
THE 10 HABITS OF

HIGHLY EFFICIENT ACCOUNTANTS

Boost your efficiency with these powerful, easy tips from accountants who use QuickBooks® Online Accountant every day.



INTRODUCTION

Get ready for a new era of efficiency.

By downloading this guide, you're already well on your way to dramatically reducing busywork and streamlining the way you and your clients work together. Using tips from accountants just like you, you'll find out how QuickBooks Online Accountant can help you to:



EASILY SHARE INFORMATION

You'll never again drive across town to get the data or client documents you need.



INSTANTLY ORGANIZE YOUR DAY

Learn how a single click lets you see which clients need your attention—right now!



OFFER EVEN BETTER INSIGHTS

Find out how you can save time and offer clients meaningful, professional-looking reports.

How to use this guide

To help you get the most from these tips, we've divided this guide into three useful sections.

Jump to the one that applies most to your practice—or read all three to increase your efficiency even more!

1

Streamline the way you work with clients

2

Manage clients' books faster

3

Create more professional reports in less time

PLUS!

Read all the way to the end for a **bonus tip!**



STREAMLINE THE WAY YOU WORK WITH CLIENTS

The tips in this section will help you spend less time chasing documents and more time focusing on your clients' success.

TIP #1

Share documents securely and instantly, wherever you are

"For me, the ultimate collaborative tool is the Document Center. I use it to share documents securely and to keep a running dialogue with my clients about the information I need. At any point, my clients and I can go in and retrieve documents right inside QuickBooks—this saves me time in retrieving source documents from other locations."

Jan Haugo

Owner, JH & Associates

Phoenix, AZ

Certified QuickBooks ProAdvisor®



TAKE A TOUR

See the Document Center in action—and find out everything you need to know to get up and running fast.

[Watch video](#)

TIP #2

Help clients solve problems more quickly

"I like to send clients the specific URL for an issue at hand. That way, there's no time lost navigating through menus or explaining what I'm talking about. Clients can go directly to the screen, transaction or report in question and reach a resolution faster. That's a big advantage of working online."

Laura Redmond

Owner, Redmond Accounting

Menlo Park, CA

Certified Advanced QuickBooks ProAdvisor

TIP #3

Get the exact documents and data you need, instantly

"I rely on the Document Center to share and organize my clients' paperwork right inside QuickBooks. It's so much faster than chasing emails and looking for attachments. I also use third-party apps that help me create a unique workflow based on my clients' needs—and each app integrates perfectly with QuickBooks."

Hector Garcia, CPA

Principal Accountant, Quick Bookkeeping & Accounting LLC

Weston, FL

Certified Advanced QuickBooks ProAdvisor

Ready to start working more efficiently with your clients?

[Sign in](#)

Or [add a client](#) today!

MANAGE CLIENTS' BOOKS FASTER

Use these tips to get ahead of everyday bookkeeping tasks—and *stay* ahead.



TIP #4

Easily prioritize tasks and organize your day

“Keeping track of client tasks and identifying the most important ones can be difficult. That’s why I create a task list and a timeline that I keep handy. It shows me what I need to do in the cycle of bookkeeping and helps me keep up with the flow, even when life gets in the way.”

Cathy Iconis

Owner, Iconis Group LLC

Atlanta, GA

Certified Advanced QuickBooks Online ProAdvisor

TIP #5

Reduce time spent reclassifying transactions

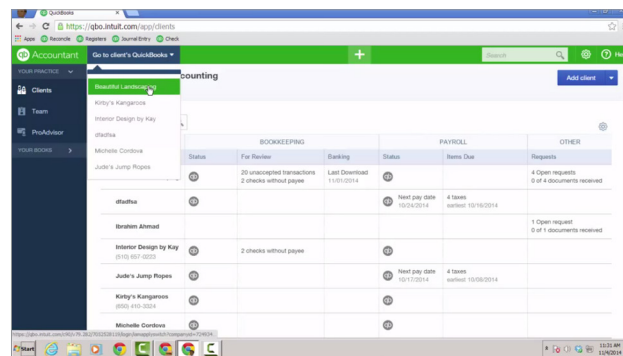
“I use the Reclassify Transactions tool in the Accountant Toolbox. It lets me correct books for my clients in no time flat. I can take a deep dive into a client’s financials for any time period, and then I can review and reclassify several transactions with one click.”

