QUICKBOOKS ONLINE 2021 CLIENT TRAINING

Course 5

Expand Usability

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About the Author

Esther Friedberg Karp, MBA

President, EFK CompuBooks Inc.

esther@e-compubooks.com

Esther Friedberg Karp is an internationally renowned trainer, writer, business consultant and speaker who has been repeatedly listed as one of Insightful Accountant's Top 100 QuickBooks ProAdvisors in the world. She has also been named to their Top 10 list on two occasions: as Top International ProAdvisor and Top Trainer/Writer ProAdvisor.

Based in Toronto, Canada, Esther has the unique distinction of holding ProAdvisor certifications in the United States, Canada and the United Kingdom. She has authored materials and delivered educational and certification courses for Intuit in all those countries, as well as Australia where she conducted live QuickBooks Online training. She has spoken at Scaling New Heights, QuickBooks Connect and other conferences, and has written countless articles for Intuit Global.

Esther's clients include companies worldwide and accounting professionals who seek her out on behalf of their own clients. She is sought out for her expertise in multicurrency and various countries' editions of QuickBooks Desktop and Online, and for her talent in customizing QuickBooks usage for different industries. She also teaches QuickBooks Core and Advanced certification classes to accounting professionals in Canada.

Esther holds a BSc from the University of Toronto in Actuarial Science and Mathematics, and an MBA in Marketing and Finance from York University's Schulich School of Business.

She can be reached at esther@e-compubooks.com or 416-410-0750.

COMPUBOOKS
Business Services

Training at a Glance

Use this as a guide to select specific steps to be covered.

TOPICS	STEP BY STEP WORKFLOWS
1. PAYMENTS	• Set up a new QuickBooks Payments account • Configure Account and Settings for online invoices • Send Online Invoices • Invoice portal from the customer's perspective
2. PAYROLL	• Links to add QuickBooks Online Payroll • Add employee to QuickBooks Online Payroll • Configure payroll settings for QuickBooks Online Payroll • Payroll Summary Report in QuickBooks Online Payroll • Tax Liability Report in QuickBooks Online Payroll • Paycheck History Report in QuickBooks Online Payroll
3. INTUIT APP CENTER	• Find and explore the QuickBooks Online App Center

QuickBooks Online Test Drive

Most exercises in the other handbooks in this series can be completed using a QuickBooks Online "test drive" file. The test drive uses a sample company file called Craig's Design & Landscaping Services. It can be accessed through the following link to a sample QuickBooks Online Plus company:

Craig's Design & Landscaping

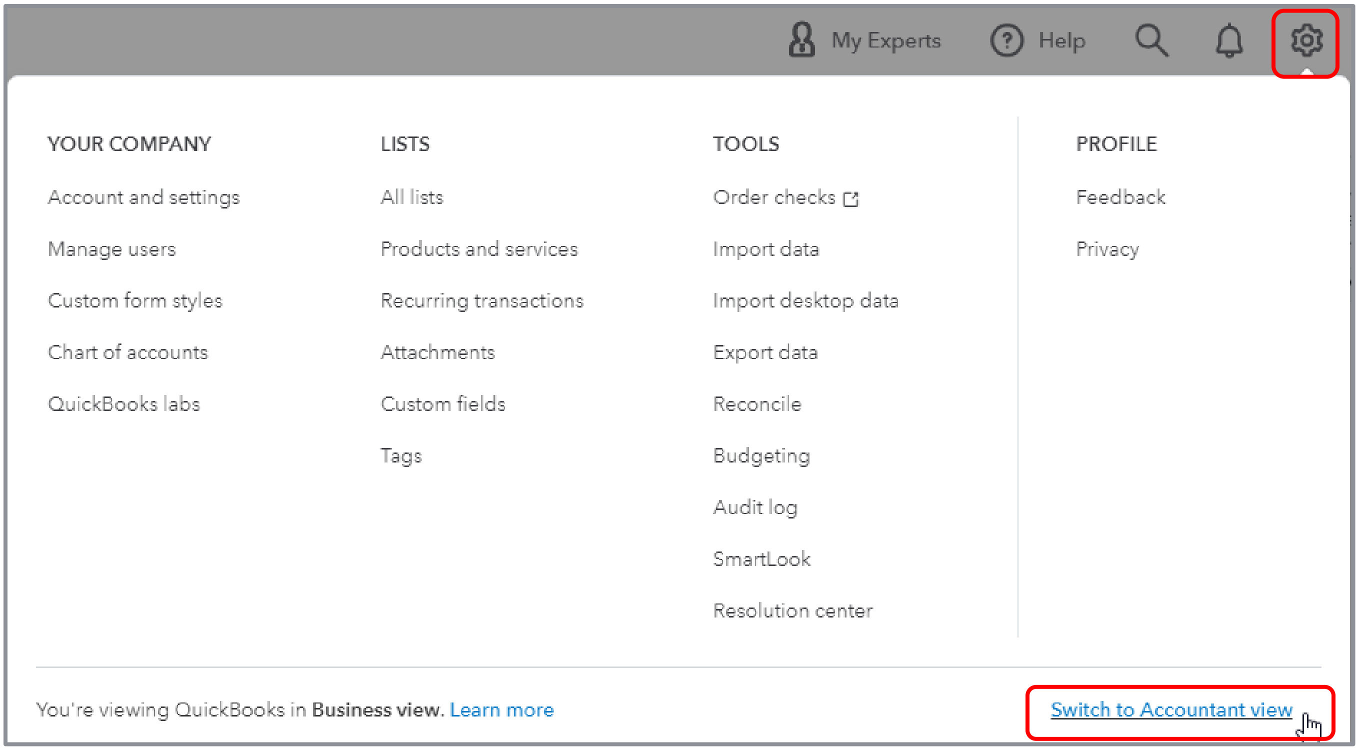
You don't have to create an account or sign in to access the test drive file; just complete the security validation and click **Continue**.

This test drive is designed for you to explore and try out new things without worrying you will break something or make a mistake. It is not designed to retain any changes you make. (Although you should change the Sign me out if inactive setting to **3 hours** if you want to give yourself plenty of time.) Once you close this QuickBooks Online test drive company it is completely refreshed, so remember to allow sufficient time to complete each task.

The exercises in this handbook on expanding usability cannot be performed in the test drive company. They are designed to be completed in an actual QuickBooks Online company. These courses use a QuickBooks Online Plus company.

Note: *When you are working in an actual company file (not a test drive company), you may see left navigation bar tabs that differ slightly from what you see here. If that is the case, the actual company is being viewed in Business View (as opposed to Accountant View). The steps in this course are following the Accountant View option. If you are in Business View, click on the **gear icon** in the top right and select **Switch to Accountant view**.*

All QuickBooks Online companies, including test drive, can be toggled between Accountant and Business View.


My Experts
Help
YOUR COMPANY
Account and settings
Manage users
Custom form styles
Chart of accounts
QuickBooks labs
LISTS
All lists
Products and services
Recurring transactions
Attachments
Custom fields
Tags
TOOLS
Order checks
Import data
Import desktop data
Export data
Reconcile
Budgeting
Audit log
SmartLook
Resolution center
PROFILE
Feedback
Privacy
You're viewing QuickBooks in Business view. Learn more
Switch to Accountant view

Topic 1: **Payments**

Topic Objectives

- Identify the functionality of QuickBooks Payments
- Recognize the features of Online Invoices
- Recognize the steps to use the invoicing portal

Functionality of QuickBooks Payments

Consumers use a variety of methods – bank transfers (ACH), Apple Pay, Samsung Pay, Google Pay, and credit cards – to make payments in the store, in the field, online and via mobile devices. QuickBooks Payments allows companies to connect to their customers electronically, accommodating customer payment preferences with both credit card and bank account options.

QuickBooks Payments is the one central payment service associated with QuickBooks Online. It helps companies using QuickBooks Online get paid faster and save time, eliminating unnecessary transaction data entry and trips to the bank.

In this section, we'll learn about QuickBooks Payments and how to apply and activate it in a QuickBooks Online account.

Features Available in QuickBooks Payments

- Supports accepting credit cards and ACH bank transfers
- Powers the payment screens (i.e., Sales Receipt and Receive Payment screens) to accept payments directly into QuickBooks Online
- Enables users to add a Pay Now button on an emailed invoice so customers can easily pay online; this automatically creates a Receive Payment transaction in QuickBooks Online linked to the invoice
- Powers mobile payments with transaction processing in the QuickBooks mobile app on mobile devices
- Funds move directly from the customer's bank account to the company's selected bank account
- There is typically a one-business-day window from the time the payment is submitted to the time it is received in the merchant's bank account. The cutoff time to get deposits the next business day is 3 p.m. Pacific Time. Payments processed after 3 p.m. go into the next deposit cycle. (Note that your first deposit with QuickBooks usually takes a little longer and should arrive within 4 to 5 days.)
- The bank deposit and merchant service fees are automatically recorded in QuickBooks Online by the QuickBooks Payments reconciliation feature. No competing accounting software can do this.
- It's the only payment service that allows credit card payments to be accepted directly in QuickBooks Online via either the Sales Receipt or Receive Payment screen
- Recurring sales receipts and credit card payments can be set up automatically
- It supports the invoicing portal referenced in the next section
- Payments made in the invoicing portal are automatically recorded in QuickBooks Online and the invoices marked as paid
- QuickBooks Payments includes the GoPayment app for mobile devices
- With GoPayment, credit cards can be swiped inside or outside of the QuickBooks Online mobile app and a card reader can be added
- GoPayment is great for those providing on-site services such as pool service technicians, electricians, personal trainers, inspectors and appraisers
- Payments are downloaded into QuickBooks Online; downloads not matched are saved and available to continue working on later
- Merchant service fees are automatically recorded with the deposit in QuickBooks Online

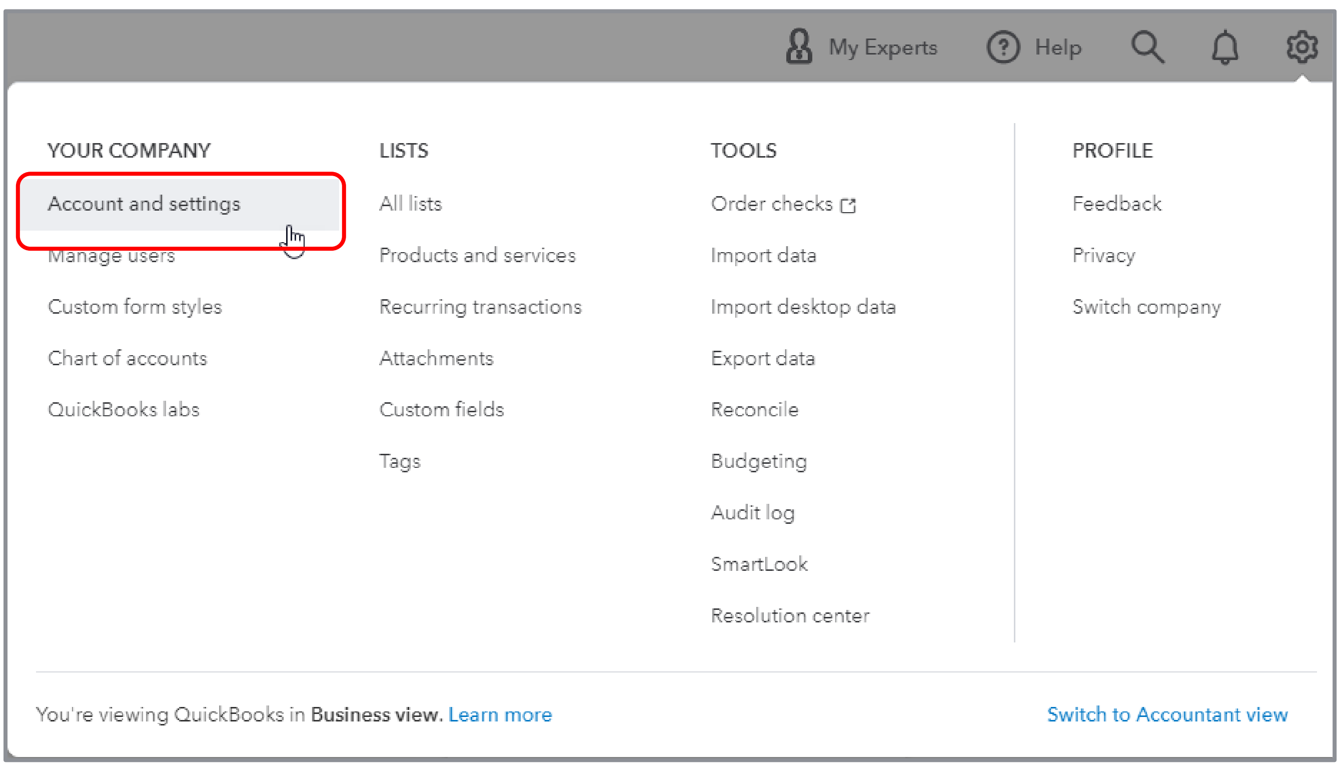
- QuickBooks Payments is available separately as a stand-alone pay-as-you-go payment solution if a company does not invoice customers
- More information can be obtained at https://quickbooks.intuit.com/payments/

NOTE: *For those who previously used Intuit Payment Network, it is no longer associated with QuickBooks Online as QuickBooks processes both credit card and ACH customer payments.*

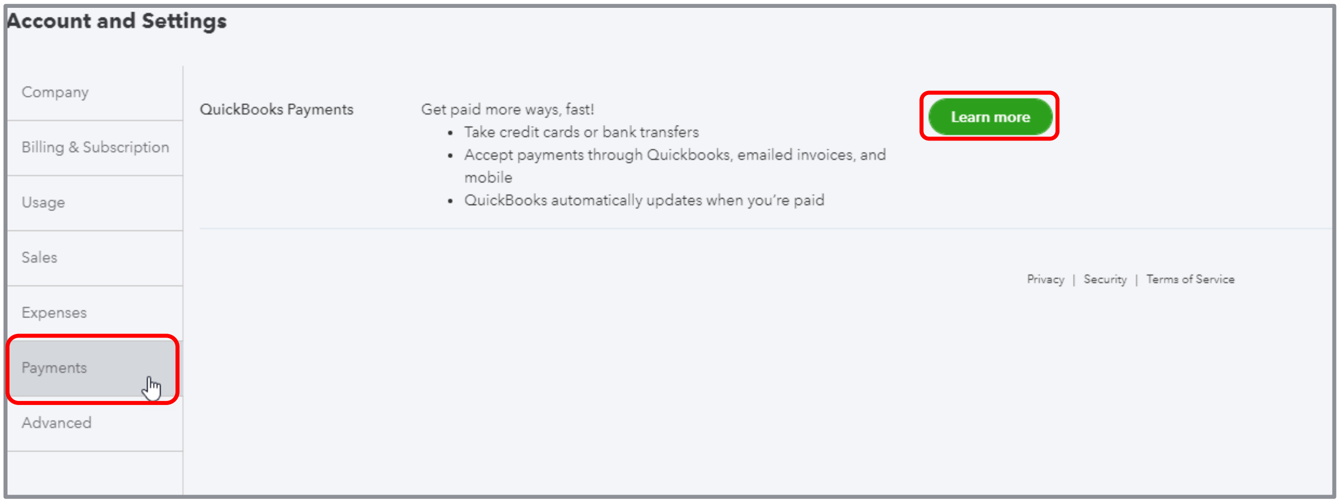
Step by Step: Set up a New QuickBooks Payments Account

For purposes of this activity, we will search for the permanent settings to turn on QuickBooks Payments.

1. Open a live QuickBooks Online account; this will not work in the test drive file.
2. Go to the **gear icon** on the top right and select **Account and Settings**.



