

# **Expanding QuickBooks Online with Payments, Payroll, and Apps**

Presented by: Bryce Forney, CPA

# Bryce Forney, CPA

[www.forneycpa.com](http://www.forneycpa.com)



In service to micro-businesses primarily in the San Francisco bay area

Primary revenue sources include tax prep, financial statements, and business valuations

Paperless and virtual

QuickBooks Certification 'collector'

Member Intuit Trainer/Writer Network



## How to receive CPE Credit:

- You must stay for the **entire webinar**.
- We will provide a **CPE Keyword** during the webinar.
- Towards the end of the webinar, you will be **prompted to enter the keyword**
- **Certificates** are **e-mailed** directly to you **3 weeks** from today's training.
- Sent to the same email address used to register for the training.
- **IMPORTANT:** Add [accountant\\_training@intuit.com](mailto:accountant_training@intuit.com) to your approved email sender file and check your SPAM folder
- You must keep this copy for your records.

**Access to today's slides:**

**[http://bit.ly/expanding\\_qbo](http://bit.ly/expanding_qbo)**

**See link in Chat window!**



Increase Adoption of Apps

Highlight Intuit Apps: Payroll & Payments

Explore Apps.com

Spotlight Popular Apps

The Small Business Life Cycle

Special Offers for ProAdvisors



After attending this course you will be able to:

- **Understand** the need for integrated apps to help small businesses work efficiently
- **Identify** Intuit's payroll & payment offerings that integrate with QuickBooks Online
- **List** available third party solutions that increase productivity
- **Perform** the process of adding an app to QuickBooks Online

# Proliferation of Apps

SMBs are using more apps to manage and grow their business



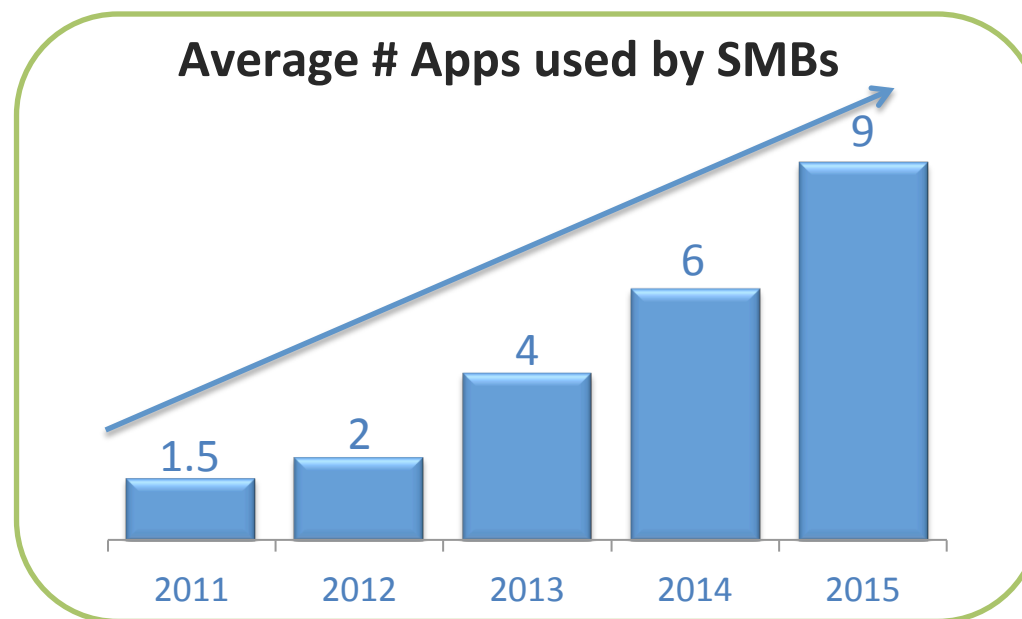
Painful lack of integration between apps:

- Multiple points of data entry
- Errors in data reconciliation
- Customer info in different places
- No ability to see consolidated view of customers' profiles
- No separation of duties

Business Apps used by QB Customers

## And the pain is getting worse...

- SMB app adoption is increasing every year as they have easier access to try and use more apps
- SMBs want to shop in App Stores where they can find & try multiple solutions that are right for them





