

Discover your firm's full potential with the Cloud ProAdvisor Program



As a trusted financial advisor, you know that partnership pays off. You go beyond basic bookkeeping for your clients—you're the financial expert they depend on to help make their business a success. Here at Intuit, we celebrate the special relationship you have with small businesses, and as our partners, we're committed to providing ProAdvisors like you with everything you need to succeed.

The Cloud ProAdvisor Program offers tools and resources that make it easy to grow your practice. From seamless transition to the cloud, adding clients, keeping up with technological improvements and marketing your services, the Cloud ProAdvisor Program can help you do it all.

Cloud ProAdvisor Program benefits

QuickBooks certification level:

	BRONZE	SILVER QuickBooks Online Core Certification - OR -	GOLD QuickBooks Online Advanced Certification - OR -	PLATINUM QuickBooks Online Core Certification - AND -
Number of QuickBooks Online clients	0-2	3-10	11-24	25+

Unique benefits at each tier

Free QuickBooks Online & Payroll for your practice	●	●	●	●
50% discount for your clients when you pay for their QuickBooks Online subscriptions ¹	●	●	●	●
Free QuickBooks Online phone & chat support	●	●	●	●
Webinars, guided tips, and a specialist to help you get started	●	●	●	●
Free training & certification	●	●	●	●

Grow your practice

ProAdvisor status badges to add to your professional profiles	●	●	●	●
Free Marketing tools		●	●	●
Printed ProAdvisor status badges ²		●	●	●
Marketing placements promoting your practice ³				●
Free ticket to QuickBooks Connect event to connect with peers & potential clients ⁴				●

Enhance your knowledge

Exclusive Workflow Masterclass training and discounts ⁵		●	●	●
Advanced QuickBooks Online tips & tricks webinar ⁶			●	●
Professional QuickBooks Online client training material			●	●
Free access to exclusive content resources			●	●

Priority support

Dedicated Account Manager focused to help you grow			●	●
Priority fast track phone support ⁷			●	●
Specialist to help you get your data into QuickBooks Online ⁸			●	●
Schedule support calls for a time that's best for you ⁹				●

Unique benefits at each tier

Unlock great benefits by getting certified and adding clients.

Free QuickBooks Online subscription for your own practice

You spend most of your time ensuring your clients' success, but the success of your own practice is important, too! Stay organized and manage your firm with a free QuickBooks Online subscription. For clients on monthly billing plans, save time when you set up auto-generated sales receipts paid with an on-file credit card—no more manual invoicing and tracking down payments.

Free QuickBooks Online Payroll for your practice

Run online payroll with direct deposit for your own firm for free with your ProAdvisor membership. Your free version of QuickBooks Online Payroll automatically downloads and categorizes transactions, saving you time and removing the hassle of manual entry. Simply login to QuickBooks Online Accountant, click on the My Company tab, and complete payroll in 3 easy steps, straight from your computer.

Simplify your tax workflow with Workpapers

Workpapers is a free feature inside QuickBooks Online Accountant that allows you to add notes and attachments to each client account, save your work in your client's file, and make multiple adjustments to your books in minutes. Year-end analysis is faster and more accurate, and come tax time, you can generate returns with just one click

Fully integrated practice management inside QuickBooks Online Account

Experience effortless organization with a variety of fully integrated, free practice management tools within QuickBooks Online Accountant. Securely streamline client collaboration and manage your workflow so nothing falls through the cracks. Several tools are available now with more on the way, as our team works to create an optimal end-to-end practice management solution.

Unlimited users for wholesale billing clients

Adding wholesale billing clients to your practice is a smart move—you'll receive valuable pricing discounts and receive one convenient monthly bill. But did you know that your wholesale billing clients have no limit to the number of users they can add, while clients added via 'Bill my client' are limited to no more than 5 users? This great benefit can help you gain more wholesale billing clients, making it easier to transition to value-based pricing, where the cost of software is included in your fee.



I think the ProAdvisor program is a great community for accountants and bookkeepers to get resources, and we can pass the benefit on to our clients.

Susan Watkin
MI BSc

50%¹ discount for your clients when you pay for their QuickBooks Online subscriptions

As a ProAdvisor you can offer your clients an exclusive, accountant only 50% off QuickBooks Online (includes Essentials and Plus) for the life of their subscription through wholesale discount (firm is billed).

Free QuickBooks Online phone & chat support

Whether you are looking for phone or chat support, we have dedicated agents who are trained on QuickBooks Online accountant-specific issues available to help you get the most from QuickBooks Online. Call us at 1-855-253-1536 from 9:00AM-8:00PM ET Mon-Fri and 9:00AM-6:00PM ET Sat. Or start a chat with us by signing into QuickBooks Online Accountant and click the ProAdvisor tab, then Support. Chat is here to help from 11:00AM-8:00PM ET Mon-Fri.