3. Click **Payments** on the left navigation bar.



4. For a new account, click **Learn More**.

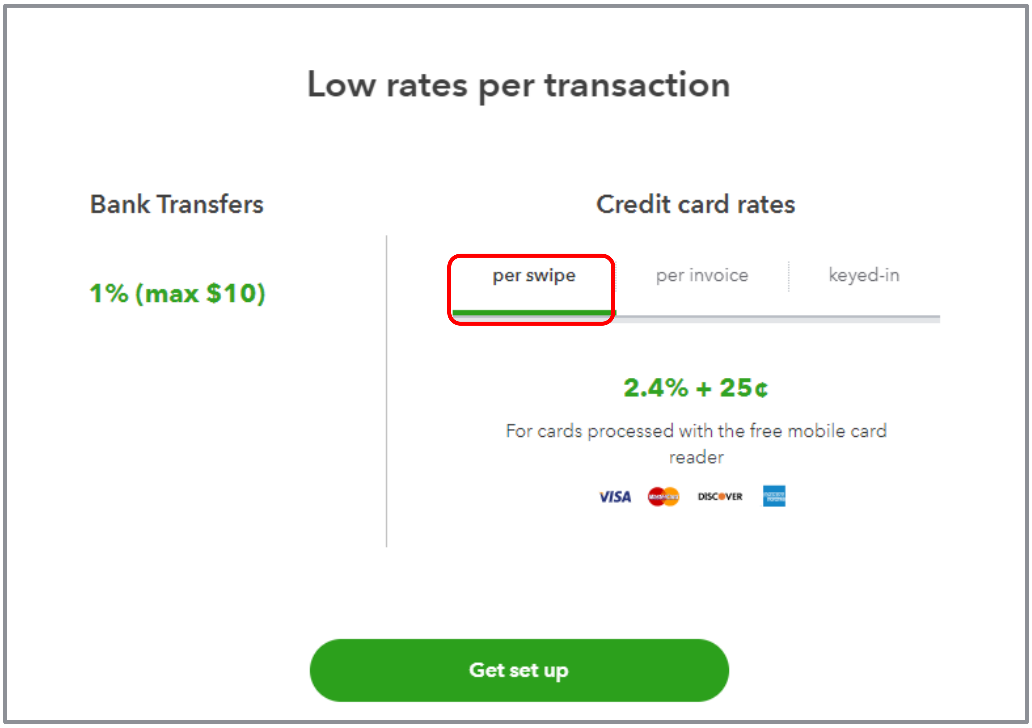
5. Review the pricing plans available. QuickBooks Payments (1-888-236-9501 for live info) has two special pricing plans for ProAdvisors' clients; you can add a mobile card reader (see https://quickbooks.intuit.com/payments/readers/ for card reader choices) to either one:
   - **Pay-as-you-go** – $0/month with slightly higher processing rates
   - **Monthly fee** – $16/month with lower processing rates

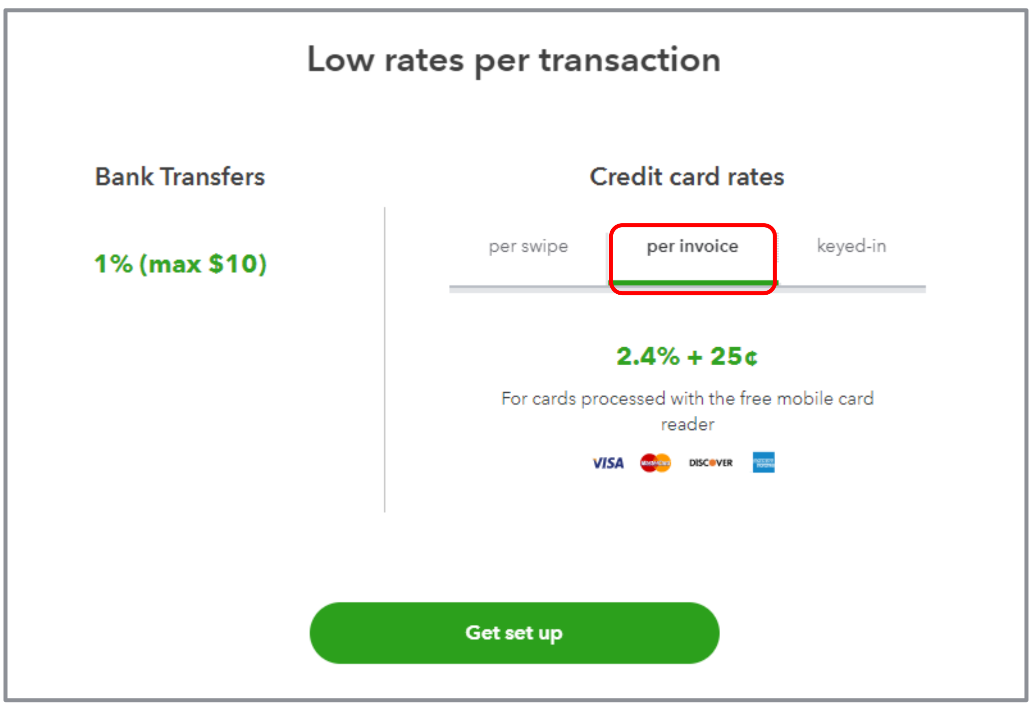
For QuickBooks Online	As you go $0/mo + transaction fees	Monthly $16/mo + transaction fees
Card - Swiped	2.2% + $0.25	1.5% + $0.25
Card - eInvoice	2.9% + $0.25	2.75% + $0.25
Card - Keyed	3.1% + $0.25	2.9% + $0.25
Bank Transfer (ACH)	1% (max $10)	1% (max $10)

Call to sign up: 888-236-9501

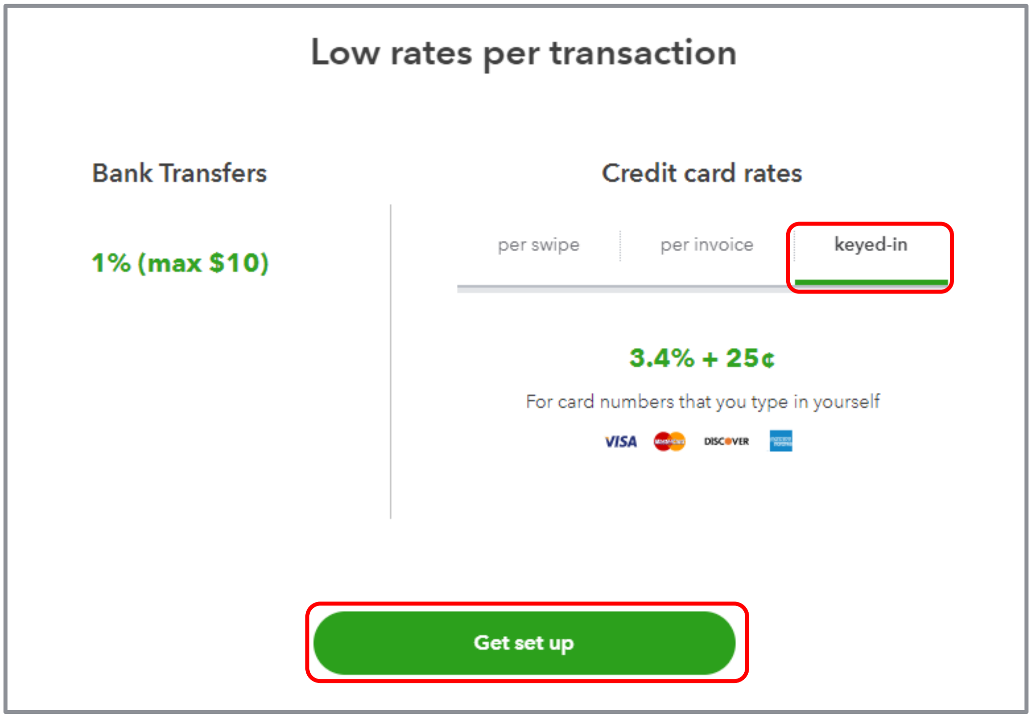
These ProAdvisor client charges can be found at https://quickbooks.intuit.com/accountants/products-solutions/merchant-services/.

Regular QuickBooks Payments charges can be found at https://quickbooks.intuit.com/payments/pricing/.

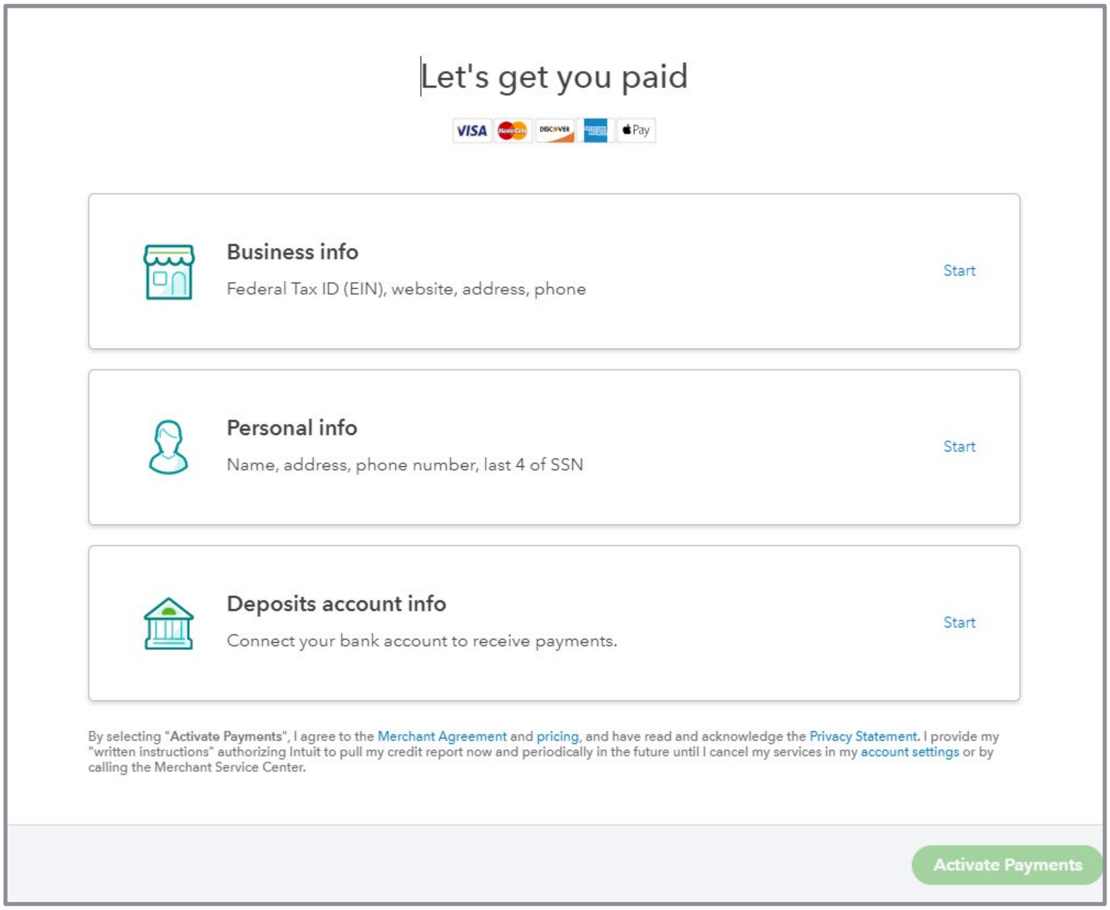

Low rates per transaction
Bank Transfers
1% (max $10)
Credit card rates
per swipe
per invoice
keyed-in
2.4% + 25¢
For cards processed with the free mobile card reader
VISA
DISCOVER
Get set up

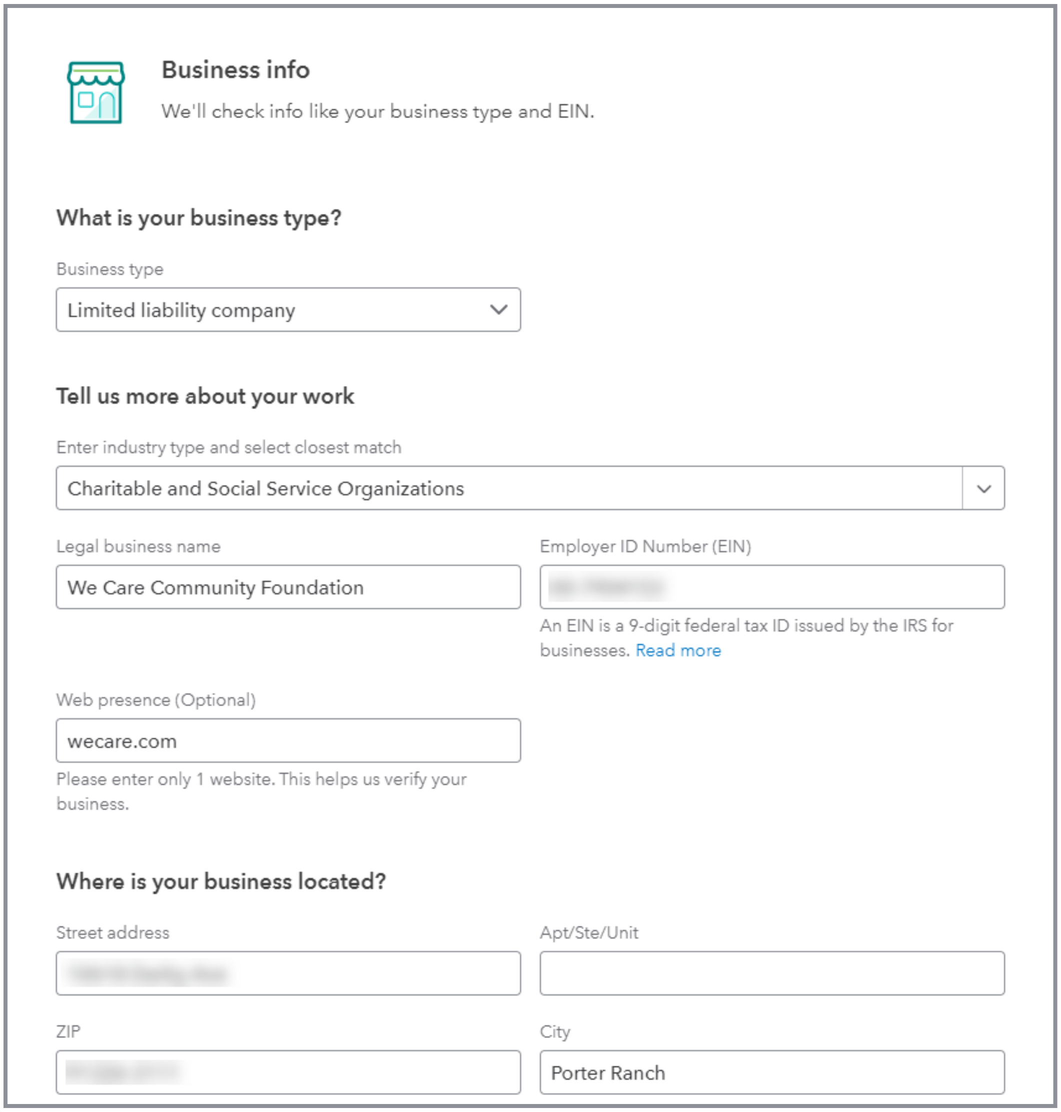

Low rates per transaction
Bank Transfers
1% (max $10)
Credit card rates
per swipe
per invoice
keyed-in
2.4% + 25¢
For cards processed with the free mobile card reader
VISA
DISCOVER
Get set up

