



Part 1: Why choose online?

Brush up on the benefits of moving online and find out how to match your clients with the QuickBooks product that will best suit their needs.

Table of Contents

Becoming a trusted advisor with QuickBooks Online.....	2
Enhancing QuickBooks Online with apps.....	3
Making a recommendation that fits your clients' business	4
Appointment-based businesses.....	5
Retail and eCommerce businesses.....	6
Professional and field services businesses.	7
Identifying the right QuickBooks product for your clients.	8
Starting a conversation about moving online.....	9
Offering the best deal on QuickBooks Online.....	10

We'll help you be a trusted advisor.

It's not easy to grow a small business. Every day, your clients face complex financial decisions, increasing demands on their time and growing competition—and they rely on you to help them overcome these challenges.

That's when you can rely on us. We've packed QuickBooks Online with smart, automated features, each designed to help you and your clients eliminate busywork and stay focused.

Here are four key benefits of switching from QuickBooks Desktop to QuickBooks Online:



Instant collaboration

Work securely with your clients from anywhere, on any connected device, and sync files in real time for simultaneous use.¹



Total security

Never worry about saving files to an external device. QuickBooks Online is always backed up and accessible, no matter where you are.



The latest software

The cloud automatically updates your software to the latest version, so you and your clients always have the most current features.



Less busywork

Your clients' transactions will be downloaded automatically when they connect their bank accounts to QuickBooks Online.²

Help clients extend the power of QuickBooks Online with these apps.

The average business uses 18 apps to enhance its QuickBooks solution. You and your clients can choose from over 130 apps, each designed to help you overcome

a unique business challenge.³ Some popular options for clients moving from QuickBooks Desktop to QuickBooks Online include:



Sync with Square

Automatically import Square sales-related transactions into QuickBooks Online.



Plooto

Streamline and automate your payments to your vendors and suppliers when you connect Plooto and QuickBooks Online.



Receipt Bank

Eliminate the need for manual data entry of accounts payable transactions with Receipt Bank's integration with QuickBooks Online.



Transaction Pro Importer

Easily import many list and transaction types into QuickBooks Online from any text or Excel file.



Method:CRM

Keep customer follow-ups and history in one place with the top-rated CRM built for QuickBooks.



TSheets Time Tracker

Effortlessly track employee time for payroll, invoicing and job costing. Integrates fully with QuickBooks Online.



Shopify

Save time by seamlessly importing Shopify revenue, tax, product, and customer information into QuickBooks Online.



Corecon Technologies

Give engineering and construction firms complete project visibility anytime, anywhere, allowing management to make quick and informed decisions with the power of QuickBooks.



DEAR Inventory

Manage costs and maximize profitability by harnessing this powerful end-to-end inventory management solution.

Do business anywhere.>



Make a recommendation that's perfect for *your* clients.

Every small business has different needs. As your clients' trusted advisor, you're in the best position to understand those needs and recommend the accounting solution that will help get your clients where they want to be.

That's where we can help. The next section is organized by industry, so you can turn straight to the page that applies most to your clients—and get all the information you need to offer individualized advice.

Which industry applies most to your clients?



Appointment-based businesses

Businesses that offer services by appointment, such as a doctor's office, salon or driving school.

Sound familiar?
Skip to [page 5](#).



Retail and eCommerce businesses

Businesses that sell or resell products, such as food trucks, eBay sellers or coffee shops.

Want to know more?
Skip to [page 6](#).



Professional and field services businesses

Businesses that get paid by the project, job or gig, such as contractors, photographers or wedding planners.

Are these your clients?
Skip to [page 7](#).

Appointment-based businesses



Here's how businesses that offer services by appointment can benefit by moving online.



Do you have appointment-based clients?

Appointment-based businesses include:

- Doctors
- Salons
- Veterinarians
- Personal trainers
- Chiropractors
- Optometrists
- Driving instructors
- Mechanics

Help these businesses minimize busywork and maximize *paid work*.

Appointment-based business owners are constantly busy. Finding time between appointments to focus on their business can be difficult. They need a fast, simple way to manage their books.

