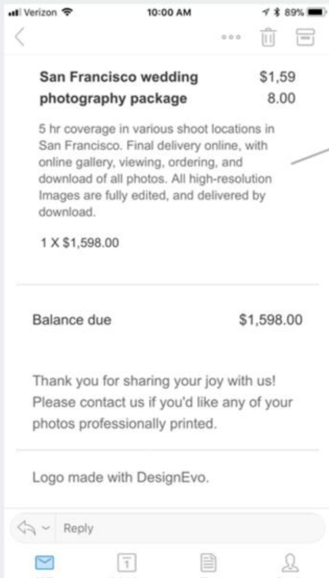
New redesigned invoice emails (2)



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

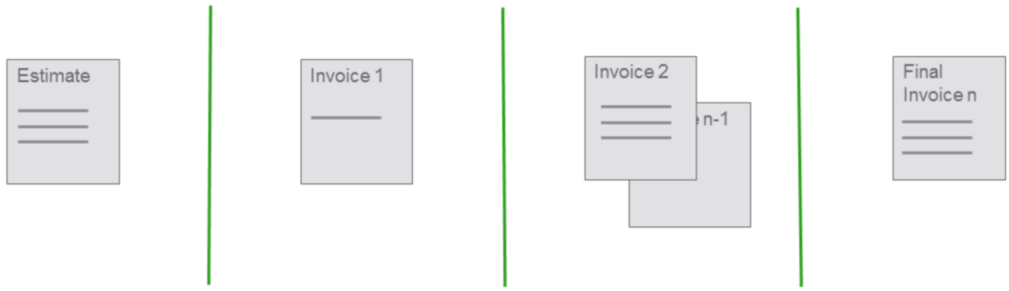
What is Progress Invoicing

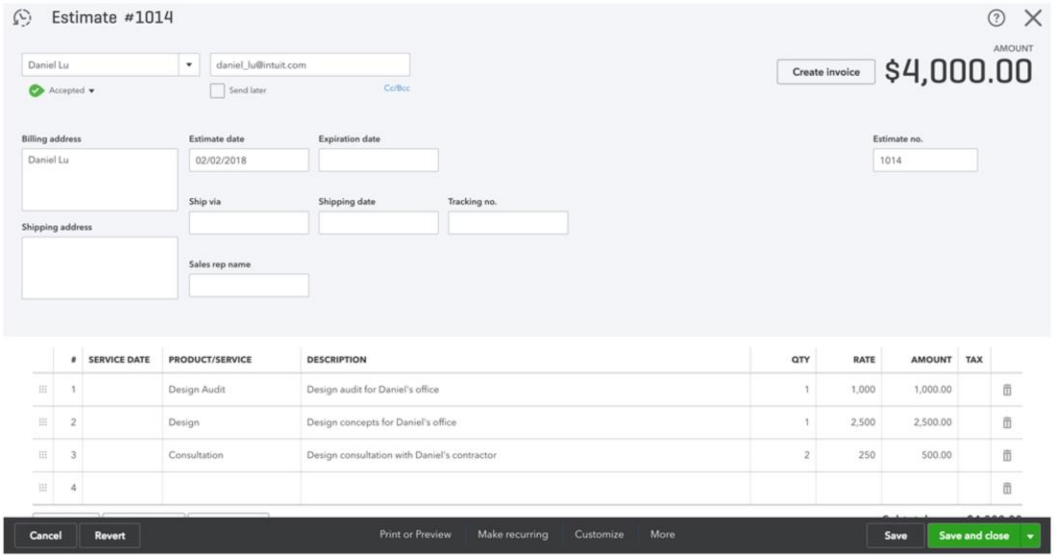
Progress invoicing is the 'incremental' invoicing of work by small businesses.

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



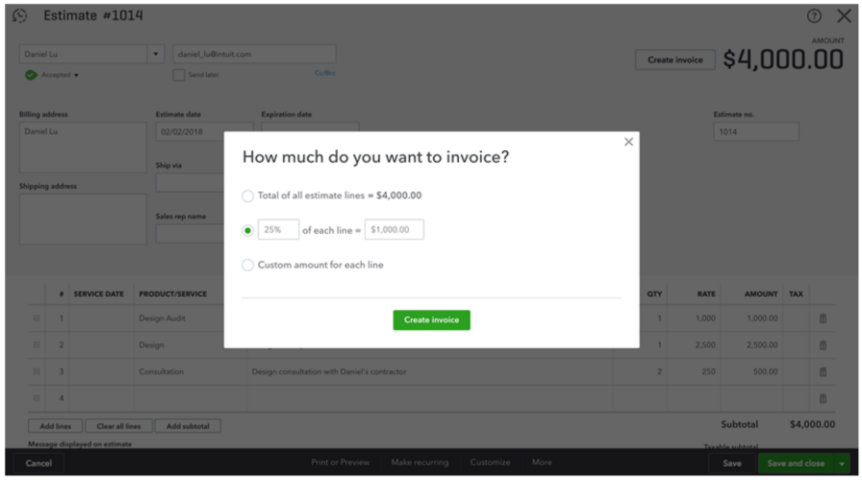


QuickBooks Online supports progress invoicing starting from an estimate. Click on ‘create invoice’ to create the progress invoice.

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



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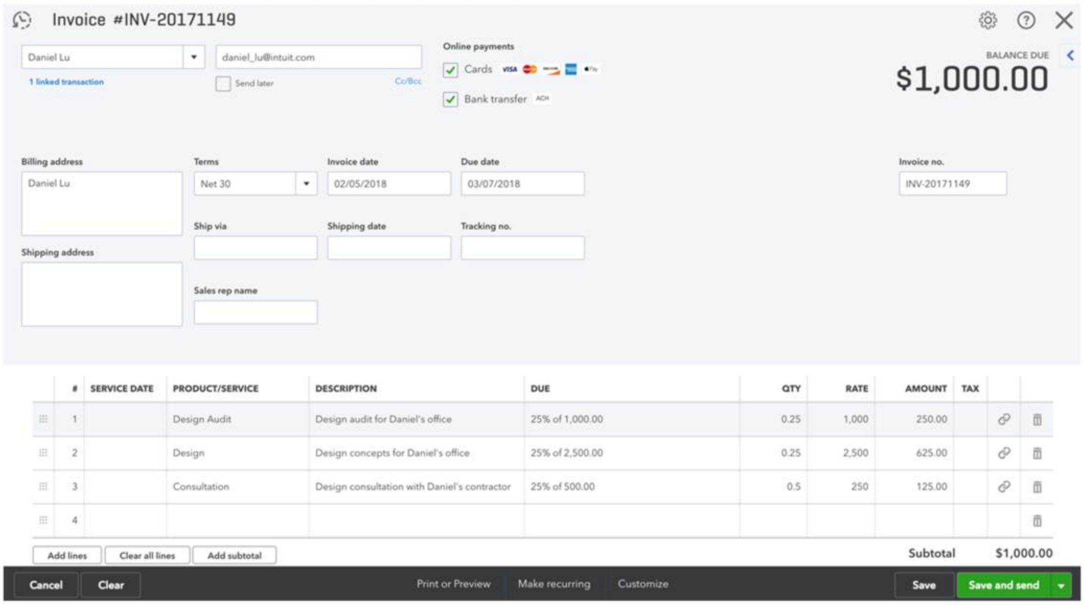

The 'Due' column in the line item table describes how much portion of each line item amount is being invoiced.

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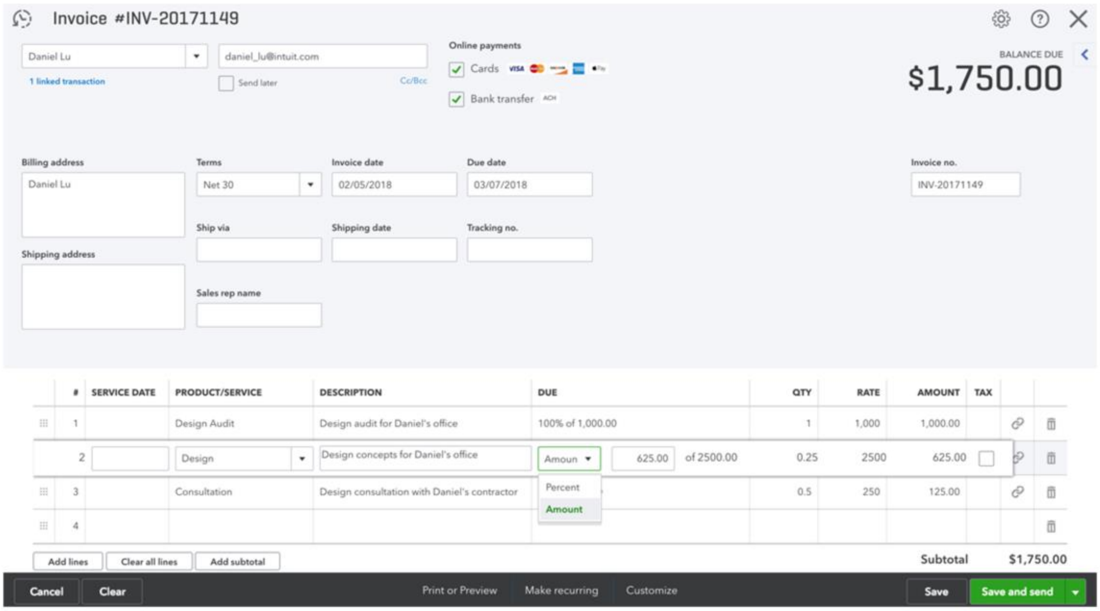

You can change the amount or percentage on each line item by clicking within the due column on a line item. Options exist to switch between the percentage or the amount options.

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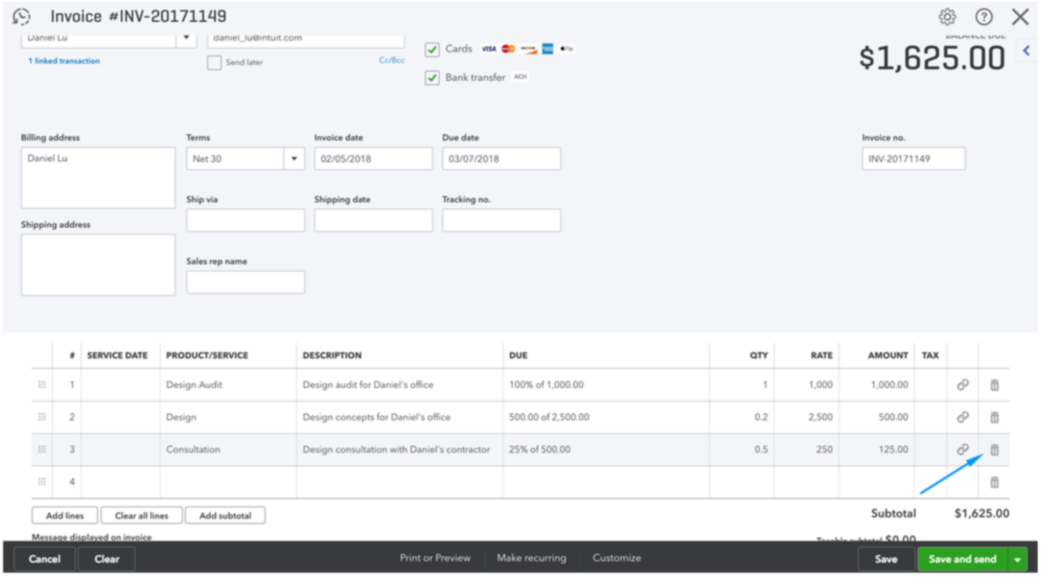

You can also remove a line item using the ‘trash’ icon (see highlighted with blue arrow).

