



Using QuickBooks Online for your Small Business

Gisele Doucet

CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

About today's speaker



Gisele Doucet
CEO, The Art of Accounting

Platinum-level Advanced Certified ProAdvisor

CURRENT TIER			
BRONZE	SILVER	GOLD	PLATINUM
0-2	3-10 OR QBO Core Certified	11-24 OR QBO Advanced Certified	25+ AND QBO Core Certified

Member of the Intuit Trainer/Writer Network

Intuit Trainer for over 5 years



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

**What business
tracking tools do
you use now?**

Agenda

Why QuickBooks Online (QBO)?

The benefits of cloud accounting!

What version of QBO should you choose?

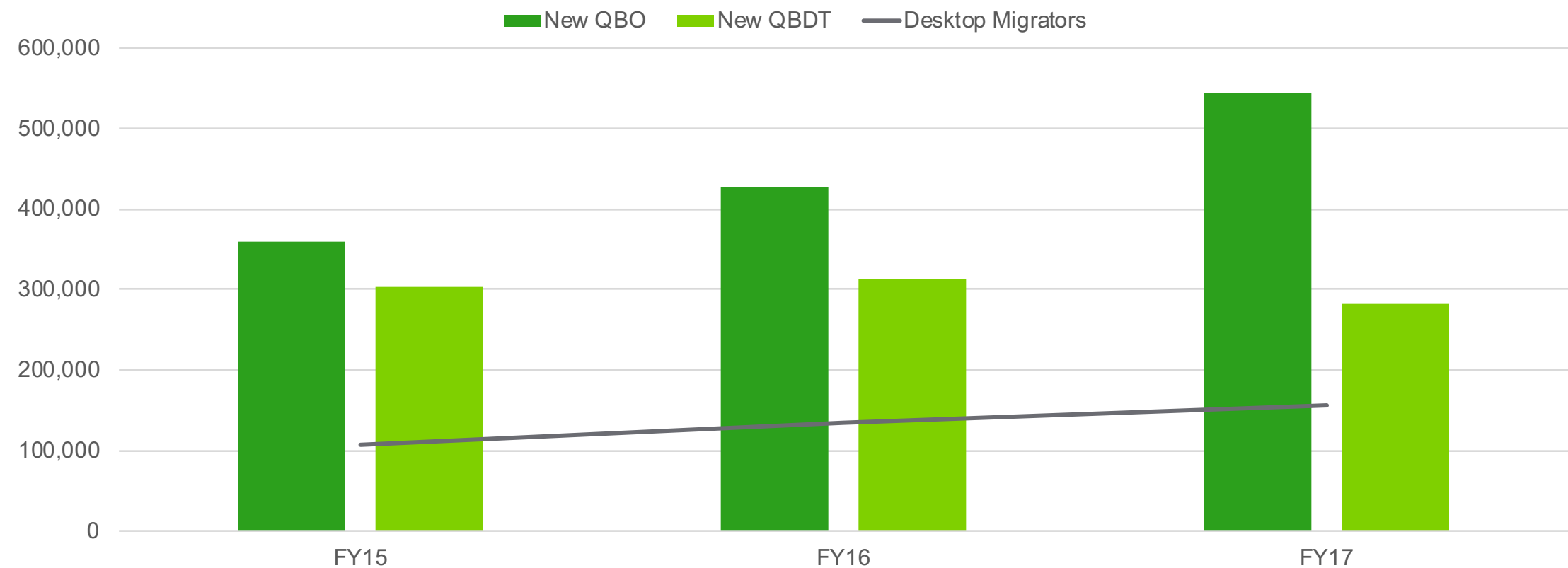
Demo: Typical income and expense workflows

Bells and whistles – the automations that save you time and effort

Why choose QuickBooks Online?



Current industry trends: Clients are choosing QuickBooks Online



Current industry trends: Why move to an online solution?

The Cloud

- Your information is accessible, and always up-to-date
- No more need to go back to the office to enter customer information
- Leverage technology to reduce effort and human error

Technical benefits



True Cloud-based
Application



Access from
Multiple Devices



Multiple Operating
Systems



Always up to Date



Real-time
Multi-user Access



128 Bit Encryption
Continuous Backup

Workflow benefits

Integrated document management

Automation features

- Bank Rules
- Recurring Transactions

Ecosystem of Apps



plotoo



Third Party Apps

Extend the power of QBO

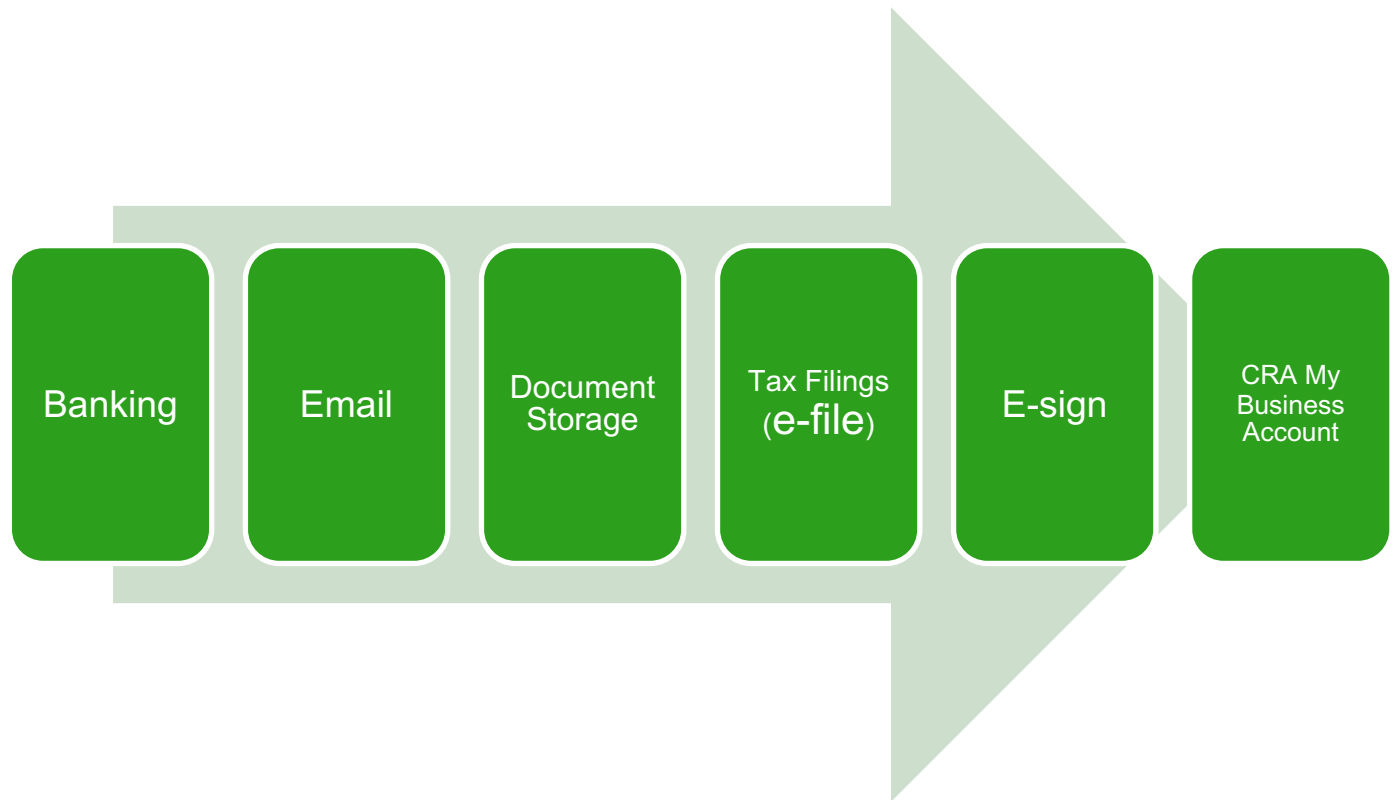
Reduce the amount of apps

Seamless integration

QBO is the “hub”



What are you already using in the cloud?