# QuickBooks Ecosystem with Add-on Apps



The screenshot shows the QuickBooks Online interface for the 'Employees' section. The top navigation bar includes the QuickBooks logo, search, add, and refresh icons, and a 'Sample Company' dropdown. The left sidebar lists various account management options, with 'Turn On Payroll' highlighted at the bottom. The main content area displays payroll statistics for 2013, all showing \$0.00. A donut chart is partially visible. A callout box points to a 'Turn on Payroll' button with the text: 'Click Turn On Payroll to sign up for payroll service'. Below the statistics is a table of employees with columns for Name, Phone Number, and Email Address. The table lists Emily Platt and John Johnson.

**Employees**

\$0.00  
2013 PAYROLL COST

\$0.00  
NET PAY

\$0.00  
EMPLOYEE

\$0.00

Need to pay employees?

[Turn on Payroll](#)

**Click Turn On Payroll to sign up for payroll service**

Filter by name  Include inactive [New](#) [Edit](#) [Delete](#) [Report](#) [Print](#)

NAME	PHONE NUMBER	EMAIL ADDRESS
Emily Platt		
John Johnson	(540) 555-9645	

The screenshot shows the QuickBooks Online Payroll interface. On the left is a dark blue navigation sidebar with icons for Home, Customers, Vendors, Employees, Transactions, Reports, Taxes, and Apps. The main content area is titled 'Employees' and shows a summary of payroll costs: '\$0' for '2015 PAYROLL COST' and '0 NET PAY'. A green callout box with white text points to a blue 'Run payroll' button in the top right corner of the main area. Below the summary are search and filter options, including a search bar for 'Find an employee' and a dropdown for 'Active employees'. At the bottom, there are two tables: one listing employee names with initials and another listing their status as 'Active'.

**Click Run payroll to start the process of paying employees**

NAME	STATUS
WA Adams, Woody	Active
JG Graham, Jonathan	Active
VK King, Vicki	Active
DW Wood, Deborah	Active

Accountant

Demo QBO ▼

- Home
- Customers
- Vendors
- Employees
- Transactions
- Reports
- Taxes
- Apps

## Reports Profit and Loss

### \$18,472

NET INCOME

### \$56,117

INCOME

### \$37,645

EXPENSES

Recommended
Management Reports
Frequently Run
My Custom Reports
All Reports

[< All Reports](#)

### Manage Payroll

**Time Activities by Employee Detail**

Lists the products/services (time activities) provided by each employee, including hourly rate and duration.

[Run](#) | [Customize](#)

**Payroll Summary**

Shows details for each paycheck you've created, including total wages, taxes withheld, and deductions.

[Run](#)

**Payroll Tax Payments**

	Client Runs Payroll	Accountant + Client Collaborate	Intuit Does it for Client
	Intuit QuickBooks Online Payroll	Intuit Online Payroll For Accountants	Intuit Full Service Payroll
Check or direct deposit	Yes	Yes	Yes
Expert support	Yes	Yes	Yes
Year-end W2 forms	Yes	Yes	Yes
Federal & State payroll tax forms automatically filled in	Yes	Yes	Yes
Accountant & client log-ins to the same account	Yes	Yes	Yes
Intuit files and pays taxes for you			Yes
Penalties, guaranteed			Yes
Setup completed for you			Yes

## QuickBooks Payments

Get paid more ways, fast!

- Take credit cards or bank transfers
- Accept payments through QuickBooks, emailed invoices, and mobile
- QuickBooks automatically updates when you're paid

[Learn more](#)

## Existing account

If you already have a Payments account with Intuit (you may know it as GoPayment or Merchant Services), connect it to your QuickBooks.

[Connect](#)

Apply for a payments account  
in the Payments section  
of the Company Settings

## Accountancy

DUE DATE  
Feb 28, 2015

BALANCE DUE  
**\$825.00**

**Pay now**


 Print  Save PDF

 Forney Accountancy  
1973 Faye Ct  
Pleasant Hill, CA 94523-3307  
  
(925)323-2892  
bryceforney@gmail.com  
http://www.forneycpa.com

<b>Invoice</b>	
Date	Invoice #
03/01/2015	2623
Terms	
Due on receipt	

### Send a message

Have a question?

