QUICKBOOKS® ONLINE ACCOUNTANT

Welcome Guide

Welcome to QuickBooks Online Accountant

We've remade QuickBooks Online Accountant, inspired by input from you, our users.
This guide gives you a roadmap to the changes we've made. Let's get started.

Contents

NAVIGATING

Get around in QuickBooks Online Accountant

Let’s start with some QuickBooks Online Accountant navigation tools:

1 Navigation bar

Get to your client list, your firm’s books, your ProAdvisor info and more.

2 Client QuickBooks menu

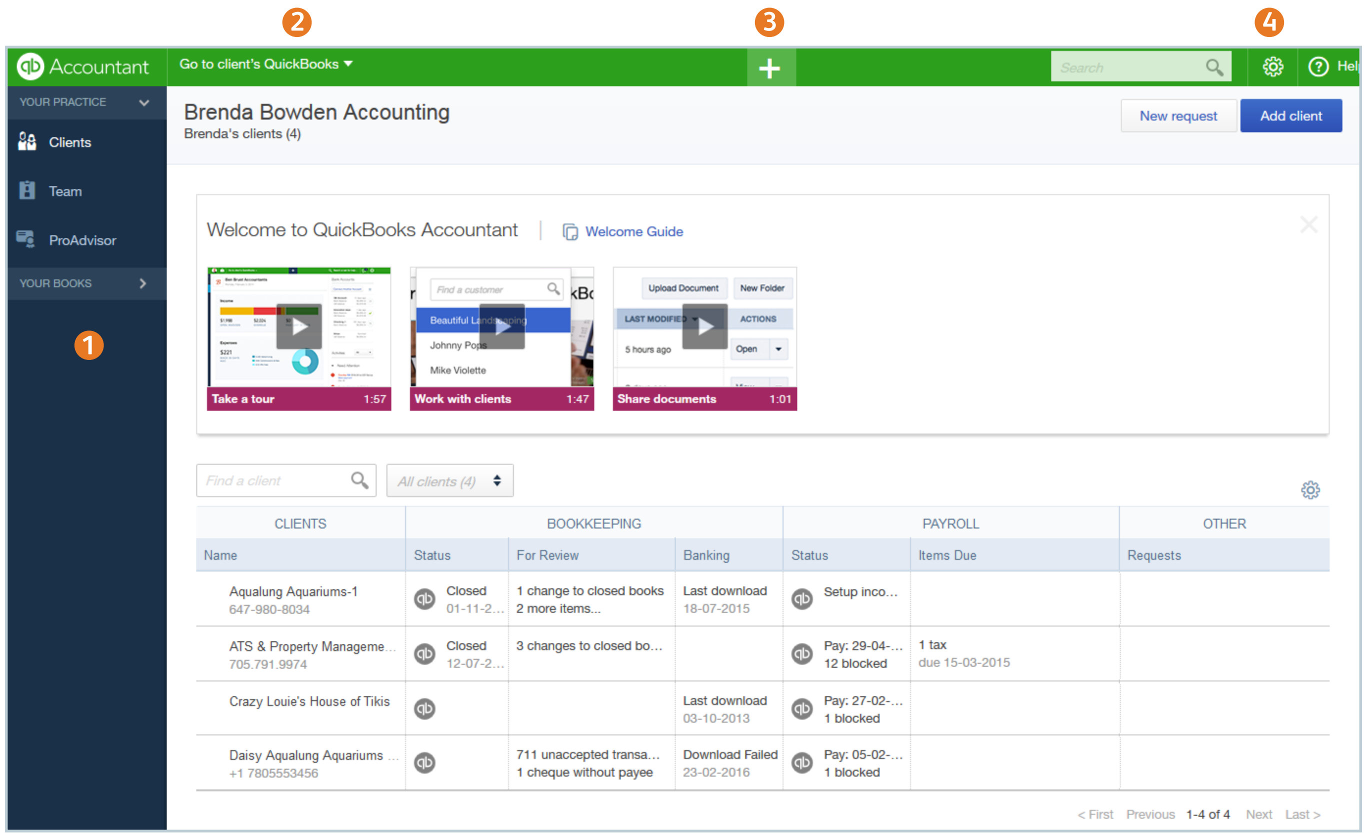
Choose a client to go right into their QuickBooks account.

3 Create (+) icon

Create a new client, a new QuickBooks Online Accountant user or a new request.