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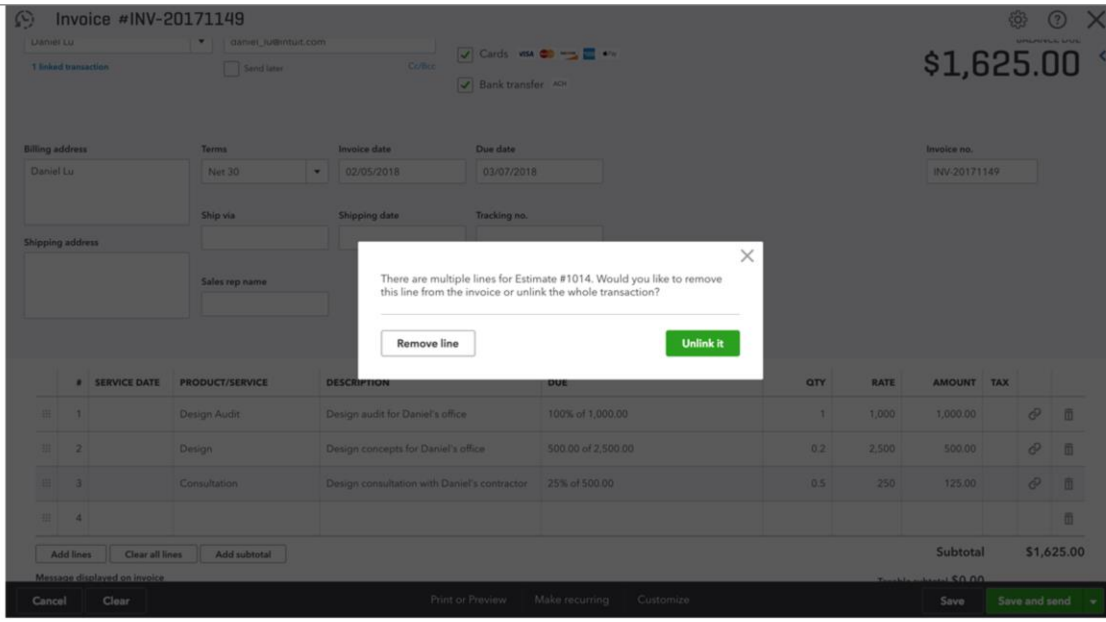

Clicking on 'remove line' removes the line from the progress invoice that you might want to hide from the invoice (and your client).

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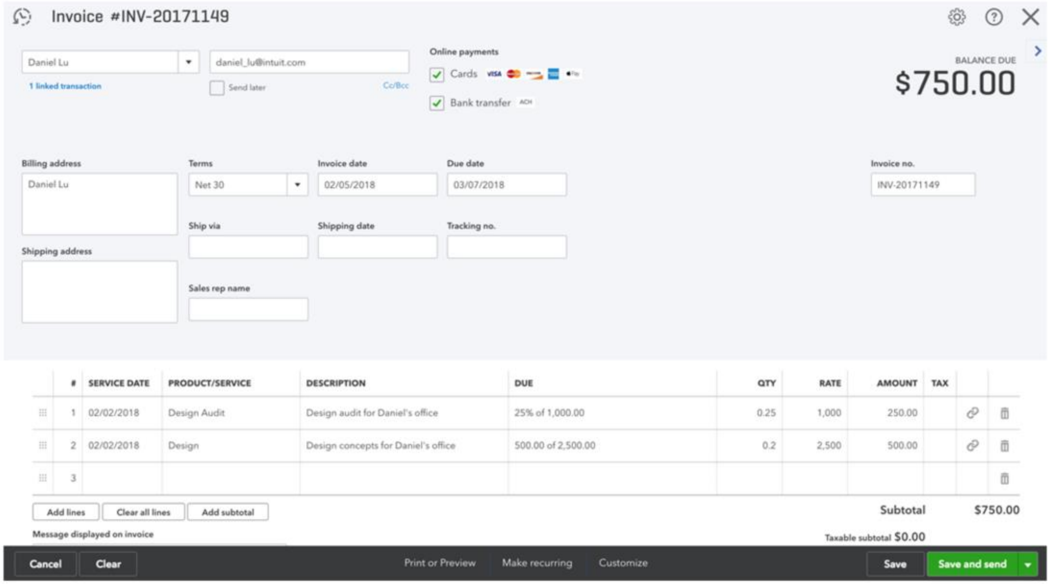

You can mix presentation formats of line items on the invoice. For instance, some items can be percentage based vs. some items can be based on dollar amounts.

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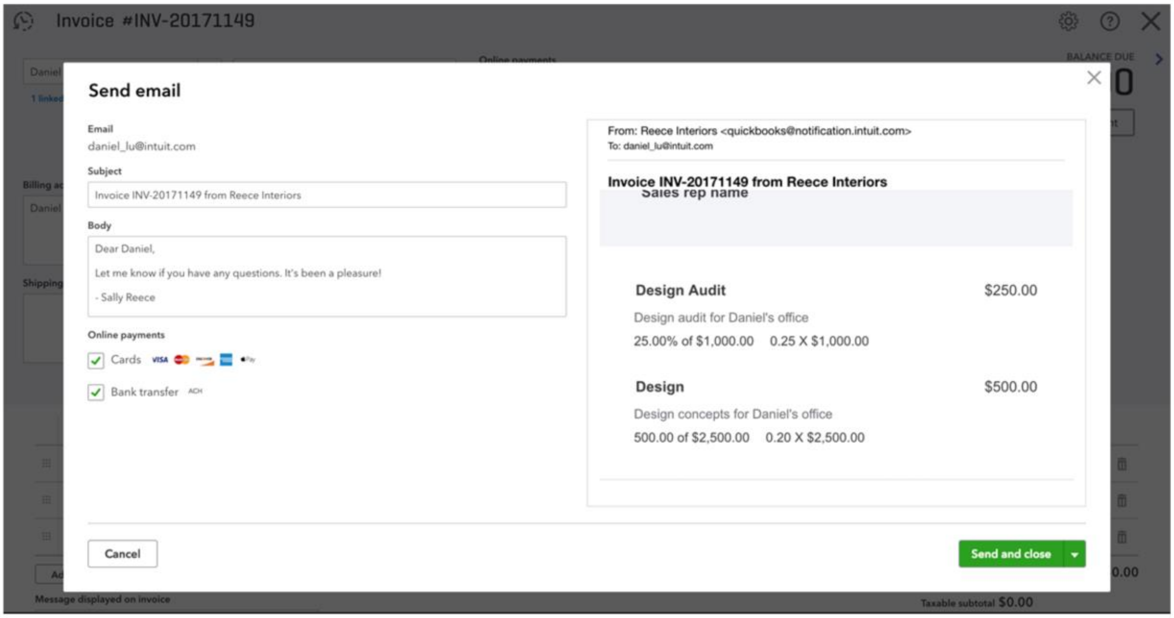

Once your invoice is ready, you can check out how the progress information (partial percentage or partial amounts) is displayed in the email preview experience.

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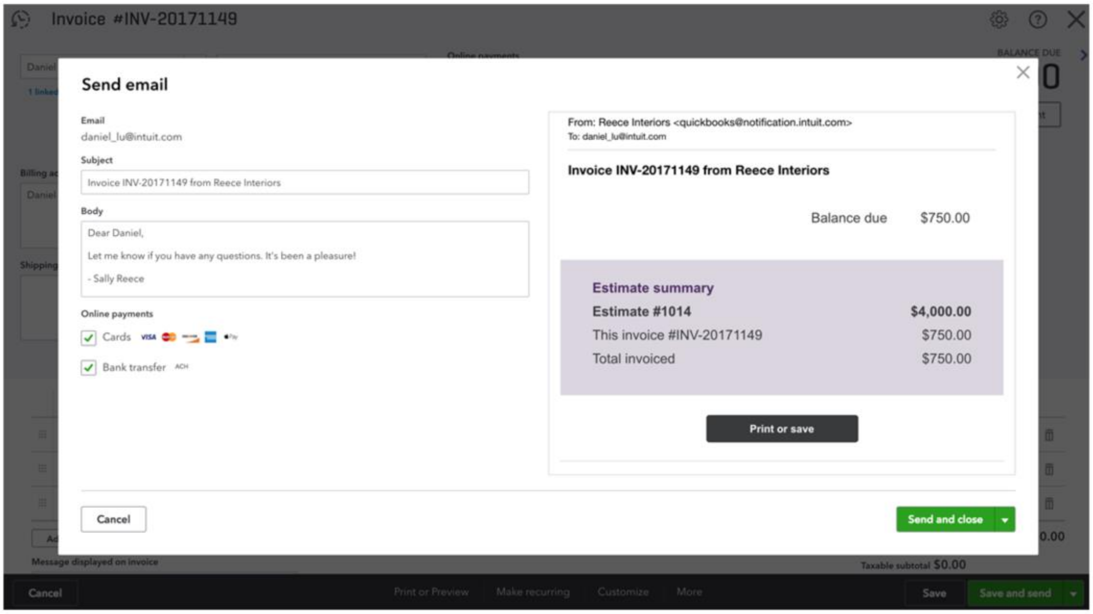

Another handy feature inside the email preview is the ability to share the 'Estimate Summary' with the client so they know how much they have been invoiced for so far.