**Which version of QuickBooks
should you pick?**



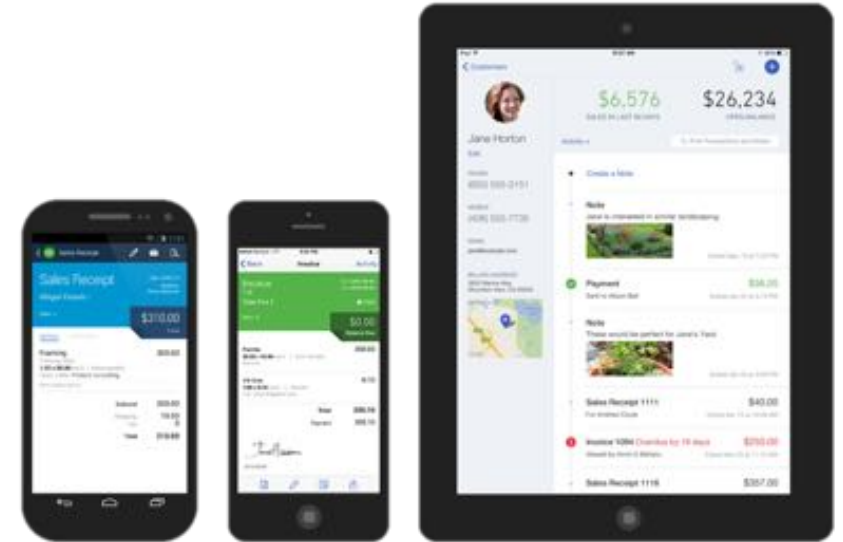
QuickBooks Online

<div><div><div>BUY NOW</div><div><div></div></div><div>FREE TRIAL</div><div>For 30 days</div></div><div><div>Black Friday Sale</div><div>Up to 70% off</div><div>SAVE ON THE FIRST 4 MONTHS</div></div></div> <div><div>Track mileage automatically</div><div>Sort business & personal transactions</div><div>Track income & expenses</div><div>Track sales & sales tax</div><div>Capture & organize receipts</div><div>Run reports</div><div>Invoice & accept payments</div><div>Progress Invoicing</div><div>Maximize tax deductions</div><div>Send estimates</div><div>Multiple users</div><div>Manage bills & payments</div></div>	<div><div>EASystart</div><div>\$13.00</div><div>\$3.90 / mo</div><div>Buy Now</div></div>	<div><div>MOST POPULAR</div><div>ESSENTIALS</div><div>\$27.00</div><div>\$8.10 / mo</div><div>Buy Now</div></div>	<div><div>PLUS</div><div>\$40.00</div><div>\$12.00 / mo</div><div>Buy Now</div></div>	<div><div>SELF-EMPLOYED</div><div>\$10.00</div><div>\$5.00 / mo</div><div>Buy Now</div></div>
				✓
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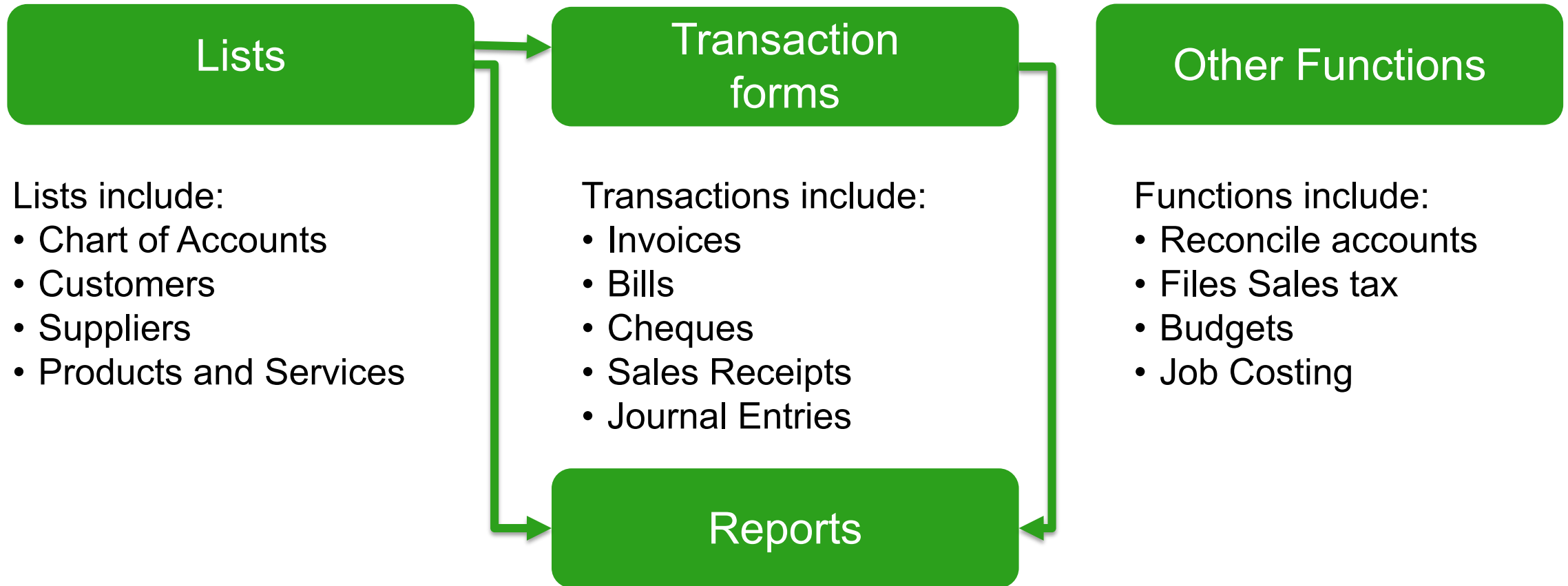
The Mobile App

The QuickBooks Online Mobile App facts:

- Free with any paid subscription of QuickBooks Online
- Available for iOS or Android devices
- Automatically syncs with QuickBooks Online on the web
- Same level of security as the browser version



Understanding how QuickBooks Online is built



Daily Workflow: Income



Income

Customer Pays at
the Time of Sale



Accounts Receivable



Banking feeds

How it works:

- Connect your bank and credit card accounts to QuickBooks Online
- Bank data is automatically downloaded from your bank each day
 - Existing transactions will be matched
 - Repeated transactions with similar bank detail will be recognized by the artificial intelligence, and a category will be suggested.
- You are still in control, and get to approve recognized transactions.

For Review

In QuickBooks

Excluded

Go to Register

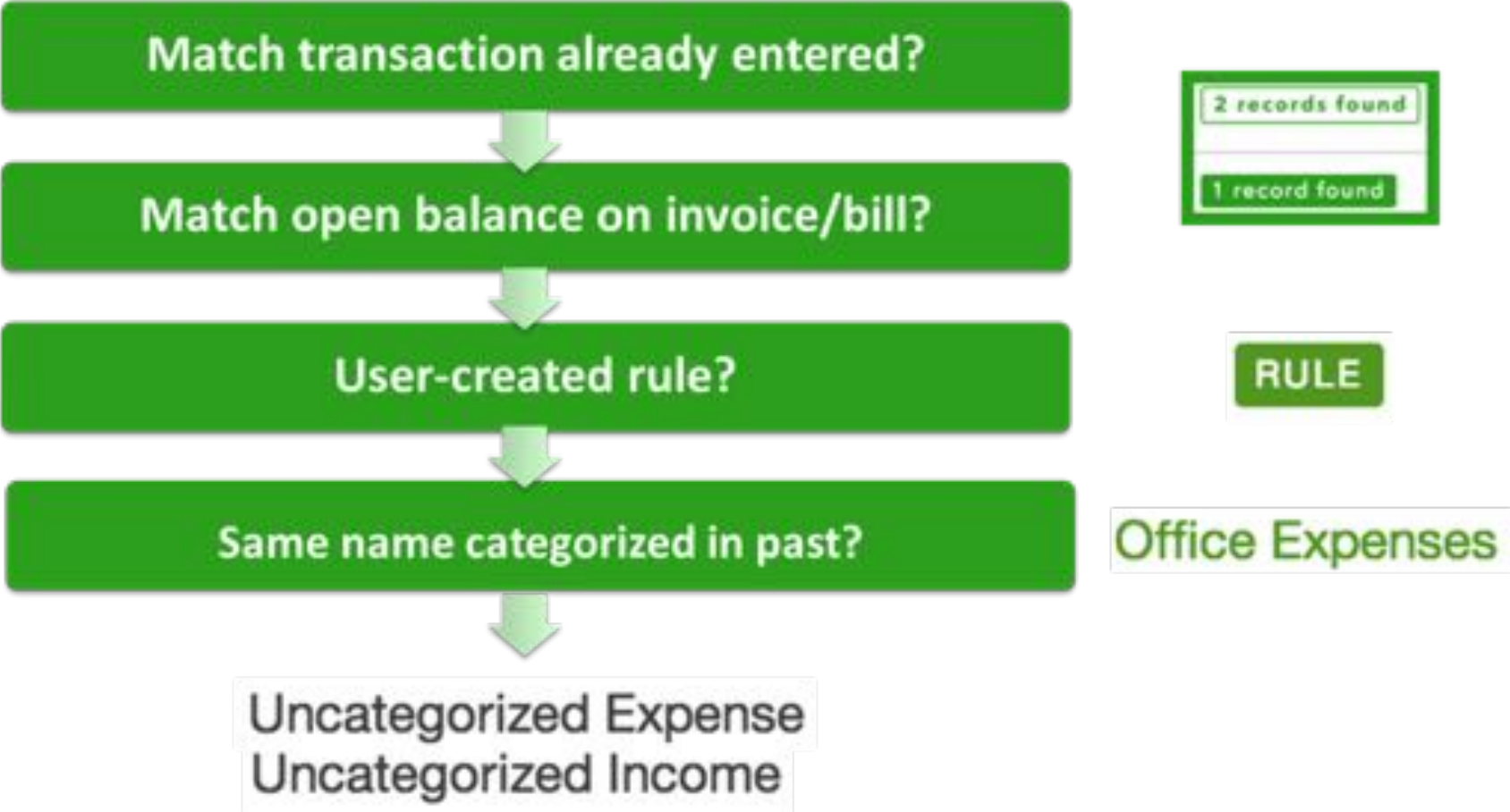
Batch actions ▾

All (35)