That's where QuickBooks Online shines. Its features are designed to help these businesses stay on top of expenses and work efficiently with teams. Best of all, your clients will have more time for bookings thanks to easy, intuitive access to the information they need—exactly when they need it.

Plus, your appointment-based clients can enhance QuickBooks Online by adding apps.

Each app is designed to meet your clients' specific needs, and each integrates fully with QuickBooks Online. Popular options include:



Method:CRM

Keep CRM data in one place.



TSheets

Effortlessly track employee time.

Retail and eCommerce businesses



Find out how working online can meet the unique needs of businesses that sell or resell products.

Do you have retail and eCommerce clients?

Common retail and eCommerce businesses include:

- Food trucks
- eBay sellers
- Breweries
- Coffee shops
- Restaurants
- Hardware stores
- Furniture stores
- App sellers
- Etsy sellers
- Boutique shops



Recommend the right tools to manage cash flow and grow profitability.

Your retail and eCommerce-based clients rely on up-to-the-second financial data to manage inventory and make crucial business decisions.

It's packed with features designed with retail and eCommerce businesses in mind. Your clients will have what they need to automatically import data from their sales tools, stay on top of payroll and seamlessly manage inventory. Plus, they'll be able to reach their goals faster thanks to a crystal-clear view of their financial health.

Plus, help retail and eCommerce businesses get more done by adding apps to QuickBooks Online.

This app will help your clients overcome the specific challenges of selling products and managing inventory.



DEAR Inventory

All-in-one cloud-based inventory management.

Professional and field services businesses



Find out which QuickBooks Online features are tailored to the needs of your project-based clients.

Do you have professional and field services clients?

Common professional and field services businesses include:

- Consultants
- Photographers
- Architects
- Entertainers
- Wedding planners
- Interior designers
- Caterers
- Landscapers
- Lawyers
- General contractors



Recommend the solution that can keep up with on-the-go clients.

Professional and field services businesses are always moving from one job to another, which leaves little time for manual data entry. They need an accounting solution that integrates with their business, automatically providing them with a clear picture of their financial health at any given moment.

QuickBooks Online is designed to provide what professional and field services businesses need. A fast, up-to-date view of their cash flow, seamless integration with their bank, simple customized invoicing—it's all built right in, ready to work as fast as your clients do.

Plus, help your clients manage job costing smoothly with the Knowify app.

With full QuickBooks Online integration, apps like Jobber and Corecon are designed to help your clients do more in less time.



Jobber



Corecon

Take advantage of powerful job costing, bid and contract management, order management and more.

Identify the right product for your clients.

Compare QuickBooks Online	Easy Start	Essentials	Plus
Number of people who can simultaneously use QuickBooks Online	1	3	5
Number of built-in business reports	20+	40+	65+
Send unlimited estimates and invoices on the go	✓	✓	✓
Track your income and expenses	✓	✓	✓
Print cheques and record transactions	✓	✓	✓
Download transactions from your bank and credit card accounts ²	✓	✓	✓
Charge sales tax to your customers	✓	✓	✓
Access your data online from a PC, Mac, tablet or smartphone ¹	✓	✓	✓
Back up your data online automatically ³	✓	✓	✓
Invite your accountant to access your data ⁴	✓	✓	✓
Import and export from Excel ⁵	✓	✓	✓
Same security and encryption as banks ⁶	✓	✓	✓
Manage and pay bills		✓	✓
Control what your users can access		✓	✓
Set up invoices to automatically bill on a recurring schedule		✓	✓
Enter bills and schedule payments for later		✓	✓
Compare your sales and profitability with industry trends		✓	✓
Create and send purchase orders			✓
Track inventory			✓
Categorize your income and expenses using class tracking			✓
Create budgets to estimate future income and expenses			✓
Give employees and subcontractors limited access to enter time worked			✓
Track billable hours by customer			✓
Track sales and profitability for each of your locations			✓

Add Payroll	With Payroll	With Payroll	With Payroll
Easy paycheques ; just enter hours	✓	✓	✓
Calculate paycheque and payroll taxes	✓	✓	✓
Includes payroll tax forms	✓	✓	✓
Unlimited free direct deposit	✓	✓	✓
Live, Canadian-based expert support during setup	✓	✓	✓

Ready to talk to your clients about moving online?