6. Click **Get set up**.

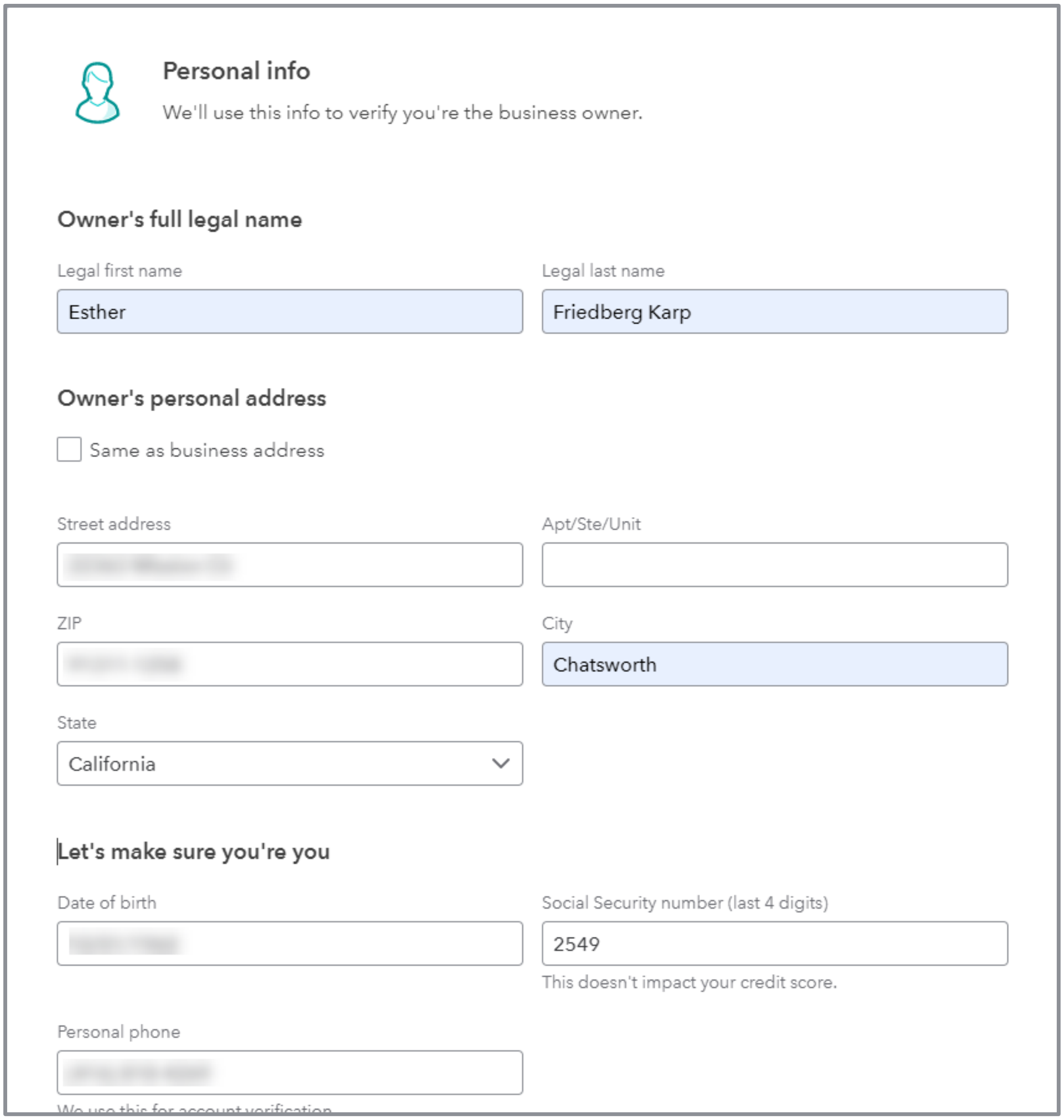


7. Complete the application. The application requires basic company, owner and banking information. Most of the basic information automatically populates from what was entered during the initial QuickBooks Online company file setup.

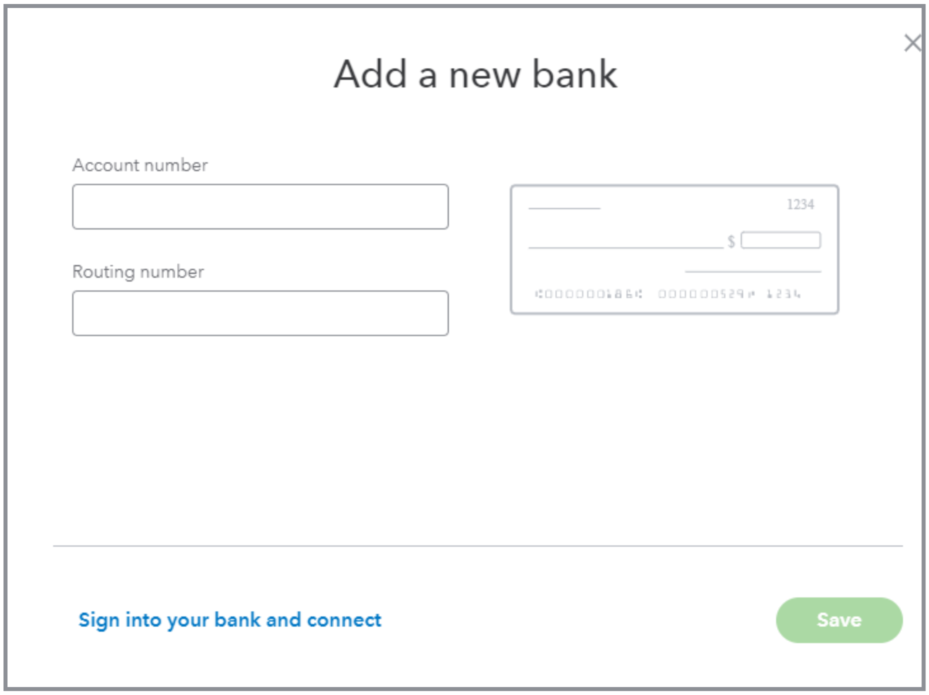




8. After completing the Business info page, click **Next**.



9. After completing the Personal info page, click **Next**.



10. After completing the bank information, click **Save**.

- If the QuickBooks Payments application is approved, you'll receive a message congratulating you, along with a notification that you'll receive an email when your account is ready to use. The service will be available for use within 24 hours for both credit card and bank account payment processing.
- If the QuickBooks Payments application is pending review, this typically means additional information is required before a decision can be made. Normally a business should receive a reply within one to two business days.
- If the QuickBooks Payments application is declined, the merchant can call the number on the screen to inquire about details or if a mistake is suspected. Sometimes companies are declined because of the kinds of products they sell.

Features of Online Invoices

Here we'll explore activities related to Online Invoices and the invoicing portal with which customers will interact.

- Allows the customer to pay the invoice by various payment methods (including Bitcoin) if QuickBooks Payments has been activated and enabled for the emailed invoice
- Currently, the Online Invoice is entirely "guest view," and does not require a username and password login. Based on the payment type selected, the payer enters the payment method information each time. This information is not saved.
- Full, partial and batch payments (paying multiple invoices at once) are allowed
- Once a payment is made from the Online Invoice
  - A confirmation screen appears to the customer
  - A confirmation email is sent to the customer and merchant
  - The invoice in QuickBooks Online is automatically updated as paid
  - A Receive Payment transaction is posted and linked to the invoice
  - The customer's Online Invoice displays a status of paid and the date that payment was received
- When funds settle, the deposit transaction is automatically recorded in QuickBooks Online with the payment; the merchant service fees are recorded as an expense

Steps to Use the Invoicing Portal

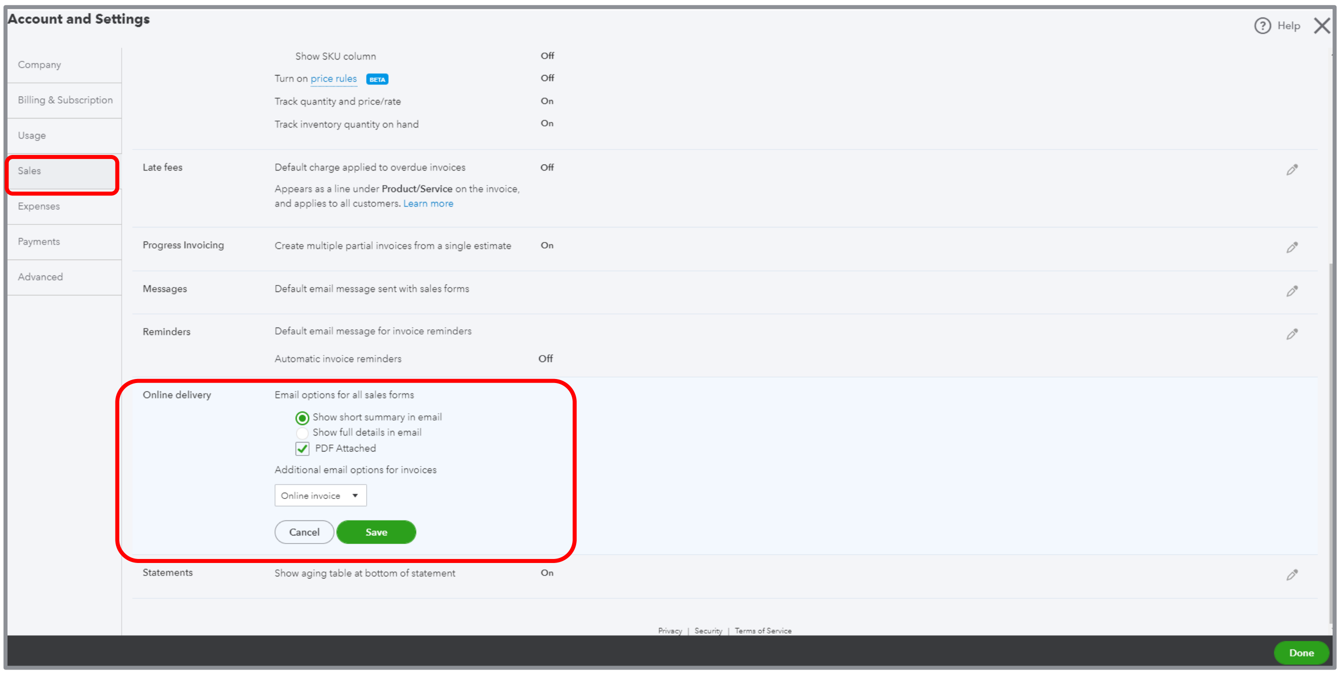
Look at the Online Invoice functionality in the invoicing portal. This is available in QuickBooks Online, even if QuickBooks Payments are not activated.

Benefits of the Invoicing Portal

- Professional invoice presentation (remember, the format of the invoice is controlled from Account and Settings)
- Consolidated messaging and attachments
- Pay Now button
- Tracking
- Transactions are automatically marked paid in QuickBooks Online
- If payment is accepted via the portal, full reconciliation will be automated within QuickBooks Online (the bank deposit and expense files for any associated fees are recorded in QuickBooks Online when the funds settle)

Step by Step: Configure Account and Settings for Online Invoices

1. Open your QuickBooks Online account and set up the proper preferences for Online Invoices to complete the next activity.
2. Click on the **gear icon** on the top right and select **Account and Settings → Sales**.
3. Click **Edit** (pencil icon) to the right of the online delivery section to expand it for editing.



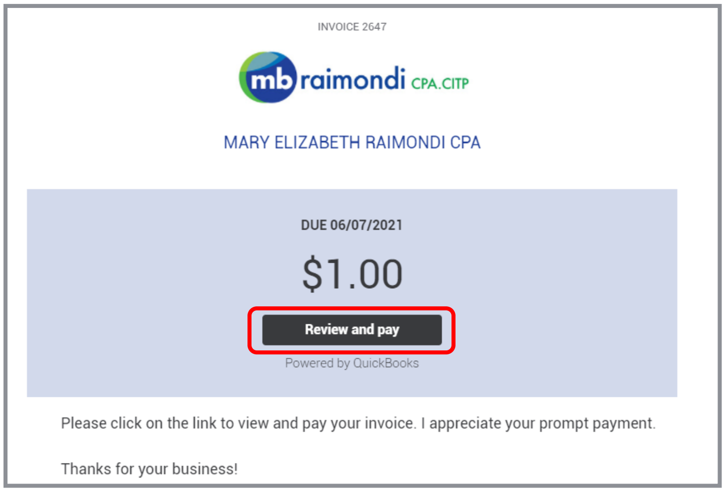
4. Use the drop-down to select **Email options** and choose **Online Invoice**.
5. Make sure the box for **PDF Attached** is *unchecked*.
6. Click **Save**.
7. Click **Done**.

Step by Step: Send Online Invoices

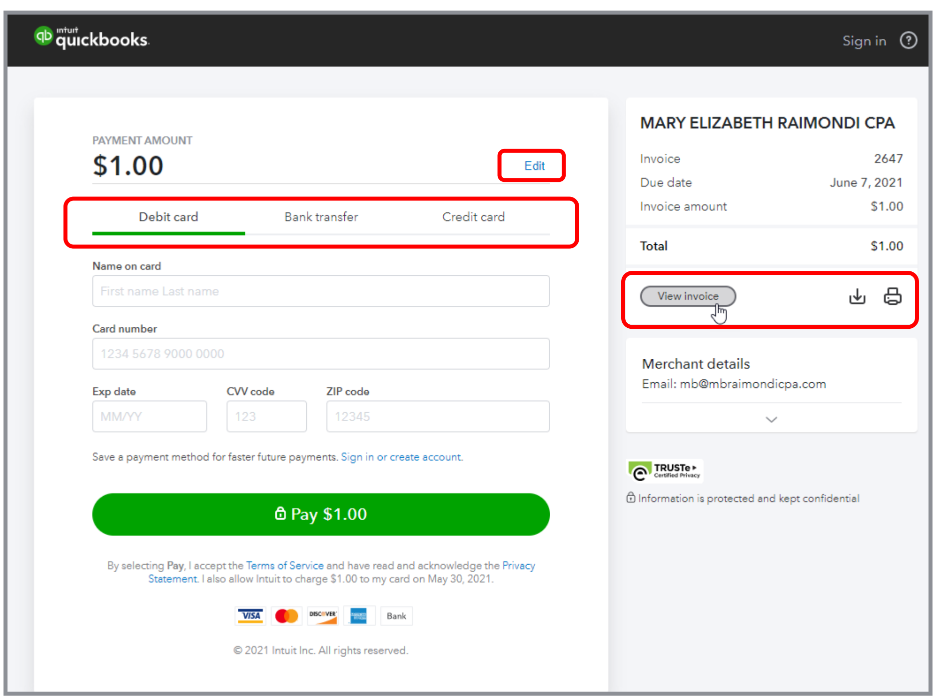
1. Open your QuickBooks Online account in which the Account and Settings were saved in the previous activity. This activity will not work in the test drive file.
2. Click **Quick Create Menu** (**+** sign) at the top right and select **Invoice**.
3. Ensure the Online payments checkboxes are checked at the top of the invoice.
4. Enter the invoice details.
5. Click **Save and send** in the lower right corner.
6. The next screen shows the option to edit the subject line and/or body of the email that the customer will see. The online payment options can be turned on here as well.
7. Click **Send and close** to send the invoice.

