




# Using custom fields in QuickBooks Online Advanced to solve professional services client reporting needs

Matthew Fulton



A photograph of two women in profile, facing each other and smiling, suggesting a friendly conversation. They are outdoors, with a blurred background of green foliage. The woman on the left has blonde hair in a ponytail and is wearing a dark jacket with a light-colored fur collar. The woman on the right has brown hair and is wearing a light-colored top. The text is overlaid on the right side of the image.

Share with your  
neighbor:

Do you do a lot of  
reporting in Excel?

#QBConnect | WiFi: QBConnect

# About today's speaker



Matthew Fulton  
CTO

**Matthew Fulton** is Co-Founder and CTO of [Parkway Business Solutions](#) where he uses his passion for technology to create time-saving tools ([Vendorsync](#)), for accountants and bookkeeping solutions to fit the needs of the modern small business owner.

As the co-creator of [QB Community Live](#), Matthew dedicates significant time to helping his fellow community members prosper given his unwavering belief that **“Together We All Succeed.”**

# Agenda

## Discovering data points

Understanding custom fields

- The four types of fields
- Current limitations

Case Study: Spot-On Advertising

Customizing reports in QuickBooks Online Advanced

- Adding new columns
- Filtering your data
- Exporting

Advanced reporting with Custom fields

Questions

**Download this guide:**

<http://bit.ly/qbconnect2019>

# CPE Process

## In order to receive CPE 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 CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

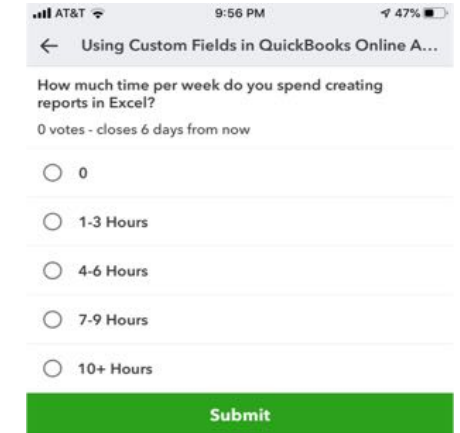
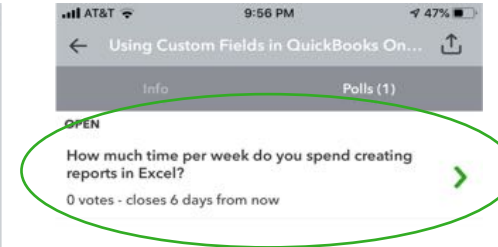
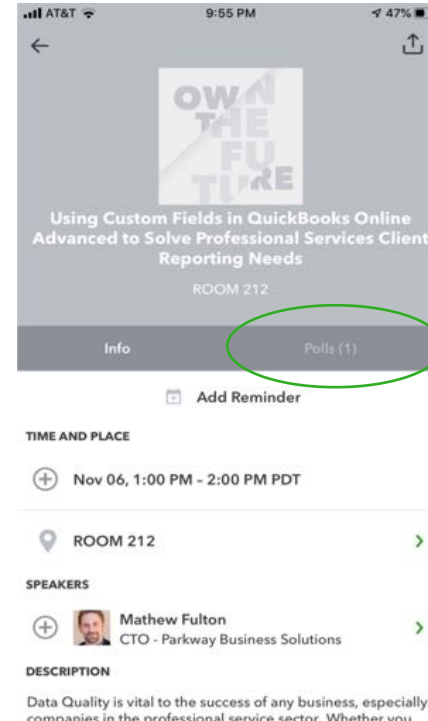
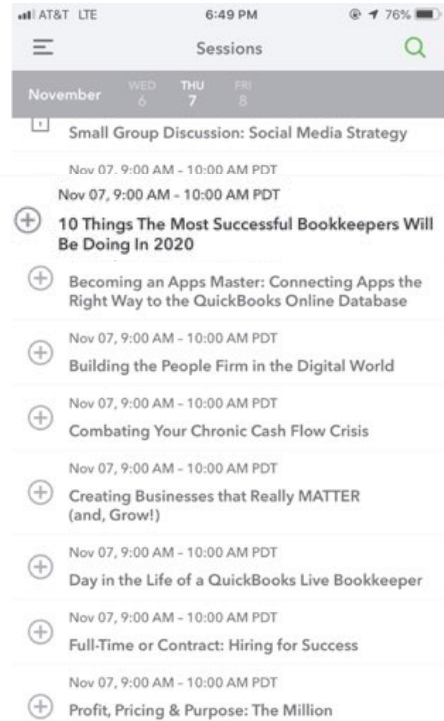
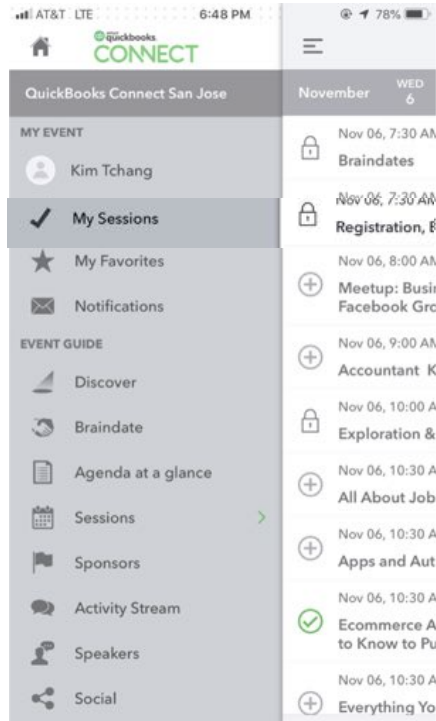


# Discovering Data Points



# How to open the Poll in the QuickBooks Connect Mobile App

1. Select **Sessions**
2. Select **Session Title**
3. Select **Poll**
4. Select **Question**
5. Select **Your Response** & Click **Submit**



# Audience Poll

How much time per week do you spend creating reports in excel? (Select One)

- 0
- 1-3 Hours
- 4-6 Hours
- 7-9 Hours
- 10+ Hours





**Sometimes the most challenging task for a business owner is understanding what data points they should be tracking.**



# Data points defined



## Data point examples:

- Totals sales per employee
- Average sales per customer
- Total labor hours per week

Get them to show you what they are doing in Excel.