4 Green gear icon

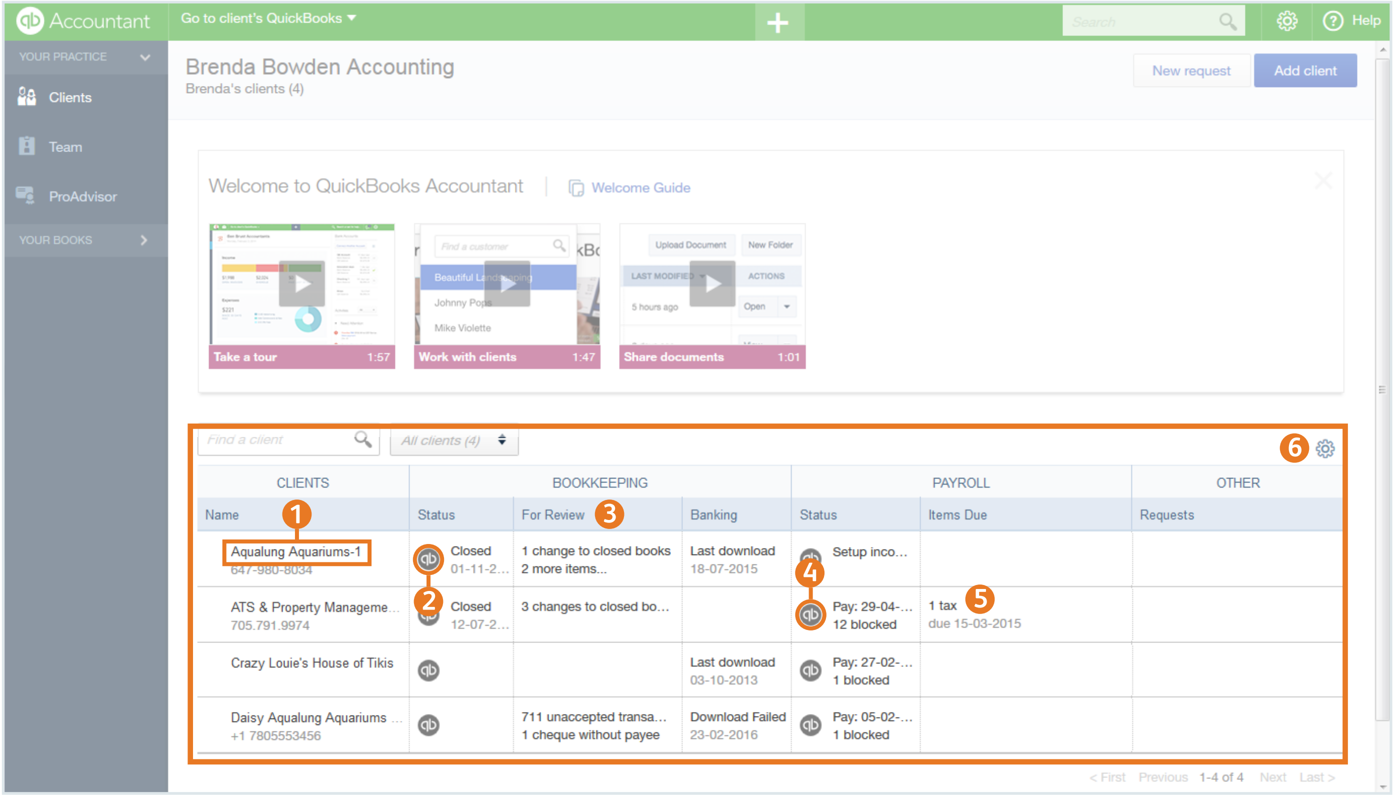
Get to Settings, Lists, Tools and Your Company menus—lots to do and explore here!



The Client Dashboard

The Client Dashboard is the jumping-off point for many tasks you do for your clients. You can see important things coming up in your clients' books, payroll and taxes in the Client Dashboard.

1. Click to get details about a client.
2. Click to go to client's books.
3. See bookkeeping activities.
4. Click to go to client's payroll.
5. See payroll activities.
6. Customize your Client Dashboard.



QUICK TIP

From the gray gear icon (number 6), you can add a Tax column to your Client Dashboard, remove Payroll, and make other changes to optimize the Client Dashboard for your practice.

WORKING WITH CLIENTS

Add a client

Here’s how you add all your clients to QuickBooks Online Accountant:

1 Click the big blue Add Client button.

2 Fill out this client’s contact info. If this client doesn’t use QuickBooks Online, click Save. You’re done.

3 Choose a QuickBooks product (with or without Payroll) to subscribe this client to. (Optional)

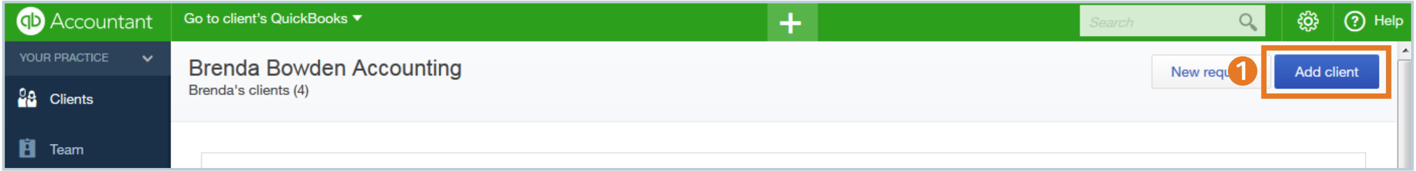
4 Choose wholesale (you get billed) or retail (client gets billed) billing.

5 Choose the Master Admin for this client’s QuickBooks Online account.

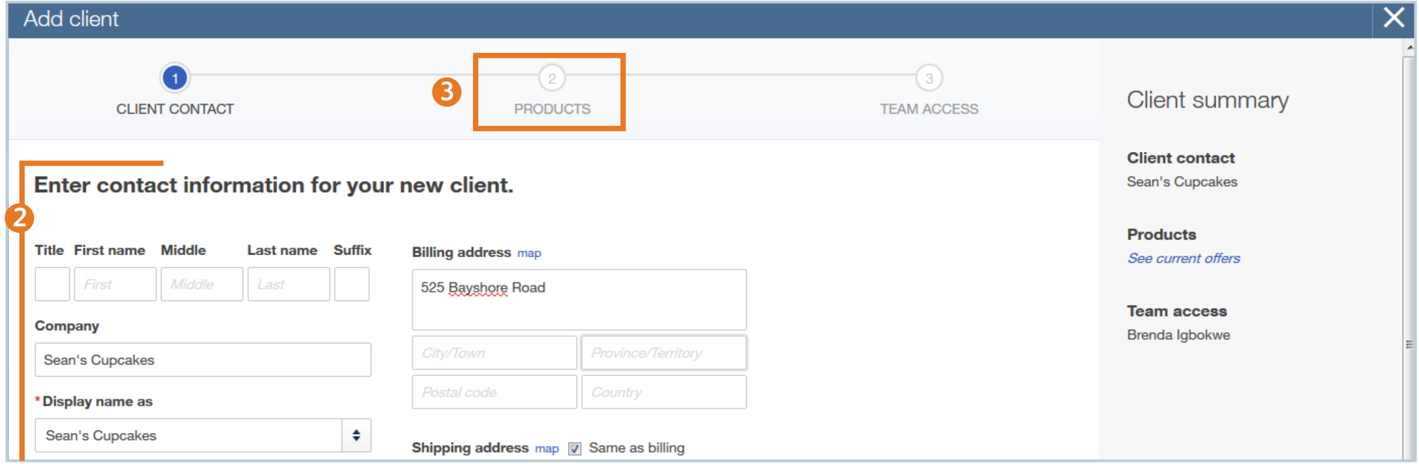
6 Click Next.