Step by Step: Invoice Portal from the Customer's Perspective

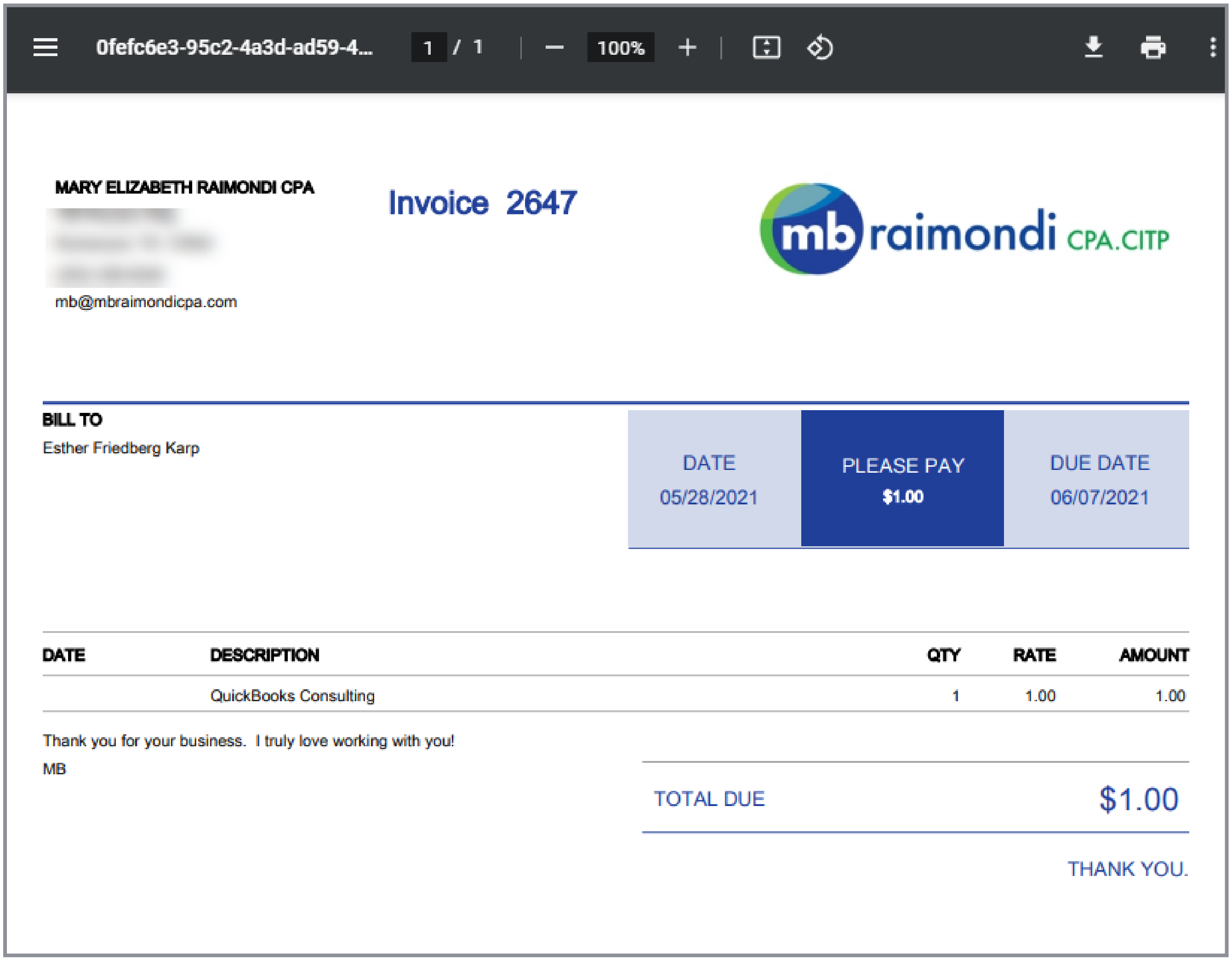
1. Once the invoice is sent, the recipient will receive an email with a link to view the invoice directly in the body of the email.



2. Once the customer clicks on **Review and pay**, they will see a window where they can enter their debit card, bank transfer, or credit card information to pay this invoice. The customer can click on **Edit** to change the amount they are paying. The customer can also view the invoice, download it (as a PDF) or print it.



3. Let's say the customer clicked on **View invoice**. The interactive Online Invoice in the invoicing portal is branded with the company's name and shows the customer an image of their invoice plus the due date and balance due amount per the QuickBooks Online account. At the top right of the previewed invoice, the customer can choose to download or print the invoice as well.



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MARY ELIZABETH RAIMONDI CPA

mb@mbraimondicpa.com

Invoice 2647

mb raimondi CPA.CITP

BILL TO
Esther Friedberg Karp

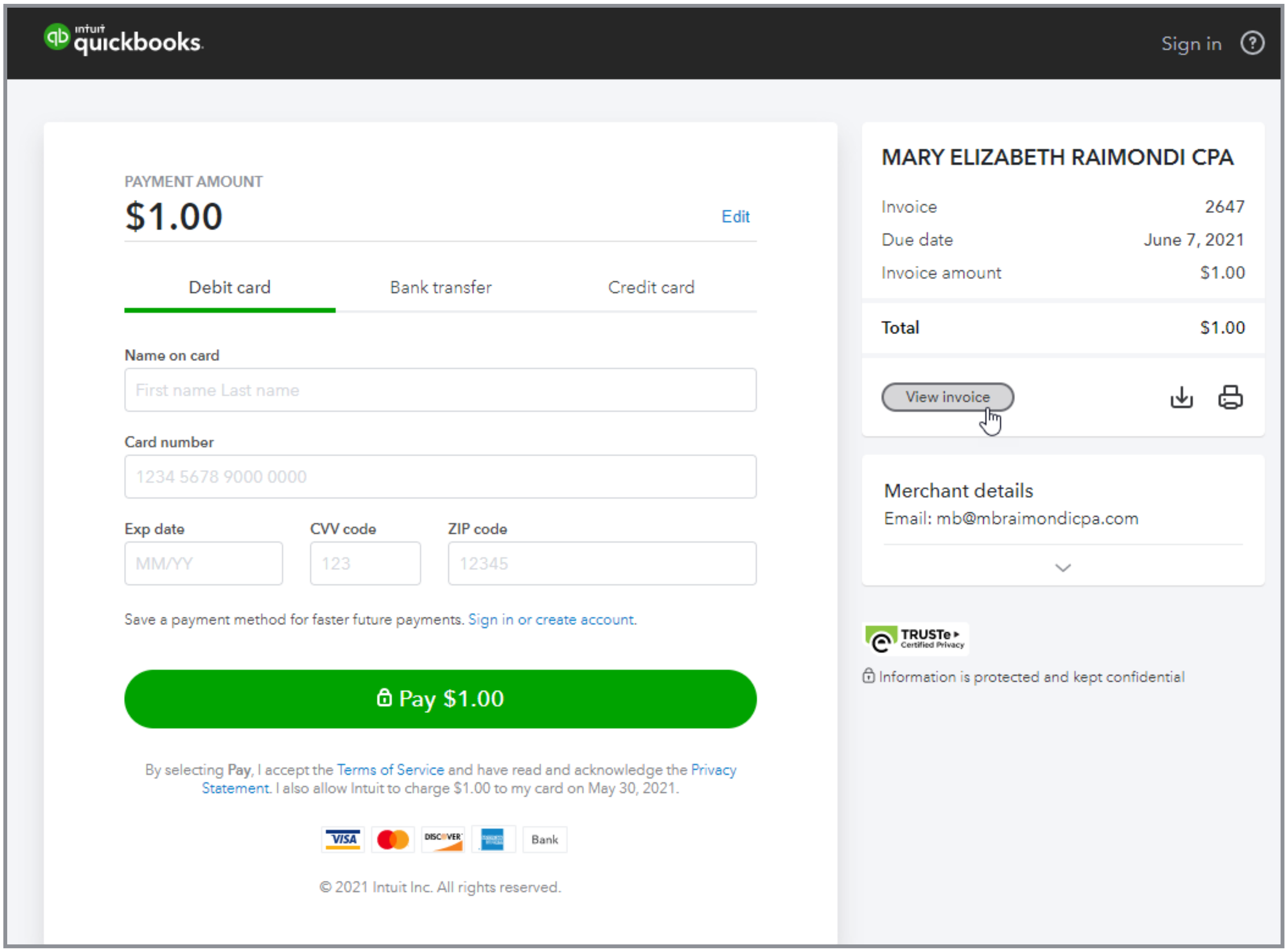
DATE	PLEASE PAY	DUE DATE
05/28/2021	$1.00	06/07/2021

DATE	DESCRIPTION	QTY	RATE	AMOUNT
	QuickBooks Consulting	1	1.00	1.00

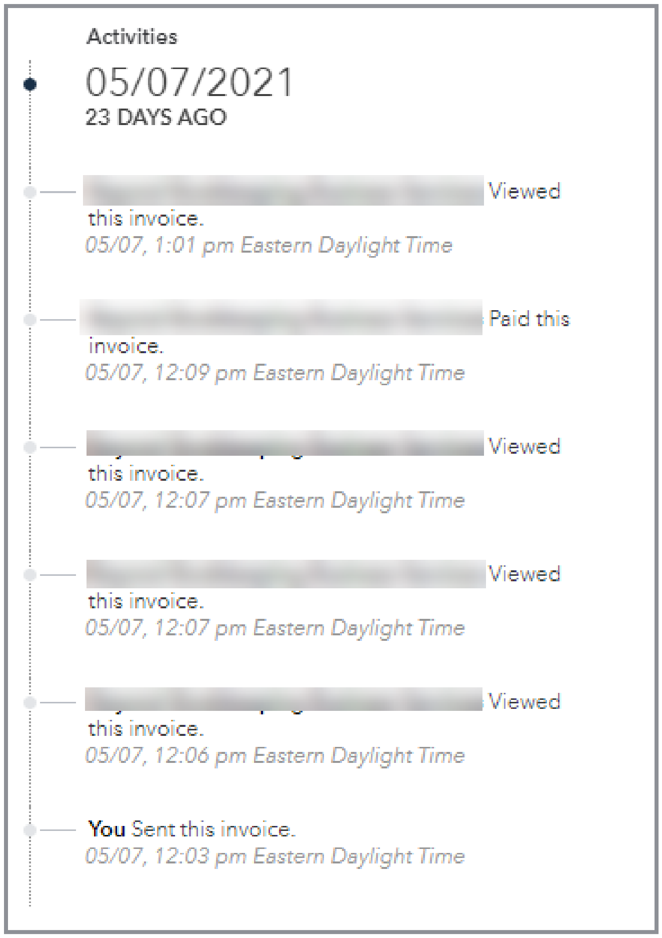
Thank you for your business. I truly love working with you!
MB

TOTAL DUE $1.00

THANK YOU.


intuit quickbooks
Sign in
PAYMENT AMOUNT
$1.00
Edit
Debit card
Bank transfer
Credit card
Name on card
First name Last name
Card number
1234 5678 9000 0000
Exp date
MM/YY
CVV code
123
ZIP code
12345
Save a payment method for faster future payments. Sign in or create account.
Pay $1.00
By selecting Pay, I accept the Terms of Service and have read and acknowledge the Privacy Statement. I also allow Intuit to charge $1.00 to my card on May 30, 2021.
VISA
DISCOVER
Bank
© 2021 Intuit Inc. All rights reserved.
MARY ELIZABETH RAIMONDI CPA
Invoice 2647
Due date June 7, 2021
Invoice amount $1.00
Total $1.00
View invoice
Merchant details
Email: mb@mbraimondicpa.com
TRUSTe Certified Privacy
Information is protected and kept confidential

4. The business can also see when the invoice was sent and when the customer viewed the invoice. When invoices are emailed, they get tracked, making it easy for the business to know when their invoice has been opened. At the bottom of the on-screen invoice that was sent out, the business owner can see a trail of when the invoice was opened and viewed, and when it was paid (if it was paid using QuickBooks Payments).



5. A payment confirmation page shows the payer their payment has been processed successfully. The payer can then click **Print receipt** if desired. An email with a receipt will be sent to the payer's email address.

6. Once a customer pays an invoice, an email notification is sent to the merchant and QuickBooks Online is automatically updated.

7. The invoice will appear with a status of paid and the date payment was received.

Keep in mind there is no login process for your customers, so their payment card information is not saved. Customers will have to enter their bank and credit card information each time they wish to pay you.

Topic 2: **Payroll**

Topic Objectives

- Identify Intuit's payroll offerings that integrate with QuickBooks Online
- Recognize the steps to set up QuickBooks Online Payroll
- Identify the various payroll reports available in QuickBooks Online Payroll

Intuit's Payroll Offerings that Integrate with QuickBooks Online

QuickBooks Online Payroll is deeply integrated in QuickBooks Online. QuickBooks Online Payroll offerings provide tremendous value and time saving to businesses.

For more info, call 1-877-202-0537

or go to https://quickbooks.intuit.com/payroll.

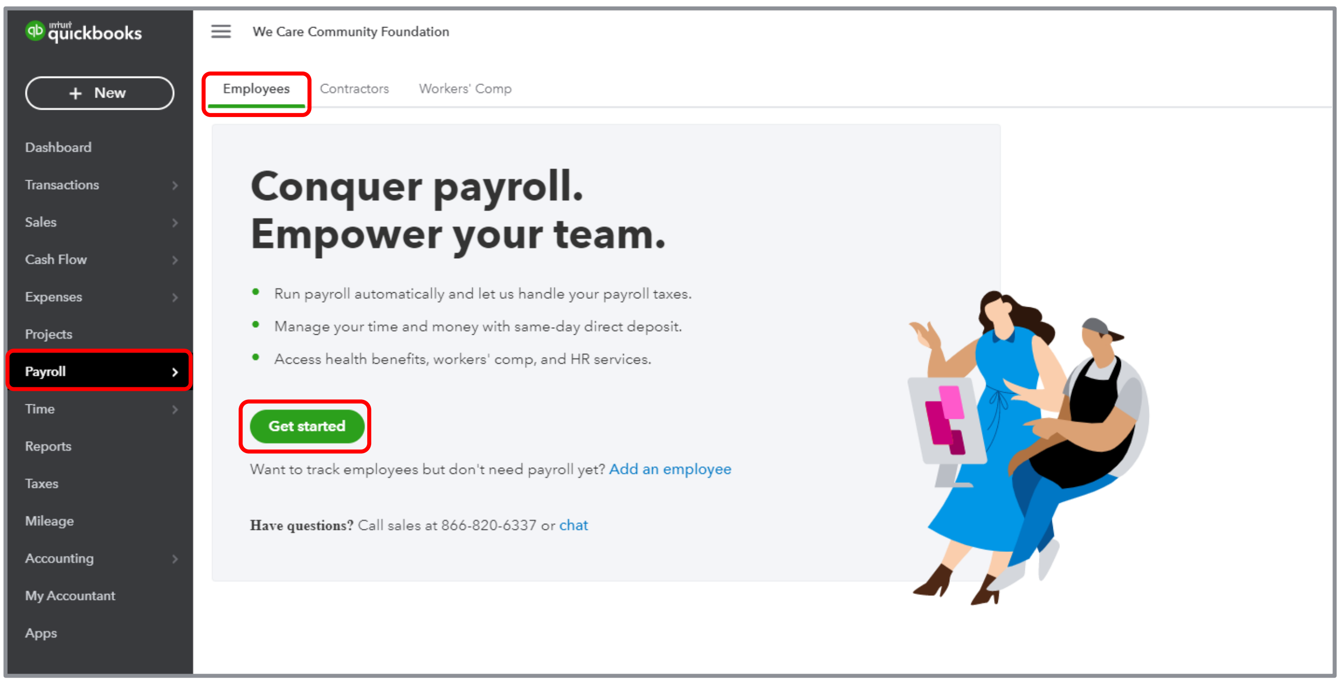
For business owners, QuickBooks Online Payroll is available in three plans: Core (previously QuickBooks Online Enhanced Payroll), Premium (previously QuickBooks Online Full Service Payroll) and Elite.

Note: *If you wish to have your accountant handle your payroll exclusively outside of QuickBooks Online (but the information can be downloaded into QuickBooks Online), you may wish to let your accountant run payroll in Intuit Online Payroll for Accounting Professionals.*

Set up QuickBooks Online Payroll

Step by Step: Links to Add QuickBooks Online Payroll

1. Open a live QuickBooks Online company; this will not work in the test drive file.
2. From the left navigation bar, select **Payroll**.
3. Choose the **Employees** sub-tab.
4. Click **Get started**.



Download a PDF that details the features of the various payroll offerings here.

intuit quickbooks.