 Add file

Bill To

Bryce Forney (Client)

## Payment information

---

**Amount due** \$825.00

**Due date** Feb 28, 2015

**Payment amount**

\$

## Payment method

---

Credit card  Bank

<b>Account type</b>	<b>Bank name</b>
<input type="text" value="Personal checking"/>	<input type="text"/>
<b>Routing number</b>	<b>Account number</b>
<input type="text"/>	<input type="text"/>





Mechanics -7864

Balance \$10,471.07

AMOUNT  
\$0.00

Date

03/01/2015

QuickBooks Payments    

These payments will be automatically added to a Deposit trans

<input type="checkbox"/>	RECEIVED FROM	DATE	TYPE	PAYMENT METHOD	MEMO	REF NO.	AMOUNT
<input type="checkbox"/>	[Blurred]	03/01/2015	Sales Receipt	Visa			515.00
<input type="checkbox"/>	[Blurred]	03/02/2015	Sales Receipt	MasterCard			167.64
<input type="checkbox"/>	[Blurred]	03/02/2015	Payment	QuickBooks P	Paid via QuickBooks Payments:		515.00
<input type="checkbox"/>	[Blurred]	03/02/2015	Sales Receipt	MasterCard			160.00
<input type="checkbox"/>	[Blurred]	03/02/2015	Sales Receipt	MasterCard			1015.00

Select all Clear all

Total 2372.64  
Selected Payments Total 0.00

Add New Deposits

#	RECEIVED FROM	ACCOUNT	DESCRIPTION	AMOUNT	CLASS
1					

Expand your QuickBooks experience with these great apps




raPort by Cloud C... ☆☆☆☆ 0 Reviews	Fundera ★★★★★ 41 Reviews	ClockShark Time Trac... ★★★★★ 1 Reviews	VeriClock ★★★★★ 5 Reviews	Eventbrite by OneSaa... ☆☆☆☆ 0 Reviews

Top Rated

Get Paid Instantly				

# Manage your business relationships


Recent CRM John

Home
Leads
Customers
Activities
Opportunities
Campaigns
Cases
Solutions
Documents
Custom Screens
QuickBooks
Customize

