



QuickBooks Online Accountant can do THAT?

Tiffany J Stewart, CPA, CMA
Dawne Leaney Davidson

A photograph of two young women with long blonde hair, one in profile and one from behind, engaged in conversation at night. They are wearing dark jackets with light-colored fur-lined hoods. The background is dark with some blurred lights.

**Take a few moments
to CONNECT with
your neighbour**

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- This session is eligible for **1 hours of CPD**
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Today's speakers



Tiffany J Stewart, CPA, CMA
Owner, Tiffany J. Stewart CPA
President, Marabirch Inc.
Administrator, QB-HQ & qb-hq for SMB



Dawne Leaney Davidson
Senior Bookkeeper, AIS Solutions
Vice-President, Marabirch Inc.
Administrator, QB-HQ & qb-hq for SMB

Agenda

Overview

QuickBooks Online Accountant (QBOA) Dashboard

- Clients
- Team
- ProAdvisor
- Work
- Tax Returns
- Apps

Accountant Tools

Workpapers

Overview Demo

Key Takeaway: NEW feature that will continue to be built out



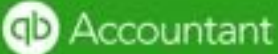
Clients Demo

Key Takeaway: Enhanced notes and shared documents.



QBOA Dashboard

KEY TAKEAWAY: Easy to add team members, their access levels, and which clients they can access.



qb Accountant

YOUR PRACTICE

- Clients
- Team**
- ProAdvisor
- Work
- Tax Returns
- Apps

User Profile | **Firm Administration and Books** | Client Access

Access: Basic

YOUR FIRM ADMINISTRATION	ACCESS
Firm information	View only
Firm users	None
Subscriptions and billing	None
YOUR FIRM BOOKS	ACCESS
Customers and accounts receivable	No
Suppliers and accounts payable	No
YOUR CLIENTS	ACCESS
Manage your clients	No

Access to firm administration and books

Full

- Full access to administrative functions for your firm
- Full access to managing clients
- Full access to your firm's books
- Administrator access to client QuickBooks

Basic

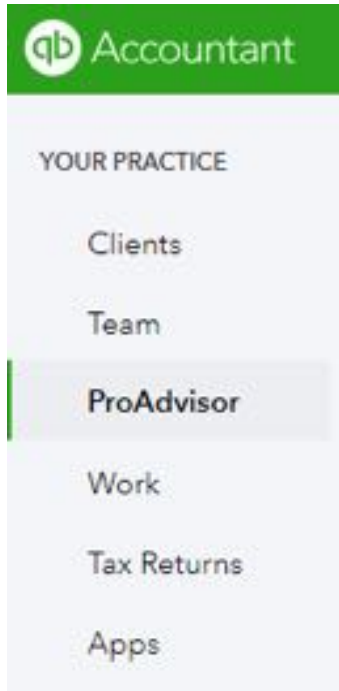
- Limited access to administrative functions for your firm
- No access to managing clients
- No access to your firm's books
- Administrator access to client QuickBooks

Custom

- Custom access to administrative functions for your firm
- Custom access to managing clients
- Custom access to your firm's books
- Administrator access to client QuickBooks

QBOA Dashboard

KEY TAKEAWAY: Certification badges available for download



Valuable information

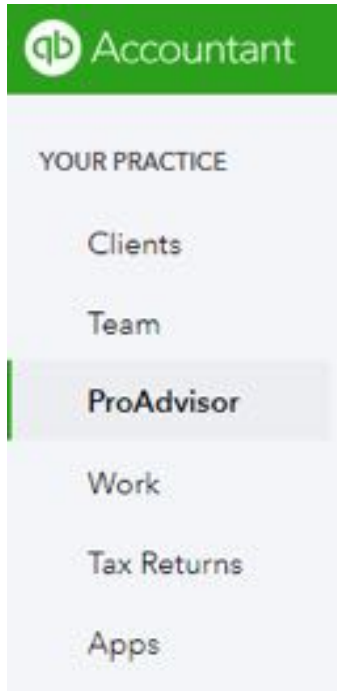
- ProAdvisor tier, company ID, and certification status
- Your Intuit consultant and how to contact them
- QBOA Release Notes
- Product Updates

ProAdvisor tiers

- Bronze – 0-2 QBO clients
- Silver – 3-10 QBO clients or QBO Core Certified
- Gold – 11-24 QBO clients or QBO Advanced Certified
- Platinum – 25+ QBO clients and QBO Core Certified

QBOA Dashboard

KEY TAKEAWAY: Certification badges available for download



Benefits

- Outline of Cloud ProAdvisor Program and benefits of each tier
- Marketing Your Practice
- Resources
- Support
- Apps & Add-ons

Training

- Links to QBO Core and Advanced Certification modules and exams
- Link to QBD modules and exam

Work Demo

KEY TAKEAWAY: NEW template option for workflows



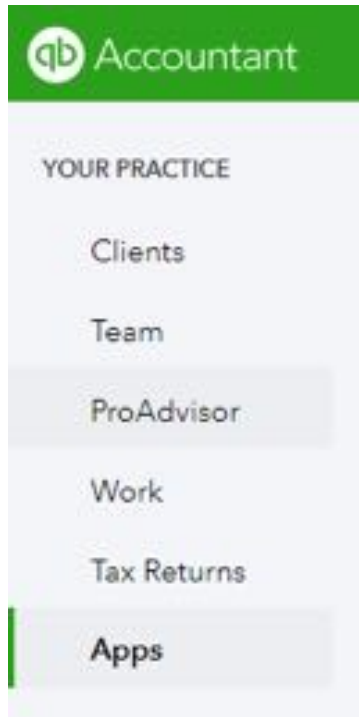
Tax Returns Demo

KEY TAKEAWAY: T2 only at this time



QBOA Dashboard

KEY TAKEAWAY: Apps enhance the QBO experience for ProAdvisors and clients



Single management location

- Find apps
- Connect apps to clients
- See and manage Firm apps

Accountant tools

Single dropdown with tools/shortcuts at your fingertips



Accountant Tools

- Workpapers
- Reclassify Transactions
- Voided/Deleted Transactions
- Write Off Invoices
- Journal Entries
- Close Books
- Reconcile
- Accountant Reports
- Management Reports
- My Custom Reports
- Reports Tools
- Chart of Accounts
- New Window