Recognized (5)

	DATE	DESCRIPTION	PAYEE	CATEGORY OR MATCH	SPENT	RECEIVED	ACTION
<input type="checkbox"/>	12/06/2016	Whole Foods	Whole Foods	Uncategorized Expense	\$3.75		Add
<input type="checkbox"/>	12/06/2016	Car Park	Car Park	TRAVEL Travel	\$18.00		Add
<input type="checkbox"/>	12/06/2016	Target		Other General and Admin Expenses	\$2.99		Add
<input type="checkbox"/>	12/06/2016	Las Margaritas	Las Margaritas	MATCH Payment 09/30/2016 \$450.00 Las Margaritas		\$450.00	Match
<input type="checkbox"/>	12/05/2016	Natural Grocers	Natural Grocers	Meals and Entertainment	\$28.47		Add

Logic for downloaded transactions from the bank feed



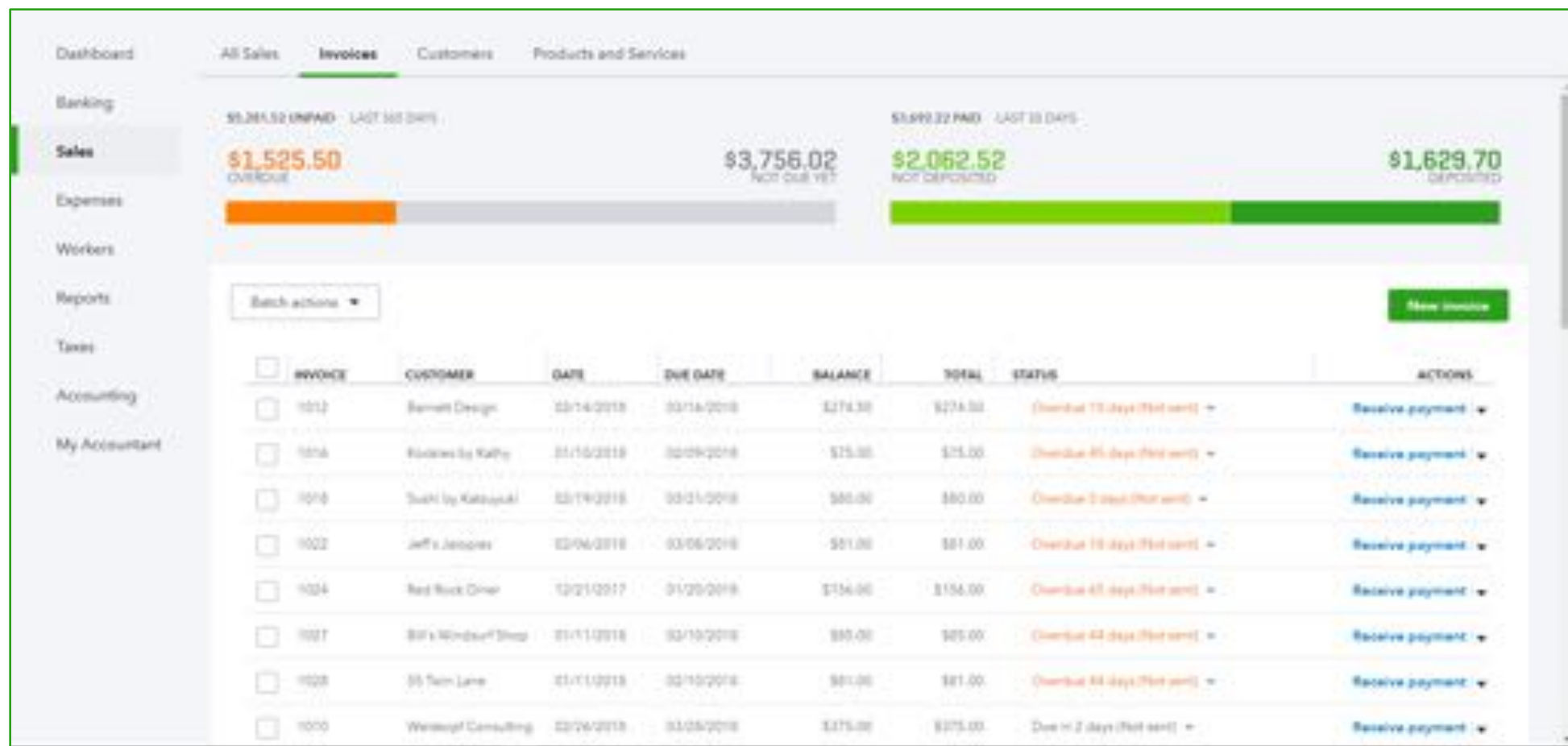
The Sales center

Sales Transactions

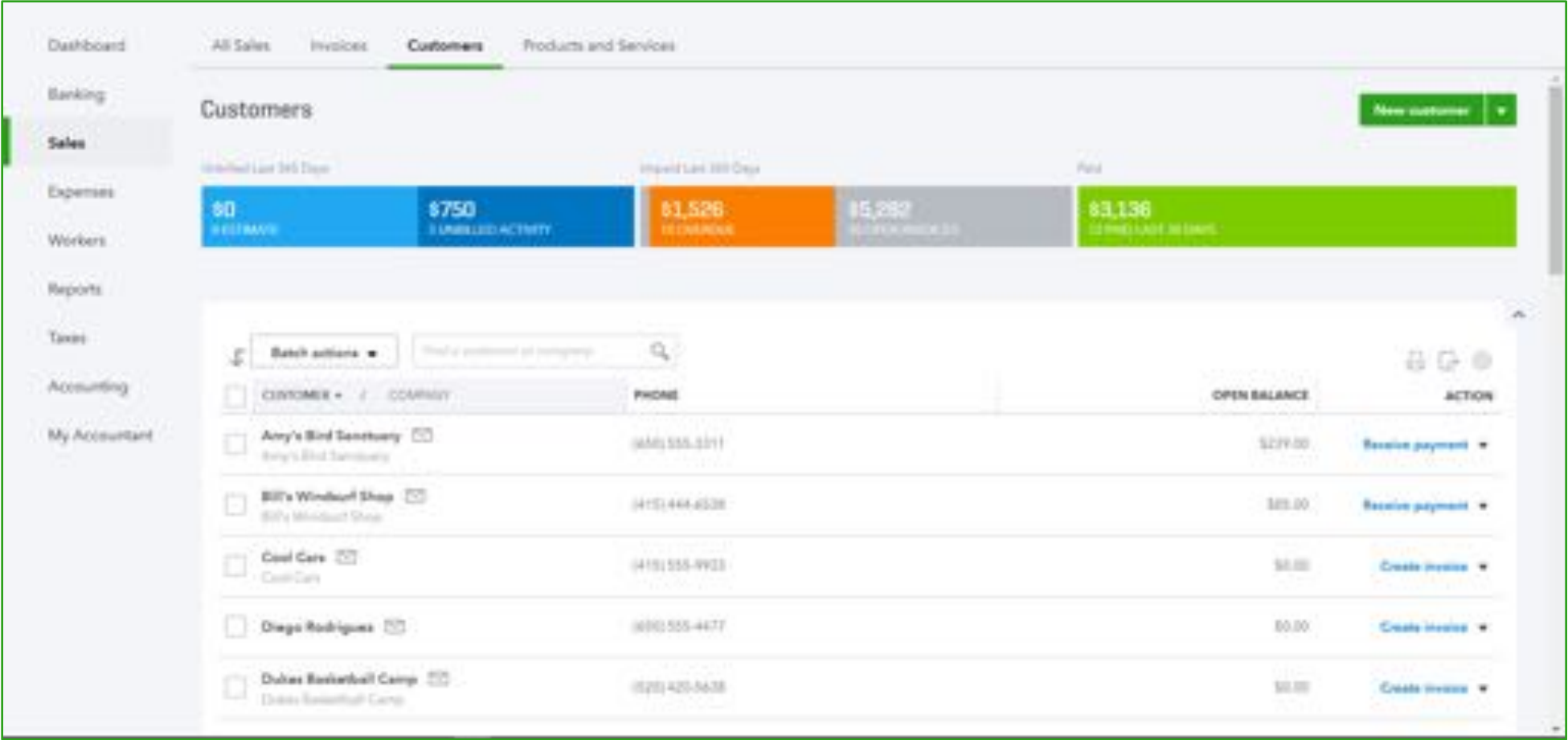
40 Sales | \$750.00 | \$1,506.00 | \$5,262.00 | \$3,136.00