Webinars, guided tips, and a specialist to help you get started

As part of your onboarding process, you will have access to a three-part webinar series housed in the ProAdvisor portal and designed especially for accounting professionals who are new to QuickBooks Online. The first webinar offers an introduction to QuickBooks Online Accountant, the second webinar shows you how to setup your firm's books, and the final webinar will show you how to manage your firm's books using QuickBooks Online. It also provides an overview of apps that can be used to extend and personalize the functionality of QuickBooks Online.

If you just recently signed up for QuickBooks Online Accountant, you'll get our First time use email series which includes guided tips on how to get started. And you can expect a call from our specialists to help guide you through the onboarding process.

Free training & certification

With self-paced, in-person, and live online training available, as well as certification and more, we've got all the tools to help you succeed in the cloud. There are currently two different types of QuickBooks Online certification exams available as part of the Cloud ProAdvisor Program.

- 1) QuickBooks Online Core Certification exam and training modules
- 2) QuickBooks Online Advanced Certification exam and training modules

The Certification Exams and Optional Training Modules are included with your Program membership at no additional cost. You can leverage the certifications to help you get into higher tier levels to access more benefits.



What I like about the ProAdvisor Program is that it gives me the flexibility to be in different locations. Right now I spend part of the year in Alberta, part of the year in Quebec, so it gives me the ability to service my clients from whatever province I am in.

Marnie Stretch
CPB

Grow your practice

Get new leads with the help of our listings, marketing aids, and networking events.

ProAdvisor status badges to add to your professional profiles²

Showcase your skills by downloading your ProAdvisor certification and tier status badges or requesting your ProAdvisor package. Assets may include desktop backgrounds, laptop stickers, tier status pin, and various sticker sizes for your office and windows. Show existing and potential clients you're an expert by displaying your badges at events, your office, business cards, your website and your social media profiles.

Free marketing tools

Market your practice like a pro with free marketing templates and guides to help you grow your firm. Learn to develop your social media strategy, effectively manage your campaigns, leverage co-branded templates for professional looking emails and get tips and competitive resources that'll help guide your conversations with moving clients to the cloud. These marketing tools are at your fingertips to promote both yourself and QuickBooks Online to current and prospective clients.

Marketing Placements promoting your practice³

Tens of thousands of small businesses visit our website looking for a QuickBooks expert to help manage their finances. As a Platinum level ProAdvisor, you'll get priority placement on select Intuit marketing vehicles to help you find new clients, where you can market your services to potential clients actively searching for an accountant, bookkeeper or consultant.

Free ticket to QuickBooks Connect event to connect with peers & potential clients⁴

Immerse yourself in the QuickBooks community by taking advantage of one free admission to QuickBooks Connect Toronto (starting 2018). Intuit leaders, partners, and industry professionals will share tips on how to maximize the Intuit product ecosystem. Leverage these events to connect with potential clients and learn from the ProAdvisor community.



QuickBooks Online's amazing. The bank feed feature delayed my decision to hire someone, because now I'm able to do my own work in less time.

Kamel Shafik
CPA CGA

Enhance your knowledge

Keep learning with our webinars, specialized training, and exclusive resources.

Exclusive Workflow Masterclass training and discounts⁵

The thought of moving your firm to the cloud can be overwhelming. New processes, tools, and technology can make it easy to put off cloud conversion, even when you know it's essential to your firm's future success. So, where do you begin?

Intuit has partnered with ProAdvisors across Canada to determine the best-in-class 3rd party apps that make converting to the cloud easier. In addition to exclusive ProAdvisor discounts, each app partner offers in-depth training materials and certification programs for you and your staff to ensure thorough working knowledge of each app.

For firms seeking deep-dive training and education in cloud transition, Intuit's Workflow Master Class program features a step-by-step workflow designed to foster an effective and integrated experience. Learn best practices of firm automation and become more efficient at client intake, task management, managing client documents and reporting.

Advanced QuickBooks Online tips & tricks webinar⁶

Take your QuickBooks knowledge to the next level with live webinars led by QuickBooks Online power users. Troubleshoot how to resolve client-entered errors and customize settings to help avoid future mistakes. Put QuickBooks Online to work for you by learning how to automate data entry through features and applications, and discover how working in Google Chrome can speed up your workflow. You and your team can interact with the instructor during the session, so bring your tough questions and get ready to master QuickBooks like never before.

Professional QuickBooks Online client training material

Thanks to our comprehensive training content, there's never been a better time for your clients to start using QuickBooks Online. You'll receive a suite of training materials designed to save you time and get clients up-to-speed in a snap, including a PowerPoint presentation, instructor notes, and a customizable training guide. Your clients will feel confident and excited to start using QuickBooks, and you'll spend less time fixing data entry errors.

Free access to exclusive content resources

We have resources developed and curated just for ProAdvisors. We'll do the legwork to keep up on the latest trends and best practices that matter to Accounting firms so you're always on the leading edge. Our content is not limited to accounting, it will include business skills, soft skills, whatever we notice is needed to succeed and lead.