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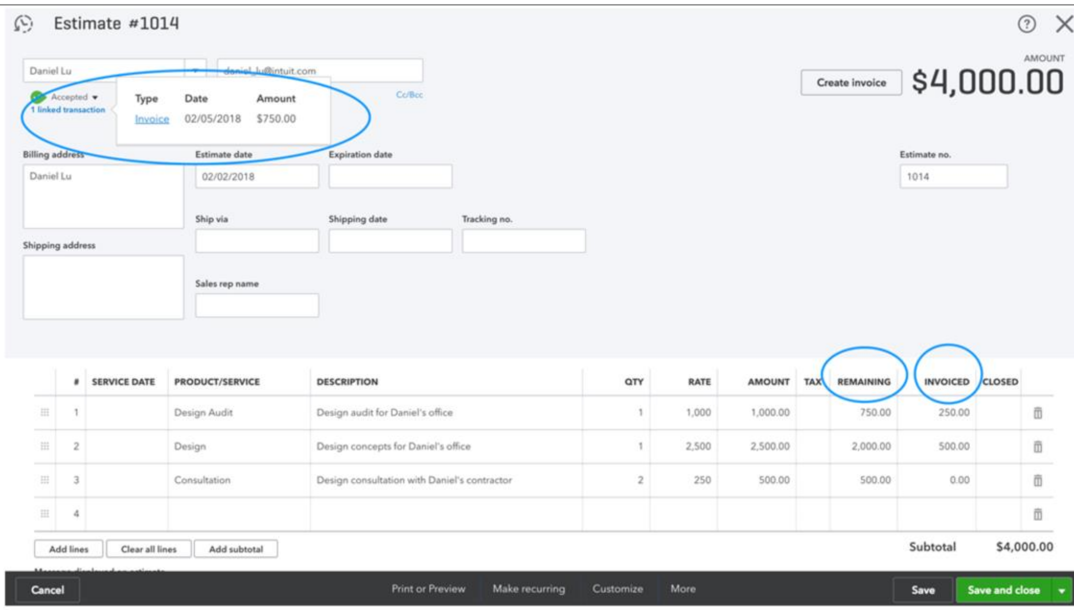

All progress invoices get linked to the estimate so you can check what has been invoiced so far and date information. You can also review from the estimate how far each line item has been invoiced.

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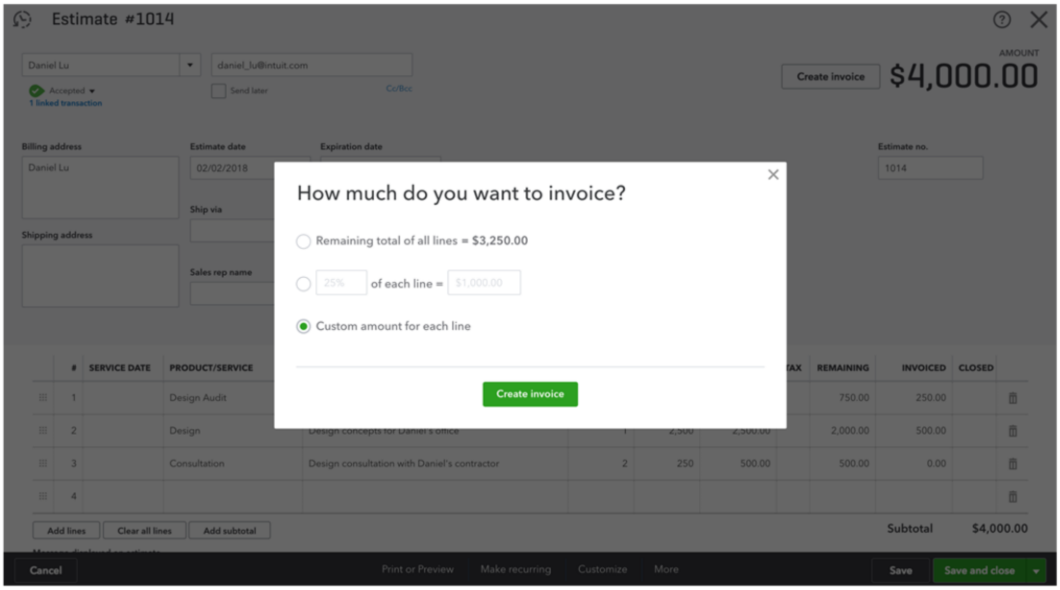

Creating a custom amount for each line means the created invoice will not pre-fill any partial amount or percentage

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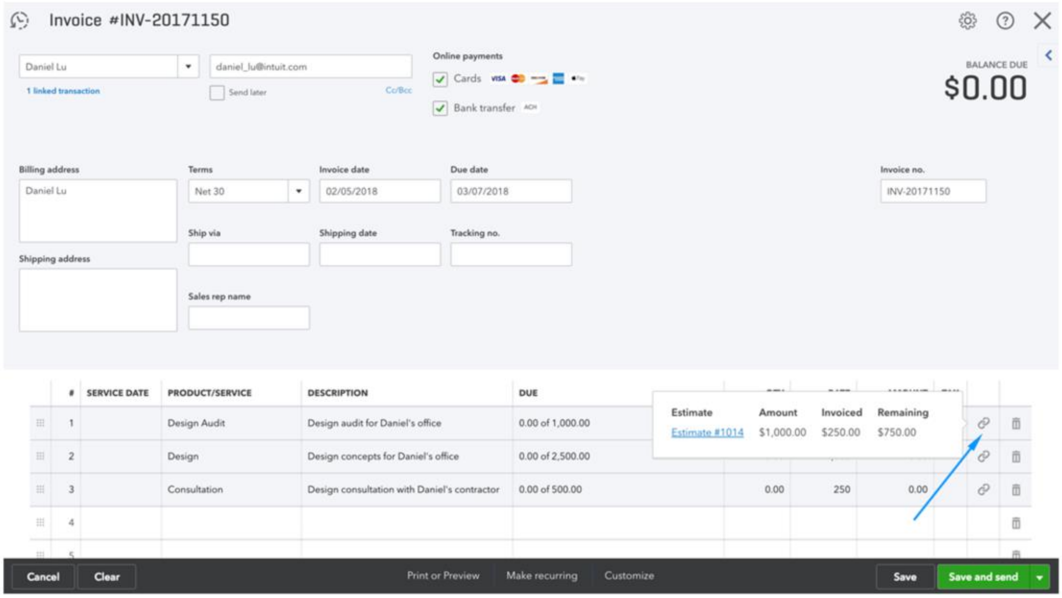

When you click on the link icon next to each line on the invoice, it shows how far that line item has been invoiced and how much remains so that you don't have to go back to an estimate to look up that info.

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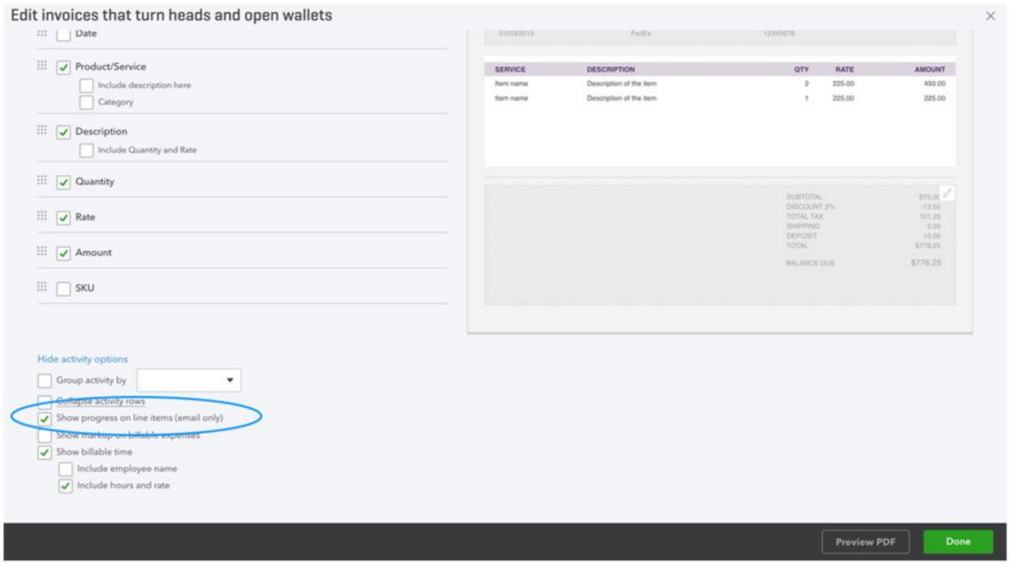

To show progress information on the line items inside the emailed invoice, you'll have to enable ' Show progress on line items' when you customize your invoices. This feature is only supported over email right now.

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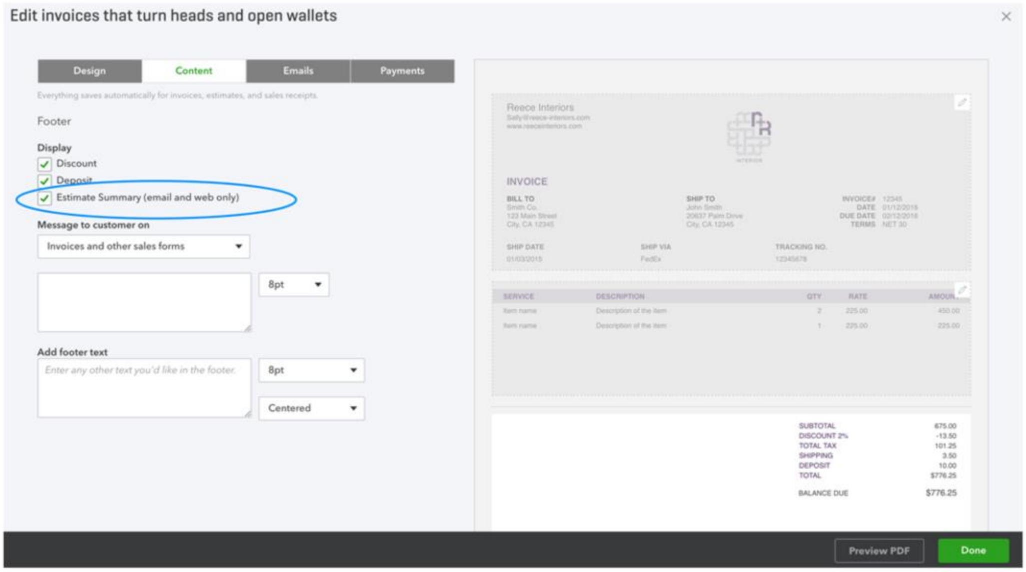

To show 'estimate summary' to your clients on the email invoice or the web invoice please customize the footer of your invoice by enabling the 'estimate summary' in the footer section of invoice customization screen.