Date	Type	Billable	Customer	Date	Amount	Total	Status	Action
01/10/2016	Invoice	1025	West Co.	01/10/2016	\$214.28	\$214.28	Open	Review payment
01/10/2016	Invoice	1027	Greenfield Family Serv.	01/10/2016	\$342.07	\$342.07	Open	Review payment
01/10/2016	Invoice	1028	Freeman Spinning Spindle Wks.	01/10/2016	\$477.30	\$477.30	Open	Review payment
01/10/2016	Payment		Freeman Spinning Spindle Wks.	01/10/2016	\$0.00	\$487.36	Closed	
01/10/2016	Payment		East Co.	01/10/2016	\$0.00	\$1,475.32	Closed	
01/10/2016	Payment		Westfield	01/10/2016	\$0.00	\$511.45	Closed	
01/10/2016	Invoice	1029	Anderson Fruit and Veg.	01/10/2016	\$75.00	\$75.00	Open	Review payment
01/10/2016	Invoice	1030	Greenfield Family Serv.	01/10/2016	\$229.33	\$229.33	Open	Review payment
01/10/2016	Payment		Andy & Bob's Laundry	01/10/2016	\$0.00	\$1,000.00	Closed	
01/10/2016	Time Charge		Anderson Fruit and Veg.	01/10/2016	\$0.00	\$25.00	Closed	
01/10/2016	Invoice	1031	West Co.	01/10/2016	\$75.00	\$75.00	Open	Review payment
01/10/2016	Invoice	1034	East Co.	01/10/2016	\$80.00	\$80.00	Open	Review payment
01/10/2016	Invoice	1035	Freeman Spinning Spindle Wks.	01/10/2016	\$242.72	\$242.72	Open	Review payment

The Invoice tab



Customers



Products and Services

Dashboard

Banking

Sales

Expenses

Workers

Reports

Taxes

Accounting

My Accountant

All Sales

Invoices

Customers

Products and Services

Products and Services

< All Lists

More

New

LOW STOCK

OUT OF STOCK

Keep tabs on your inventory with reorder points. Know what's running low and what's out of stock so you'll always have what your customers want. [Learn more](#)

Find products and services

NAME

SKU

TYPE

SALES DESCRIP

SALES PRICE

COST

TAXABLE

QTY ON HAND

REORDER POINT

ACTION

Design

Design

Service

Custom Desi...

75

Edit

Fountains

Concrete

Service

Concrete for ...

0

Edit

24

@DoucetGisele

#QBConnect

qb

intuit

quickbooks.

CONNECT

Sales Receipts

The screenshot shows the 'Sales Receipt' form in QuickBooks. Red numbered callouts are placed on the following elements:

- 1: Customer dropdown menu (currently showing 'Dariusz Grifol')
- 2: Email field (currently showing 'grifol@sample.com')
- 3: Sales Receipt date field (currently showing '03/24/2018')
- 4: Payment method dropdown menu (currently showing 'Cash')
- 5: Deposit to dropdown menu (currently showing 'Checking')
- 6: Product/Service dropdown menu (currently showing 'Landscaping & Weekly Gardening Service')
- 7: Amount field in the product/service table (currently showing '0.00')
- 8: Save and send button at the bottom right.

The form also displays a subtotal of \$30.00, a tax rate of 8% for California, and a 'Save and send' button.

Use Sales Receipts when:

- Money is received at the time of sale
- Cash and revenue are recorded in the same transaction
- Start by clicking on the Quick Create (Plus +) button > Sales Receipt

Invoices

Invoice #1039

To: Name **1** Email **1** Send now

Billing address: Name Address City State Zip Country

Terms: Net 30 Invoice date: 03/25/2018 **2** Due date: 04/25/2018

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1	Landscaping installation	Installation of landscape design	4	50	500.00	
2						

Subtotal: \$500.00

Message displayed on invoice: Thank you for your business and have a great day!

Print or Preview Make recurring Customize More **5** Save Save and send

Use Invoices when:

- The sale is recorded when products or services are rendered
- Payment will be received later
- Multiple payments will be made
- One payment for multiple invoices

Receiving Payments

Receive Payment

Payment to: Red Rock Clear 1 Find by invoice no.

AMOUNT RECEIVED: \$70.00

Payment date: 03/04/2018 2

Payment method: Cash 3 Reference no.: Deposit to: Checking 4

Amount received: 70.00

Outstanding Transactions

DESCRIPTION	DUE DATE	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
Invoice # 1024 (02/01/2018)	01/00/2018	100.00	100.00	
<input checked="" type="checkbox"/> Invoice # 1023 (02/04/2018) 5	03/08/2018	70.00	70.00	70.00

Amount to Apply: \$70.00
Amount to Credit: \$0.00

Cancel Clear 6 Save and new 7

Make Payments when:

- Paying off open invoices

Making Deposits

Deposit

Checking Balance \$37,307.03 Date 12/12/2016

AMOUNT \$1,250.00

Show payments for this location: All Locations

Select Existing Payments

RECEIVED FROM	DATE	TYPE	PAYMENT METHOD	MEMO	REF NO.	AMOUNT
<input checked="" type="checkbox"/> General Customer	10/25/2016	Sales Receipt	Credit Card			250.00
<input checked="" type="checkbox"/> General Customer	11/01/2016	Sales Receipt	Credit Card			250.00
<input checked="" type="checkbox"/> General Customer	11/06/2016	Sales Receipt	Credit Card			250.00
<input checked="" type="checkbox"/> General Customer	11/15/2016	Sales Receipt	Credit Card			250.00
<input checked="" type="checkbox"/> General Customer	11/22/2016	Sales Receipt	Credit Card			250.00
<input type="checkbox"/> General Customer	11/29/2016	Sales Receipt	Credit Card			250.00
<input type="checkbox"/> General Customer	12/04/2016	Sales Receipt	Credit Card			250.00
<input type="checkbox"/> General Customer	12/12/2016	Payment	Credit Card			307.88

Cancel Clear Print Make recurring Save and new

Make Deposits to:

- Clear out Undeposited Funds
- Combine individual payments to equal the total that you put in the bank
- Batch merchant service payments