QUICK TIP

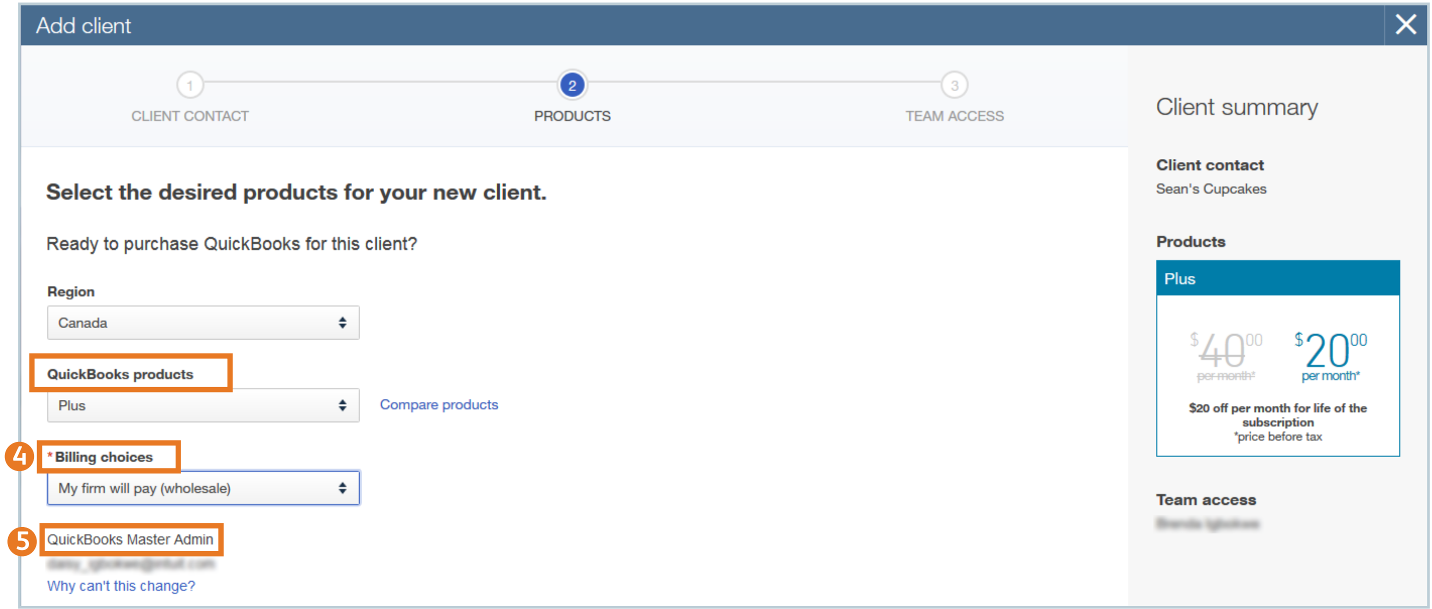
Wholesale billing lets you both make a profit and pass on a never-expiring discount to your clients for QuickBooks Online with or without Payroll.



