



# Getting "old" data into QuickBooks Online

Debra Kilsheimer



A photograph of two young women with long blonde hair talking outdoors at night. The woman on the left is in profile, looking towards the woman on the right. They are both wearing dark jackets. The background is dark with some blurred green lights, possibly from trees or streetlights.

Take a minute  
to connect with  
your neighbor

#QBConnect | WiFi: QBConnect

# 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 **2 hours 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

# Today's speaker



Debra Kilsheimer

Behind the Scenes Financials, Inc.

@debbiekilz

# Agenda

Purpose

Pricing

Tools

Demo

After action analysis

Questions



# **PURPOSE**

Why did they call you?

What do they want?





**Perfect books are expensive”**

- Debra Kilsheimer



# CLIENT INFORMATION

What the client provides

It's all about the Balance Sheet

# TOOLS

The Wizarding World  
of YOU!

# DEMO:

**Step #1:** Setting up the QuickBooks Online file

# Step #2

## Getting in the data!

# Step #3

## Reconciling the Balance Sheet accounts

## Step #4

# Reviewing the Income statement

# Step #5

Finalize with your customer

# AFTER ACTION ANALYSIS

**Questions**

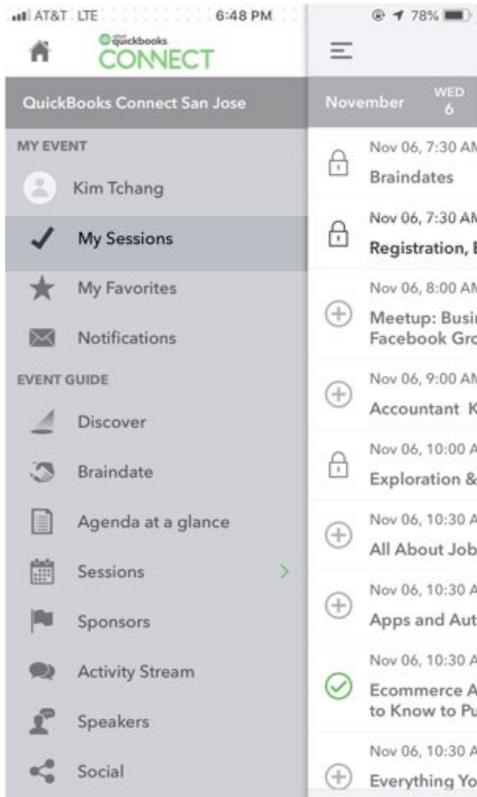


# One last thing...

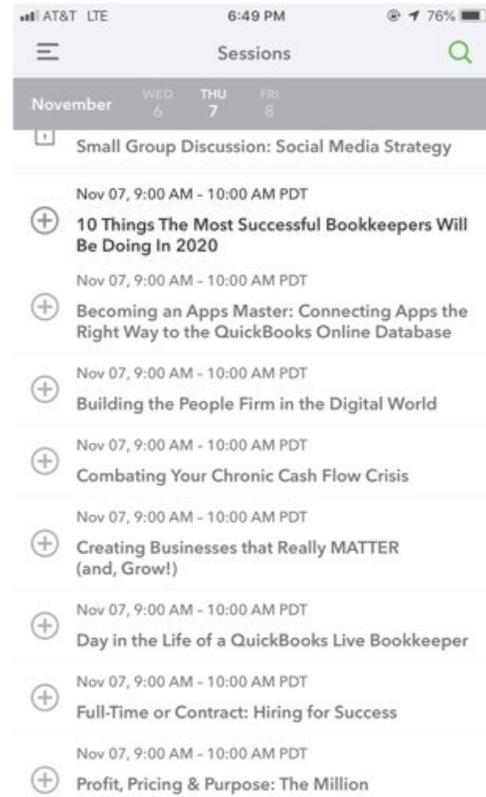
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