Leads and Contacts List | New Lead | Edit Ray Charles | Estimates | Lead Reports

## Ray Charles

\* = Required Information

<table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Lead Name*</td> <td colspan="3"><input type="text" value="Ray Charles"/></td> </tr> <tr> <td>Company Name</td> <td colspan="3"><input type="text" value="Oak City Grill"/></td> </tr> <tr> <td>Mr./Ms./...</td> <td colspan="3"><input type="text"/></td> </tr> <tr> <td>First Name</td> <td><input type="text" value="Ray"/></td> <td>M.I.</td> <td><input type="text"/></td> </tr> <tr> <td>Last Name</td> <td colspan="3"><input type="text" value="Charles"/></td> </tr> <tr> <td>Bill To</td> <td colspan="3"><input type="text" value="Oak City Grill"/></td> </tr> <tr> <td></td> <td colspan="3"><input type="text" value="Ray Charles"/></td> </tr> <tr> <td></td> <td colspan="3"><input type="text" value="210 Oak Grove Avenue"/></td> </tr> <tr> <td>City</td> <td><input type="text" value="Menlo Park"/></td> <td>State / Prov.</td> <td><input type="text" value="CA"/></td> </tr> <tr> <td>Zip / Postal Code</td> <td><input type="text" value="94025"/></td> <td>Country</td> <td><input type="text"/></td> </tr> </table>	Lead Name*	<input type="text" value="Ray Charles"/>			Company Name	<input type="text" value="Oak City Grill"/>			Mr./Ms./...	<input type="text"/>			First Name	<input type="text" value="Ray"/>	M.I.	<input type="text"/>	Last Name	<input type="text" value="Charles"/>			Bill To	<input type="text" value="Oak City Grill"/>				<input type="text" value="Ray Charles"/>				<input type="text" value="210 Oak Grove Avenue"/>			City	<input type="text" value="Menlo Park"/>	State / Prov.	<input type="text" value="CA"/>	Zip / Postal Code	<input type="text" value="94025"/>	Country	<input type="text"/>	<a href="#" style="color: #0056b3; text-decoration: none;">Copy Address &gt;&gt;</a>	<table border="0" style="width: 100%;"> <tr> <td>Contact*</td> <td><input type="text" value="Ray Charles"/></td> </tr> <tr> <td>Phone</td> <td><input type="text" value="212-887-3947"/></td> </tr> <tr> <td>Fax</td> <td><input type="text"/></td> </tr> <tr> <td>Email</td> <td><input type="text" value="ray@oakcitygrill.com"/></td> </tr> <tr> <td>Alt Contact</td> <td><input type="text"/></td> </tr> <tr> <td>Alt Phone</td> <td><input type="text"/></td> </tr> <tr> <td>Ship To</td> <td><input type="text"/></td> </tr> <tr> <td></td> <td><input type="text"/></td> </tr> <tr> <td></td> <td><input type="text"/></td> </tr> <tr> <td>City</td> <td><input type="text"/></td> </tr> <tr> <td>State / Prov.</td> <td><input type="text"/></td> </tr> <tr> <td>Zip / Postal Code</td> <td><input type="text"/></td> </tr> <tr> <td>Country</td> <td><input type="text"/></td> </tr> </table>	Contact*	<input type="text" value="Ray Charles"/>	Phone	<input type="text" value="212-887-3947"/>	Fax	<input type="text"/>	Email	<input type="text" value="ray@oakcitygrill.com"/>	Alt Contact	<input type="text"/>	Alt Phone	<input type="text"/>	Ship To	<input type="text"/>		<input type="text"/>		<input type="text"/>	City	<input type="text"/>	State / Prov.	<input type="text"/>	Zip / Postal Code	<input type="text"/>	Country	<input type="text"/>
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# Manage your payables and receivables

Home | Inbox | Payables | Receivables | Documents | Reports

Laura Redmond | intuit. | Redmond Accounting Inc

Approval

Notes

AAA | Open Document | Options | Page

**Approve Bill**

Vendor Sprint  
 Invoice # 2013-04-28 (Last 5 bills)  
 Invoice Date 04/30/13  
 Due Date 04/30/13  
 Bill Amount \$167.11  
 Approved Amount \$0.00  
 Description Recurring Bill cell phone

Expenses - \$167.11

Account	Amount	Department	Customer: Job
6510 Communication	\$167.11		

Description

Approvers - 1

Note/Message

Approve Deny Skip Edit Cancel

**Sprint**

Hello!

Need more information? Visit [sprint.com](http://sprint.com) for a complete activity and call detail.

Previous Balance..... -\$159.68

Payment on Apr 19..... -\$159.68

New Charges..... \$167.11

**Total Due \$167.11**

Your bank account will be charged on May 20

You can contact Sprint Customer Service

On the Web: [www.sprint.com](http://www.sprint.com)

By Phone: 1-877-639-8351

Use your Mobile free of charge:

Overview | My Bills | All Bills | Pay Bills | View Payments | Vendors | Manage Recurring

Approval Status: Approved | Due Date: to | Go

Sort By Due Date

Unpaid bills

Bill Information	Due Date	Approval Status	Bill Amount	Payment Amount	Process Date	Select
Blue Apple Design Inv # - 168000	03/17/12	Approved	\$2,940.00	\$2,940.00	03/08/12	<input type="checkbox"/>
Cisco Store Inv # - 654645		Approved	\$6,400.00	\$6,400.00	03/08/12	<input type="checkbox"/>
OffTeam Inv # - 22445	03/15/12	Approved	\$6,724.00	\$6,724.00	03/08/12	<input type="checkbox"/>
			<b>Total Due: \$16,064.00</b>			<b>Total Selected: \$0.00</b>

Notes: JM McCarthy 01/23/12 10:59 AM Pay 1/2 this week, a/2 next week

Common Questions

- What will my vendors receive?
- Can I still print checks?