New and improved
QuickBooks Online Payroll lineup

Features	Core	Premium	Elite NEW
Retail price	$45/mo + $4/employee/mo	$75/mo + $8/employee/mo	$125/mo + $10/employee/mo
Wholesale price	~~$45~~ $22.50/mo + $4/employee/mo 50% off	~~$75~~ $37.50/mo + $8/employee/mo 50% off	~~$125~~ $62.50/mo + $10/employee/mo 50% off
Fast unlimited payroll runs	✓	✓	✓
Calculate paychecks & taxes[1]	✓	✓	✓
Year-end filings included	✓	✓	✓
Self-service employee portal (Workforce)[2]	✓	✓	✓
Available in all 50 states	✓	✓	✓
Manage garnishments and deductions[3]	✓	✓	✓
Payroll reports	✓	✓	✓
Auto Payroll[4]	✓	✓	✓
Health benefits for your team[5]	✓	✓	✓
State new-hire reporting	N/A	✓	✓
Grant users permissions[7]	N/A	✓	✓
Automated tax payments & form filing[6]	Federal, state	Federal, state, local	Federal, state, local
Multi-state filing[21] (single state filing included)	$12 fee add on per additional state	$12 fee add on per additional state	Additional states included
Workers' compensation administration fee	$5 administration fee add on	Administration fee included	Administration fee included
Product support	Expert product support[8]	Expert product support[8]	Elite product support[9]
Direct deposit	Next day[10]	Same day[11]	Same day[11]
HR support center	N/A	HR support center[12]	Personal HR advisor[13]
Time tracking by TSheets	N/A	Premium time tracking[14]	Elite time tracking[15]
Onboarding	Self-serve setup[16]	Expert setup review[17]	Elite onboarding assistance[18]
Guarantees	Existing Error-free Filing Guarantee[19]	Existing Error-free Filing Guarantee[19]	Tax Penalty Free Guarantee[20]

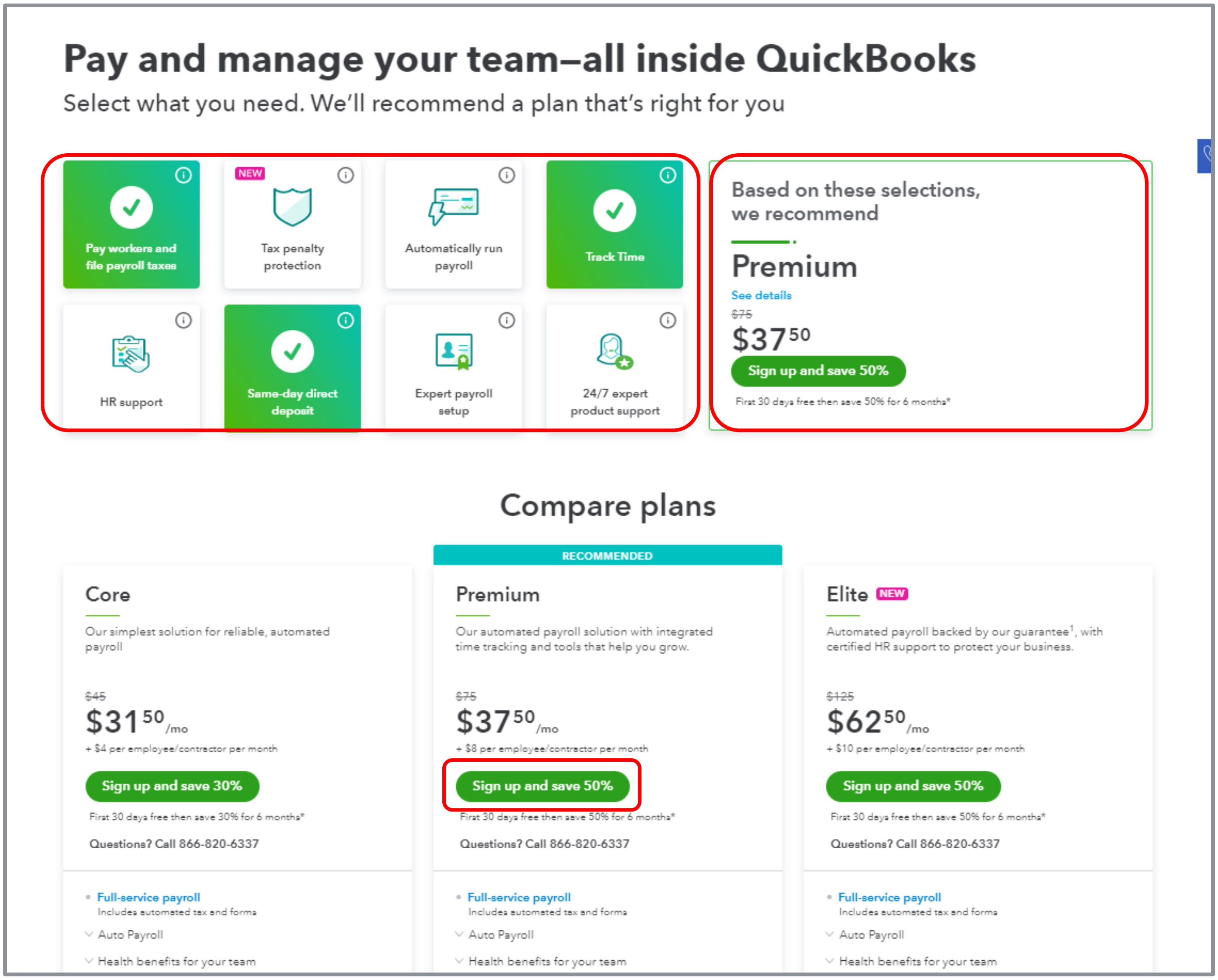
Feature details

1. Calculate paychecks and pay workers
We do the math for you

- Calculate gross wages, employee withholdings, and net pay for each worker
- We'll monitor and update federal, state, and local taxes, so you don't have to
- Employees can view pay stubs and W-2s anytime via the online workforce portal

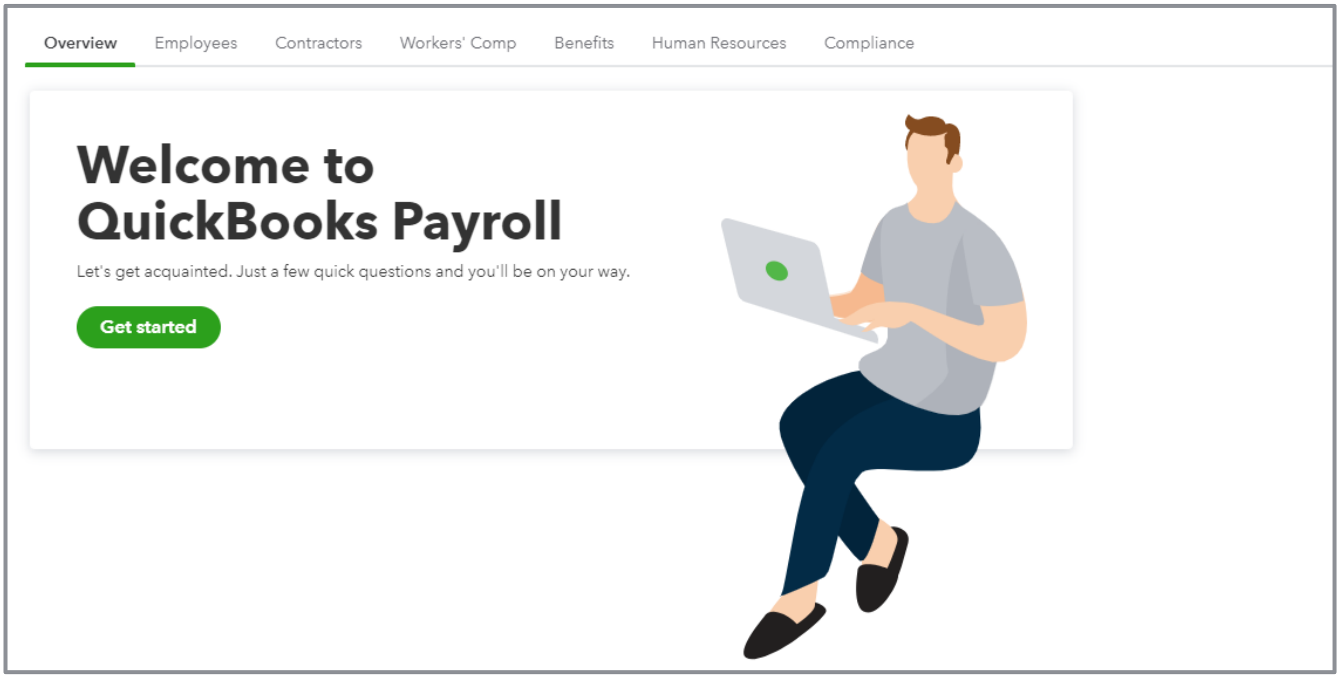
*QuickBooks Workforce available to employees. Requires an Intuit Account and acceptance of the Intuit **Terms of Service** and **Privacy Statement.***

5. Back in the Employee Center, click on the features you require. QuickBooks will make a recommendation as to which payroll service would suit you best. For comparison purposes, the plans are listed below with their features.

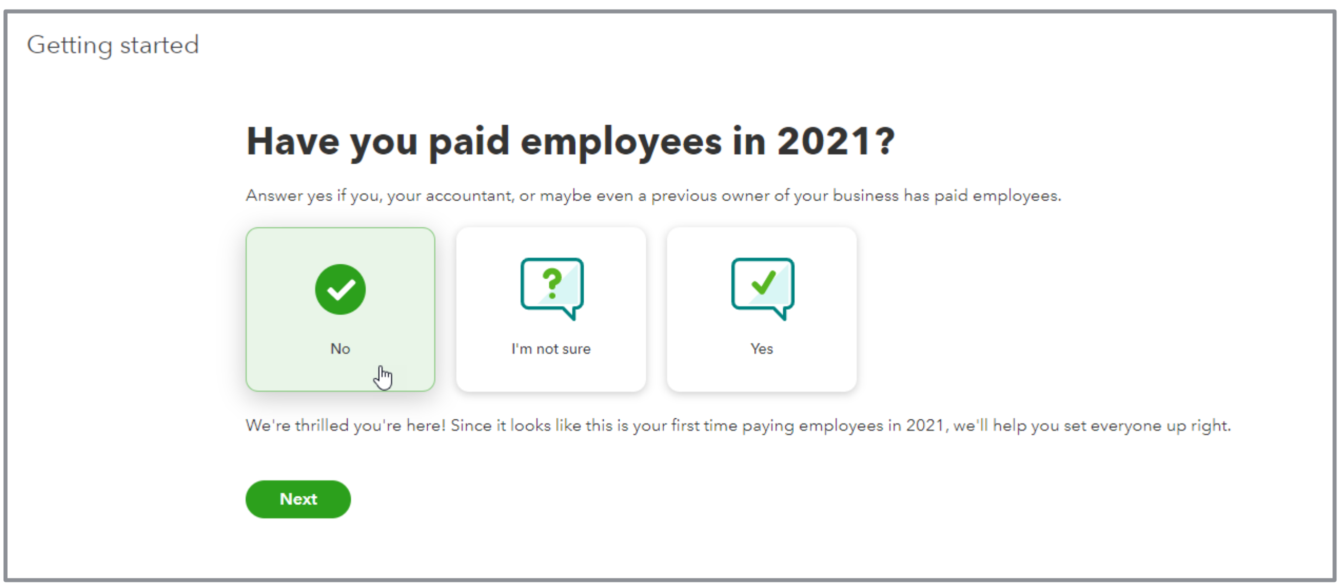


6. Choose your payroll plan and select **Sign up**.

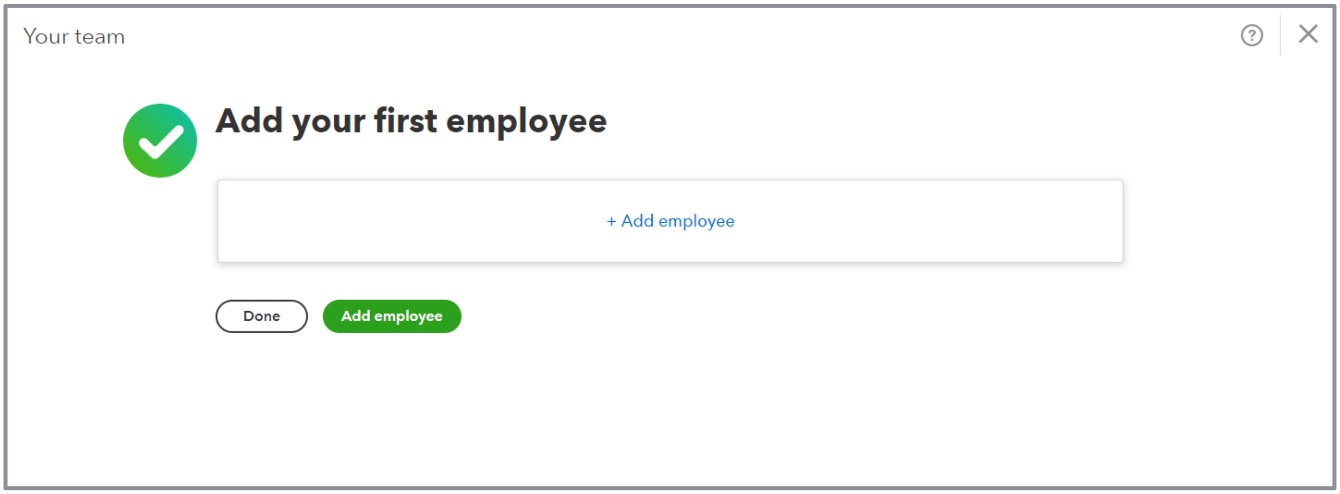
7. You'll see a welcome page for payroll; select **Get started**.



8. You'll be asked several questions, such as if you've already paid employees in this calendar year. Answer and select **Next** after each question.

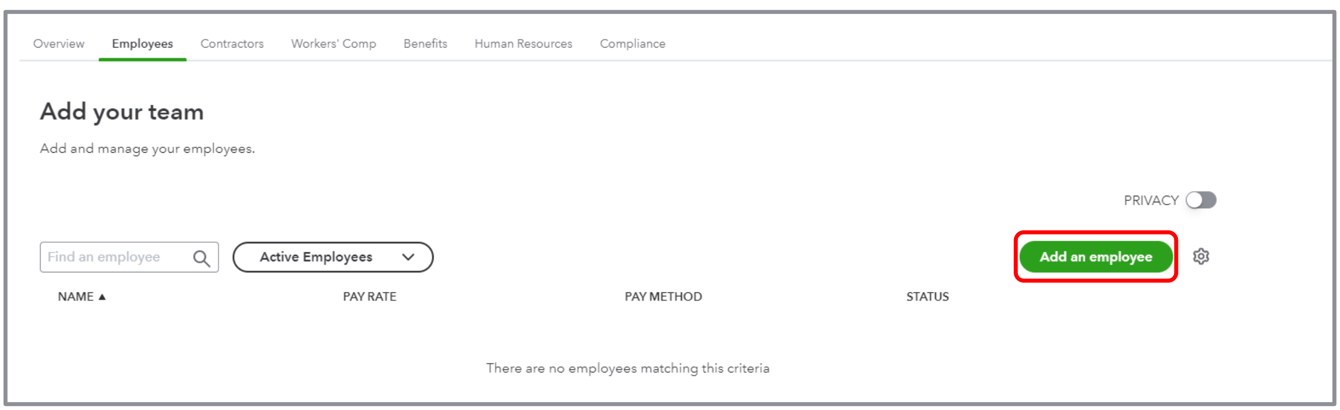


9. After answering the questions, you'll be prompted to start adding employees. You can start adding them directly from this screen, or you can close it and add employees later as described in the next exercise.