**Time Saving Tip:** Custom Fields reduce the amount of time spent in Excel while increasing accuracy.

# Discover data points

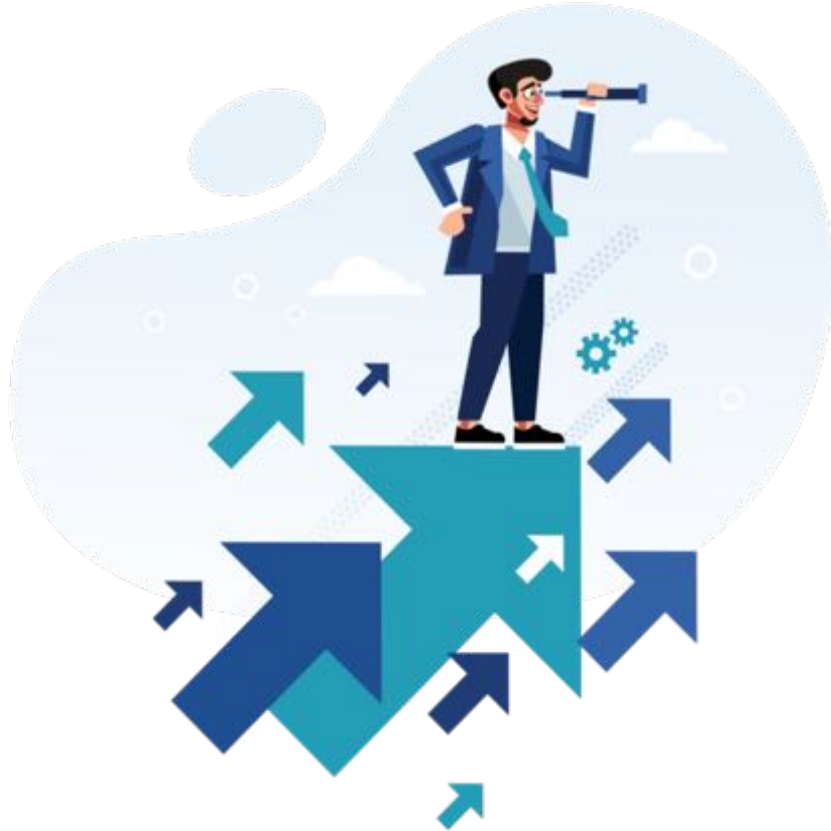
Knowing how to uncover the crucial data points for any business in three steps:

TASK	FACT FINDING	OBJECTIVE
1. Stakeholder Interview	<ul style="list-style-type: none"><li>• Mission</li><li>• Vision</li><li>• Pain Points</li></ul>	Understand the stakeholder's vision their pain points.
2. Sales Cycle	<ul style="list-style-type: none"><li>• Employee Roles</li><li>• Flow of Information</li><li>• Bottlenecks</li></ul>	Define each role within the company and what data passes through that position.
3. Accounting Workflow	<ul style="list-style-type: none"><li>• Accounting Structure</li><li>• Existing Data Points</li><li>• Review Reporting</li></ul>	Review existing reporting and evaluate gaps in the information.

**Objective:** Respond to every answer with “Why” questions until you cannot dive any deeper.

# Stakeholder interview

Interview the company stakeholders to understand the business



Interview the stakeholders to understand the business.

- Mission
- Vision
- Pain Point

# Evaluate the sales cycle



Interview the team members to get the full picture

- Employee Roles
- Flow of Information
- Look for Bottlenecks

# Review the existing accounting workflow



Study their existing Excel worksheets and uncover the gaps in their reporting.



# Understanding Enhanced Custom Fields

# Types of custom fields:

Select between four different types of custom fields

New for QuickBooks Online  
Advanced

## Drop-Down Field

Select from a list of predetermined values

## Number Field

Reporting can be filtered by the numerical value. ( <, >, =)