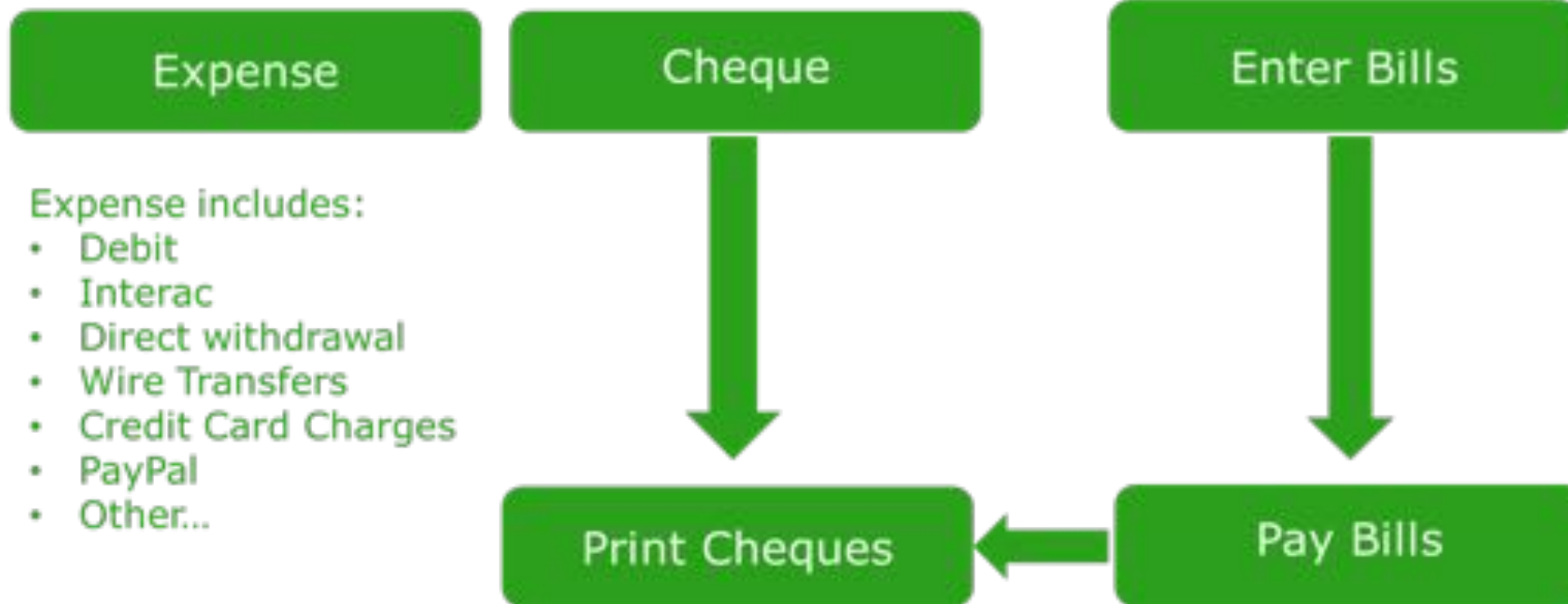
Daily Workflow: Expenses



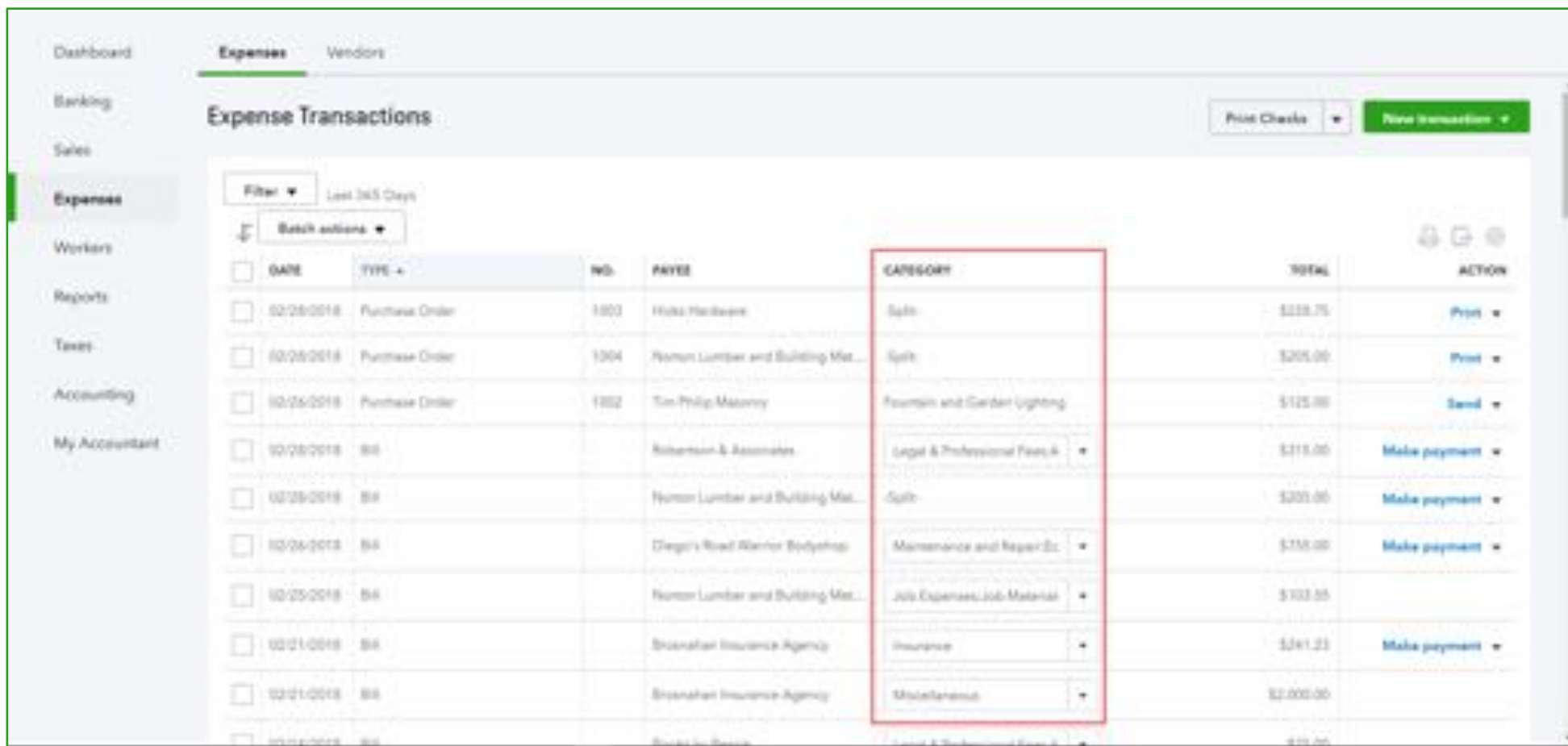
Workflow

“Cash” Transactions

Accounts Payable



The Expenses center



The screenshot displays the 'Expenses' section of the QuickBooks interface. The 'Expense Transactions' table is shown with columns for DATE, TYPE, NO., PAYEE, CATEGORY, TOTAL, and ACTION. A red box highlights the 'CATEGORY' column, which contains various expense categories like 'Supplies', 'Furniture and Garden Lighting', 'Legal & Professional Fees', 'Maintenance and Repairs', 'Job Expenses/Job Materials', 'Insurance', and 'Miscellaneous'.

DATE	TYPE	NO.	PAYEE	CATEGORY	TOTAL	ACTION
02/26/2018	Purchase Order	1003	Hicks Hardware	Supplies	\$228.75	Print
02/26/2018	Purchase Order	1004	Norton Lumber and Building Mat...	Supplies	\$205.00	Print
02/26/2018	Purchase Order	1002	Tim Philip Masonry	Furniture and Garden Lighting	\$125.00	Send
02/26/2018	Bill		Robinson & Associates	Legal & Professional Fees	\$115.00	Make payment
02/26/2018	Bill		Norton Lumber and Building Mat...	Supplies	\$201.00	Make payment
02/26/2018	Bill		Diego's Road Runner Bodyshop	Maintenance and Repairs	\$158.00	Make payment
02/25/2018	Bill		Norton Lumber and Building Mat...	Job Expenses/Job Materials	\$103.55	
02/21/2018	Bill		Brancher Insurance Agency	Insurance	\$241.23	Make payment
02/21/2018	Bill		Brancher Insurance Agency	Miscellaneous	\$2,000.00	
02/16/2018	Bill		Brancher Insurance Agency	Insurance	\$241.23	

The Vendor center

Vendors

Prepare 1099s New vendor

Unpaid Last Bill Due Unpaid Last Bill Due Paid

\$125 PURCHASE ORDER **\$845** INVOICE **\$1,603** OPEN BALANCE **\$3,892** PAID (LAST 30 DAYS)

Batch actions Search vendors or company

VENDOR + COMPANY	PHONE	EMAIL	OPEN BALANCE	ACTION
Bob's Burger Joint			\$0.00	Create bill
Books by Beanie Books by Beanie	(858) 555-7745	Books@Intuit.com	\$0.00	Create bill
Brenahan Insurance Agency Brenahan Insurance Agency	(858) 555-9912		\$241.23	Make payment
Cal Telephone Cal Telephone	(650) 555-7676		\$0.00	Create bill
Chin's Gas and Oil Chin's Gas and Oil			\$0.00	Create bill

The Vendor Detail page

The screenshot shows the 'Vendor Detail' page for 'Brosnahan Insurance Agency'. The left sidebar contains navigation links: Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, and My Accountant. The main header area includes the vendor name, address (P.O. Box 5, Middlefield, CA 94032), and a 'New transaction' button. Below this, there are two summary boxes: a yellow one for 'OPEN' transactions totaling \$241.23, and a red one for 'OVERDUE' transactions totaling \$241.23. The main content area has tabs for 'Transaction List' (selected) and 'Vendor Details'. The 'Transaction List' tab shows a table with columns: DATE, TYPE, NO., PAID, CATEGORY, TOTAL, and ACTION. The table contains three rows of transactions, all dated 02/01/2018, with a total of \$241.22. The first two rows are for 'Miscellaneous' and 'Insurance' categories, both with a total of \$241.22. The third row is a 'Total' row. The 'ACTION' column for the third row has a 'Make payment' button. At the bottom right, there is a footer for 'QB Intuit quickbooks. CONNECT'.

Dashboard +1 Brosnahan Insurance Agency Edit New transaction +

Brosnahan Insurance Agency P.O. Box 5, Middlefield, CA 94032

02/01/2018 - 02/01/2018

Transaction List Vendor Details

Batch actions Filter

<input type="checkbox"/>	DATE +	TYPE	NO.	PAID	CATEGORY	TOTAL	ACTION
<input type="checkbox"/>	02/01/2018	Bill Payment (Check)	1	Brosnahan Insurance Agency		\$2,000.00	
<input type="checkbox"/>	02/01/2018	Bill		Brosnahan Insurance Agency	Miscellaneous	\$2,000.00	
<input type="checkbox"/>	02/01/2018	Bill		Brosnahan Insurance Agency	Insurance	\$241.22	Make payment +
Total						\$241.22	

1/1 of 1 items 1-1 of 1

Entering Expenses

Expenses are used when:

- Payment is made at the time of purchase
- Use for cash, credit card, debit card, ACH payments or wire transfers to others

The screenshot shows the 'Expense' entry form in QuickBooks. It includes fields for 'Account' (Building Materials), 'Bank/Credit account' (MasterCard), 'Payment date' (6/24/2018), and 'Payment method' (MasterCard). A table under 'Account details' shows a single line item with a debit of \$50.00. The 'Total' is \$50.00. The bottom of the form has buttons for 'Cancel', 'Clear', 'Make recurring', 'Save', and 'Save and new'.