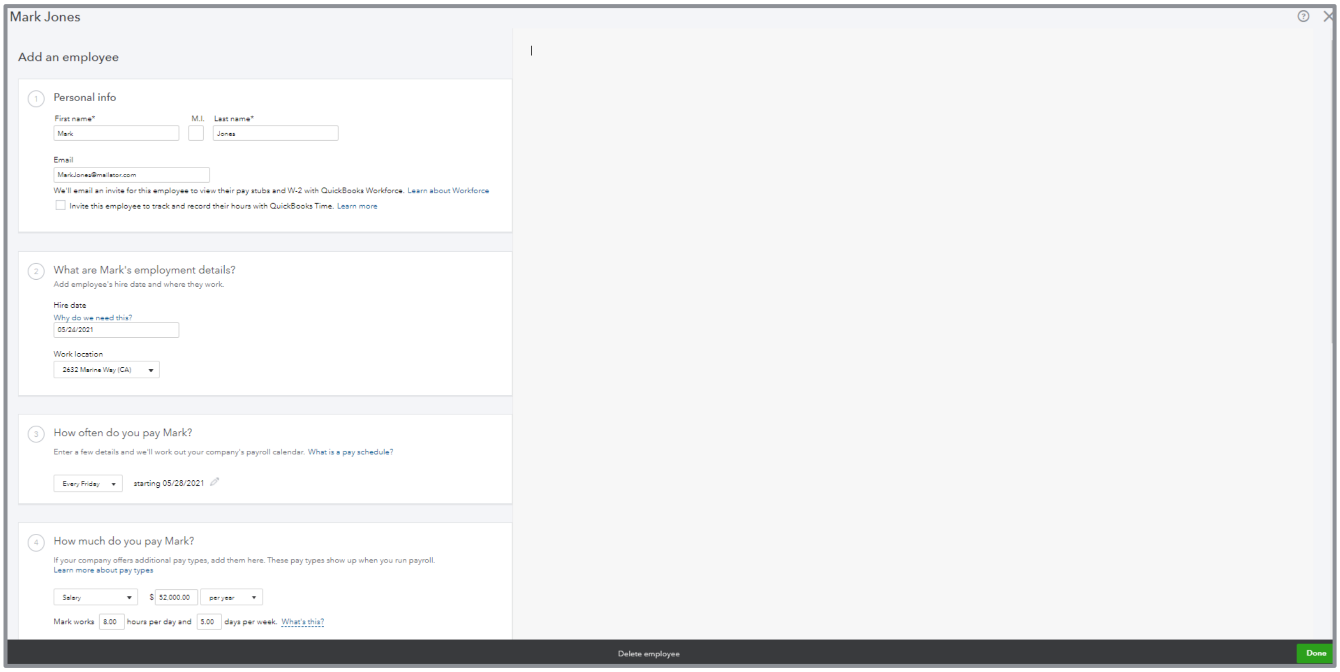


Step by Step: Add Employee to QuickBooks Online Payroll

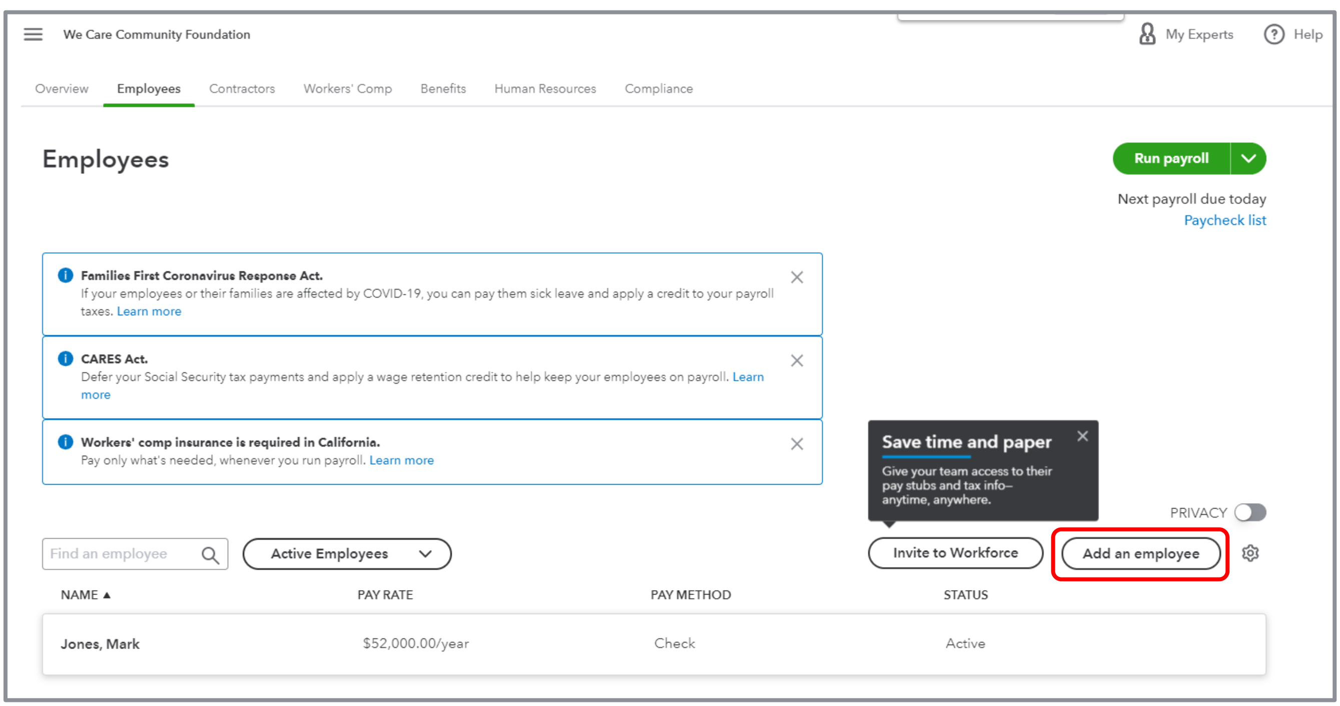
1. Open a live QuickBooks Online company; this will not work in the test drive file.
2. Navigate to the Employee Center by clicking **Payroll** in the left navigation bar, then click **Employees**.
3. Click **Add an Employee**.



Fill out the information to add an employee: personal info, W-4 info, pay schedule, type and amount of pay, deductions, how they get paid, and date of birth.



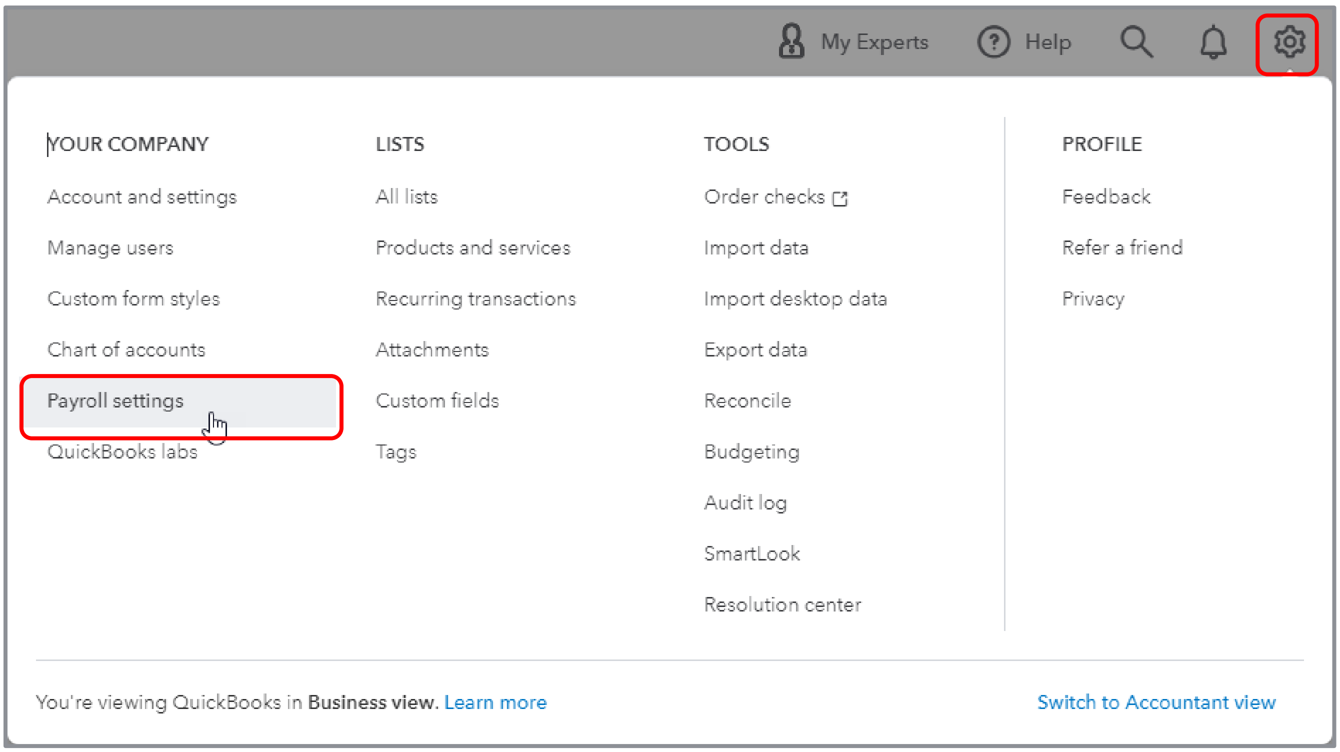
4. Click **Done**. Notice the new employee has been added to the Employee list. If you wish, you can add the employee to Workforce where he/she can access their pay stubs and tax information.



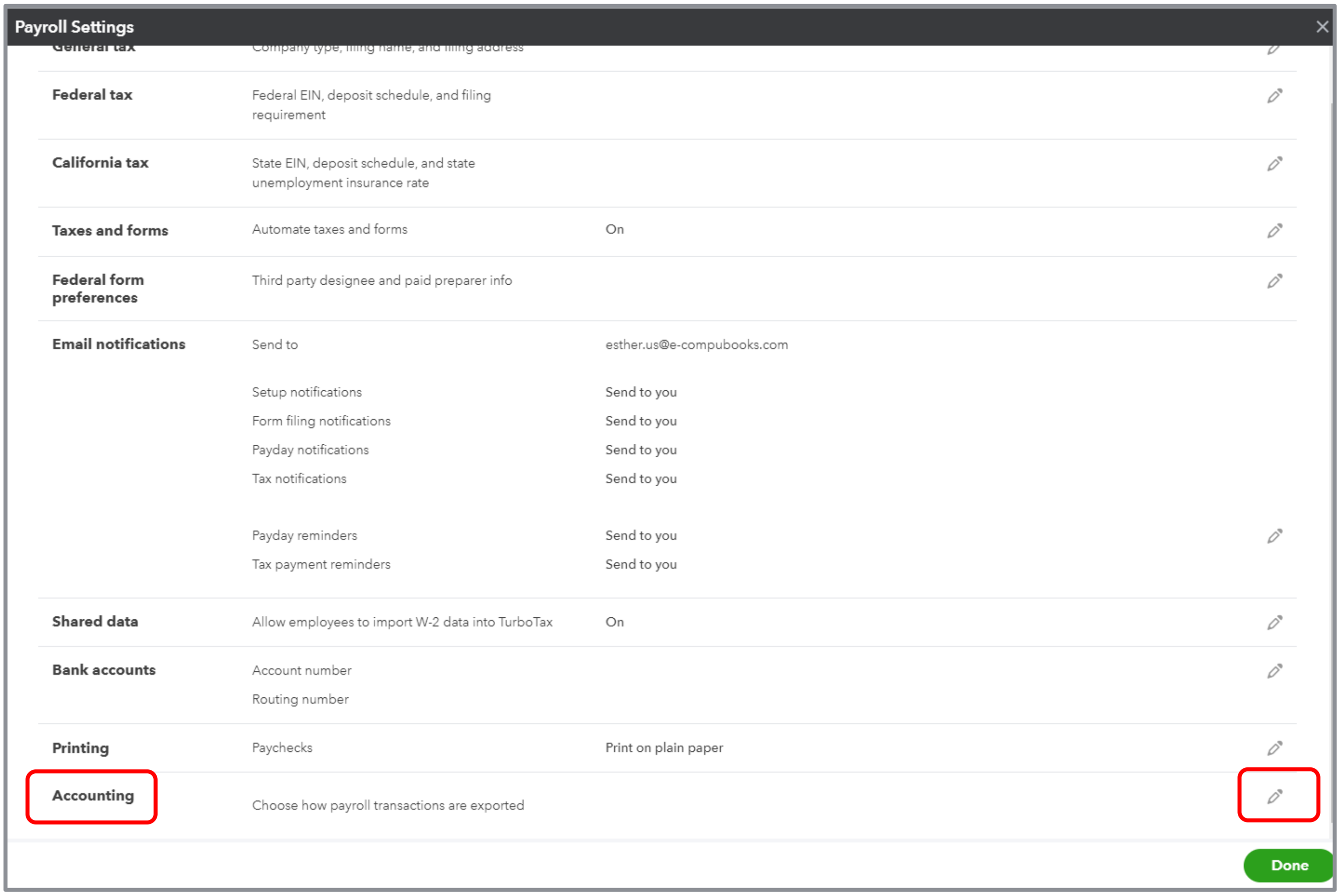
Step by Step: Configure Payroll Settings for QuickBooks Online Payroll

1. To practice configuring payroll settings, open a live QuickBooks Online company; this will not work in the test drive file. (These instructions are for companies using Premium Payroll.)

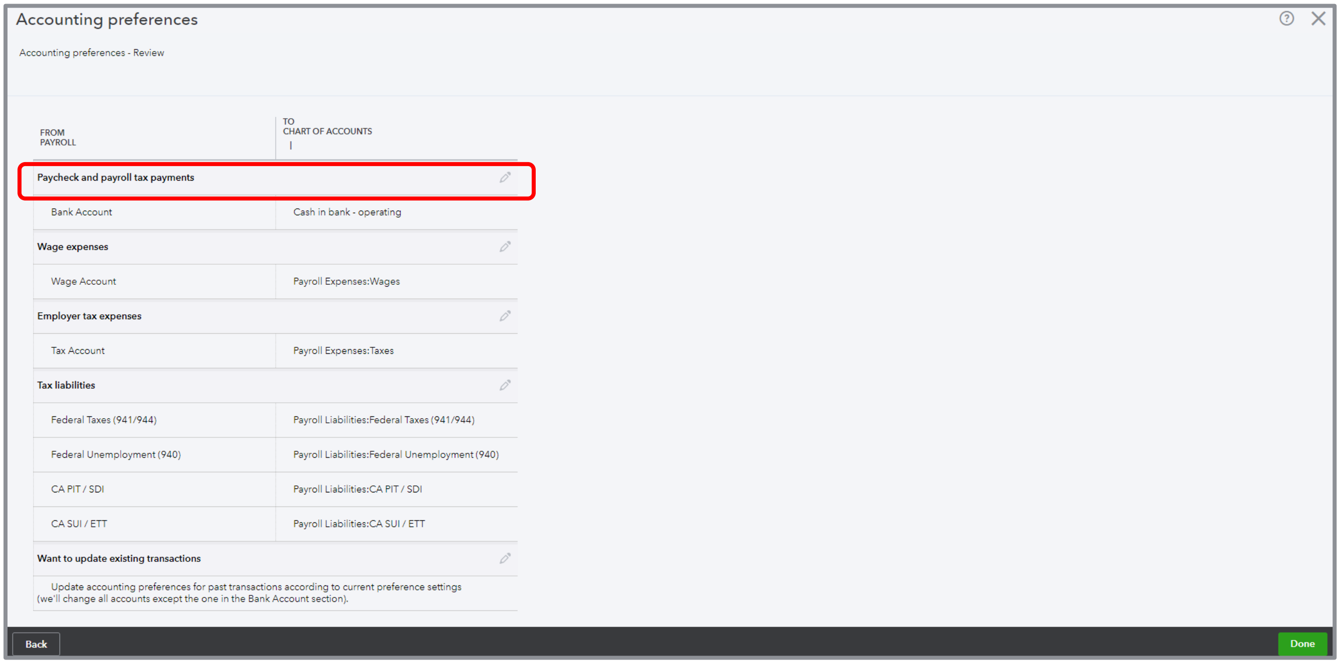
2. Click the **gear icon** on the top right and select **Payroll Settings**.



3. Click the **pencil icon** in the Accounting section.



4. Click the **pencil icon** in any section you wish to alter (in this case, we wish to alter the **Paycheck and payroll tax payments**).