Jan Haugo

Owner, JH & Associates

Phoenix, AZ

Certified QuickBooks ProAdvisor



TAKE A LOOK AROUND

Discover what’s inside the Accountant Toolbox feature, and how it can help you enhance the way you work.

[Watch video](#)

MANAGE CLIENTS' BOOKS FASTER *(cont'd)*

TIP #6

Save time with built-in features

"I use the 'More' button on the bottom bar of any transaction screen. It contains great tools to copy the transaction, view the journal for debit and credit account details, and access the audit history for time/date stamps and highlighted changes by users."

Laura Redmond

Owner, Redmond Accounting

Menlo Park, CA

Certified Advanced QuickBooks ProAdvisor

TIP #7

Keep track of important client details

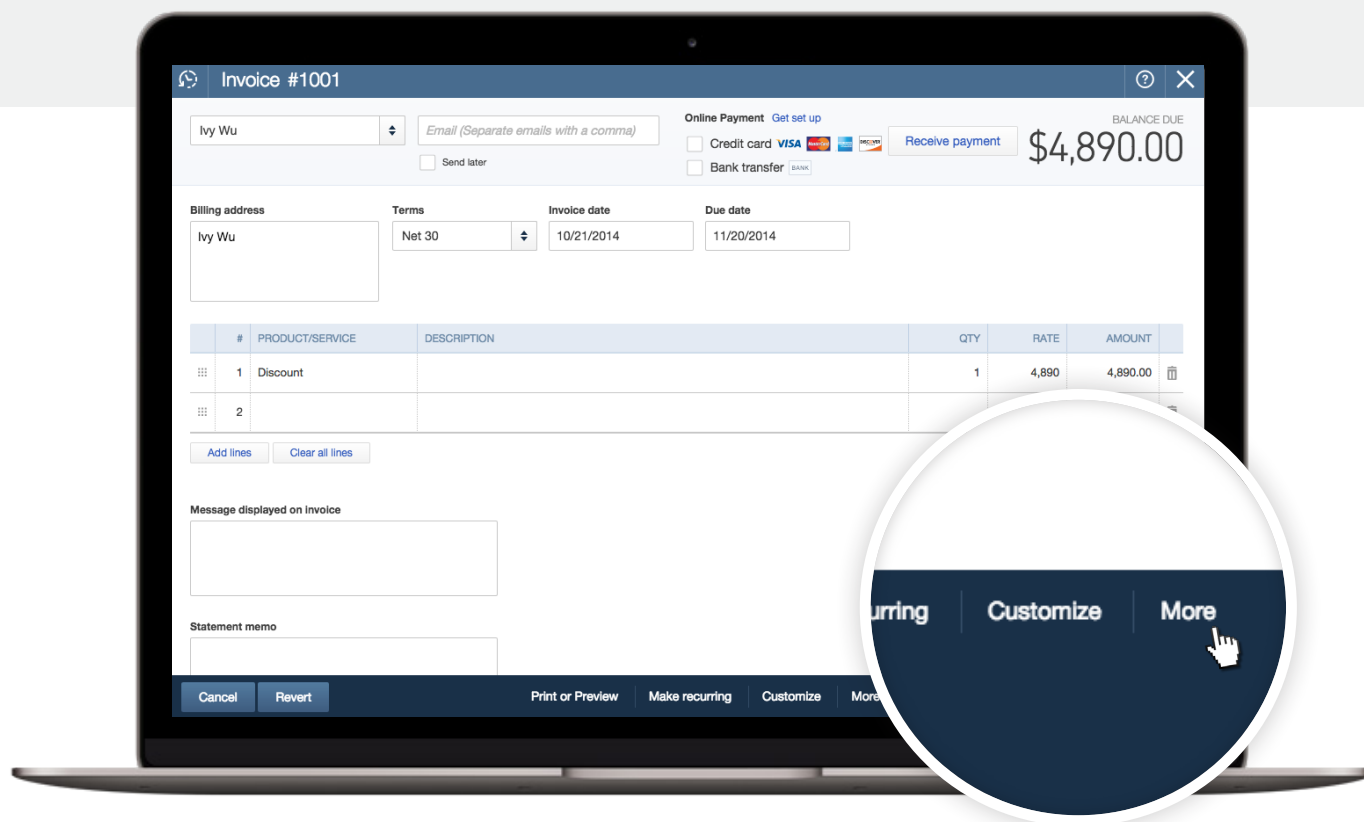
"We use the Client Notes section to keep track of important client information. This might include links to the third-party apps we use for that client, links to Intuit Online Payroll (or wherever their payroll is processed), and links to any document or long notes that are stored in the cloud. We put the links right inside the Client Notes section for easy access."