Expense

Account: Building Materials Bank/Credit account: MasterCard Balance: \$157.72

Payment date: 6/24/2018 Payment method: MasterCard

Amount: \$50.00

Account details

ACCOUNT	DESCRIPTION	AMOUNT	BILLABLE	TAX	CUSTOMER
7 Job Expenses Job Materials D	8 Drilling location	50.00			
2					

Item details

Notes

Total: \$50.00

Buttons: Cancel, Clear, Make recurring, Save, Save and new

Entering Bills

Bills are used when:

- The expense is recorded when products or services are purchased (accrual basis)
- Payment will be made later
- Multiple payments may be made
- One payment against multiple bills

The screenshot shows the 'Bill' entry form in QuickBooks. At the top right, the 'BALANCE DUE' is \$250.00. The 'Bill to' dropdown is set to 'Ella Equipment Rental'. The 'Mailing address' field contains: 'Mr. John L. Ella', 'Ella Equipment Rental', '6399a Main St', 'Middlefield, CA 94032 USA'. The 'Terms' field is 'Net 30', 'Bill date' is '03/24/2018', and 'Due date' is '04/23/2018'. The 'Account details' section shows a table with one row: 'Equipment Rental' (Account), '2 days' excavator rental' (Description), '250.00' (Amount), and 'Billable' (checked). The 'Total' is \$250.00. The 'Item details' section has a 'Memo' field. At the bottom, there are buttons for 'Cancel', 'Clear', 'Make recurring', 'Save', and 'Save and new'.

Paying Bills

Bills Payments are used when:

- Payment is made to satisfy an existing Bill in QuickBooks
- Can be paid from a bank or credit card account
- Pay in full, make partial payment, or pay several bills at once

The screenshot shows the 'Bill Payment' window in QuickBooks. At the top, it says 'Bill Payment #To print'. Below this, there are fields for 'Bill #', 'Bank/Credit account' (set to 'Checking'), and 'Balance \$1,201.00'. On the right, the 'Amount Due' is \$86.44. There are buttons for 'To print' and 'Print later'. Below this, there are fields for 'Mailing address' and 'Payment date' (03-24-2018). An 'Amount' field is set to \$8.44. The 'Outstanding Transactions' section shows a table with one transaction: a bill for \$8.44 dated 02/13/2018. At the bottom, there are buttons for 'Cancel', 'Clear', 'Print check', 'Order checks', 'Save and close', and 'Save and new'.

DESCRIPTION	DUE DATE	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
✓ 88-01/14(2018)	02/13/2018	\$8.44	\$8.44	\$8.44

Writing Checks

Checks are used when:

- Creating manual or computer printed checks
- Payment is made at the time of purchase
- Paying off a Bill

The screenshot shows the 'Write Check' window in QuickBooks. At the top, the title is 'Check #85'. Below it, there are dropdown menus for 'To: Computers by Jeroi' (1), 'Bank Account: Checking' (2), and a balance of '\$1,201.00'. On the right, the 'Amount' is '\$400.00'. Below the 'To:' field is the 'Mailing address' for 'Jeroi Windows Computers by Jeroi'. The 'Payment date' is '03-24-2018'. On the right, there is a 'Check no.' field (3) and a 'Print letter' checkbox. Below this is the 'Account details' section with a table. The table has columns for 'ACCOUNT', 'DESCRIPTION', 'AMOUNT', 'BILLABLE', 'TAX', and 'CUSTOMER'. One row is visible with 'Maintenance and Repair Comp' (4) and 'Repair Laptop' (5), with an amount of '400.00' (6). Below the table are 'Add item' and 'Clear all items' buttons. The 'Item details' section has a 'Memo' field. At the bottom right, the 'Total' is '\$400.00'. At the bottom, there are buttons for 'Cancel', 'Clear', 'Print check', 'Order checks', 'Make recurring', 'More', and a green 'Save and close' button (7).

ACCOUNT	DESCRIPTION	AMOUNT	BILLABLE	TAX	CUSTOMER
Maintenance and Repair Comp	Repair Laptop	400.00			

Additional Bookkeeping Tools



Running Payroll

Pay employees and contractors:

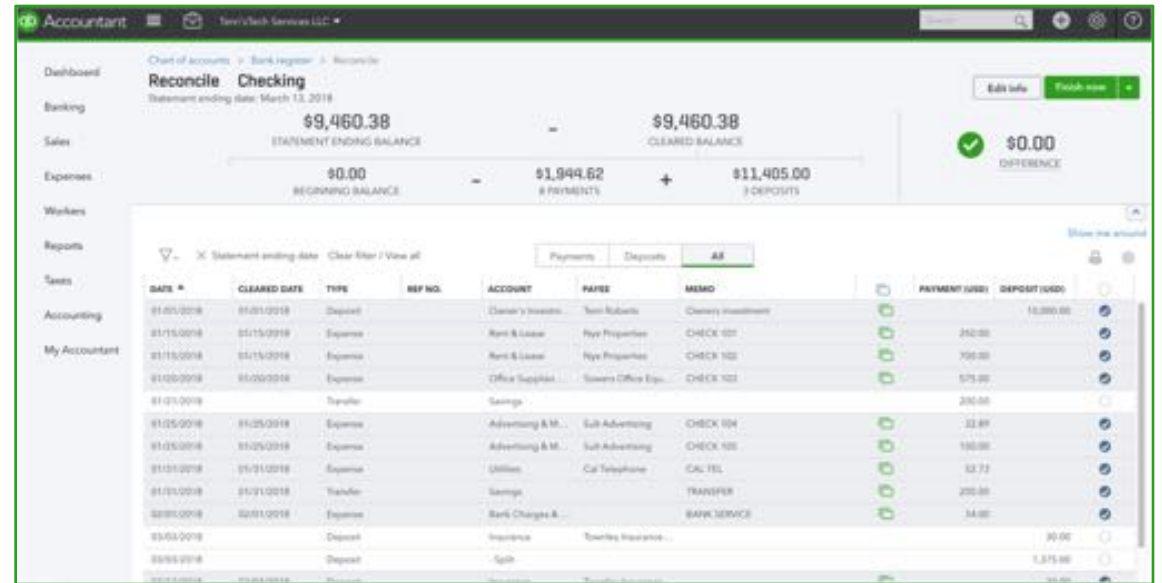
- Enhanced (DIY) or Full service (Intuit does everything)
- Direct Deposit
- Pay Taxes with a push of a button
- T4s



Reconciling your Accounts

Reconcile all bank accounts, credit cards and loans every month:

- Super-easy because of the Banking Feed
- Catch and delete duplicate transactions
- Find transactions posted to the wrong accounts



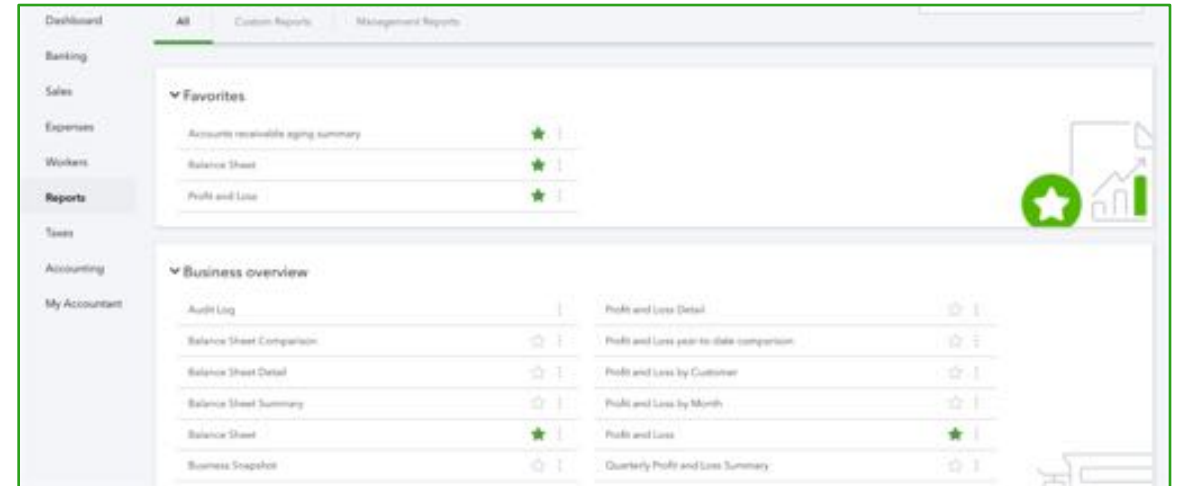
The screenshot shows the 'Reconcile Checking' interface in QuickBooks. At the top, it displays the 'Reconcile Checking' window with a 'Statement ending date' of March 13, 2018. The 'Statement Ending Balance' is \$9,460.38, and the 'Cleared Balance' is also \$9,460.38. Below this, the 'Beginning Balance' is \$0.00, 'Payments' are \$1,944.62, and 'Deposits' are \$11,405.00, resulting in a 'Difference' of \$0.00. A table of transactions is shown below, with columns for Date, Cleared Date, Type, Ref No., Account, Payee, Memo, Payment (USD), and Deposit (USD). The table lists various transactions including deposits, expenses, and transfers.