5. Click **Next**.

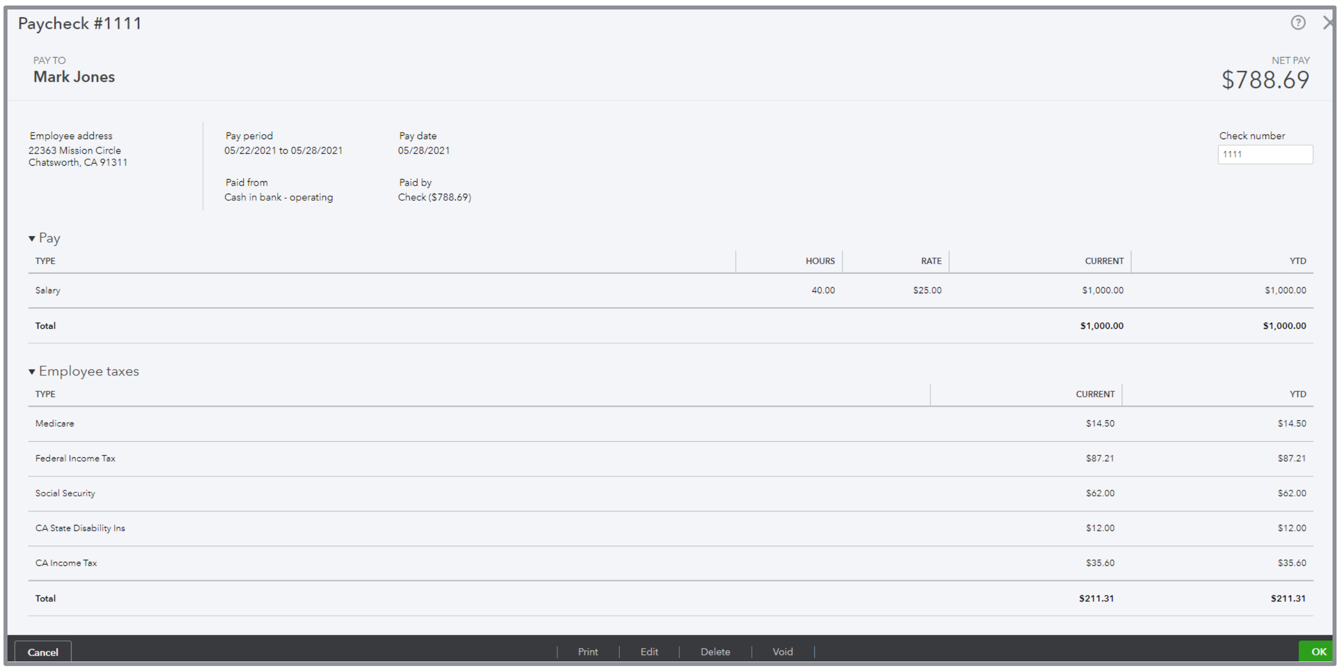
6. For Bank Account, select the **Checking** or **Operating** account.

7. Click **Continue**.

8. Click **Done → Done** again.

9. Review other company payroll settings.

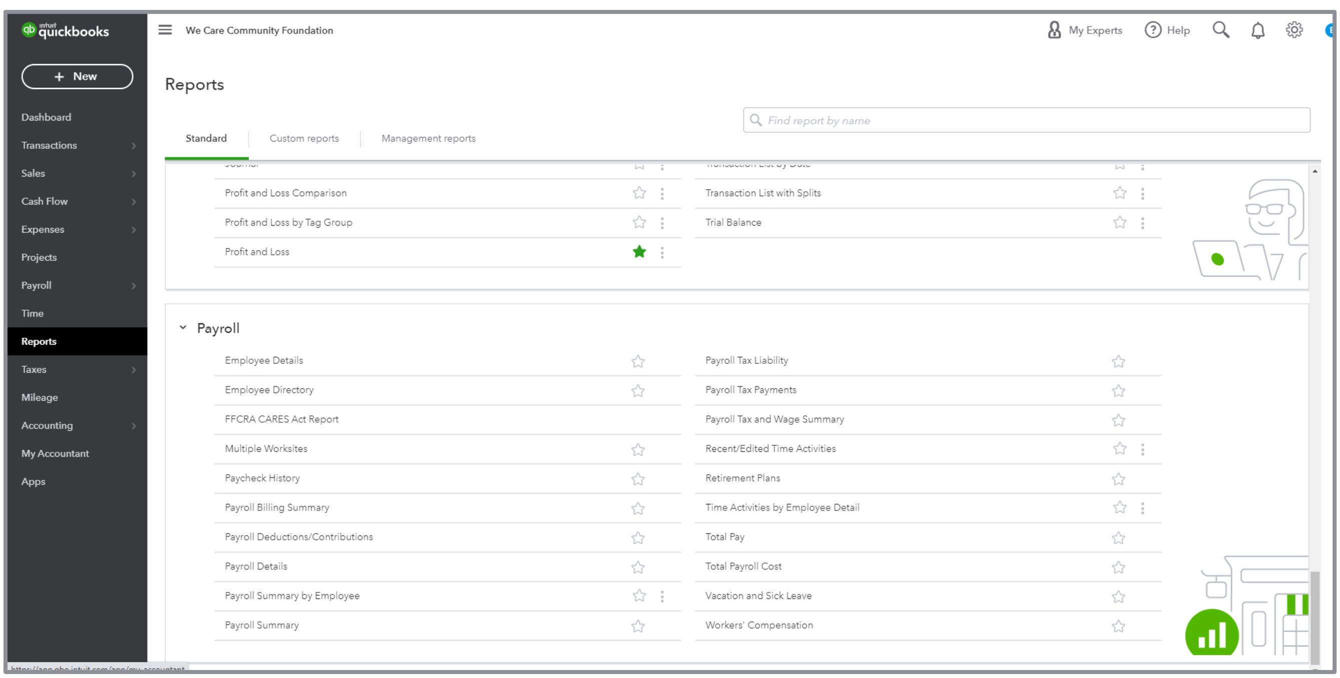
Now, assume we've run one paycheck for this employee so we can populate the various payroll reports.



VARIOUS PAYROLL REPORTS IN QUICKBOOKS ONLINE PAYROLL

The payroll reports available include:

- Time Activities by Employee Detail
- Recent/Edited Time Activities
- Payroll Summary
- Payroll Summary by Employee
- Payroll Tax Liability
- Payroll Tax Payments
- Payroll Billing Summary
- Payroll Details
- Employee Details
- Payroll Tax and Wage Summary
- Workers' Compensation
- Total Payroll Cost
- Payroll Deductions/Contributions
- FFCRA CARES Act Report
- Paycheck History
- Total Pay
- Vacation and Sick Leave
- Retirement Plans
- Multiple Worksites
- Employee Directory



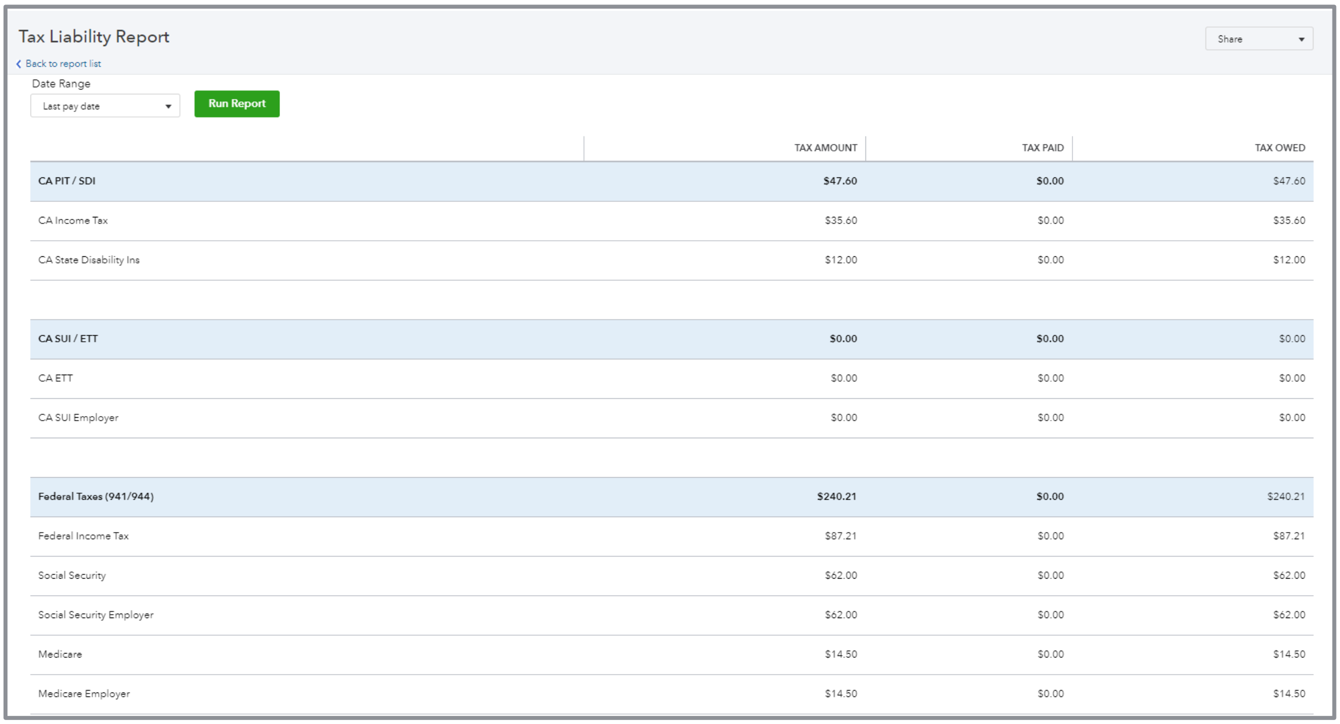
Step by Step: Payroll Summary Report in QuickBooks Online Payroll

1. Practice running payroll reports by opening a live QuickBooks Online company; this will not work in the test drive file.
2. From the left navigation bar, select **Reports → Standard**.
3. Scroll down to the **Payroll** report group.
4. Click the **Payroll Summary** hyperlink. Notice the Payroll Summary Report shows subtotals for each paycheck created in the date range, including total wages, total taxes withheld and total deductions.

Pay date	Name	Hours	Gross pay	Pretax deductions	Other pay	Employee taxes	Aftertax deductions	Net pay	Employer taxes	Company contributions	Total payroll cost
Total		40h	$1,000.00			-$211.31		$788.69	$82.50		$1,082.50
05/28/2021 Check: 1111	Jones, Mark	40h	$1,000.00			-$211.31		$788.69	$82.50		$1,082.50

Step by Step: Tax Liability Report in QuickBooks Online Payroll

1. Open a live QuickBooks Online company; this will not work in the test drive file.
2. From the left navigation bar, select **Reports → Standard**.
3. Scroll down to the **Payroll** report group.
4. Click the **Payroll Tax Liability** hyperlink. Notice the Tax Liability Report shows the payroll taxes that have been paid and amounts still due.



Tax Liability Report

Share

Back to report list

Date Range

Last pay date

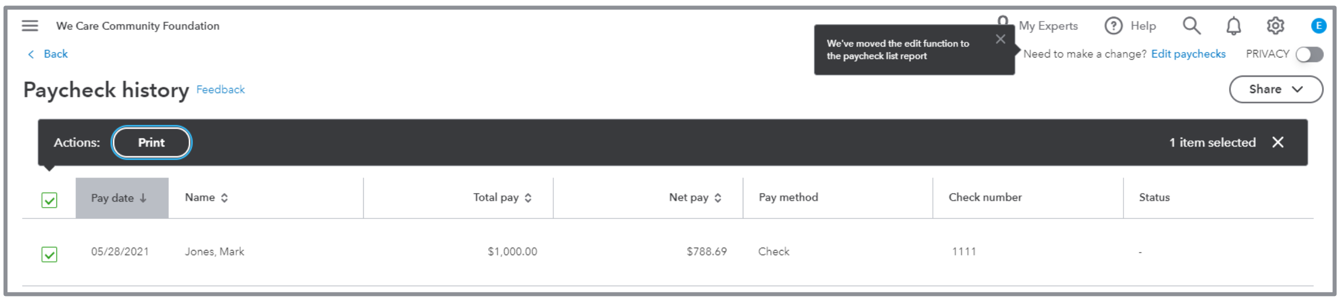
Run Report

	TAX AMOUNT	TAX PAID	TAX OWED
CA PIT / SDI	**$47.60**	**$0.00**	$47.60
CA Income Tax	$35.60	$0.00	$35.60
CA State Disability Ins	$12.00	$0.00	$12.00
CA SUI / ETT	**$0.00**	**$0.00**	$0.00
CA ETT	$0.00	$0.00	$0.00
CA SUI Employer	$0.00	$0.00	$0.00
Federal Taxes (941/944)	**$240.21**	**$0.00**	$240.21
Federal Income Tax	$87.21	$0.00	$87.21
Social Security	$62.00	$0.00	$62.00
Social Security Employer	$62.00	$0.00	$62.00
Medicare	$14.50	$0.00	$14.50
Medicare Employer	$14.50	$0.00	$14.50

Step by Step: Paycheck History Report in QuickBooks Online Payroll

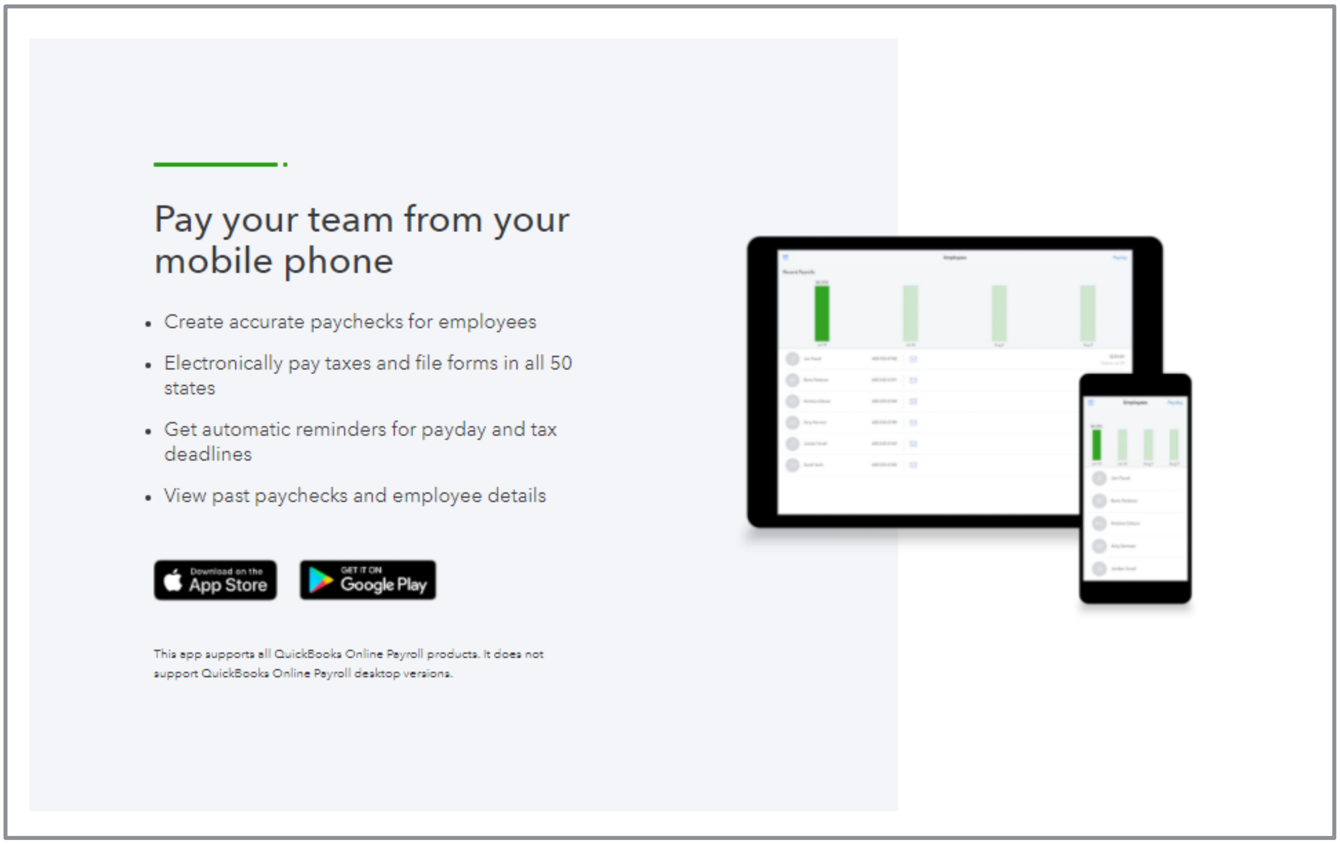
1. Open a live QuickBooks Online company; this will not work in the test drive file.
2. From the left navigation bar, select **Reports → Standard**.
3. Scroll down to the **Payroll** report group.
4. Click the **Paycheck History** hyperlink.