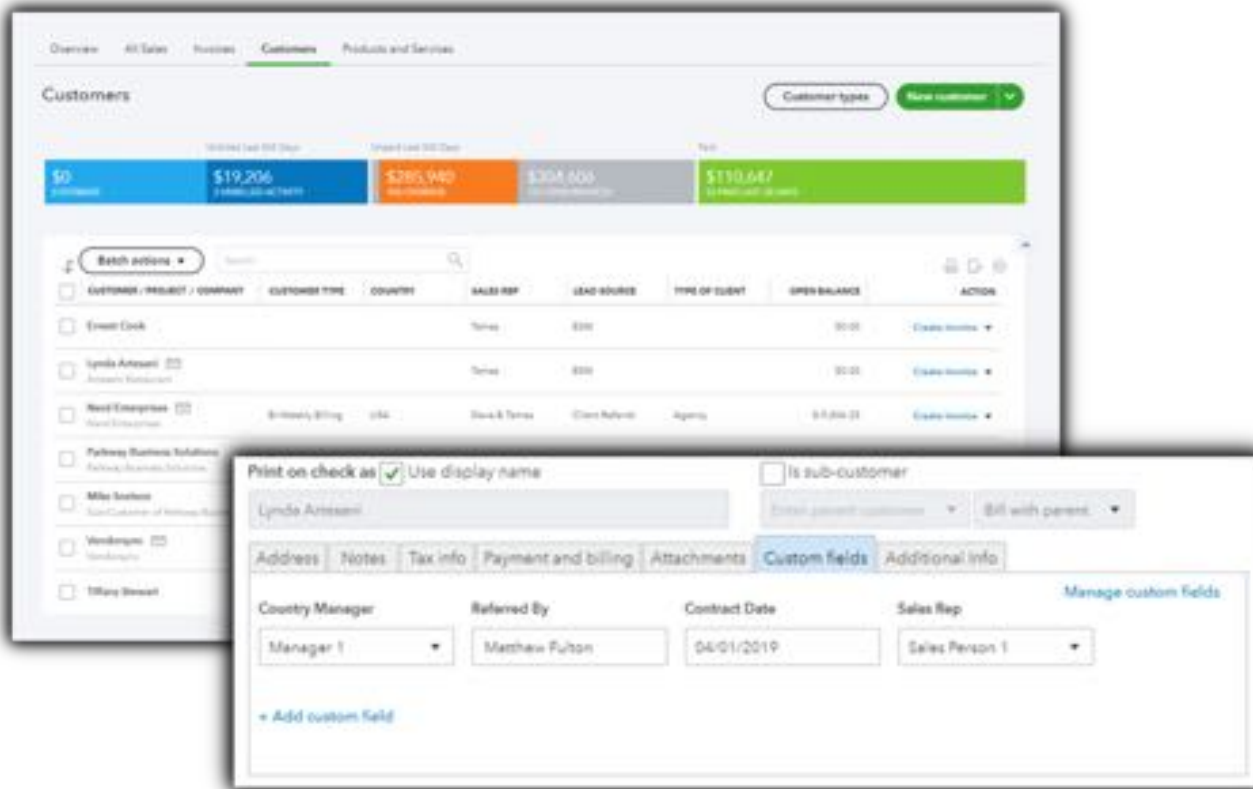
## Date Field

Select a date from a pop-up calendar

QuickBooks Online Essentials, Plus  
& Advanced

## Text Field

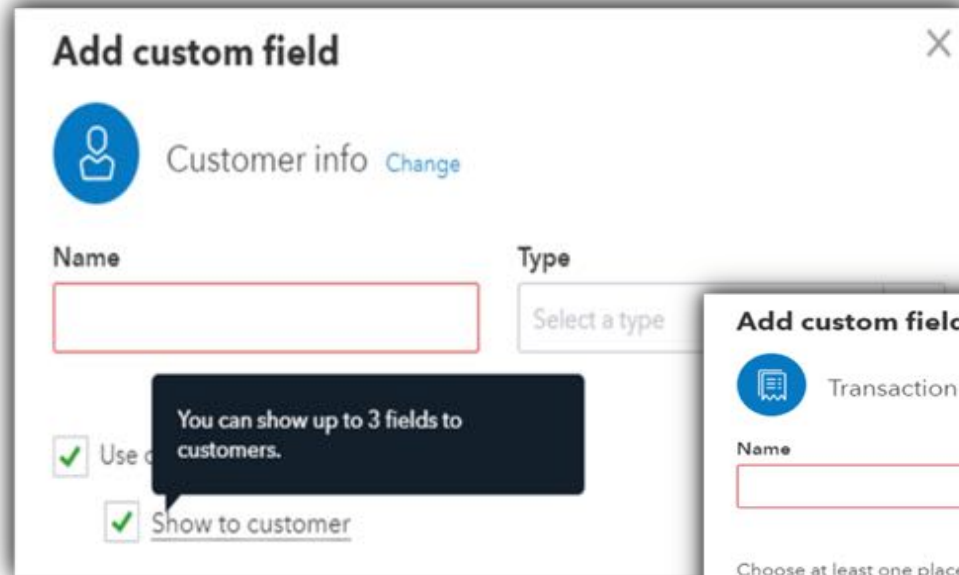
Freeform text allowed



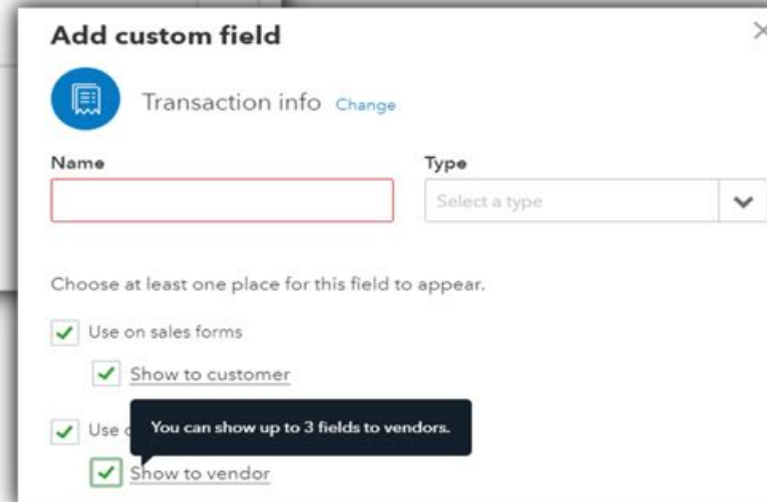


# Customer vs transaction fields:

Value are automatically populated on any documents that they are utilized on.