DATE	CLEARED DATE	TYPE	REF NO.	ACCOUNT	PAYEE	MEMO	PAYMENT (USD)	DEPOSIT (USD)
01/01/2018	01/01/2018	Deposit		Client's Invoice	Tom Roberts	Client's Invoice		10,000.00
01/15/2018	01/15/2018	Expense		Rent & Lease	Rye Properties	CHECK 101	250.00	
01/15/2018	01/15/2018	Expense		Rent & Lease	Rye Properties	CHECK 102	700.00	
01/05/2018	01/05/2018	Expense		Office Supplies	Stevens Office Eqp.	CHECK 103	575.00	
01/01/2018		Transfer		Savings			250.00	
01/05/2018	01/05/2018	Expense		Advertising & M...	Sub Advertising	CHECK 104	22.89	
01/05/2018	01/05/2018	Expense		Advertising & M...	Sub Advertising	CHECK 105	100.00	
01/01/2018	01/01/2018	Expense		Utilities	Cal Telephone	CAL TEL	52.72	
01/01/2018	01/01/2018	Transfer		Savings		TRANSFER	200.00	
02/01/2018	02/01/2018	Expense		Bank Charges &...		BANK SERVICE	34.00	
03/03/2018		Deposit		Insurance	Travelers Insurance...			30.00
03/05/2018		Deposit		-Split				1,875.00

Running Reports

Slice and dice your data to analyze your business

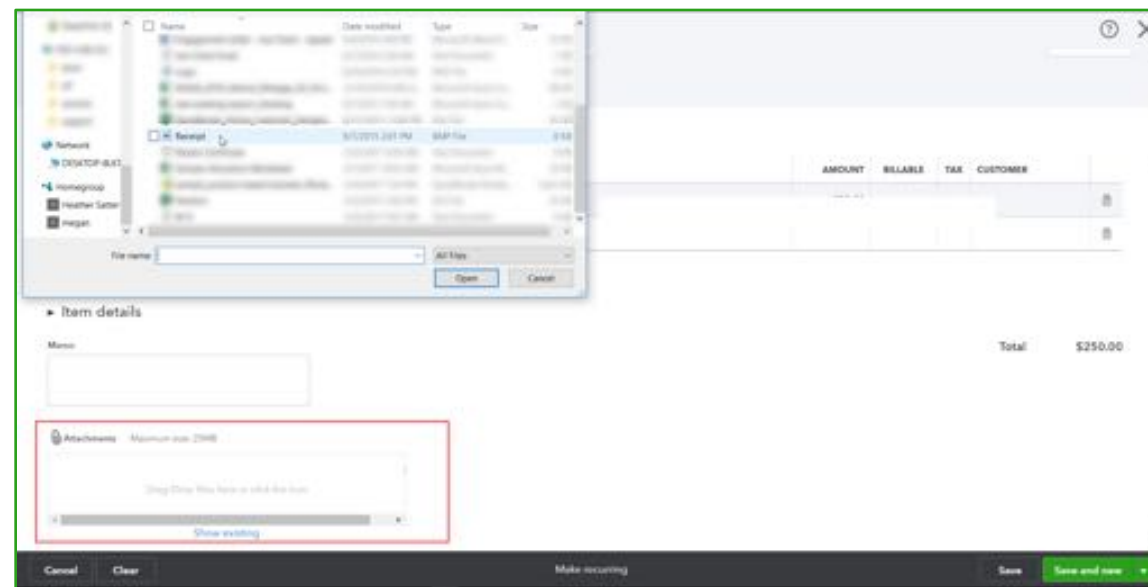
- How many reports you have depends on the version of QBO you're using – over 100 in Plus
- All reports are customizable
- Reports can be exported to Excel
- Reports can be emailed to management automatically



Attaching Receipts

You can attach backup documentation to every transaction:

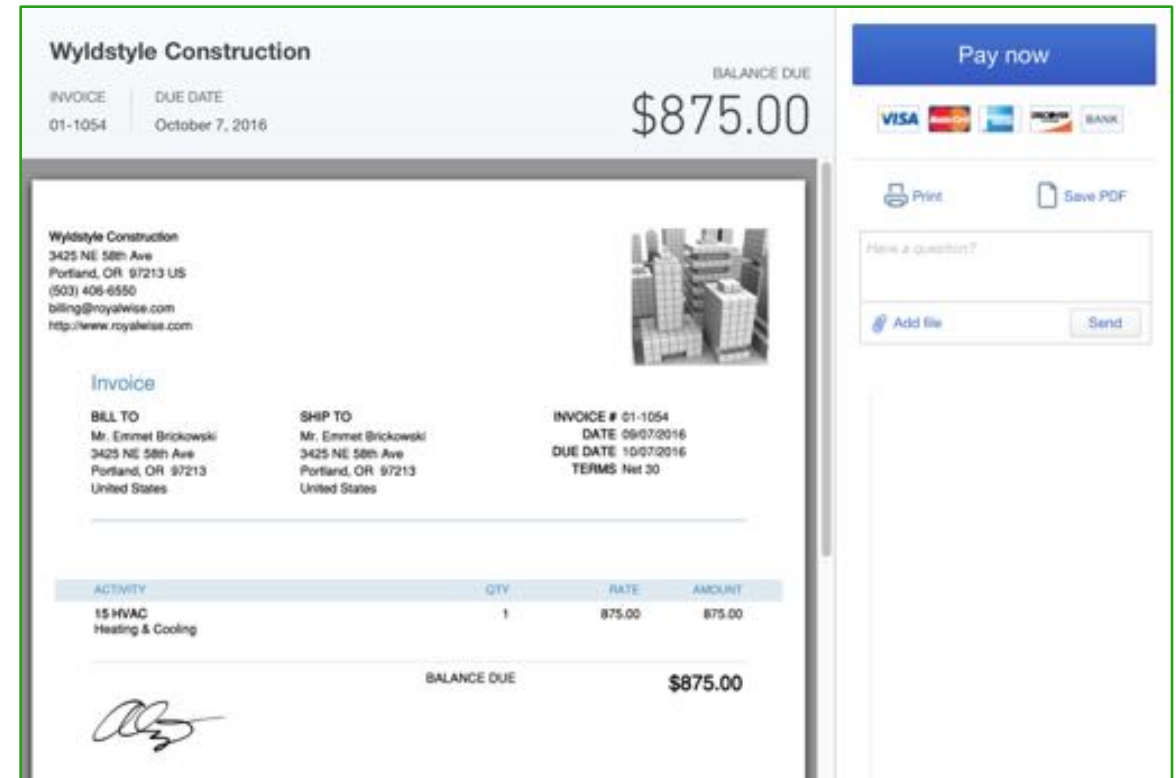
- Images and PDFs
- Drag and drop
- Click paperclip and browse to saved file



QuickBooks Payments Merchant Services

QBO has built-in credit card processing for your customers

- Most major credit cards
- Send Invoices with a Pay Now button
- Automatically charge customers with Recurring Sales Receipts
- All Payments batch automatically



Bells and Whistles: Workflow Miracles



Special features

QuickBooks Online features automate bookkeeping processes



Unlimited Bank
Feeds with
Rules



Recurring
Transactions



Sync from your
mobile device

Banking Rules to reduce or eliminate data entry

The screenshot shows the 'Rule' configuration window in QuickBooks. It includes fields for 'Rule name' (Hubdoc), 'For' (Money out), and 'In' (All bank accounts). A condition is set for 'Bank text' containing 'HUBDOC.COM'. The rule is configured for 'Expense' transactions, assigned to 'Hubdoc' payee, 'Computer Supplies/Equipment' category, and 'Overhead' class. The memo is set to 'Hubdoc subscription'. The 'Automatically add to my books' checkbox is checked. Numbered callouts 1 through 10 highlight specific fields and options.