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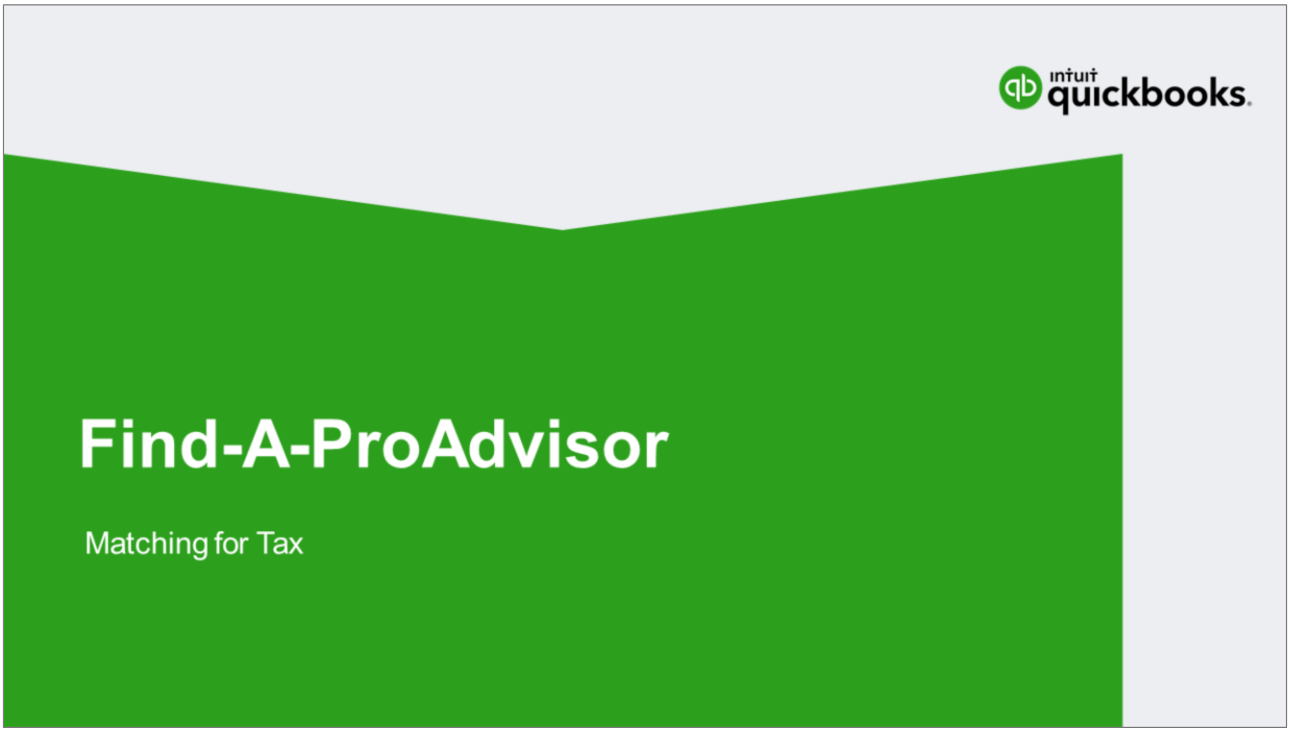


info

Presenter

Leah Wetzel
Product Manager

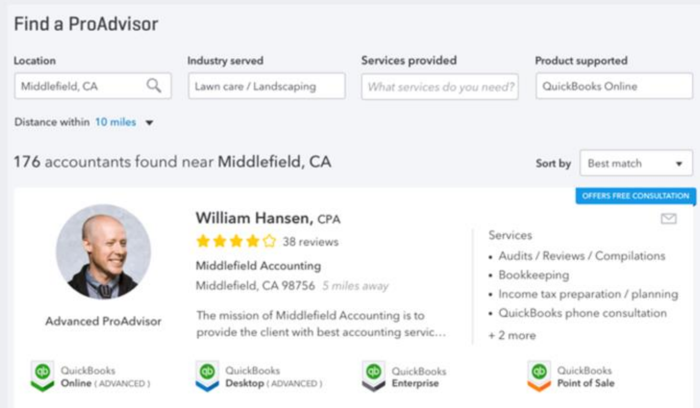
About Leah
- QuickBooks Online Accountant
- Passionate about connecting Small Businesses with their most trusted advisors!
- 1 year at Intuit
- Mountain View, CA

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”

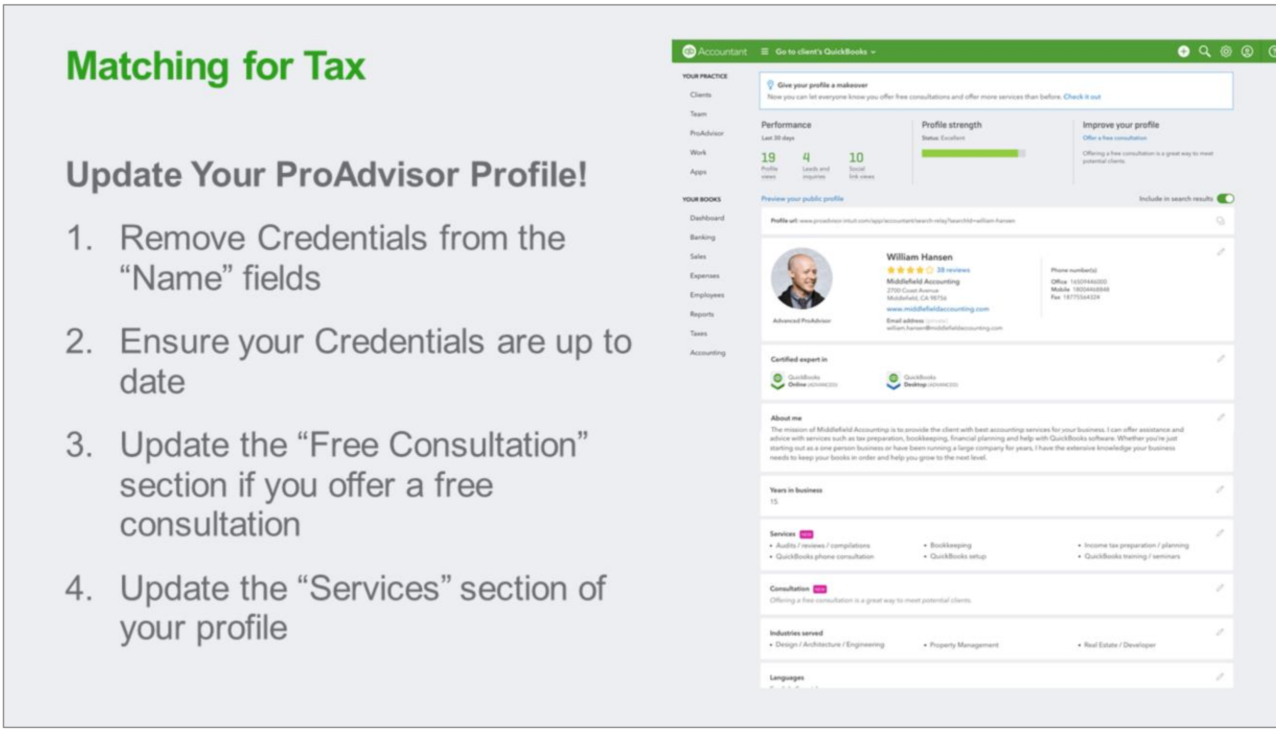


Visitors seeking tax help on the current Find-a-ProAdvisor experience feel like Find-a-ProAdvisor is not “meant for me”. Enhancements are being made to allow you to better highlight your expertise as it relates to tax and encourage engagement from visitors seeking tax help.

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



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

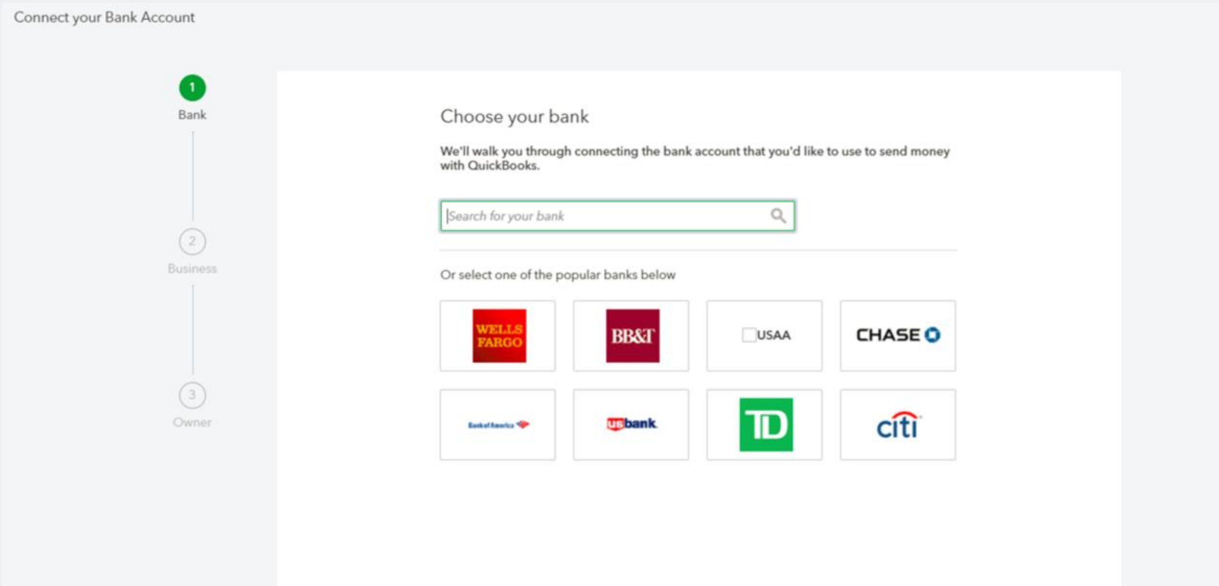
Amy Au

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



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:

March 5th -May 4th

(844) 391-9894

Mon- Fri 6 AM to 6 PM PT

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

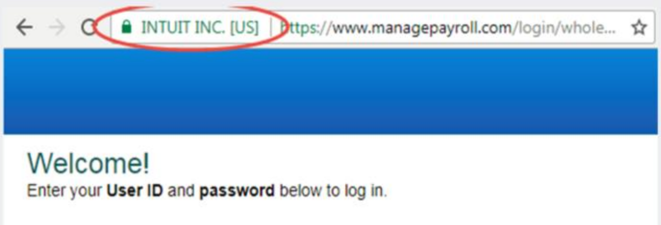
(844) 391-9894
This toll-free phone number will be activated when migrations start on March 5th and will be monitored during our usual support hours, from 6 AM to 6 PM PT, Monday through Friday. If you wish, you may direct your clients to contact us at that phone number for login migration help. We will 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