The screenshot shows the 'Add custom field' dialog for 'Customer info'. It has a 'Name' text input field and a 'Type' dropdown menu. Below these are two checked checkboxes: 'Use on sales forms' and 'Show to customer'. A dark blue tooltip bubble points to the 'Show to customer' checkbox with the text 'You can show up to 3 fields to customers.'



The screenshot shows the 'Add custom field' dialog for 'Transaction info'. It has a 'Name' text input field and a 'Type' dropdown menu. Below these are four checked checkboxes: 'Use on sales forms', 'Show to customer', 'Use on vendor forms', and 'Show to vendor'. A dark blue tooltip bubble points to the 'Show to vendor' checkbox with the text 'You can show up to 3 fields to vendors.'

Value must be filled in at the transactions level.

**Important Tip:** Custom fields do not auto fill for projects like they do at the customer level.

# Custom text field:

The four different types of custom fields

## Ways to use text field

- Referred by
- Phone number
- Security code
- Point of contact

Available in QuickBooks Online Essentials, Plus and Advanced

The image shows a screenshot of the QuickBooks Online interface for Estimate #1004. The main form displays customer information, including the name 'Lynda Arnesen', email 'lyndam@arnesensrestaurant.com', and a total amount of \$1,139.86. A custom text field labeled 'Referred By' is highlighted in yellow, showing the value 'Matthew Fulton'. Below the main form, a modal window titled 'Customer information' is open, providing a detailed view of the customer's contact information, including company name, address, phone numbers, and the same 'Referred By' field, which is also highlighted in yellow. The modal window includes tabs for Address, Notes, Tax info, Payment and billing, Attachments, Custom fields, and Additional info. The 'Custom fields' tab is currently selected, showing the 'Referred By' field and other custom fields like 'Country Manager' and 'Contract Date'.

# Custom number field:

The four different types of custom fields

**NEW for**  
**QuickBooks Online Advanced**

Reporting can be filtered by the numerical value. ( <, >, =)

Ways to use number field

- Preferred rate
- Reference number
- Security code
- Point of contact

The image shows two overlapping screenshots from the QuickBooks Online Advanced interface. The top screenshot is a dialog box titled 'Edit custom field' for 'Customer info'. It has a 'Name' field containing 'Rate \$' and a 'Type' dropdown set to 'Number'. There are checkboxes for 'Use on sales forms' and 'Show to customer'. The bottom screenshot shows a customer record with tabs for 'Address', 'Notes', 'Tax info', 'Payment and billing', 'Attachments', 'Custom fields', and 'Additional Info'. The 'Custom fields' tab is active, showing a table with columns: 'Sales Manager' (Matthew Fulton), 'Referred By' (Vendorsync), 'Rate' (225.00), and 'Renewal Date' (01/17/2019). The 'Rate' field is highlighted with a yellow box. A '+ Add custom field' link is at the bottom left, and a 'Manage custom fields' link is at the top right of the table.

# Custom date field:

The four different types of custom fields

**NEW for**  
**QuickBooks Online Advanced**

The image shows two overlapping windows from the QuickBooks Online Advanced interface. The background window is the 'Customer information' form, which includes fields for Company, Title, First name, Middle name, Last name, Suffix, Email, Phone, Mobile, Other, Website, and various checkboxes. The 'Contract Date' field is highlighted with a yellow box, and a calendar popup is visible below it, showing the month of July 2018. The foreground window is the 'Customize report' dialog, which has a list of checkboxes on the left and a dropdown menu on the right. The 'Contract Date' checkbox is highlighted with a yellow box, and the dropdown menu is open, showing various date range options like 'All Dates', 'This Week', 'This Month', etc.

Select a date from a popup calendar anywhere the field is listed.

# Custom drop-down field:

The four different types of custom fields

Drop-down fields eliminate the potential of typos that require manual correction to fix.

**NEW for**  
**QuickBooks Online Advanced**

The screenshot shows the 'Customer information' form in QuickBooks Online Advanced. The 'Custom fields' tab is selected, and the 'Industry' dropdown menu is open, showing a list of industries including Retail, E-commerce, Legal, Dental, Medical, Marketing, Construction, Restaurant, Real Estate (highlighted), and Property Management. Other fields visible include Company (Key Accounting), Email, Title, First name (Lisa), Middle name, Last name (Vos Drutar), Suffix, Phone, Mobile, Fax, Other, Website, Is sub-customer, Print on check as (checked), Use display name, Display name as (Lisa Vos Drutar), Address, Notes, Tax info, Payment and billing, Language, Attachments, Additional info, Lead Source (Google Search), Content Creator (Matthew F), Sales Rep (Lynda A), Country, and Type of Client (Established Compe). Buttons for Cancel, Make inactive, and Save are also visible.

# The limitations of enhanced custom fields


- 10 fields per company file
- 3 fields can be visible on a printed invoice
- Additional seven can be used for internal reporting only
- Not accessible through the SDK
- Not accessible through Fathom

**Important Tip:** When using third party applications, you will need to choose what data points to track in QuickBooks Online and which to track in the external application.

# Audience Poll

Which Custom Field are you most excited to use? (Select all that apply)

- Text
- Date
- Number
- Drop-Down



# Case Study: Spot-On Advertising



# Case study: Spot-On Advertising

Your client, Mary owns Spot-On Advertising, a small business marketing firm with six employees.

During your interview, Mary shares her vision of her company as an industry specialist, but she is not sure which one to choose.