QB ACCOUNTANT HOME > ADD CLIENT BUTTON



ADD CLIENT > FILL OUT CLIENT INFO > CHOOSE QUICKBOOKS PRODUCT



ADD CLIENT > QUICKBOOKS ONLINE PRODUCTS > CHOOSE BILLING OPTION

WORKING WITH CLIENTS

Work in client books

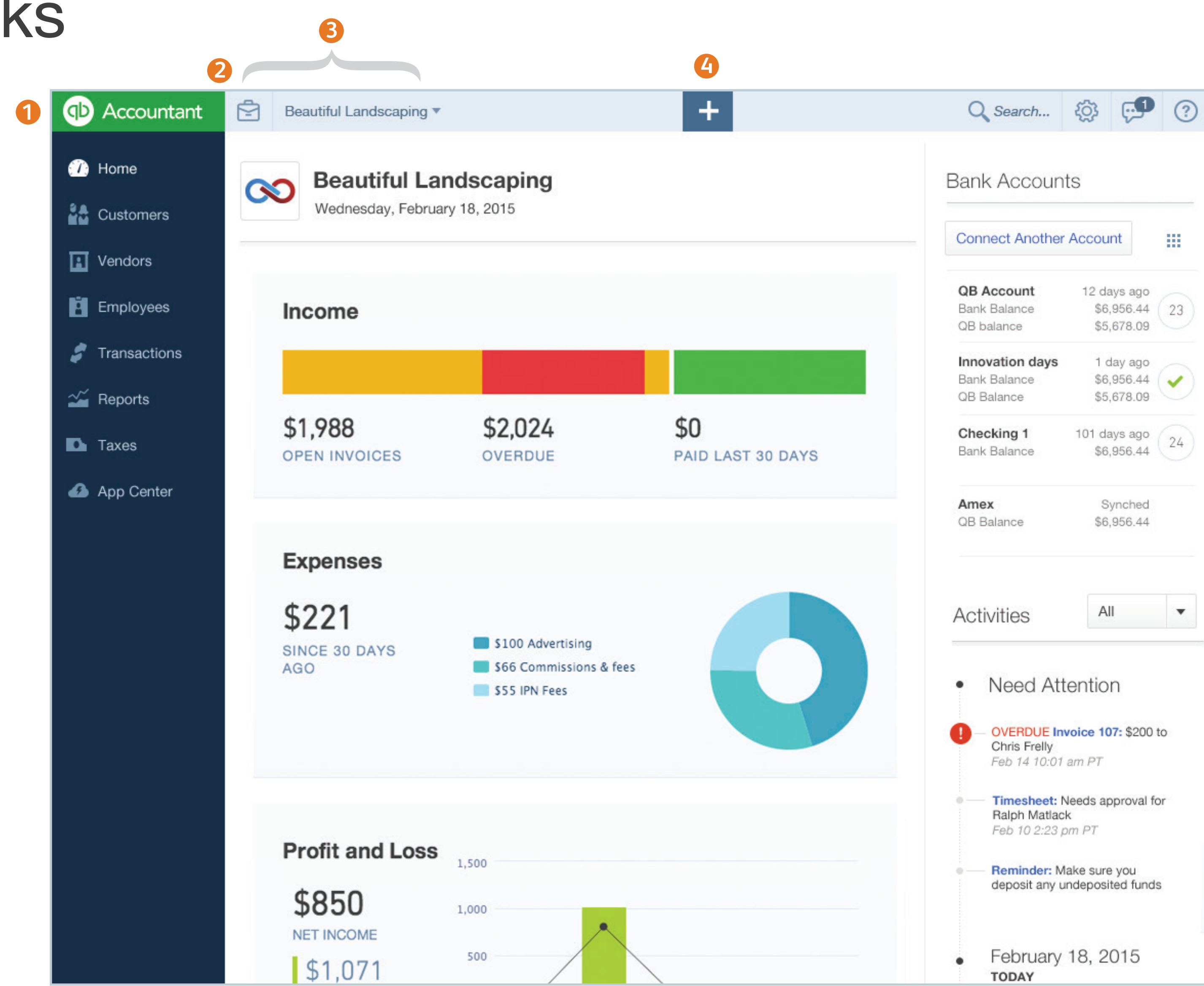
Let's start with some QuickBooks Online Accountant navigation tools:

1. Return to QuickBooks Online Accountant home.

2. Open the Accountant Toolbox to access some of your most commonly used tools.

3. Choose a different client to go directly to their books.

4. Create new items in your client's books.



Work on a client's payroll

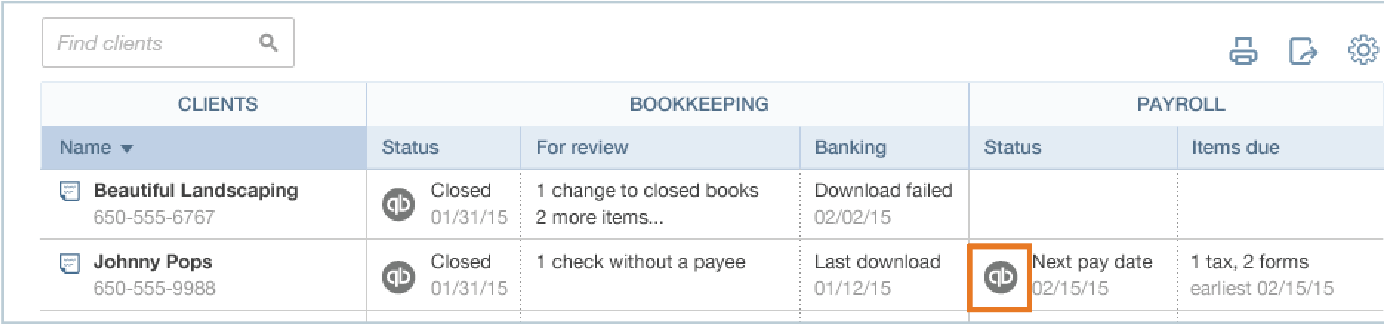
From the Client Dashboard, you can see a client's last paycheck date and the next payroll item coming due.