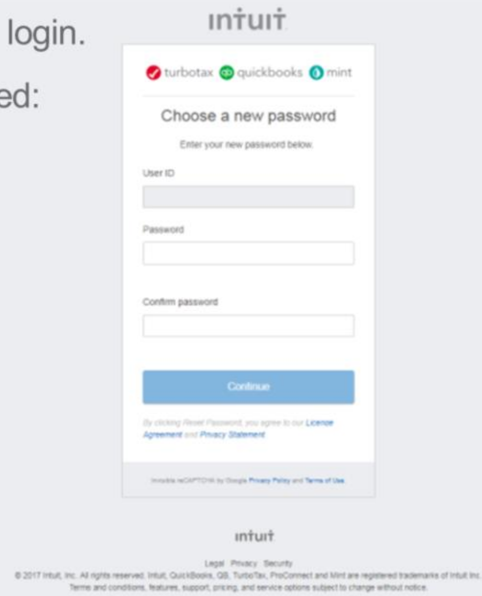
IOP4A User ID Migrations

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

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

QuickBooks Capital

Funding Small Businesses

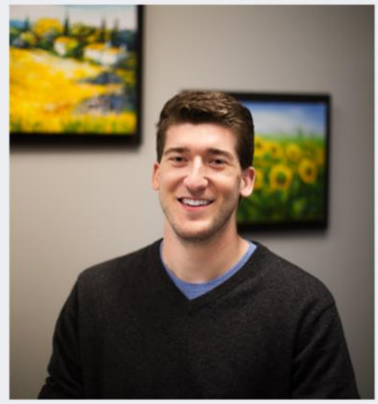
Presenter

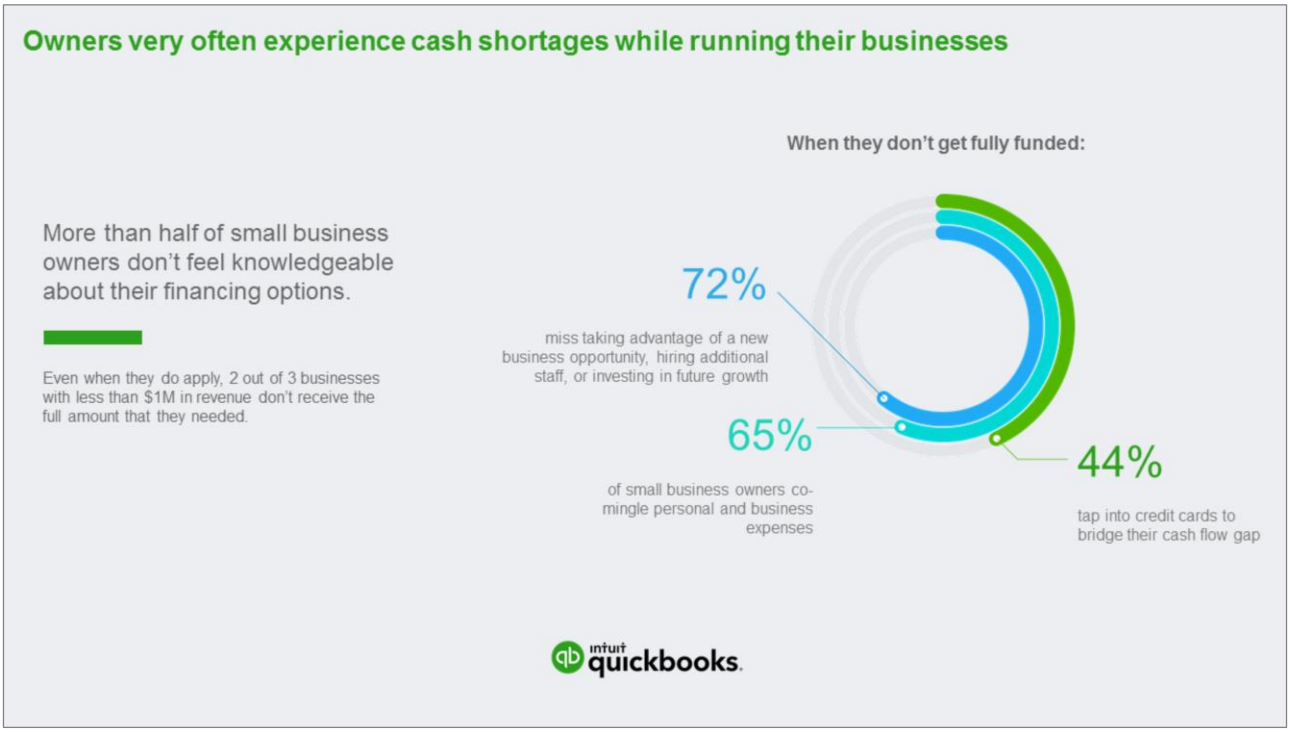
Jacob Chappell

Product Manager

About Jacob

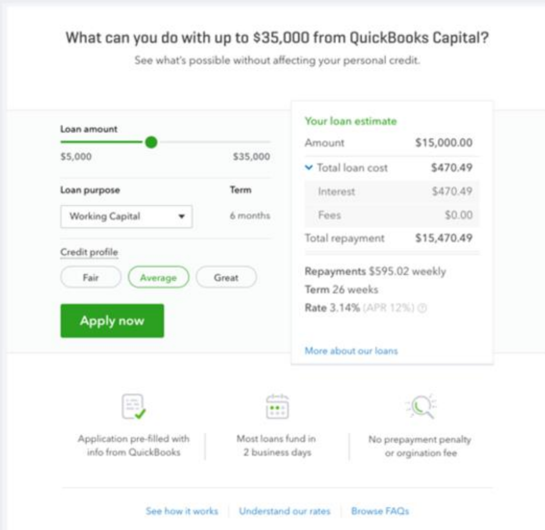
- QuickBooks Capital
- Passion: Solving Problems
- 3.5 years at Intuit
- Mountain View, CA