We'll help you guide the conversation, making it easy for your clients to see how working online will help empower them to overcome everyday business challenges and achieve their goals.

“You'll have more time to do the work you love.”

Here's how to start the conversation with clients who value saving time.

- ✓ **Your data will always be up to date and in sync.**
No more chasing emails or spending hours entering numbers.
- ✓ **You'll be able to easily track profit and expenses.**
Clearly see the state of your business in just a few clicks.
- ✓ **You'll have the freedom to work where and when you want.**
Access your books anytime, from anywhere.

“Your bottom line will improve.”

Here's how to start the conversation with clients who value growing profits.

- ✓ **You'll always have the latest version.**
QuickBooks Online includes automatic updates.
- ✓ **You'll eliminate many unnecessary expenses.**
Connect to financial institutions for free.
- ✓ **You'll receive free cloud storage.**
Automatic, secure backup is included with QuickBooks Online.
- ✓ **You'll be able to offer access to more users.**
Up to five users can have access.

“You'll get the advice you need to reach your goals faster.”

Here's how to start the conversation with clients who value deeper business advice.

- ✓ **You'll get the best value possible from my expertise.**
QuickBooks Online lets me quickly identify the state of your business.
- ✓ **You'll be able to take advantage of integrated apps.**
Extend the power of QuickBooks Online.
- ✓ **You'll be able to easily stay up to date on the health of your business.**
Generate regular reports that track profit and loss, vendor expenses and more.

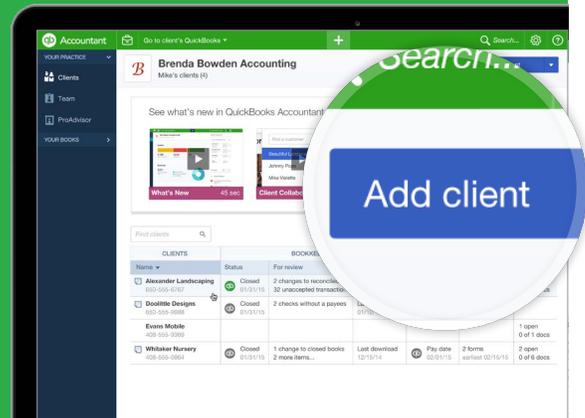
Two ways to help your clients get the best deal on QuickBooks Online

Choose the offer that best suits your clients: wholesale pricing or pass along savings.

Manage your clients' subscription for them with wholesale pricing.

Offer them 50% off QuickBooks Online for the life of their subscription.¹²

With wholesale pricing, your clients save big on the MSRP of QuickBooks Online for life. It's as simple as that—no hassles, no price hike down the road.



Wholesale pricing also offers you:



Complete control

Add just one client, or all of them. The choice is yours.



Simple billing

You'll get monthly consolidated bills for all of your clients on wholesale pricing.



Flexible options

Offer clients wholesale pricing on QuickBooks Online Essentials or Plus. For additional savings, bundle with Payroll.

You can add both new and existing QuickBooks Online clients to **wholesale pricing.**

Or offer clients **accountant-exclusive savings!**



1. QuickBooks Online requires a computer with a supported Internet browser (see System Requirements for a list of supported browsers) and an Internet connection (a high-speed connection is recommended). The QuickBooks Online mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/Internet provider network availability and occasional downtime due to system and server maintenance and events beyond our control. Product registration required.
2. Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees.
3. Data access is subject to cellular/Internet provider network availability and occasional downtime due to system and server maintenance and events beyond our control.
4. Small business clients can invite up to two accounting professionals such as a bookkeeper or an accountant to access their data. Once an accounting professional accepts the invitation, they will automatically get signed up for QuickBooks Online Accountant, allowing them to access their clients' data.
5. Microsoft Word and Excel integration requires Word and Excel 2003, 2007 or 2010.
6. 128-bit Secure Sockets Layer (SSL) is the same encryption technology used by some of the world's top banking institutions to secure data that is sent over the Internet. Terms, conditions, pricing, features, service and support are subject to change without notice.