Client QuickBooks Payroll

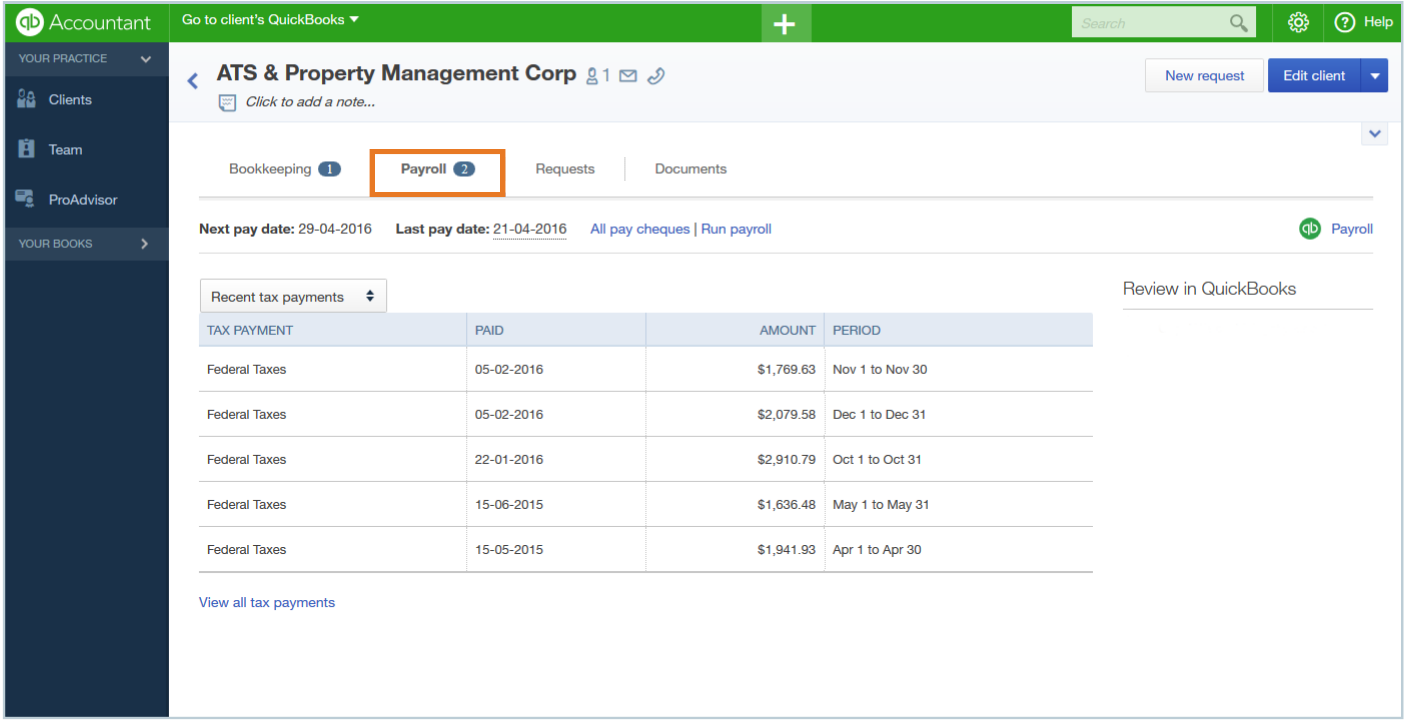
Click the QB icon to drill into a client's QuickBooks Payroll account. To get to a client's Payroll details, click that client's name in the dashboard. Then click the Payroll tab.

Payroll Details

On the Payroll details tab, you can see recent payroll tax payments and form filings.