Rule

Rule name: Hubdoc (1)

For: Money out (2)

In: All bank accounts (3)

When a transaction meets all of these conditions

Bank text: Contains HUBDOC.COM (4)

Add line

Set one or more of the following

Transaction type: Expense (5)

Payee: Hubdoc (6)

Category: Computer Supplies/Equipment (7)

Class: Overhead (8)

Split

Department:

Memo: Hubdoc subscription (9)

☒ Automatically add to my books (10)

Automate the banking feed:

- Create Rules to assign Payee, Category, Class, Memo, and even Splits for expenses
- Use a single criteria or multiple conditions
- Use Automatically add to books for routine transfers and expenses
 - You don't have to touch them at all!

Recurring transactions

Expense

Recurring Expense

Template name: Insurance Payment Type: Scheduled Create days in advance

Payee: Insurance Account: Bank of Steve

Interval: Monthly on day 1st of every 1 month(s) Start date: 01/01/2017 End: Auto Occurrences: 6

Payment method: MasterCard

Ref no. Location

Account details

#	ACCOUNT	DESCRIPTION	AMOUNT	BILLABLE	TAX	CUSTOMER	CLASS
1							
2							

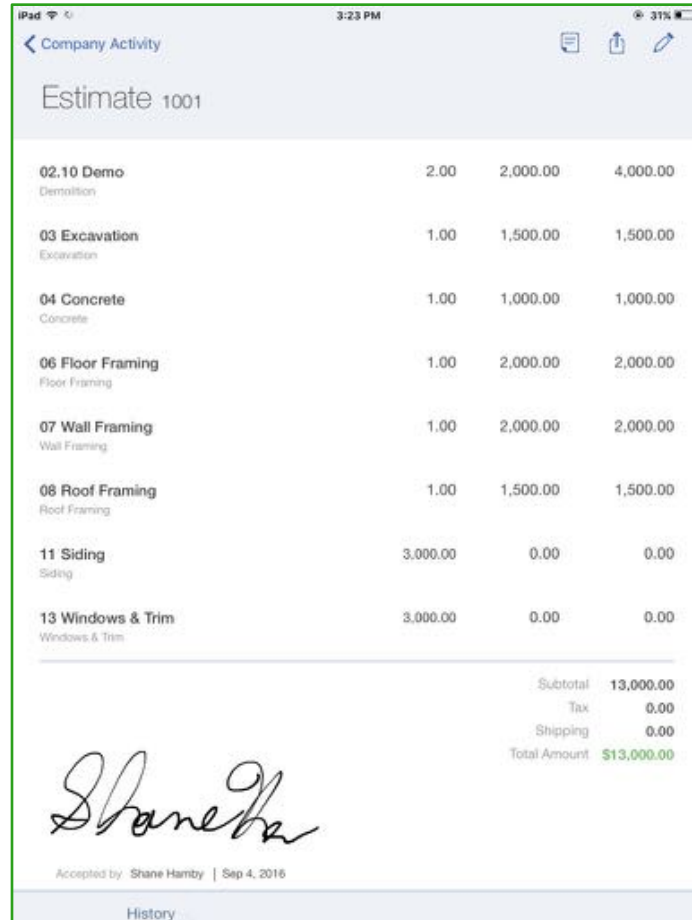
Add lines Clear all lines

Cancel Clear Save template

Create templates for all transaction types:

- Run them on a schedule, get reminders, or just save for future use
- For regular client billing, create a Scheduled Invoice or Sales Receipt
 - Run credit cards and send emails to clients
 - Do your invoicing without lifting a finger

Do your work in the field



Estimate 1001			
02.10 Demo Demolition	2.00	2,000.00	4,000.00
03 Excavation Excavation	1.00	1,500.00	1,500.00
04 Concrete Concrete	1.00	1,000.00	1,000.00
06 Floor Framing Floor Framing	1.00	2,000.00	2,000.00
07 Wall Framing Wall Framing	1.00	2,000.00	2,000.00
08 Roof Framing Roof Framing	1.00	1,500.00	1,500.00
11 Siding Siding	3,000.00	0.00	0.00
13 Windows & Trim Windows & Trim	3,000.00	0.00	0.00
Subtotal		13,000.00	
Tax		0.00	
Shipping		0.00	
Total Amount		\$13,000.00	
Accepted by: Shane Hamby Sep 4, 2016			
History			

Reduce after-the-fact accounting and redundant procedures:

- Build Estimates, get approval signatures, and email a copy right on the spot
- Create Sales Receipts and swipe credit cards
- Use time-tracking apps for timecards
- Use scheduling and dispatch apps

Next Steps



What should you do now?

Talk to a ProAdvisor to help you!

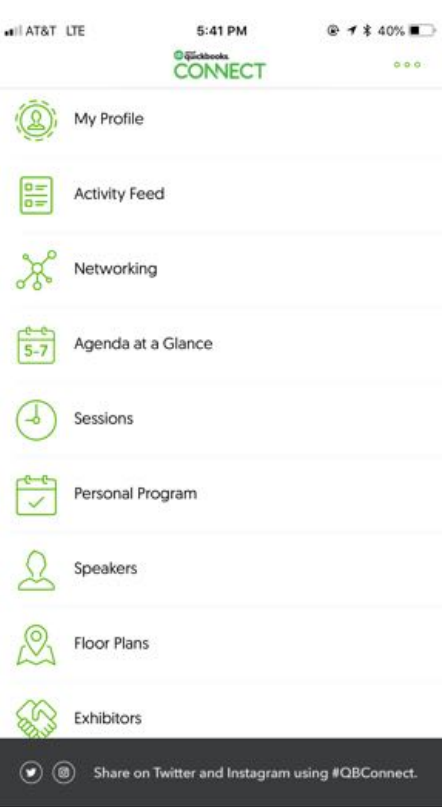
- Choose a version of QBO
- Set up the account file, and customize it for your business
- Explore third-party apps to solve your pain points
- Send Invoices to clients and take payments
- Automate as many routine workflows as you can to reduce data entry... and human error!



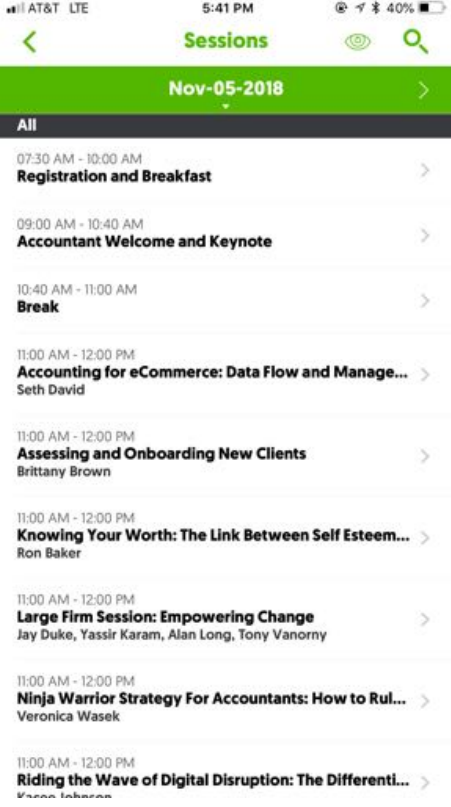
Questions?

Rate this session

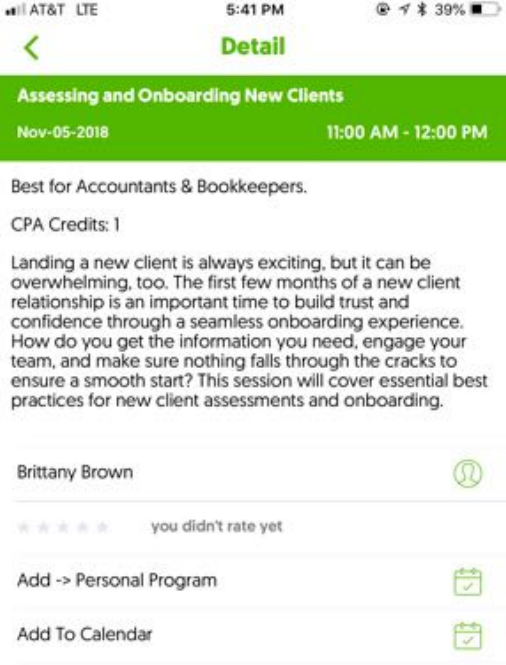
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11:00 am-12:00 pm	Breakout Sessions	
	Exhibits, Activations and Connections	+
	HR Essentials: 5 Steps to a Compliant Workplace	+
	Building Compassion: The Role We All Play in Creating Unbiased Businesses	+
	• session repeats	
	Freelance Finance: A Toolkit for the Self-Employed	• session repeats +
	The Fine Print: Legal Know-How for New Businesses	+
	Get Bossy: Develop Next-Generation Leadership Skills	+
	No Stone Unturned: New Funding Sources to Fuel Business Growth	+
	Marketing Your Business Part 1: Customer Acquisition	+
	Digital Savvy: Nurturing Your Online Brand	• session repeats +



CONNECT