While her business has continued to increase revenues year over year, it has not been very profitable even after adding on additional staff.



**Objective:** Understand the stakeholder's vision for the future and the pain points, they believe are holding them back.

## Stakeholder interview



## Mary Estrada

Business Owner

As the founder of Spot-On Advertising, Mary utilizes her online marketing knowledge to help small business owners organically grow their business.

## Sales Cycle Review



## Lynda Artesani

Sales Representative

Lynda is the newest employee to join the sales team led by Chris Wise.

Her previous experience in video marketing is expected to help expand the services currently being offered by the company.

During her introductory period, Lynda is only paid hourly for her time until she reaches \$3,000 per month in sales.

## Sales Cycle Review



## Chris Wise

Account Manager

As an account manager with the company, Chris is focused on sales which includes nurturing client relationships and scoping client's projects.

With more than 5 years with the company, Chris' monthly sales are very consistent and earn him a nice commission check on top of his hourly wage.

## Sales Cycle Review







## Mike Snelson

Office Manager

Mike handles all the phone calls, scheduling and client document collection for the team.

All new client contracts are received by Mike before he adds them to the company's CRM and assigns the tasks to team members.

Additionally, Mike collects the expense reports from the Sales Team and enters all the billable expenses into QuickBooks Online.

Mike is an hourly employee.

## Sales Cycle Review





## Mariette Martinez

Social Media Manager

Mariette is the team's social media master! Her electrifying personality and passion for shared knowledge helps her generate creative content for her clients.

Mariette is an hourly employee with quarterly bonuses.





## Seth David

Lead Content Creator

Seth is the company's lead content creator who oversees the work of the production team. Most of his day is split between working on the work assigned to him and managing the projects of the entire team.

All billable time is approved by Seth before payroll is processed.

Seth is a salaried employee.

## Sales Cycle Review

# Case study: Recap



## EMPLOYEE

## IMPORTANT FACT

**Mary Estrada**

Wants to choose a niche, questions profitability per employee

**Lynda Artesani**

Hourly pay until gross monthly sales > \$3,000.00

**Chris Wise**

Paid hourly plus commission

**Mike Snelson**

Responsible for contract collection, paid hourly

**Mariette Martinez**

Paid hourly with quarterly bonuses

**Seth David**

Approves all billable times, paid salary

## Sales Cycle Review



# What data points should we track?





# Customizing Reports in QuickBooks Online Advanced



# Customized reporting

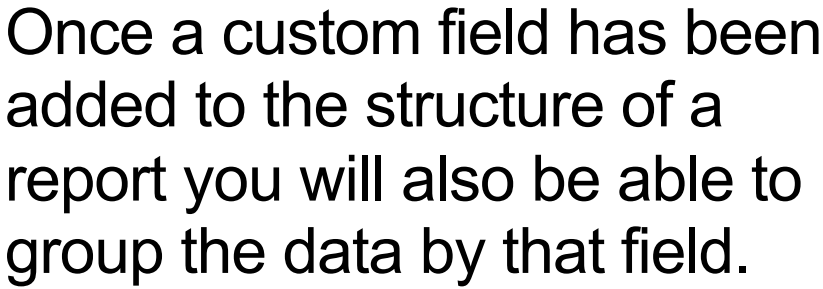
Know which base reports to use

**Add columns** to sales based detail reporting.

**Filter reporting** on sales based detail and summary reporting.

Report Title	Custom Field Column	Filter By Custom Field
Accounts Receivable Aging Detail	✓	✓
Collections Report	✓	
Customer Balance Detail		✓
Invoice List	✓	✓
Open Invoices	✓	✓
Estimates by Customer	✓	✓
Sales by Class Detail	✓	✓
Sales by Class Summary		✓
Sales by Customer Detail	✓	✓
Sales by Customer Summary		✓
Sales by Customer Type Detail	✓	✓
Sales by Product/Service Detail	✓	✓
Sales by Product/Service Summary		✓
Transaction List by Customer	✓	✓
Open Purchase Order List	✓	✓
Transaction List by Vendor	✓	✓
Taxable Sales Summary		✓
Recent Transactions	✓	✓
Transaction Detail by Account		✓
Transaction List by Date	✓	✓
Transaction List with Splits		✓

## Adding the custom fields to a report



# Customized Reporting

Filter reporting by the custom fields

**Customize report**

▼ General

Report period

This Year ▼ 01/01/2019 to 12/31/2019

Accounting method

☐ Cash ☒ Accrual

Number format

☐ Divide by 1000

☐ Without cents

Negative numbers

-100 ▼

☐ Show in red

► Rows/Columns

▼ Filter

☒ Industry Construction ▼

☒ Sales Rep Chris W ▼

☒ Content Creator Seth D ▼

You can filter reports by multiple fields at the same time.

When selecting a value from the filter, you can only select one item from a **drop-down field** to filter by.

When the custom **number field** is used, reports can be used to filter by the value.