ACCOUNTANT HOME PAGE > CLIENT DASHBOARD > PAYROLL STATUS



CLIENT DASHBOARD > PAYROLL TAB

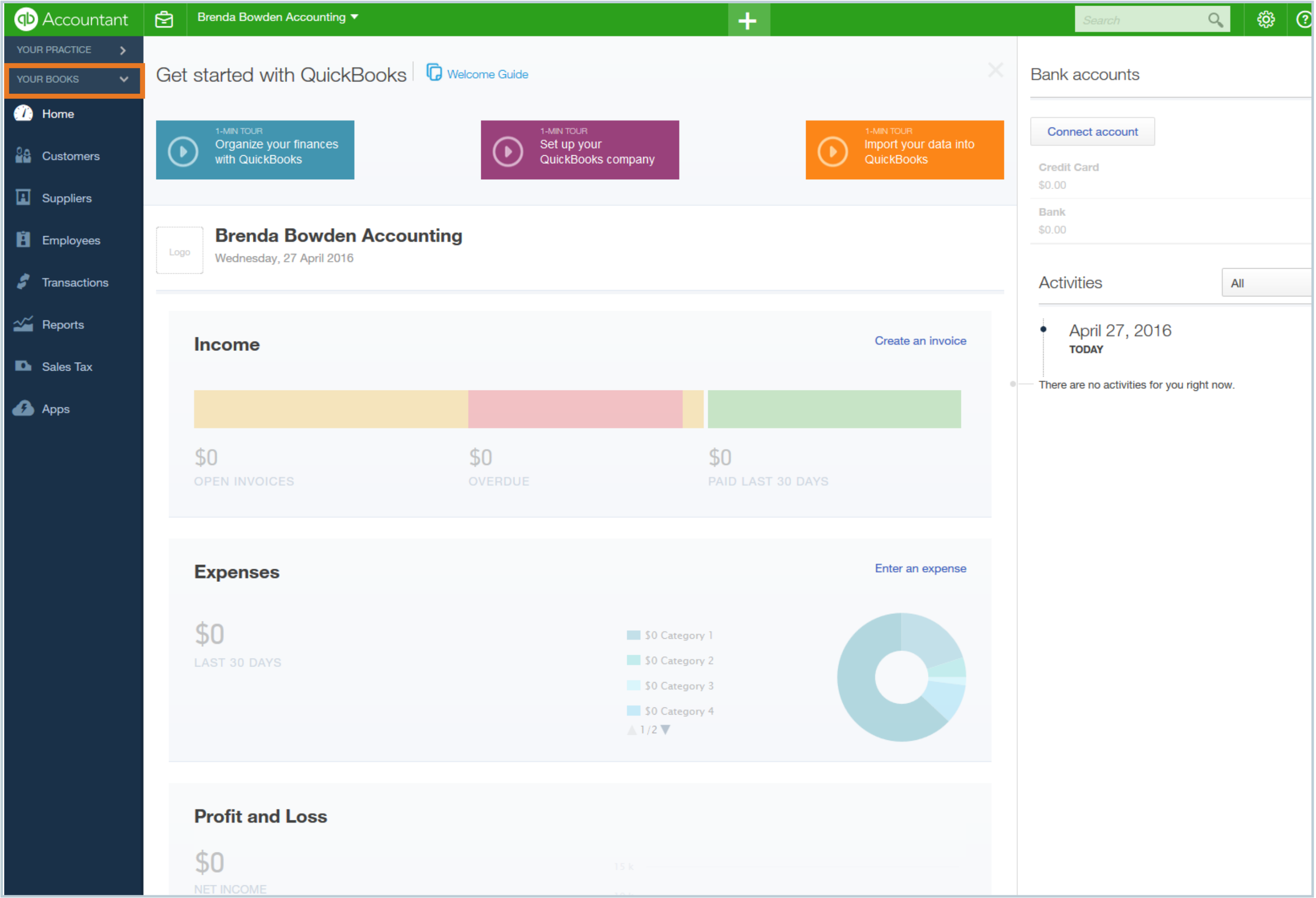
QUICK TIP

You asked, we listened. You can now offer your clients wholesale Payroll integrated with QuickBooks Online.

Manage your own firm

You get a free subscription to QuickBooks Online with Payroll to manage your own firm when you sign up for QuickBooks Online Accountant.

Click Your Books in the navigation bar to manage your own firm's books and payroll.



QUICK TIP

When you enter clients into your practice, they get automatically added to your QuickBooks as customers.

MANAGING YOUR FIRM

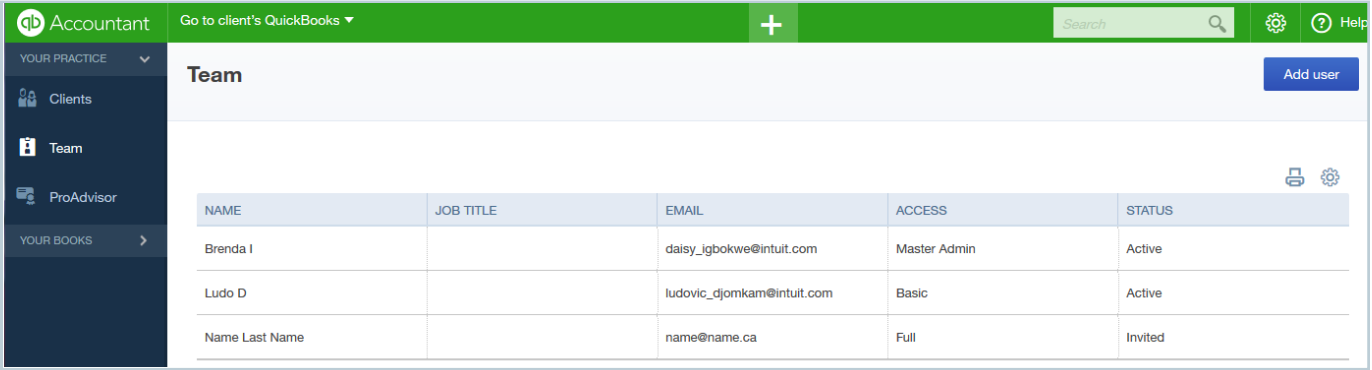
Add a user to QuickBooks Online Accountant

Here's how you add a coworker to your QuickBooks Online Accountant team:

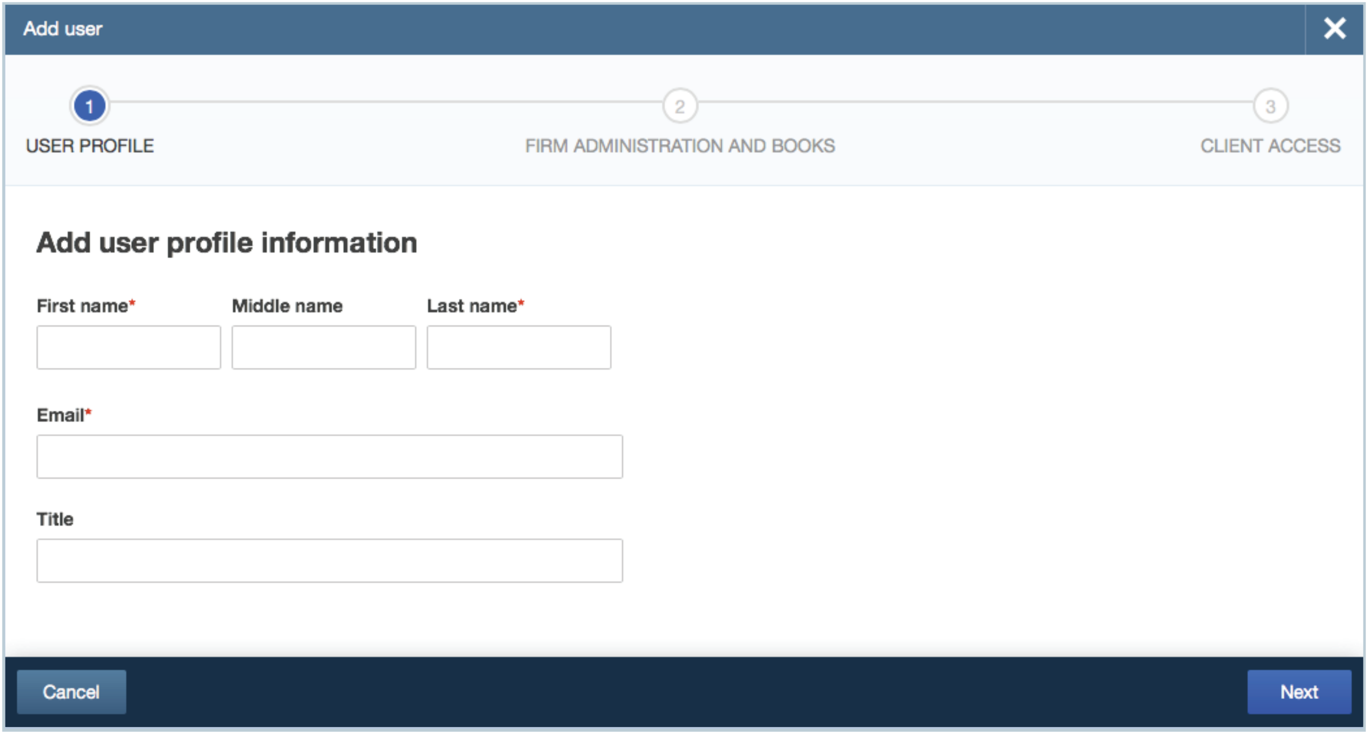
1. On the navigation bar under Your Practice, click Team.