- 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



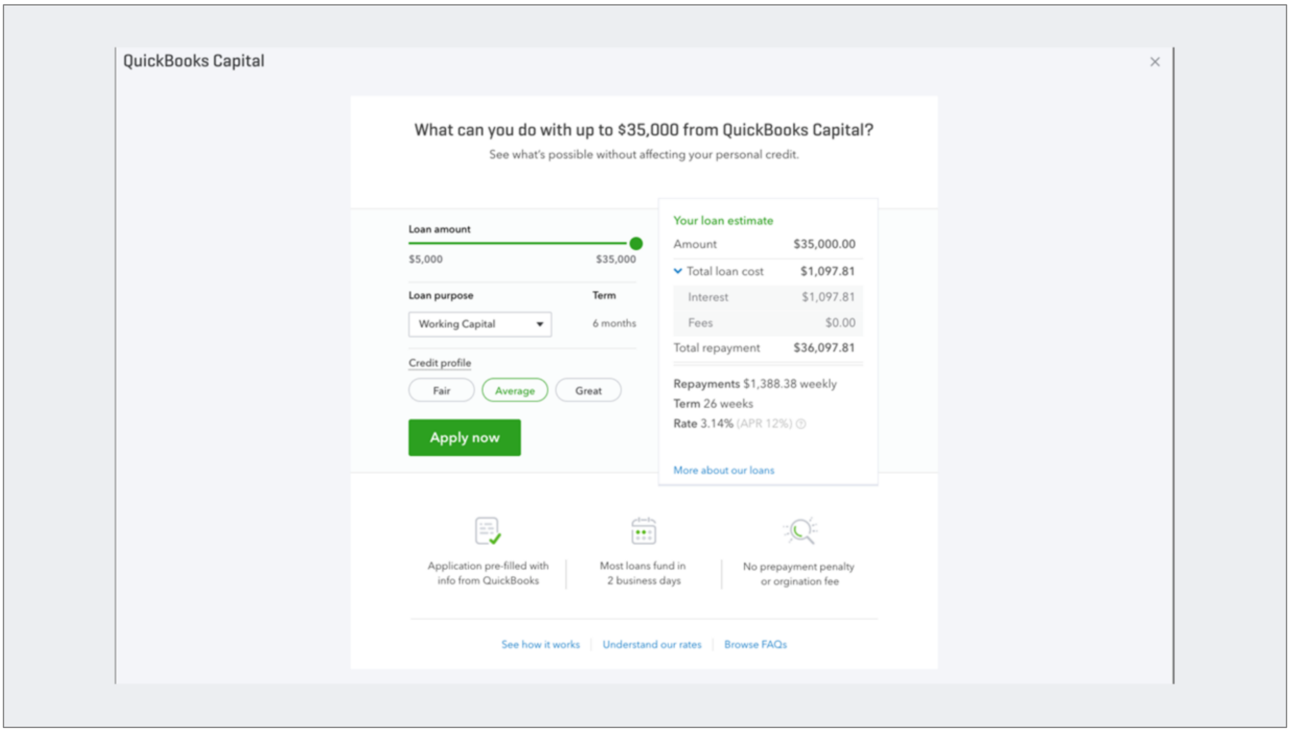
Loan Amount
$5,000 - $35,000

Term
6 Months

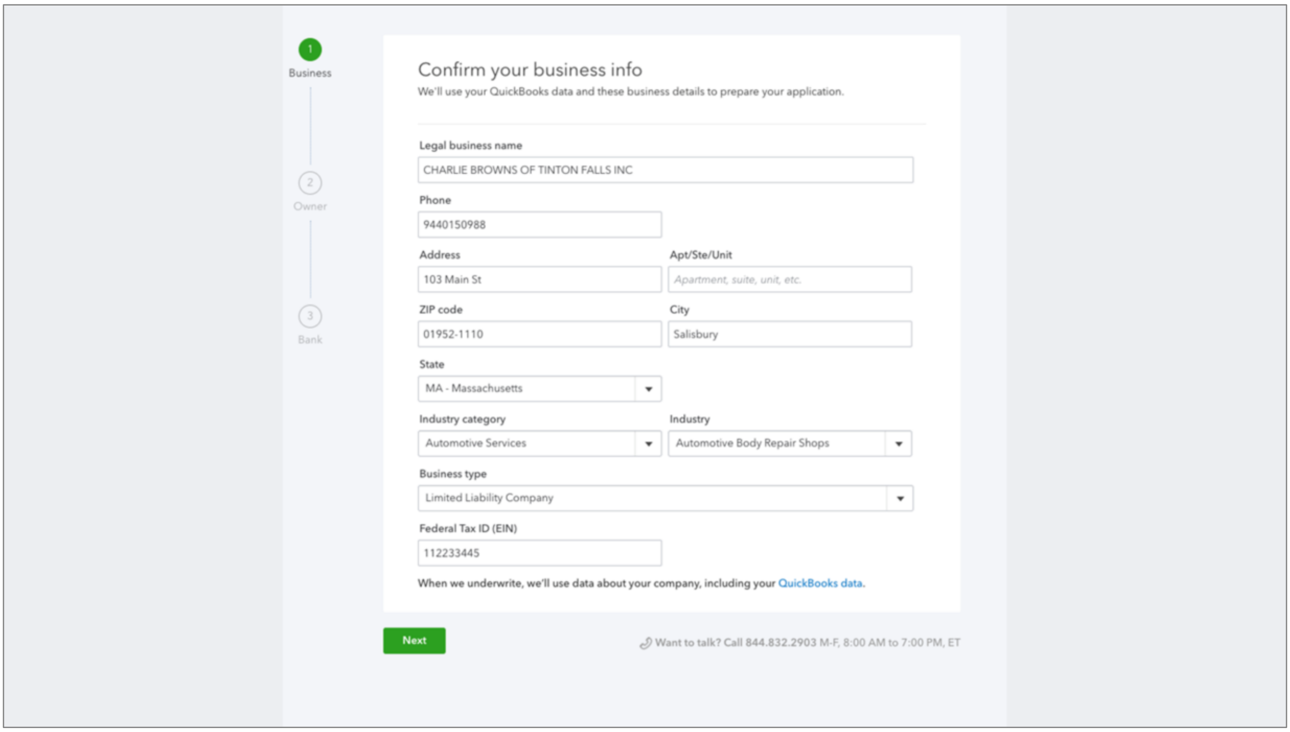
APR
10 - 18%

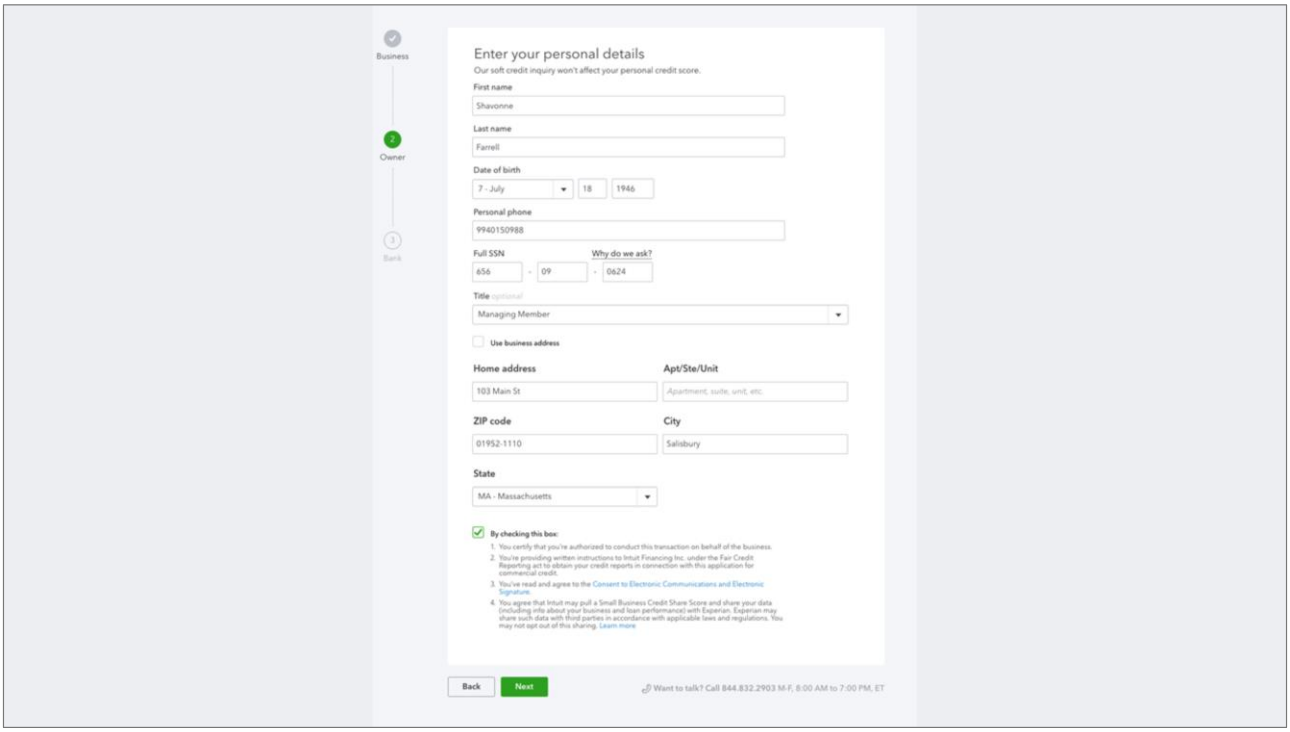
Loan Cost
$130 - $1,650

Payback
Weekly Repayment

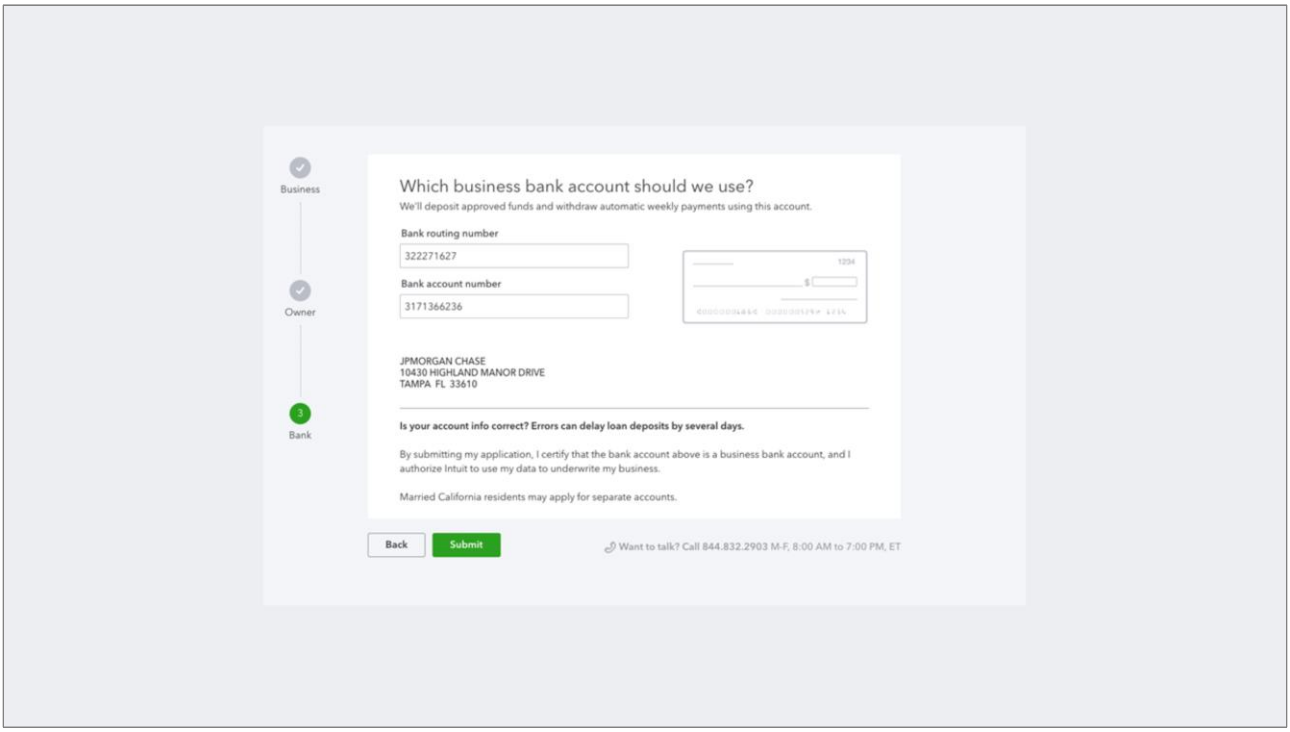


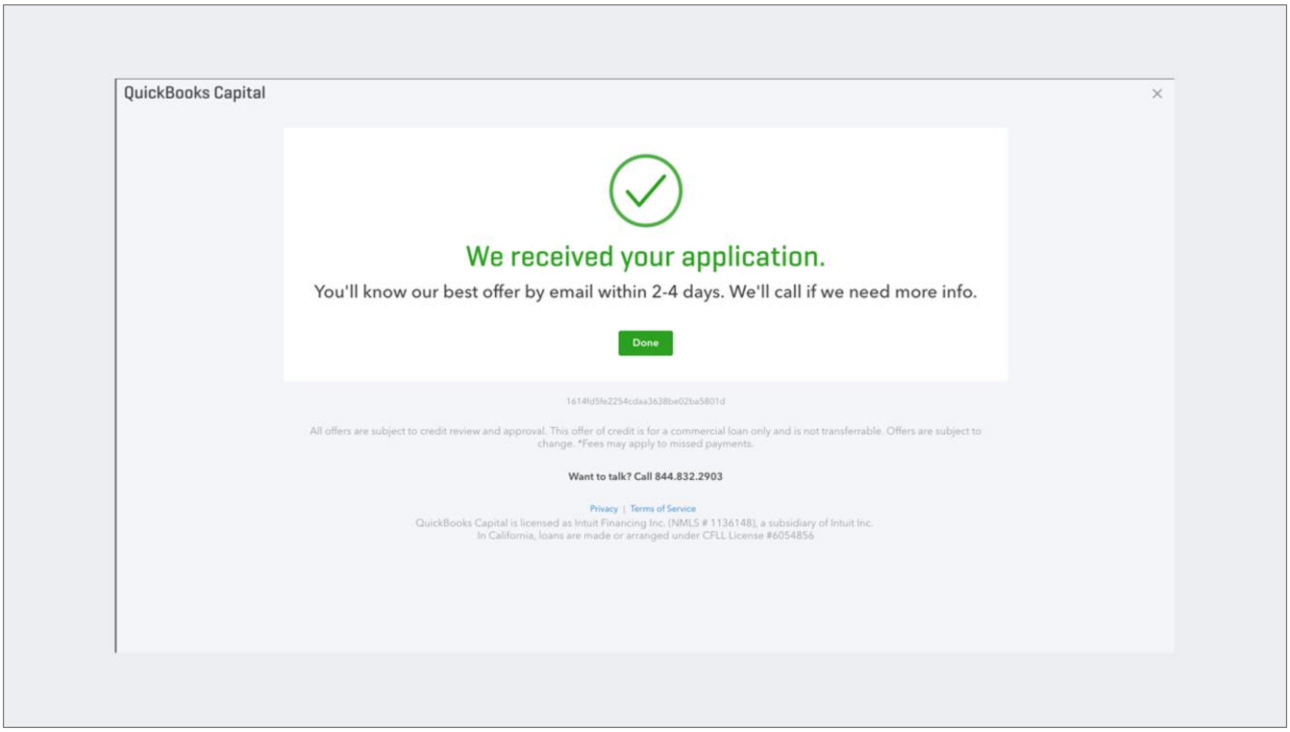
This begins the application process.