## Exporting data to Excel

[illegible]

# Audience Poll

Which report would you like to create? (Select all that apply)

- Average Sale per Customer
- Total Sales by Employee
- Total discounts given by salesperson
- Most Popular Category & item Sold by Sales Rep
- Closing Ratio by Sales Associate



# Advanced Reporting with Custom Fields



# Customized reporting

Improving cash flow

A/R Aging detail report  
by sales rep:

Reduce the company's days  
sales outstanding ratio by  
providing custom reporting to  
the sales team

Access This Guide:

<http://bit.ly/qbconnect2019>

Spot-On Advertising						
A/R AGING DETAIL FOR CHRIS W.						
As of October 2, 2019						
SALES REP	DATE	NUM	CUSTOMER	DUE DATE	AMOUNT	OPEN BALANCE
+ 91 or more days past due						
Chris W	04/05/2019	1017	Vendorsync:Bank Feed Enhancer	04/05/2019	5,214.26	5,214.26
Chris W	04/19/2019	1018	Vendorsync:Bank Feed Enhancer	04/19/2019	8,066.25	8,066.25
Chris W	05/01/2019	1001	Perkway Business Solutions:Web Developm...	05/01/2019	892.58	892.58
Chris W	05/03/2019	1016	Vendorsync:Bank Feed Enhancer	05/03/2019	3,432.50	3,432.50
Chris W	05/10/2019	1002	Perkway Business Solutions:Community Forum	05/10/2019	892.58	892.58
Chris W	05/17/2019	1029	Vendorsync:Bank Feed Enhancer	05/17/2019	4,321.25	4,321.25
Chris W	05/31/2019	1030	Vendorsync:Bank Feed Enhancer	05/31/2019	3,617.50	3,617.50
Chris W	06/03/2019	1036	Perkway Business Solutions:Web Developm...	06/03/2019	1,189.00	1,189.00
Chris W	06/14/2019	1031	Vendorsync:Bank Feed Enhancer	06/14/2019	2,041.25	2,041.25
Chris W	06/26/2019	1032	Lynda Artesani:Bathroom Remodel	06/26/2019	1,528.12	1,528.12
Total for 91 or more days past due					\$29,197.29	\$29,197.29
+ 61 - 90 days past due						
Chris W	07/09/2019	1005	Perkway Business Solutions	07/09/2019	43.00	43.00
Chris W	07/09/2019	1006	Ernest Cook	07/09/2019	75.00	75.00
Chris W	07/09/2019	1010	Nerd Enterprises	07/09/2019	75.00	75.00
Chris W	07/13/2019	1066	Perkway Business Solutions	07/13/2019	25.00	25.00
Chris W	07/18/2019	1047	Lynda Artesani	07/18/2019	1,498.58	1,498.58
Chris W	07/18/2019	1049	Nerd Enterprises	07/18/2019	1,508.68	1,508.68
Chris W	08/01/2019	1074	Perkway Business Solutions	08/01/2019	150.00	150.00
Total for 61 - 90 days past due					\$3,375.26	\$3,375.26
+ 31 - 60 days past due						
Chris W	08/15/2019	1172	Customer B	08/15/2019	250.00	250.00
Chris W	08/15/2019	1175	Customer C	08/15/2019	250.00	250.00
Chris W	07/20/2019	1060	Customer A	08/19/2019	1,235.00	1,235.00
Chris W	07/20/2019	1062	Customer C	08/19/2019	1,235.00	1,235.00
Chris W	08/01/2019	1076	Lisa Voss Duster	08/31/2019	150.00	150.00
Total for 31 - 60 days past due					\$3,120.00	\$3,120.00
TOTAL					\$35,692.57	\$35,692.57

# Customized reporting

Evaluating team performance

Revenue earned by creator:

Evaluate the total revenue generated by each member of the production team.

CONTENT CREATOR	DATE	NUM	CUSTOMER	AMOUNT	SALES REP	OPEN BALANCE
• Matthew F						
Matthew F	07/01/2019	1081	Nerd Enterprises	272.00	Lynda A	272.00
Matthew F	07/18/2019	1046	Nerd Enterprises Cash Flow Projection Tool	110.85	Lynda A	110.85
Matthew F	07/18/2019	1047	Lynda Artesani	1,498.59	Chris W	1,498.59
Matthew F	07/20/2019	1060	Customer A	1,235.00	Chris W	1,235.00
Matthew F	07/20/2019	1061	Customer B	1,235.00	Chris W	0.00
Matthew F	07/20/2019	1062	Customer C	1,235.00	Chris W	1,235.00
Matthew F	08/15/2019	1171	Customer D	250.00	Lynda A	250.00
Total for Matthew F				\$5,836.44		
• Seth D						
Seth D	08/01/2019	1076	Lisa Vos Drutar	150.00	Chris W	150.00
Seth D	08/15/2019	1173	Customer A	250.00	Lynda A	250.00
Total for Seth D				\$400.00		
• Lynda A						
Lynda A	07/13/2019	1058	Hector Garcia	25.00	Lynda A	25.00
Lynda A	07/18/2019	1044	Lisa Vos Drutar	100.75	Lynda A	100.75
Lynda A	07/18/2019	1049	Nerd Enterprises	1,508.69	Chris W	1,508.69
Lynda A	08/15/2019	1172	Customer E	250.00	Chris W	250.00
Lynda A	08/15/2019	1174	Customer B	250.00	Lynda A	0.00
Lynda A	08/15/2019	1175	Customer C	250.00	Chris W	250.00
Lynda A	09/01/2019	1083	Lisa Vos Drutar	150.00	Lynda A	150.00
Total for Lynda A				\$2,534.44		
• Not Specified				\$19,827.72		
The Revenue by Content Creator could be used to evaluate the efficiency of the team as well as the gross profit per employee. Some advanced reporting will require exporting the data as a CSV flat file to excel.						

# Customized reporting

Selecting a niche

## Revenue earned by industry

Track the sales by industry for a period to determine where most of your sales are coming from.