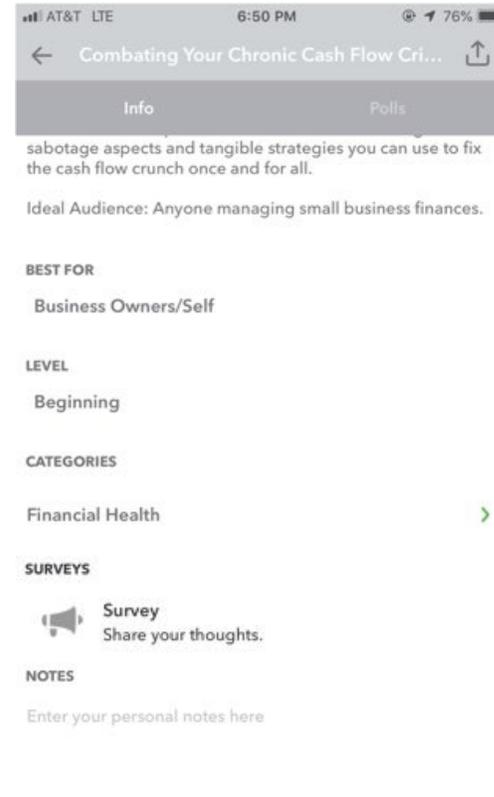
## 1. Select Sessions



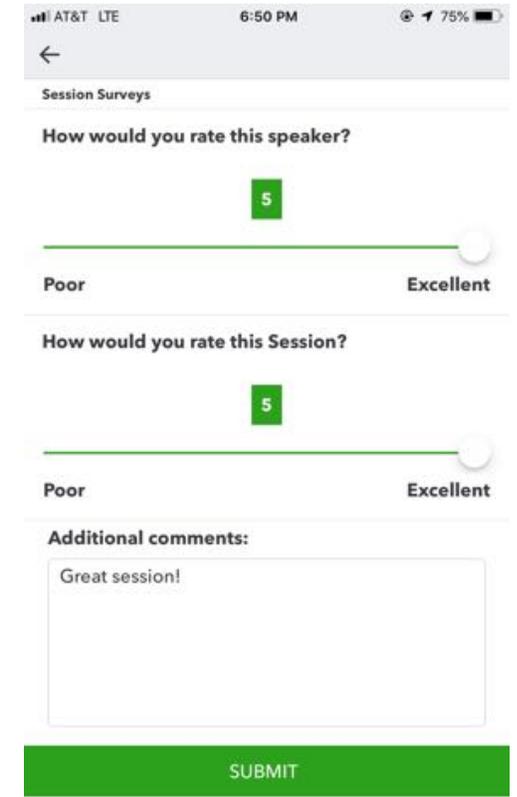
## 2. Select Session Title



## 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, 2023. The page features a navigation bar with links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is located in the top right corner. Below the navigation bar, there are tabs for 'November 6: Accountant Day', 'November 7' (which is selected), and 'November 8'. A 'Print Agenda' button is also present. The main content area includes a search bar labeled 'Search for sessions' and a set of filters: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. An 'Expand all +' button is located to the right of the filters. The agenda items are listed in a table with columns for time slots and session titles. The items include 'Registration, Breakfast & Exploration', 'Braindates', 'Yoga', and 'Breakout Sessions' (which includes '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', and 'Small Group Discussion: Build Your Dream Bookkeeping firm').

QuickBooks CONNECT Why Attend Agenda Speakers Pricing Sponsors Travel FAQ Register now

November 6: Accountant Day November 7 November 8 Print Agenda

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.

Search for sessions

Filters: Business Growth Life & Business Skills Organizational Culture Technology Training Advisory Financial Health Expand all +

7:30-9:00 am	Registration, Breakfast & Exploration	
7:30-10:30 am	<b>Braindates</b> New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. <a href="#">Learn more</a> Best for: All Audiences CPE Hours: not eligible	✕
8:00-8:30 am	Yoga	+
8:00-8:45 am	<b>Breakout Sessions</b>	
	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	+

 **CONNECT**

OWN  
THE  
FUTURE  
FUTURE