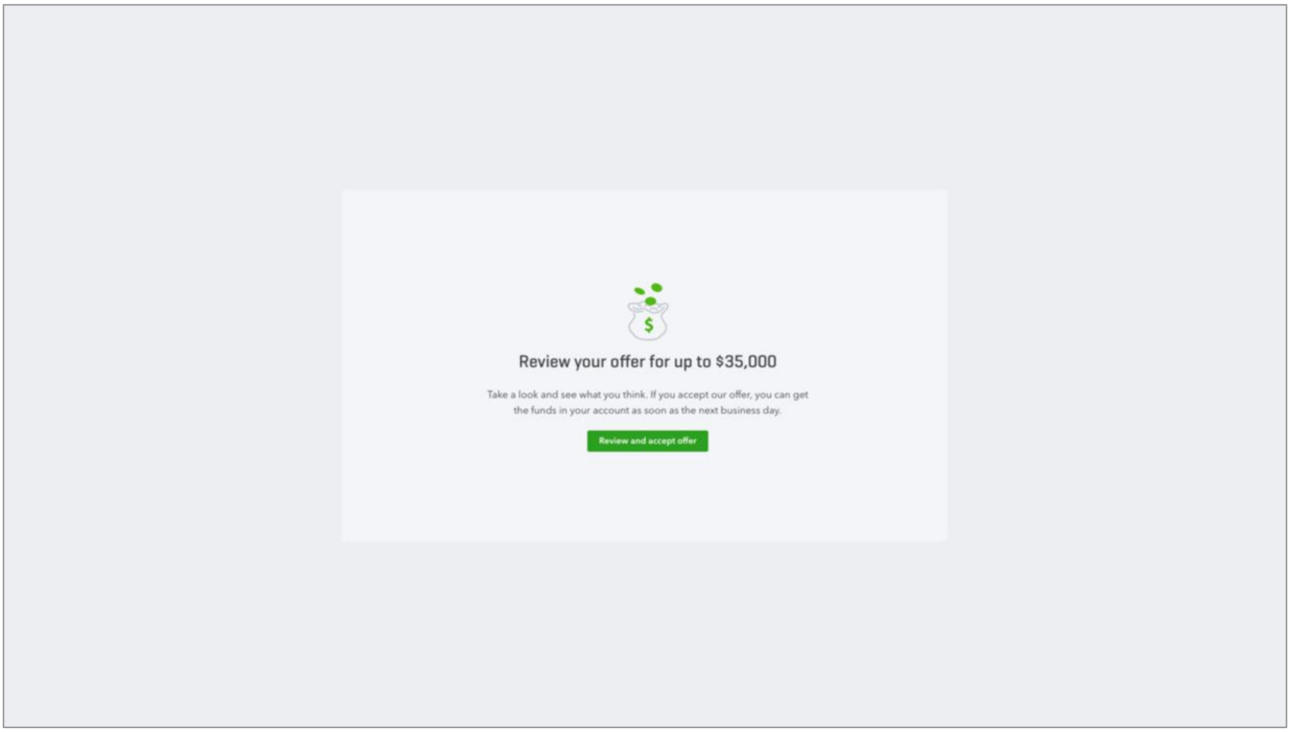

1
Business
2
Owner
3
Bank
Confirm your business info
We'll use your QuickBooks data and these business details to prepare your application.
Legal business name
CHARLIE BROWNS OF TINTON FALLS INC
Phone
9440150988
Address
103 Main St
Apt/Ste/Unit
Apartment, suite, unit, etc.
ZIP code
01952-1110
City
Salisbury
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



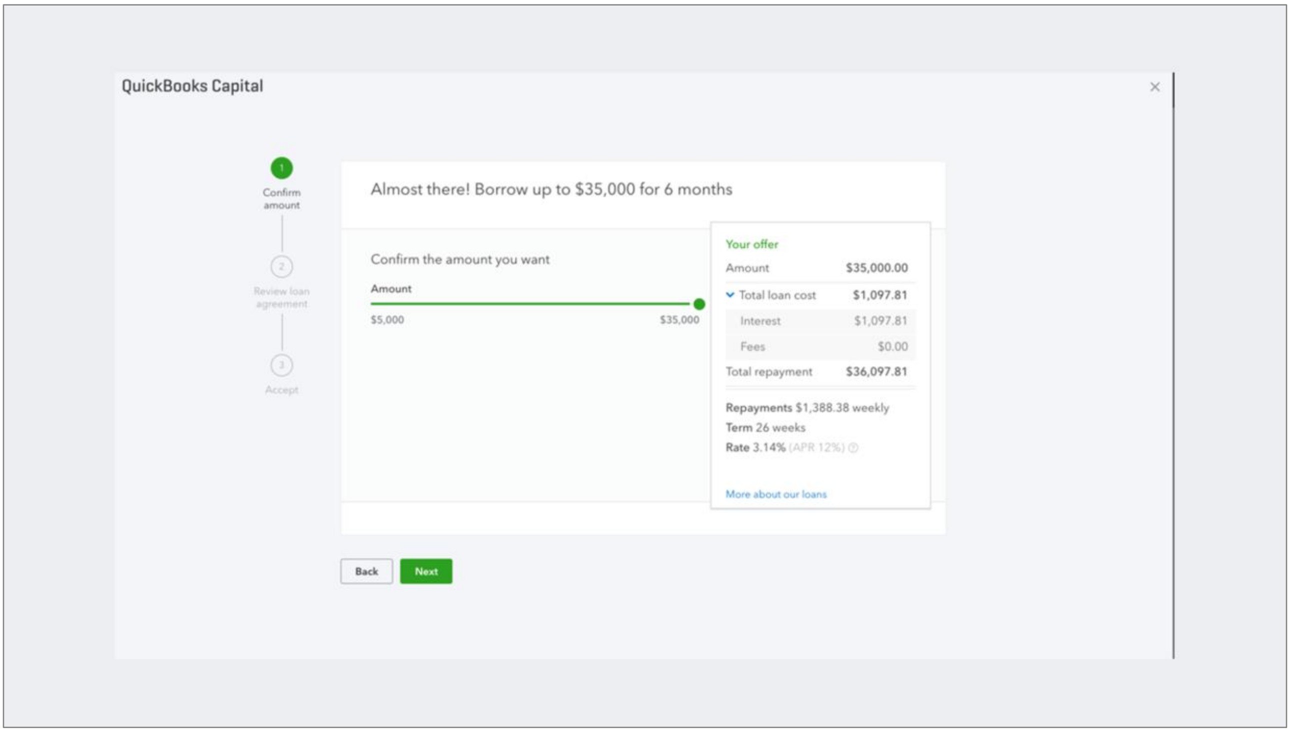
Business
2
Owner
3
Bank
Enter your personal details
Our soft credit inquiry won't affect your personal credit score.
First name
Shavonne
Last name
Farrell
Date of birth
7 - July
18
1946
Personal phone
9940150988
Full SSN
Why do we ask?
656
09
0624
Title optional
Managing Member
Use business address
Home 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
Back
Next
Want to talk? Call 844.832.2903 M-F, 8:00 AM to 7:00 PM, ET

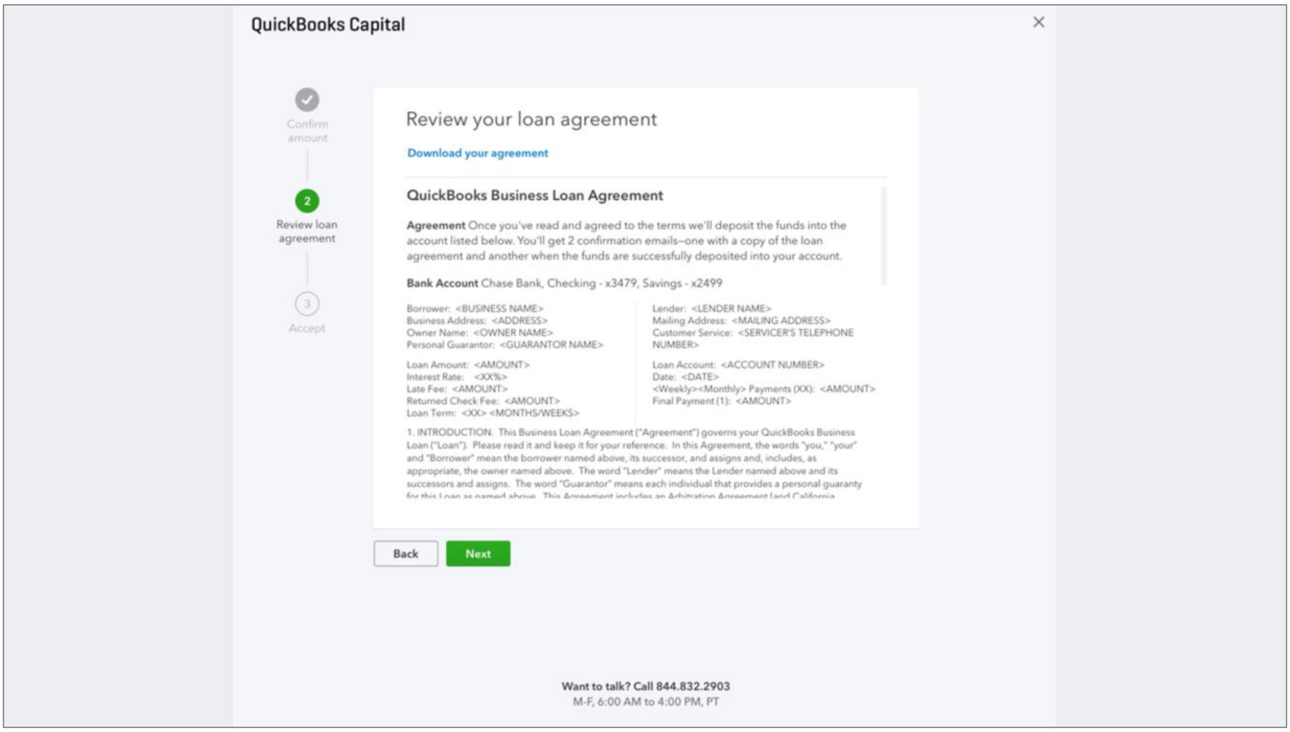

Business
Owner
3
Bank
Which business bank account should we use?
We'll deposit approved funds and withdraw automatic weekly payments using this account.
Bank routing number
322271627
Bank account number
3171366236
1234
JPMORGAN CHASE
10430 HIGHLAND MANOR DRIVE
TAMPA FL 33610
Is your account info correct? 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.
Back
Submit
Want to talk? Call 844.832.2903 M-F, 8:00 AM to 7:00 PM, ET