2. Click Add User.

3. Enter this user's profile info and click Next.



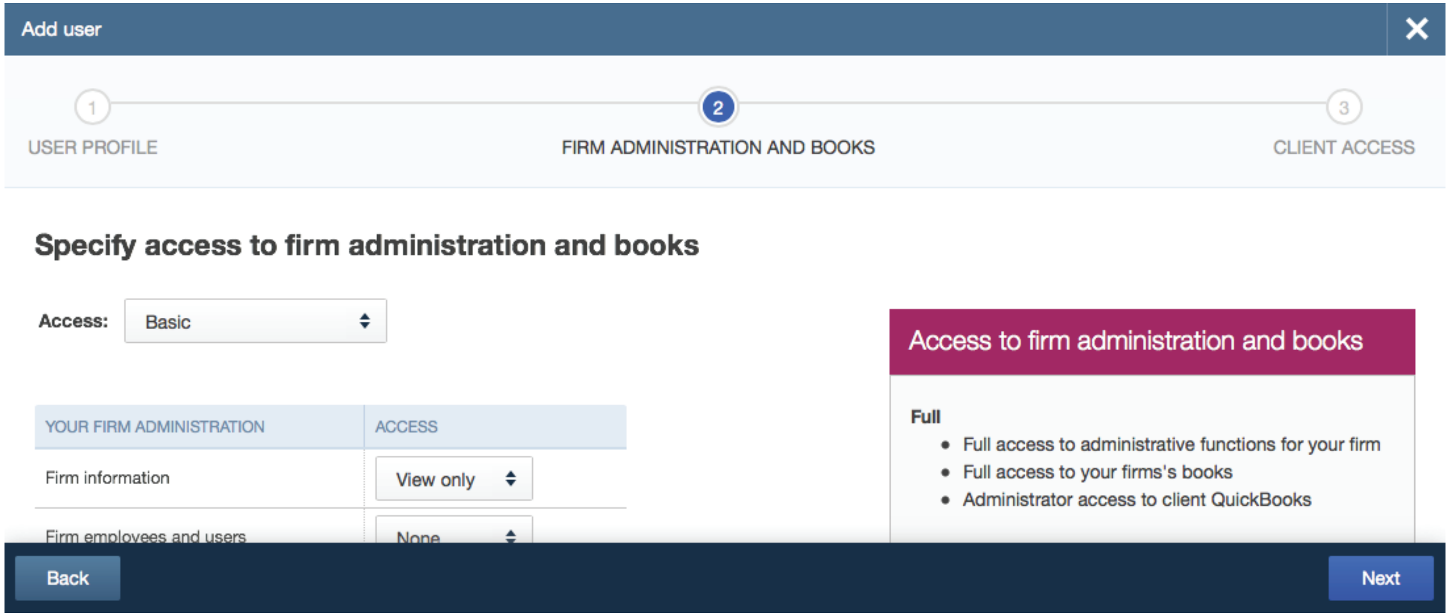
TEAM PAGE > NEW USER BUTTON



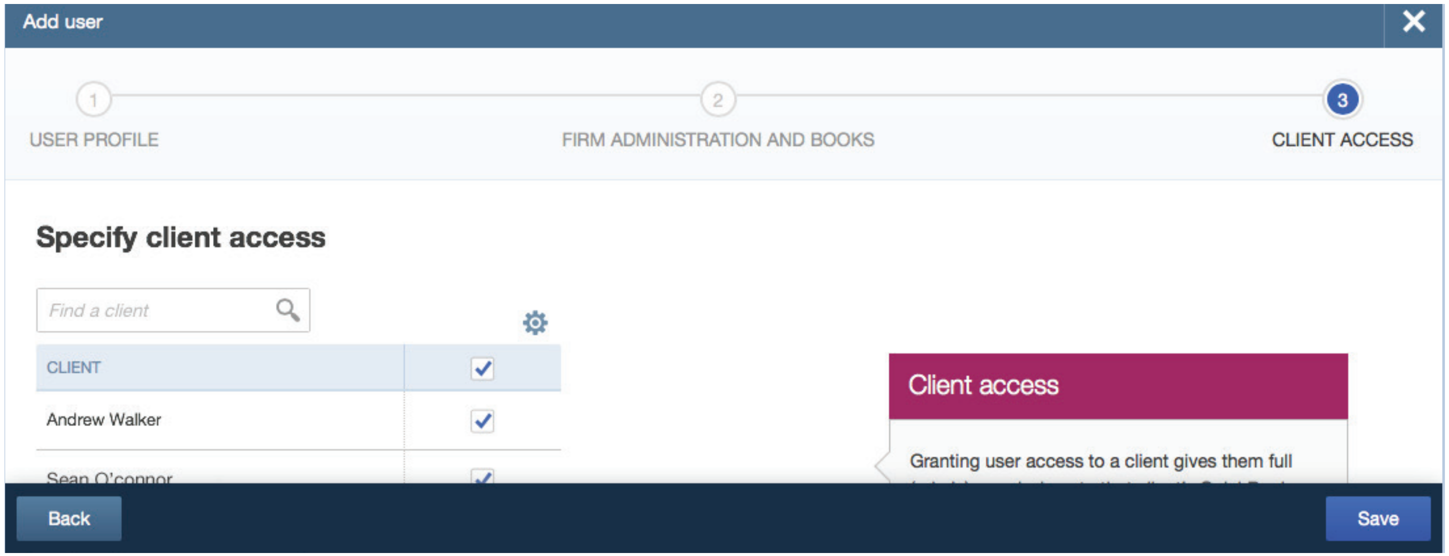
ADD USER

Give a user permissions and clients

1. Give this user full or basic access to QuickBooks Online Accountant.
2. Choose whether this user can view or manage different parts of your firm.
3. Click Next.
4. Specify which clients this user can access by checking the box next to each client name.



FIRM ADMINISTRATION AND FIRM BOOKS



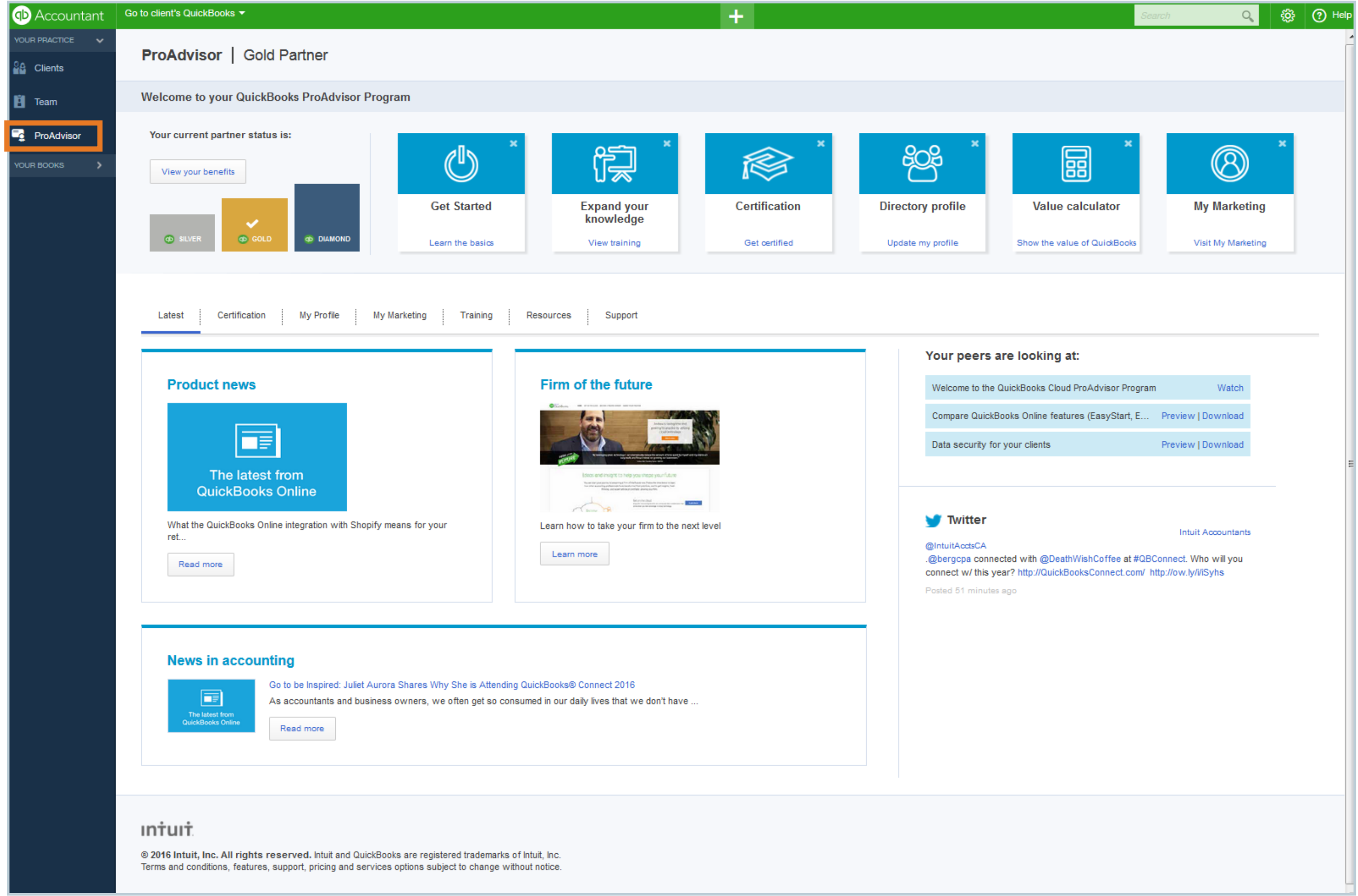
CLIENT BOOKS

Access ProAdvisor benefits

If you're a member of Intuit's ProAdvisor Program, you can access all your ProAdvisor benefits inside QuickBooks Online Accountant.

You'll find:

- Free QuickBooks certification training and exams
- Additional (non-certification) training and resources
- Discounts on Intuit products for you and your clients
- ProAdvisor Program notifications
- A place to edit and publish your online directory profile (to help generate client leads)



Get more information

This Welcome Guide is just the beginning!

When you have questions or need assistance with a task in QuickBooks Online Accountant (or QuickBooks Online), click the Help menu.

You can:

- Search for a help topic
- Join our Accountant Community
- Check out useful links to more information