QuickBooks Online allows you to do the work no matter where you are. I have somebody right now who's working on QBO for a client and they're at their cottage. It doesn't matter... Of course, for a heavy volume person, you're saving a ton of money using Quickbooks. Saving a ton of money, a ton of time.

Dianna Thorne
CPA

Priority Support

From online chat support to dedicated account managers, we have your back.

Dedicated Account Manager focused to help you grow

Gold and Platinum level ProAdvisors receive a dedicated, regional account manager who will get to know you and your firm on a more personalized level. Think of them as your strategic partner, committed to helping you evolve your practice and maximize the unique benefits of your top-tier membership.

Some of the things your account manager can assist with include:

- Migrating your firm to the cloud
- Advice on marketing your practice
- Leveraging free program benefits and resources
- Maximizing firm growth and acceleration

Priority fast track phone support⁷

For our Gold and Platinum level members, when you call Technical Support during regular business hours you will be routed to a special group of agents for assistance. Not only are the agents that will help you some of our most experienced, but you'll spend less time going through Interactive Voice Response (IVR) options and experience shorter hold times when lines are busy. We can't promise that you won't wait, but you'll get priority assistance.

Specialist to help you get your data into QuickBooks Online⁸

We'll make it easy to move clients to QuickBooks Online. You'll work with a migration specialist one-on-one to help you move your data from desktop or other accounting software to QuickBooks Online. Your specialist will develop a migration or workflow plan together with you based on your needs and will work with you to schedule a mutually agreed convenient time and frequency of meetings. Your clients will start benefiting from any time, any place access and having their data always, automatically backed up.

Schedule support calls for a time that's best for you⁹

We're here to help, but we also know you're busy. As a Platinum level member, you can schedule support calls for the time that works best with you with one of our most experienced support specialists. We can help you get started, dive into advanced features, including payroll and sales tax, QuickBooks Desktop to QuickBooks Online migration support, monthly onboarding calls, and quarterly product feature updates. Appointments can be made 12:00PM-5:00PM ET Mon-Fri.

PA Program Terms and conditions

1. You can give your clients 50% off the then-current MSRP pricing of QuickBooks Online (includes Essentials and Plus) for the life of their subscription when you sign up for wholesale discount (firm is billed) within your QuickBooks Online Accountant account. The MSRP price is subject to change at any time in Intuit's sole discretion.
2. Silver, Gold, and Platinum Tier achievement print badges offered approximately 30-60 days after your request has been submitted. Bronze offers digital tier achievement badge only.
3. Platinum members are eligible to receive marketing placements promoting your practice on select Intuit marketing vehicles. Firms are required to opt-in to this benefit and must have an acceptable, fully completed profile on QuickBooks Find an Accountant. Marketing placements are limited to one placement per firm. Placements are based on province and these terms are subject to change without notice.
4. Platinum members are eligible for one complimentary admission per firm, per year to the current QuickBooks Connect event (starting in 2018). Request for your free admission must be made before deadline and based on event capacity.
5. These are third party App offerings that Intuit, at its sole discretion, may include in the ProAdvisor Program. These programs and discounts are provided by third party application partners whose terms and conditions of service must be accepted by the ProAdvisor and/or the client to obtain the services. Discounts may vary and additional fees may apply. Please speak to your Account Manager for further details.
6. Intuit will provide Gold and Platinum members up to 60 minutes of live webinar training. ProAdvisors are responsible for ensuring their site is equipped with sufficient Internet bandwidth to facilitate the live webinar. Dates will be available for sign up through the QuickBooks Online Accountant - ProAdvisor tab.
7. Intuit offers priority phone support to Gold and Platinum members by directly routing to a team of QuickBooks Online experts to deal with advanced product queries. The team is on hand to help 9am-8pm EST Monday to Friday and 9AM-6PM EST on Saturdays (excluding holidays).
8. Gold and Platinum members are eligible to access free implementation services to help identify which clients are a fit for QuickBooks Online. Working with a specialist one-on-one, you'll develop a migration or workflow plan together based on customer analysis. Firms must have a minimum of 5 clients to migrate at one time to take advantage of our implementation services. The team aims to acknowledge the implementation services requests within the next working day and will work with you to schedule the provision of the Implementation Team at a mutually agreed convenient time subject to availability of Intuit personnel. Migration of data is subject to a suitability assessment by Intuit.
9. Platinum members will have access through the QuickBooks Online Accountant - ProAdvisor tab to schedule an appointment at their own convenience with our most experienced support agents during the hours of operation 12pm - 5pm EST Monday to Friday (excluding holidays). All call backs will be made as close to the scheduled time, give or take 15 minutes. Members may have no more than one (1) session reserved at any given time. After the completion of your session, you may schedule your next. Sessions are offered in 30- and 60-minute increments and include up to 5 to 10 minutes to prepare and wrap up the session. Two attempts will be made to contact within the first 15 minutes of the scheduled call back; if there is no contact made the session may result in its cancellation or rescheduling.

Terms, conditions, pricing, features and support options on the Program are subject to change without notice.