   Notice the Paycheck History report shows all the paychecks created in the specified date range. This interactive report lets you print the paychecks selected.



Intuit Online Payroll Mobile App

- Process payroll on the go with QuickBooks Online Payroll's mobile app
- Preview paychecks before approving
- Pay employees with direct deposit
- View past paychecks
- E-pay taxes and e-file forms in all states
- For more information, visit https://quickbooks.intuit.com/payroll/mobile/



Topic 3: **Intuit App Center**

Topic Objectives

- Recognize the benefits of Intuit approved add-ons
- Identify steps to find, purchase and access QuickBooks Online add-ons

Benefits of Intuit Approved Add-ons

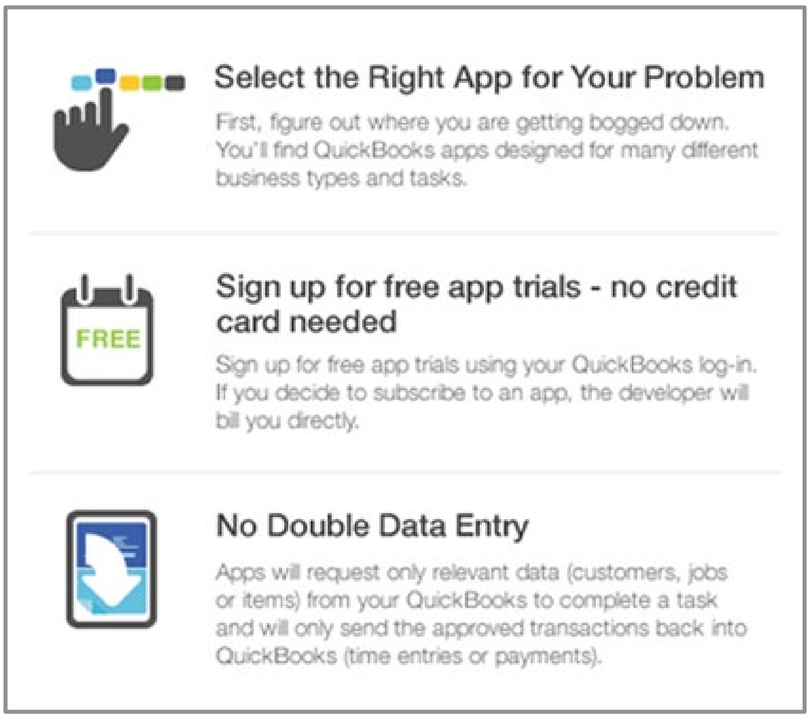
While QuickBooks Online focuses on tackling core accounting tasks, there are many other related business management tasks for small businesses addressed by other apps that integrate with QuickBooks Online. The cloud offers an unparalleled opportunity to connect to these applications so data is shared. Instead of re-entering data, which creates unnecessary work and the potential for errors, data flows seamlessly across applications.

QuickBooks Online connects to third-party apps through the Intuit Partner Platform. QuickBooks Online is an open platform, allowing third-party developers to build integrations. Developers must meet strict requirements to be eligible for listing in the App Center.

Features Available with Intuit Approved Apps

- Apps customize QuickBooks Online to further fit specific business needs
- Apps are mobile and web-based for anytime, anywhere access
- Data entered in an invoicing app can use QuickBooks Online data such as customers, jobs and product/service items outside of QuickBooks Online and send invoices to QuickBooks Online, without the need for duplicate work or the potential for error
- QuickBooks Online can be updated automatically without exposing company information. For example, time-tracking entries entered by staff and contractors outside of QuickBooks Online are updated in QuickBooks Online without giving them access to QuickBooks Online accounts.
- Import to QuickBooks only when necessary. An app can handle an important job, but won't clutter up QuickBooks with unnecessary information. For example, an app captures requests from a company's website and tracks them as sales leads. Only when a lead is converted to an actual customer does the app automatically add them to the company's QuickBooks Online Customer list.

- Separation of duties – Many apps can have separate logins that don't allow users access to sensitive financial data stored in QuickBooks Online
- Apps are created by Intuit and independent developers; Intuit reviews and approves each app to ensure it meets exacting quality and security standards
- Only apps that are authorized can access the QuickBooks Online data
- Intuit's security review team makes sure apps use and protect data properly. Also, the app's connection to QuickBooks Online can be turned off or on as needed.



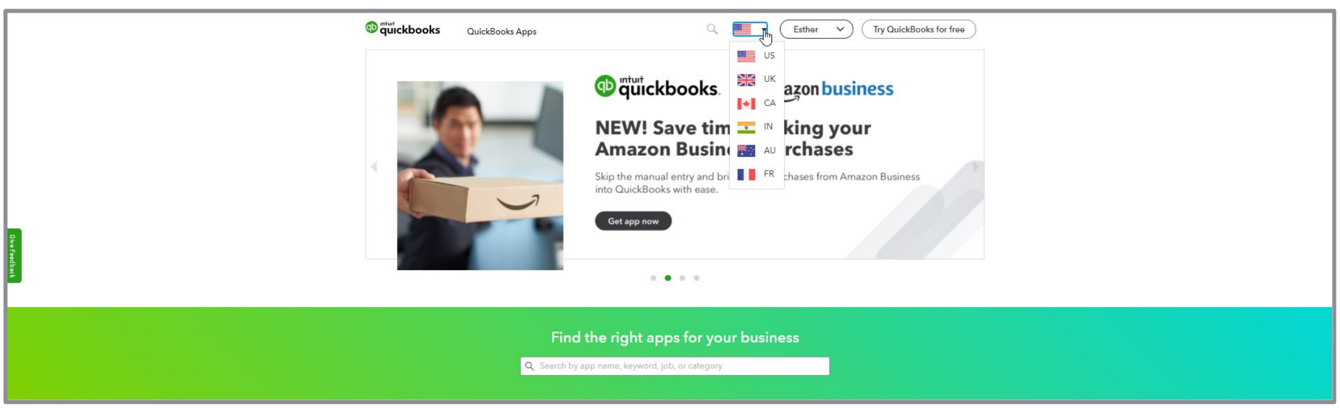
Find, Purchase and Access QuickBooks Online Add-ons

Step by Step: Find and Explore the QuickBooks Online App Center

1. Open your QuickBooks Online account; this will not work in the test drive file.
2. From the left navigation bar, select **Apps**.

   You will see two tabs at the top: Find Apps (which displays all apps in the Intuit App Center) and My Apps (which displays all apps currently linked to this company).

   Click the **Find apps** tab to get a complete listing of apps in the Intuit App Center for QuickBooks Online in the United States. You can search by name or browse by category.
3. Click on any app to view more information.
4. Many of the apps accessed in the Intuit App Center from a live account can be tried for free by clicking the app then clicking **Get App Now** (if it's visible).
5. The Intuit App Center may also be accessed without a subscription to a live QuickBooks Online company by going to apps.com. Make sure to choose the correct country flag in the top right. You can click **View all apps**, find specific apps by browsing by category, or search by an app's name in the top right corner next to the country flag.



Features of Some Apps

- **WORKetc** – This is an all-in-one social CRM, projects, quotes and billing platform to keep everyone on the same page and always up-to-date using a web browser, mobile device or tablet

- **Dext Prepare** – This app uses OCR technology and syncs data from your receipts, bills and other documents with QuickBooks Online. This eliminates manual data entry for these areas. Your data is stored safely (and found easily) on Dext's cloud servers for a minimum of 10 years in case of audit, natural disaster or fraud.

Snap it

Use your phone to snap and extract all the important data, and then scrap the physical copy. Simple and paperless!

Send it

Upload bills, receipts, invoices and bank statements on-the-go from your phone, laptop or email account, before connect your accounting software via our seamless integration.

Sorted

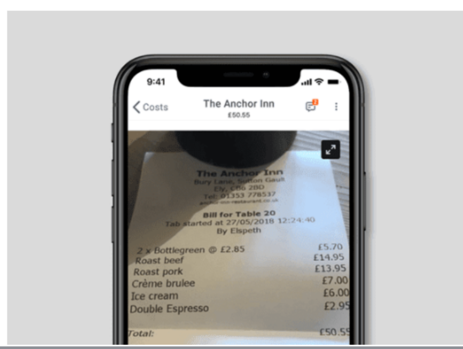
The time you'd usually spend on your financial admin? You've just won it back. Now you're free to focus on what really matters — like growing your business.

No more manual data entry

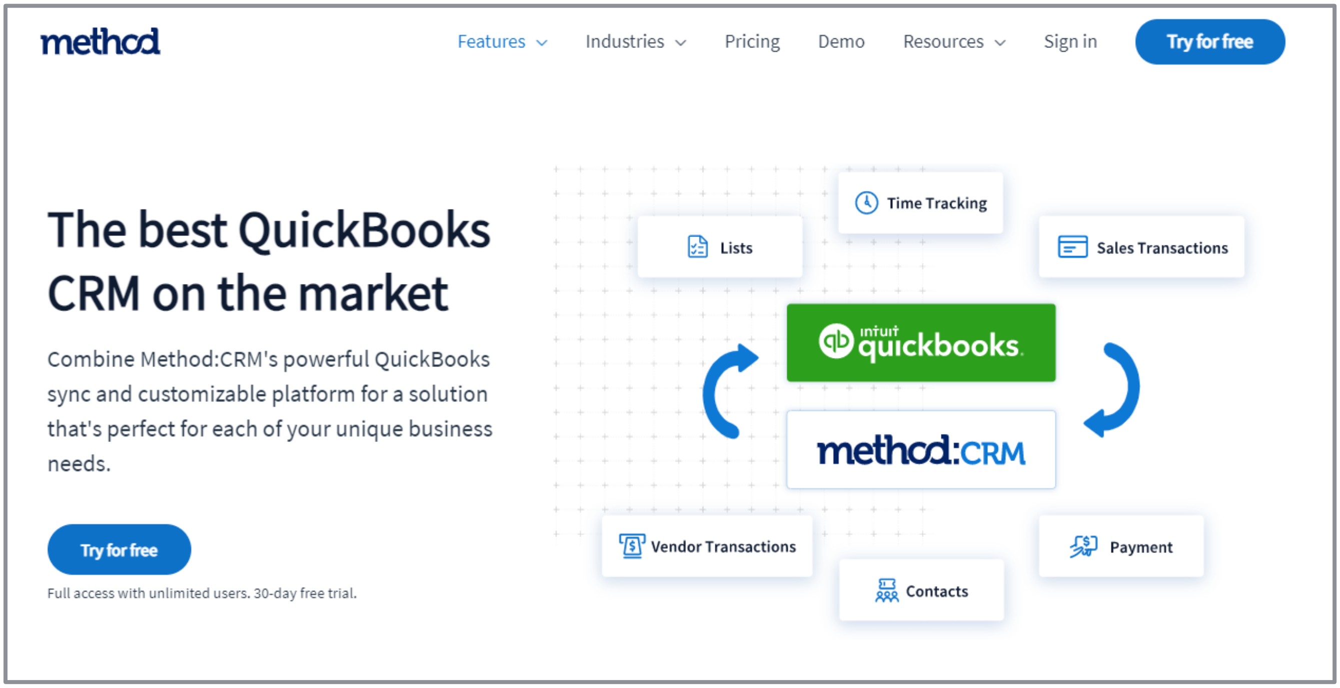
Instead of manually copying each line of your receipts, bills, invoices or bank statements into your accounting software, Dext Prepare analyses and extracts the important information so you don't have to.

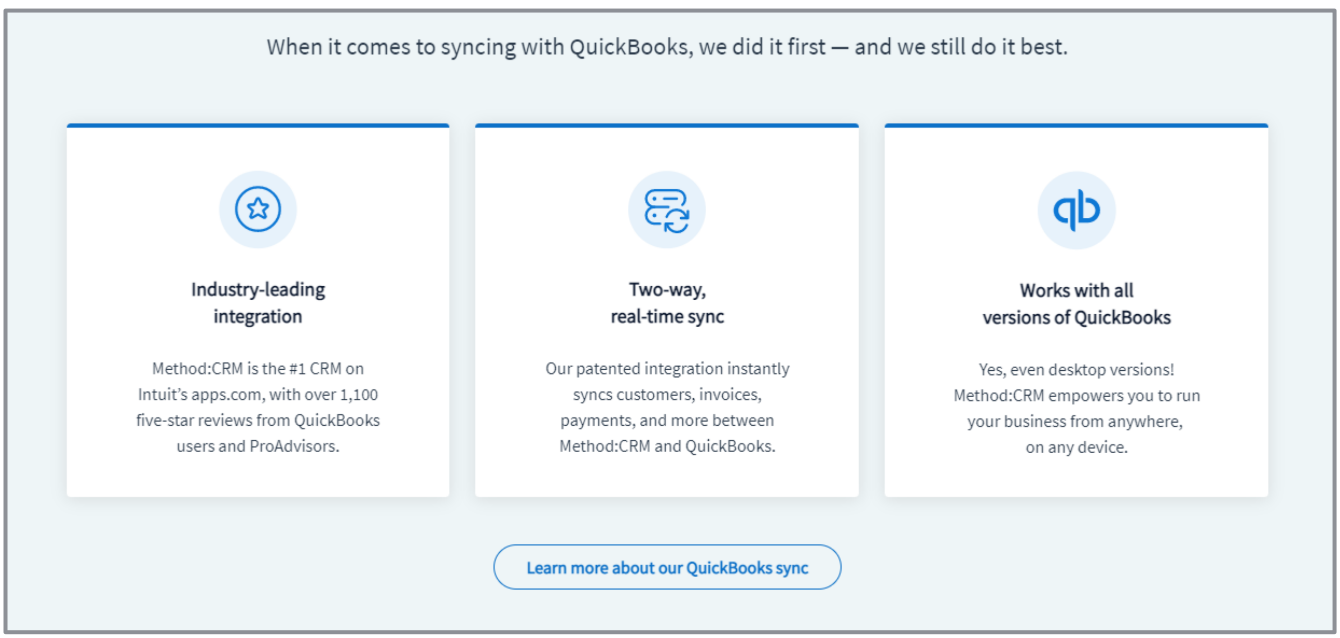
Effortlessly update

Paper receipts and invoices are messy and often don't follow a standard layout. Dext Prepare goes beyond simply converting documents into digital text – one quick photo and the app intelligently analyses, understands and organises the data for you.



- **Method:CRM** – Method's customizable no-code platform makes it easy to develop a CRM (customer relationship management) solution or app that is perfect for your unique business. Use activities to track emails and phone calls. The two-way real-time sync consolidates customer history and accounting data, giving everyone a 360-degree view of every customer.





Course Conclusion

You have just covered *Course 5 - Expand Usability*. This course has been developed to help you train your clients how to use QuickBooks Online successfully.

By completing this module, your client should understand:

- Activating QuickBooks Payments
- Using Payroll
- The Intuit App Center