Tools

- Workpapers
- Reclassify Transactions
- Journal Entries
- Reconcile
- Reports Tools

Shortcuts

- Voided/Deleted Transactions
- Close Books
- Accountant Reports
- Management Reports
- My Custom Reports
- Chart of Accounts
- New Window

KEY TAKEAWAY: Use Report Tools to change report default dates, Cash or Accrual report default, Close Books, and see Reconciliation Status.

BEST PRACTICE: Do not use Write Off Invoices – you cannot recapture GST/HST on bad debt with this tool.

Workpapers Demo

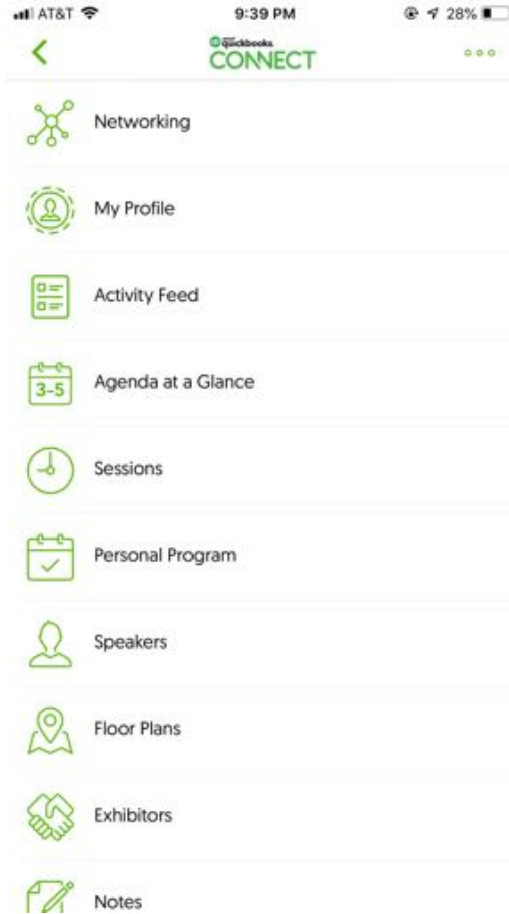
KEY TAKEAWAY: Corporation books to tax in one platform.



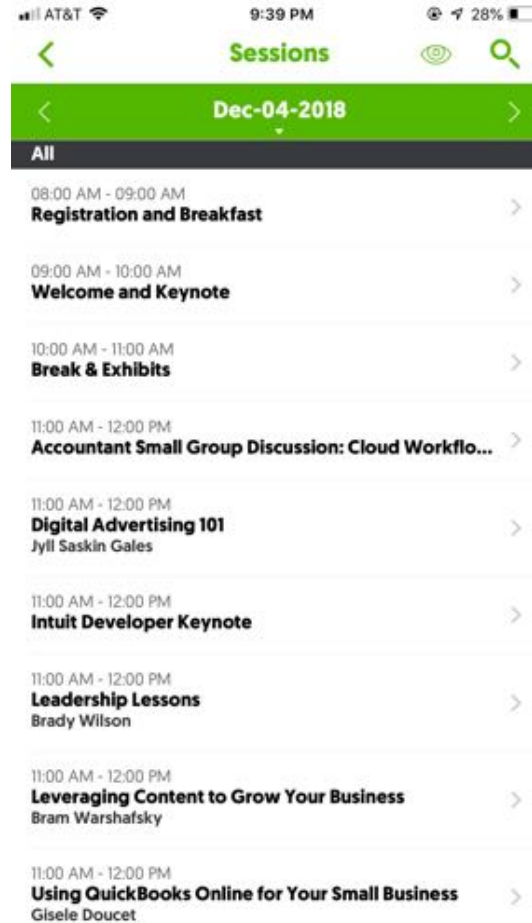
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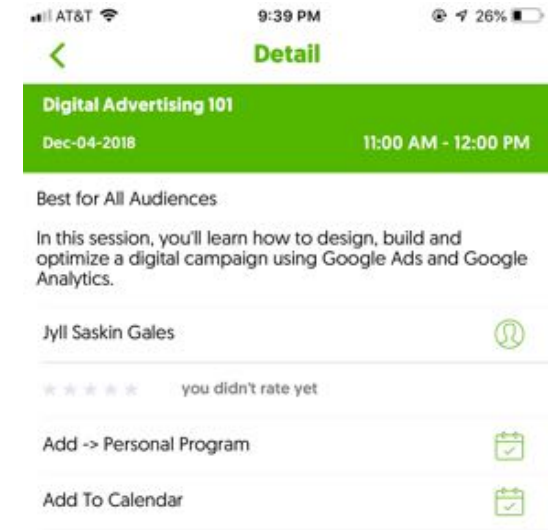
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11:00 am-12:00 pm

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Digital Advertising 101	+
Leveraging Content to Grow Your Business	+
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Using QuickBooks Online for Your Small Business	+
Warrior Approach to Productivity • session repeats	+
Accountant Small Group Discussion: Cloud Workflows	+
Intuit Developer Keynote • session repeats	+

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