Stacy Kildal

Owner, Kildal Services LLC

White Lake, MI

Certified Advanced QuickBooks Online ProAdvisor



All set to start managing your clients' books with greater efficiency?

[Sign in](#)

Or [add a client](#) today!

CREATE MORE PROFESSIONAL REPORTS IN LESS TIME

Put these tips into action to make report building a breeze—and find out how much free time you'll gain to spend with your clients.

TIP #8

Create professional reports in minutes

"The Management Reports tool has saved me so much time. It helps me complete and customize clients' month-end reports, then email them out in minutes. I've even received compliments from clients on the professional look and the detailed information they receive."

Jan Haugo

Owner, JH & Associates

Phoenix, AZ

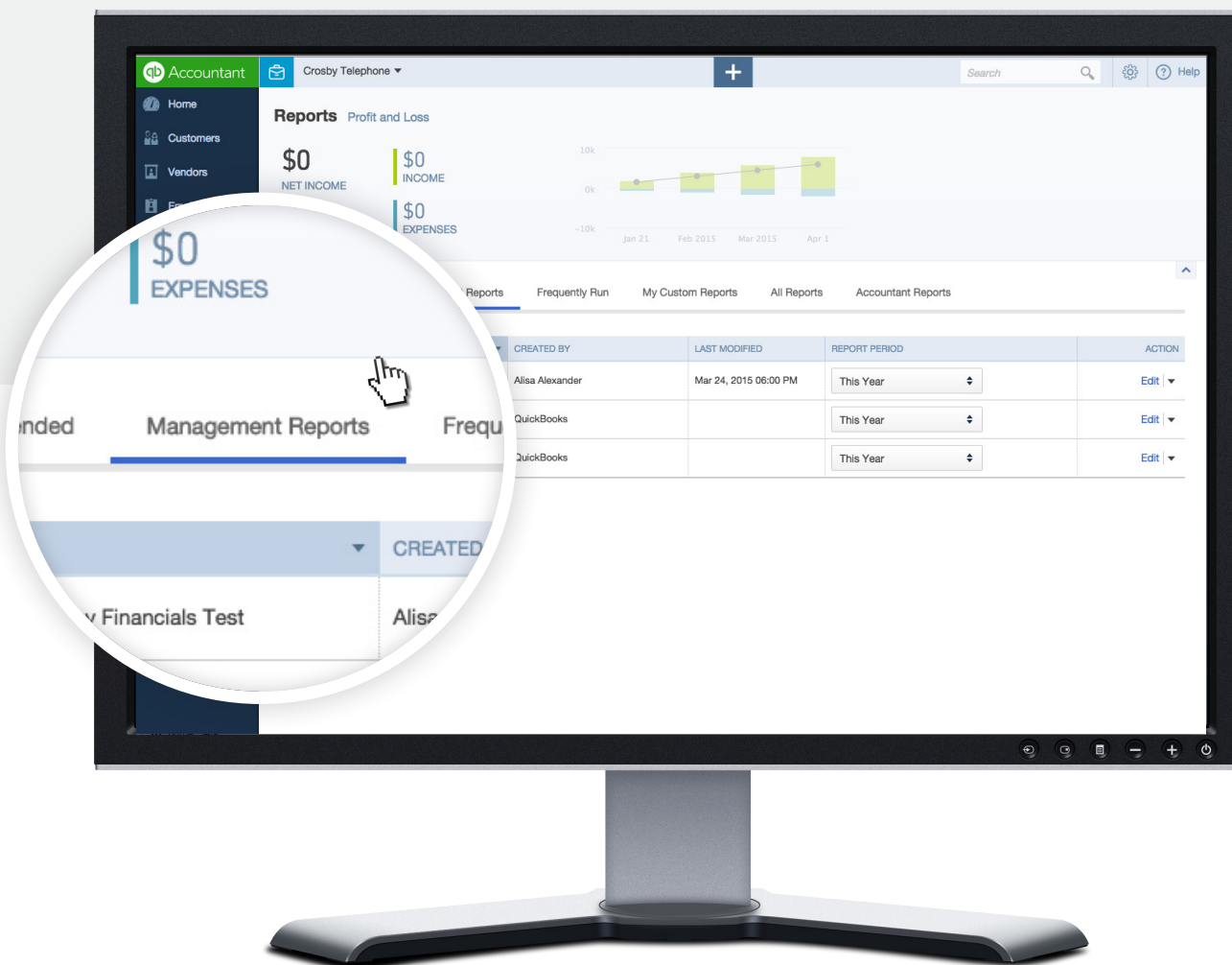
Certified QuickBooks ProAdvisor



TRY IT FOR YOURSELF

Discover just how easy it is to access personalized and professional report packs with the Management Reports feature.

[Sign in](#)



CREATE MORE PROFESSIONAL REPORTS IN LESS TIME *(cont'd)*

TIP #9

Offer fast, proactive support with automatic custom reports

"We help our clients create a custom report in QuickBooks Online that's automatically emailed to us on a regular basis. We build reports like 'Ask My Accountant' and 'Opening Balance Equity,' which are especially useful for clients who are not bookkeeping experts. I can access these reports on my phone at any time, which allows me to help my client more proactively."

Hector Garcia, CPA

*Principal Accountant, Quick Bookkeeping & Accounting LLC
Weston, FL*

Certified Advanced QuickBooks ProAdvisor

TIP #10

Increase clients' satisfaction with custom reports

"The Custom Reports tool takes the pressure off of me and my staff to modify and generate the custom report each time. I customize reports for different purposes like sales tax, payroll and 'need additional info.' That way, users will always get consistent, standardized and high-quality reports—and I will look like a rock star!"

Jan Haugo

Owner, JH & Associates

Phoenix, AZ

Certified QuickBooks ProAdvisor



Start freeing up time with the Management Reports feature today!

Sign in

Or [add a client](#) today!

BONUS!

Become even more productive with one last time-saving tip.

EXTRA TIP!