## QB Community Live!

### REVENUE BY INDUSTRY

January - December 2019

DATE	NUM	NAME	AMOUNT	SALES REP	CONTENT CREATOR
▼ Property Management					
07/18/2019	1044	Lisa Vos Drutar	100.75	Lynda A	Lynda A
08/01/2019	1076	Lisa Vos Drutar	150.00	Chris W	Seth D
09/01/2019	1083	Lisa Vos Drutar	150.00	Lynda A	Lynda A
10/02/2019	1090	Lisa Vos Drutar	150.00	Lynda A	Seth D
Total for Property Management			\$550.75		
► SaaS			\$30,367.46		
► Software Development			\$65,442.43		
▼ Non-Profit					
07/13/2019	1058	Hector Garcia	25.00	Lynda A	Lynda A
08/15/2019	1171	Customer D	250.00	Lynda A	Matthew F
08/15/2019	1175	Customer C	250.00	Chris W	Lynda A
Total for Non-Profit			\$525.00		
▼ Construction					
06/14/2019	1037	Nerd Enterprises:Guest Hous...	6,926.12	Lynda A	Matthew F
06/26/2019	1032	Lynda Artesani:Bathroom Rem...	1,528.12	Chris W	Seth D
06/28/2019	1004	Lynda Artesani:Bathroom Rem...	9,348.00	Chris W	Matthew F
07/18/2019	1047	Lynda Artesani	1,498.59	Chris W	Matthew F
07/18/2019	1049	Nerd Enterprises	1,508.69	Chris W	Lynda A
10/03/2019	1091	Parkway Business Solutions:W...	2,018.10	Chris W	Lynda A
Total for Construction			\$22,827.62		
► Not Specified			\$4,259.86		

The Revenue by Industry report can be used to help a business owner decide what niche would be best for them to focus on.

# Customized reporting

Nurture your lead sources

## Sales by lead source

Track where your business comes from to ensure you always focus on the relationships that matter the most.

QB Community Live								
SALES BY LEAD SOURCE								
January - December 2019								
DATE	TRANSACTION TYPE	NUM	MEMO/DESCRIPTION	AMOUNT	BALANCE	SALES REF	LEAD SOURCE	TYPE OF CLIENT
+ Personal network								
05/31/2019	Invoice	1806	-100% marku...	-120.00	-120.00	Idalia...	Personal network	
05/31/2019	Invoice	1806	4218-Imre K...	120.00	0.00	Idalia...	Personal network	
06/14/2019	Invoice	1832	4301-Imre K...	175.00	175.00	Idalia...	Personal network	
06/14/2019	Invoice	1832	71.42857% ...	125.00	300.00	Idalia...	Personal network	
07/26/2019	Invoice	1927	4553-Imre K...	227.50	527.50	Idalia...	Personal network	
07/26/2019	Invoice	1927	71.42857% ...	162.50	690.00	Idalia...	Personal network	
08/09/2019	Invoice	1961	4640-Imre K...	70.00	760.00	Idalia...	Personal network	
08/09/2019	Invoice	1961	71.42857% ...	50.00	810.00	Idalia...	Personal network	
Total for Personal network				\$810.00				
+ Galvanize Incubator								
05/03/2019	Invoice	1748	4066-David L...	35.00	35.00	Idalia...	Galvanize Incubator	Direct - Startup
05/03/2019	Invoice	1748	4067-Marton...	20.00	55.00	Idalia...	Galvanize Incubator	Direct - Startup
05/03/2019	Invoice	1748	-100% marku...	-20.00	35.00	Idalia...	Galvanize Incubator	Direct - Startup
05/03/2019	Invoice	1748	-100% marku...	-35.00	0.00	Idalia...	Galvanize Incubator	Direct - Startup
Total for Galvanize Incubator				\$0.00				

# Audience Poll

Are you interested to see more examples of custom reports in QBO Advanced?

- Yes
- No

# Bump up your reporting power

Combine QuickBooks Online with third party apps to boost your reporting capabilities.



Job/Project Costing:



Advisory & Report Packages:



Granular Custom Reports:



# Expand your knowledge of QBO Advanced

QuickBooks Online advanced articles

[Real Estate Property Management \(3 Parts\)](#) – Seth David

[Law Firm Accounting](#) – Lynda Artesani

[User Permissions for Nonprofits](#) – Megan Genest Tarnow

[Accelerated Invoicing \(2 Parts\)](#) – Matthew Fulton

[Deep Dive into Advanced Custom Fields](#) – Matthew Fulton

[QBO Advanced Checklist](#) – Erin Walsh Dyer

[Facebook Live Demo of QBO Advanced](#) – Matthew Fulton & Lynda Artesani  
(QB Community Live)

**Download this guide:**

<http://bit.ly/qbconnect2019>



# Questions?





# WHAT TO DO NEXT: QUICKBOOKS ONLINE ADVANCED TEST DRIVE ACCOUNT

Download this guide:

<http://bit.ly/qbconnect2019>

# Contact information



## Matthew Fulton

Parkway Business Solutions | Vendorsync | QB Community Live!