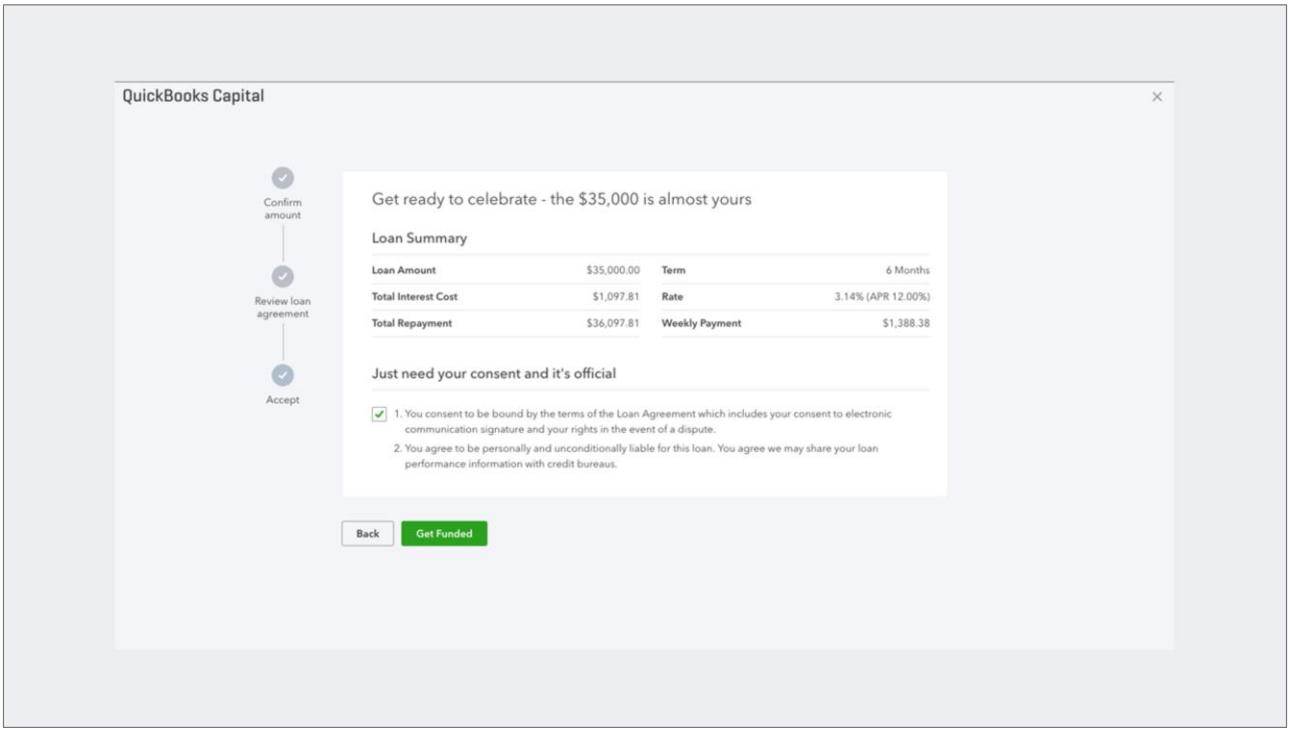

QuickBooks Capital
We received your application.
You'll know our best offer by email within 2-4 days. We'll call if we need more info.
Done
1614fd5fe2254cdaa3638be02ba5801d
All offers are subject to credit review and approval. This offer of credit is for a commercial loan only and is not transferrable. 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 CFLL License #6054856

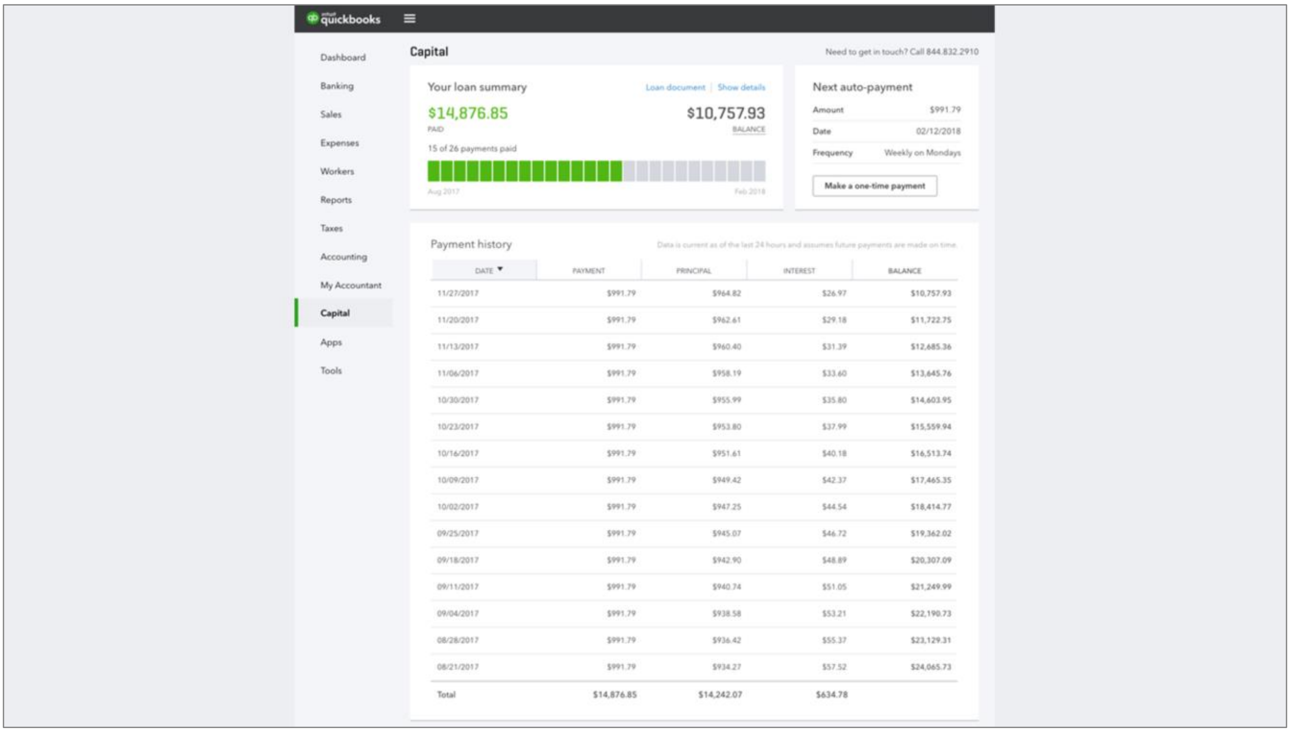


The start of the approval and acceptance process.

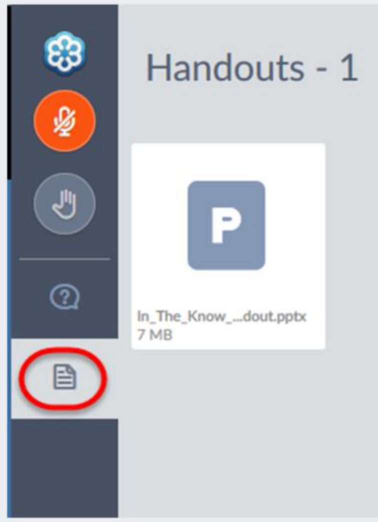

QuickBooks Capital
Confirm amount
Review loan agreement
Accept
Almost there! Borrow up to $35,000 for 6 months
Confirm the amount you want
Amount
$5,000
$35,000
Your offer
Amount $35,000.00
Total loan cost $1,097.81
Interest $1,097.81
Fees $0.00
Total repayment $36,097.81
Repayments $1,388.38 weekly
Term 26 weeks
Rate 3.14% (APR 12%)
More about our loans
Back
Next


QuickBooks Capital
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>
Loan Amount: <AMOUNT>
Interest Rate: <XX%>
Late Fee: <AMOUNT>
Returned Check Fee: <AMOUNT>
Loan Term: <XX> <MONTHS/WEEKS>
Lender: <LENDER NAME>
Mailing Address: <MAILING ADDRESS>
Customer Service: <SERVICER'S TELEPHONE NUMBER>
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
Back
Next
Want to talk? Call 844.832.2903
M-F, 6:00 AM to 4:00 PM, PT


QuickBooks Capital
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



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


Handouts - 1
In_The_Know_...dout.pptx
7 MB

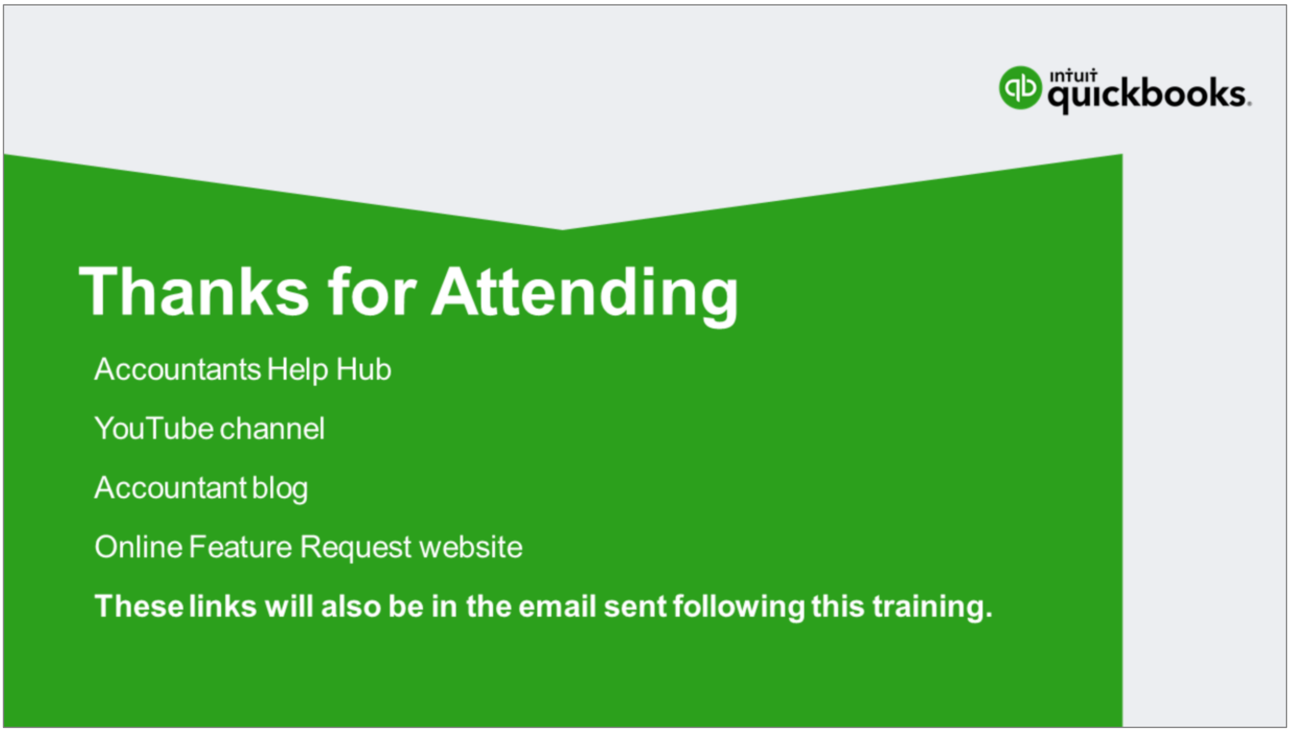
Webinar Links

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



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.