Stay on top of cleanup tasks

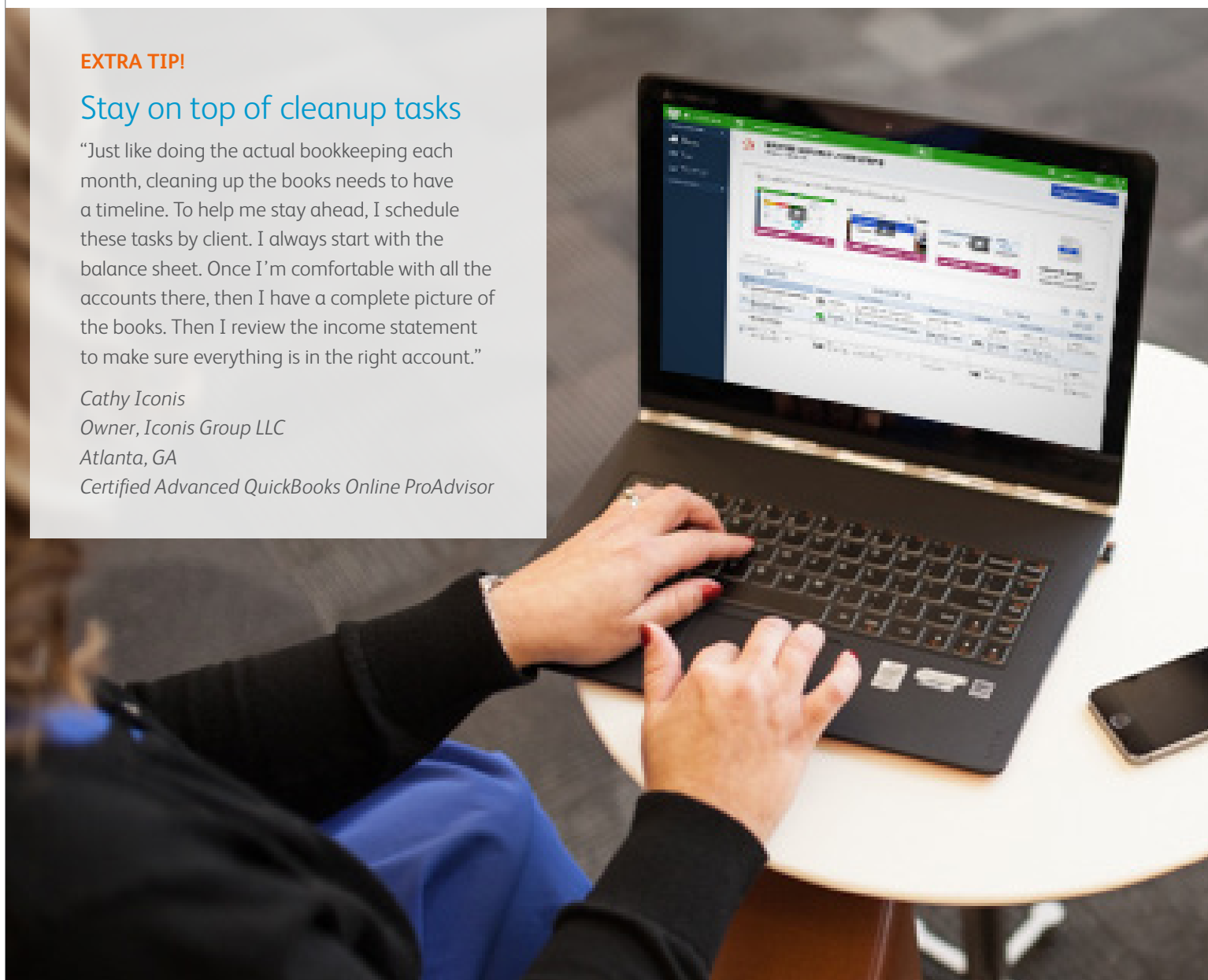
"Just like doing the actual bookkeeping each month, cleaning up the books needs to have a timeline. To help me stay ahead, I schedule these tasks by client. I always start with the balance sheet. Once I'm comfortable with all the accounts there, then I have a complete picture of the books. Then I review the income statement to make sure everything is in the right account."

Cathy Iconis

Owner, Iconis Group LLC

Atlanta, GA

Certified Advanced QuickBooks Online ProAdvisor



Discover other ways to easily manage tasks.

QuickBooks Online Accountant makes it even simpler for you to stay on top of client tasks, thanks to a feature called the Client Dashboard. Take a tour today!

[Watch video](#)

It's time for even greater efficiency!

Now you're all set to start spending less time on busywork and more time on *valuable* work, just like the highly efficient accountants in this guide.

To get started right now, sign in to QuickBooks Online Accountant.

Sign in

Or make the most of these tips by [adding a client!](#)

