Running your business from the car using QuickBooks Online
About today’s speaker

Alicia Katz Pollock
learn.Royalwise.com

Member of:
- Intuit Trainer/Writer Network
- QuickBooks ProAdvisor, Elite Level

Trainer:
- Weekly live classes and webinars on QuickBooks, Excel, and business productivity software

Author of:
- New Book! "Specialty Retail: Gas Stations and Convenience Stores” on Amazon.com
- “Master QuickBooks Online: From Setup to Tax Time” on Amazon.com
- The Mentorship Membership™ program at learn.Royalwise.com
This session is interactive!

If you already use QuickBooks Online (QBO), you are welcome to pull out your smartphone or tablet and log into the QBO app now.
Agenda

Using the QuickBooks Online app on an iPad
App-only features
Submitting expenses with Receipt Capture
Creating estimates & invoices with signatures
Using QuickBooks Payments to accept credit cards
3rd Party service apps
Why Use the Mobile App?
QBO on a Smartphone or Tablet

• No need to drag around a laptop
• Work while waiting in line
• All employees can enter transactions
• Use built-in camera to record receipts
• Swipe credit cards while onsite

Streamlined essentials that go where you go... and your employees, too!

KEY TAKEAWAY: This ain’t yo’ mama’s 10-key!
Mobile App feature: Interactive maps

• Zoom in, tap for more info
• Customer location map
• Look up where a customer lives
• Open in Maps app

All customer addresses automatically appear on a visual map.

KEY TAKEAWAY: See where your customers are located when you want to open a new branch, or know where to advertise
Mobile App feature: Notes & attachments

• Notes made in the Mobile App show up under Customer Details in the browser
• Take notes to share with colleagues
• Text or pictures

KEY TAKEAWAY: Additional ability to store info
Mobile App feature: Customer pictures

Keep track of who’s who

• Take a picture of the customer
• Picture will show up on all related transactions

KEY TAKEAWAY: Remind yourself who they are before you get there
Mobile App feature: Autofill addresses

AutoFill current location when making a new Customer

The GPS will fill in the address for you (iPad only)

KEY TAKEAWAY: No need to type an address with your thumbs
Mobile App feature: Charts
Interactive charts and graphs show your data in instantly-digestible, attractive images

Tablet Reports and Graphs:
• P&L, Balance Sheet
  – Invoices by Month
  – Invoices by Status
  – Invoices by Customer

Phone:
• P&L Report and Graph
• Balance Sheet report
When Service Meets Bookkeeping
Create Estimates on the spot

Don’t write on paper on a clipboard, and then recreate it when you get back to the office.

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<tr>
<td>13 Windows &amp; Trim</td>
<td>3.000.00 0.000.00 0.00</td>
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</tbody>
</table>

**KEY TAKEAWAY:** Why do the work twice?

- No double-entry
- Electronic record, with signature
...and get an approval signature!

- No hoops to jump through
- Expedite the process

Get a legally-binding signature without snail-mail, faxes, or e-sign services

KEY TAKEAWAY:
It looks like Kindergarten, but as long as they recognize it, you’re fine.
Email Invoices & Sales Receipts

- No paperwork at your desk
- Billing is immediate

Finish the paperwork before you get back in the truck

KEY TAKEAWAY:
Why wait for the bookkeeper? Speed up your A/R!
QBO allows me to do things that I had a hard time doing with paper invoices.

It allows me to capture my customer’s information. When I'm done with my work, I can email them the receipt.

I don't have to enter my paper invoices like I did on QuickBooks Desktop.

It has saved me time and money.

Scott Trantel, Trantel Heating & Cooling, Portland, OR
Your Mobile Office
Intuit QuickBooks Payments

- Lower rates than Square
- Swipe the card to get the lowest rates
- Reduce A/R
- Customer love

Accept Credit Cards on the spot

KEY TAKEAWAY: ProAdvisors get a 1.5% + .25 swipe rate for themselves and their clients
Receipt Capture

- Enter an expense, complete with paper trail, while you’re still in the restaurant or store
- Attaches image to transaction in QBO
- Digital copies for IRS
- Employees don’t lose receipts
- No need to enter back in the office

KEY TAKEAWAY: How much time do you spend chasing down, digitizing, or storing receipts?
Mileage tracker

- Automatically records every trip
- Swipe left for business, swipe right for personal
- Valid documentation for IRS
- No need to keep paper logs
- No need for 3rd party mileage apps

KEY TAKEAWAY: Only works for Master Administrator
3rd Party Service Apps
Time cards in the field: T-Sheets

- Time cards managed from website
- Approve time in QBO
- Imported into Payroll
- Services assigned to clients
- Billable or non-billable
- Allows job costing
- Assign to Classes
- Entries are geotagged

Employees can clock in and clock out using their cell phones

KEY TAKEAWAY:
Punching the clock becomes fun again.
Expenses in the field: Expensify

- Take pictures of receipts…with OCR to autofill the text
- Manage employee credit cards
- Track auto mileage
- Store travel itineraries
- Submit expense reports with a few taps

Employees can create expense reports using their cell phones

KEY TAKEAWAY:
No forms to fill out and submit. Paperless expense reporting!
Auto mileage: MileIQ

- Tracks without even opening the app
- See destinations on a map
- Name & automate frequent locations
- Swipe to mark as Business or Personal
- Enter specific names or purposes
- Web interface too
- Generates reports with just a few taps

**Track auto mileage without having to write down each date, location, and miles driven**

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KEY TAKEAWAY:
Keeping a trip log without keeping a trip log.
Scheduling and dispatch

ServiceM8
Jobber
FSM
KickServ

- Drag-and-drop scheduling
- Remind clients of appointments
- Dispatch staff to job locations
- Send notifications to employees
- Book specific hours or service windows

KEY TAKEAWAY:
Schedule changes are immediate, and immediately apparent
What should you do next?

- Install the QBO app on your smartphones and tablets
- Test out creating a live Estimate or Invoice, and get a signature
- Take pictures of your clients
- Take pictures of your receipts
- Turn on Mileage tracker
- Sign up for QuickBooks Payments, then create a Sales Receipt with credit card payment
- Create accounts with Expensify and MileIQ
- Integrate T-Sheets, ServiceM8, or other 3rd party apps into your workflow
- Talk to your accountant or bookkeeper if you need any advice.
Questions?
About today’s speaker

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