(805) 419-9197



<https://parkway.business>



[mfulton@parkwaymail.com](mailto:mfulton@parkwaymail.com)

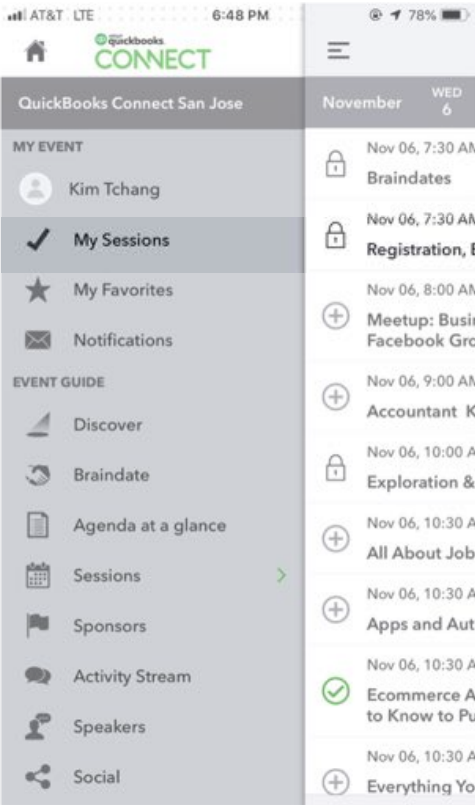


[facebook.com/groups/qbcommunitylive](https://facebook.com/groups/qbcommunitylive)

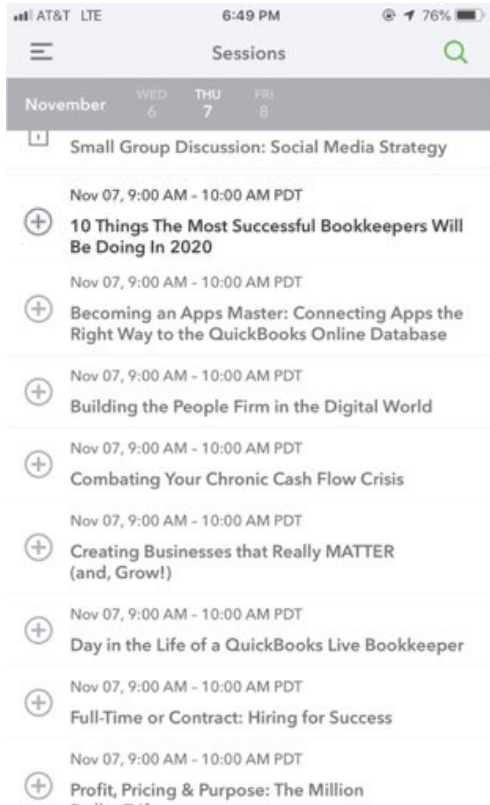
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

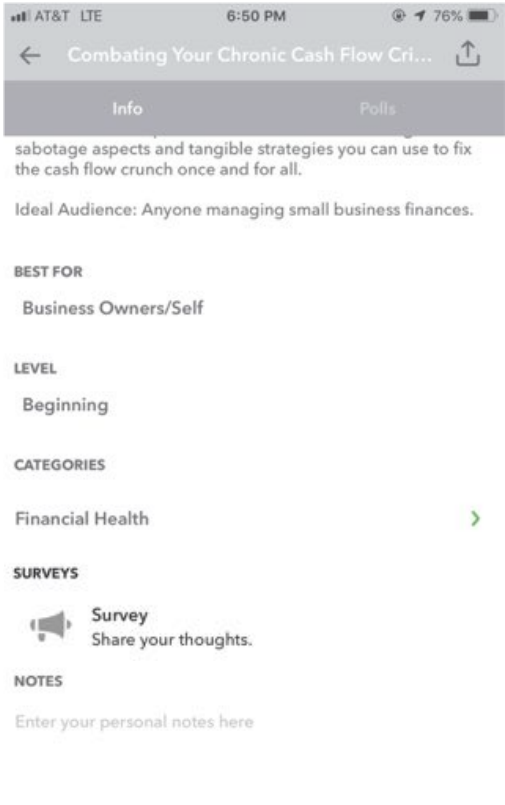
## 1. Select Sessions



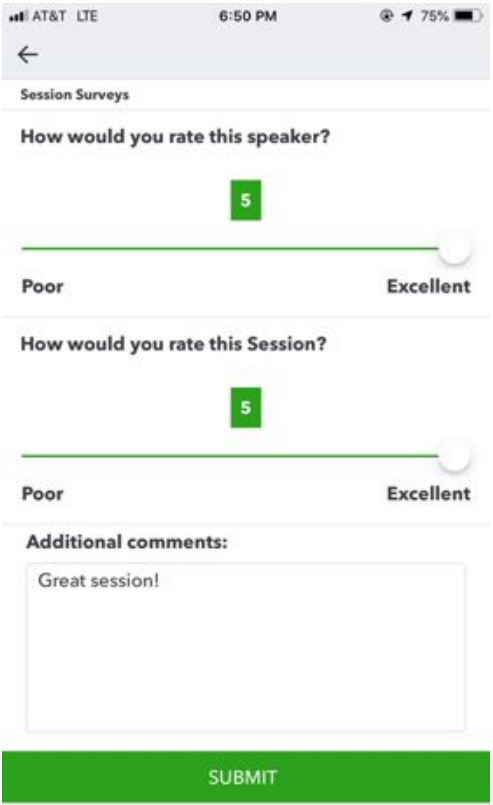
## 2. Select Session Title



## 3. Select Survey



## 4. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. Below the header, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is also present. A paragraph of text describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' Below this is a 'Search for sessions' search bar. A 'Filters' section includes buttons for Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list shows sessions for November 7:

- 7:30-7:00 am: Registration, Breakfast & Exploration
- 7:30-10:30 am: Braindates. New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#). Best for: All Audiences. CPE Hours: not eligible.
- 8:00-8:30 am: Yoga
- 8:00-8:45 am: Breakout Sessions
  - Small Business Meetup: Relationship Marketing and the Power of Human Connection
  - Small Group Discussion: Social Media Strategy
  - Small Group Discussion: Showing up - Why What You Wear Matters
  - Small Group Discussion: Build Your Dream Bookkeeping firm



OWN  
THE  
FUTURE