Pay via Bill.com

Bank Account: Primary Checking \*\*\*\*\*2156

Record as Paid

Pay

# Import Lists and/or Transactions

## Data Mapped to QuickBooks Online

The grid below displays the data that will be imported into QuickBooks Online. Review this grid carefully as it represents the data that will be imported into QuickBooks Online.

<input type="checkbox"/> Import	RefNumber	Customer	TxnDate	DueDate	SalesTerm	BillAddrLine1	BillAddrLine2	BillAddrLine3	BillAddrLine4	BillAddrLineCity	BillAddrLineStat
<input type="checkbox"/>	101	Janice Johnson	4/14/2011		Net 30	110 Main Street	Suite 2000			Dallas	TX
<input type="checkbox"/>	101	Janice Johnson	4/14/2011		Net 30	110 Main Street	Suite 2000			Dallas	TX
<input type="checkbox"/>	101	Janice Johnson	2/14/2011		Net 30	110 Main Street	Suite 2000			Dallas	TX
<input type="checkbox"/>	102	Leonard Walker Inc	4/15/2011		Net 30	9 Winding Road				Winchester	NY
<input type="checkbox"/>	102	Leonard Walker Inc	4/15/2011		Net 30	9 Winding Road				Winchester	NY
<input type="checkbox"/>	102	Leonard Walker Inc	4/15/2011		Net 30	9 Winding Road				Winchester	NY
<input type="checkbox"/>	103	Lisa Smith	4/15/2011		Net 30	19 Jerico Drive				Bensalem	PA
<input type="checkbox"/>	103	Lisa Smith	4/15/2011		Net 30	19 Jerico Drive				Bensalem	PA
<input type="checkbox"/>	103	Lisa Smith	4/15/2011		Net 30	19 Jerico Drive				Bensalem	PA
<input type="checkbox"/>	103	Lisa Smith	4/15/2011		Net 30	19 Jerico Drive				Bensalem	PA

Avalara is a Gold Certified Intuit Developer Calculations  
(both rates & taxability rules)

Fully completed returns.

AvaTax sales tax calculations are automatically applied  
to items in the estimate and invoice.

Multiple Sales Tax Rates

Integrated With

GoPayment

The screenshot shows the 'Administration' section of the AvaTax software, specifically the 'Taxability' tab. The interface includes navigation tabs for 'Users', 'Product Types', 'Taxability', 'Nexus', and 'Returns'. Below the tabs, it displays 'Account: Test Account' and a 'Page Size' dropdown set to 100. The main content is a table listing various tax rules and rates for different states and locations.

State	County	City	GEO Code	Customer Type	Product Type	Tax Type	Rule Type	Exempt	Tax Base %	Rate %	Local Rate %	Effective Date
AK			02		3	Sales	Rate			3.4500	1.2500	1/1/
AK			02		FR	Both	Base	✓				1/1/
AL			01	FARMER		Both	Base	✓				1/1/
AL			01		3	Both	Rate			1.3400	2.3000	1/1/
AL			01		FR	Both	Base	✓				1/1/
AL	Baldwin		01003	123		Sales	Rate			0.0000		1/1/
AL	Baldwin	Foley	0100326992	123		Sales	Rate			0.0000		1/1/
AR			05		FR	Both	Base		100.00			1/1/
AS			60		FR	Both	Base	✓				1/1/
AZ			04		FR	Both	Base	✓				1/1/
CA			06		FR	Both	Base		100.00			1/1/

## Robust inventory for QuickBooks Online

Track inventory assemblies

WIP

Create sales orders and  
convert them to QuickBooks

Online invoices

Value inventory using LIFO method

Receive automated email or SMS alerts when inventory  
gets low

Automatically update inventory counts from QuickBooks

Online invoices and sales receipts

The screenshot shows the 'Inventory' section of the SOSInventory.com website. At the top, there is a navigation menu with buttons for Home, Purchasing, Manufacturing, Inventory, Sales, QuickBooks, and Admin. Below the menu is a search bar and a 'Find' button. The main content area displays an 'Item List' table with the following data:

Item #	Name	Description	Type	Income Account	Vendor
1	Assembly Item #2	Assembly Item #2 Description	Assembly	Billable Expense Income	
2	Assembly1	Assembly Part 1	Inventory Item	Test	
3	Deposit	Prepayment	Inventory Item	Services	
4	Gasket	Aluminum gasket for car	Inventory Item	Product Sales	
5	Hammer	Standard hammer	Inventory Item	Product Sales	
6	Income Account Test		Inventory Item	Product Sales	
7	Labor	Labor	Inventory Item	Test	
8	Labor1	Labor1	Inventory Item	Test	
38	New Assembly		Assembly	Billable Expense Income	
9	New Ipp Item	test description 2	Inventory Item	Services	
10	New Other Item	New Other Item	Inventory Item	Test	
11	Overhead		Inventory Item	Services	
12	Pipe Fitting	this is a pipe fitting	Inventory Item	Product Sales	
13	Please delete me		Inventory Item	Sales of Product Income	
14	Processed Fish		Inventory Item	Sales of Product Income	
15	Raw Fish	Line 1 Line 2	Inventory Item	Sales of Product Income	
16	Red Toolbox	Red Toolbox - Southeast	Inventory Item	Services	

ckBooks.

Maver

Project Management

Team Collaboration

Syncs with QuickBooks Items

Syncs with Google Docs

Email Updates

Scheduling

Invite Clients to Participate

[appcenter.intuit.com/](http://appcenter.intuit.com/)

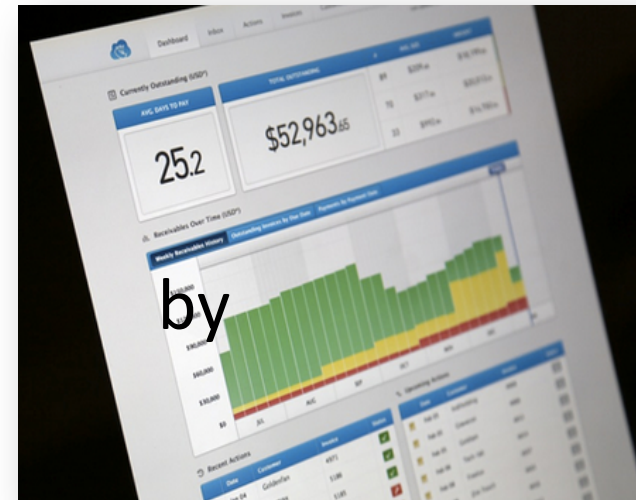
[mavenlink](http://mavenlink)

The screenshot displays the Mavenlink website interface. At the top, there is a navigation bar with the Mavenlink logo and buttons for 'BLOG', 'FEATURES', 'TOUR', and 'SIGN OUT'. Below the navigation bar, a 'Features' section highlights the benefits of the platform: 'A better way to manage your projects online with features designed to streamline workflow and increase your productivity'. A callout box on the right states 'Mavenlink integrates with Google Apps' and lists 'Tasks', 'Calendar', 'Docs', and 'Contacts'. The main content area is organized into a grid of feature cards, each with an icon and a brief description. A 'Filters' sidebar on the left allows users to filter features by 'Collaboration', 'File Sharing', 'Project Management', 'Team Management', and 'Pro Features'. The features listed include: File Sharing (20GB), Project Activity Stream, Schedule, Real-time Messaging, Assign Responsibility, Link Conversations, Reply Directly, Manage Tasks, Google Apps Integration, Centralized Dashboard, Emailed Updates, Filter, Subtasks, Dashboard Bar, View Files, Project History, Private Messaging, Manage Activity, Smartphone, and Email Digests. Each card provides a concise overview of the feature's functionality.



## Transform A/R into a disciplined, well groomed part of any company

Shepherding Invoices from Unpaid to Paid  
Accounts Receivable Dashboard  
Efficient collections in just a few clicks  
And beautiful printed thank you cards  
Full automation or a la carte  
Scheduling  
Reminder calls with your scripts  
Elite AR specialists



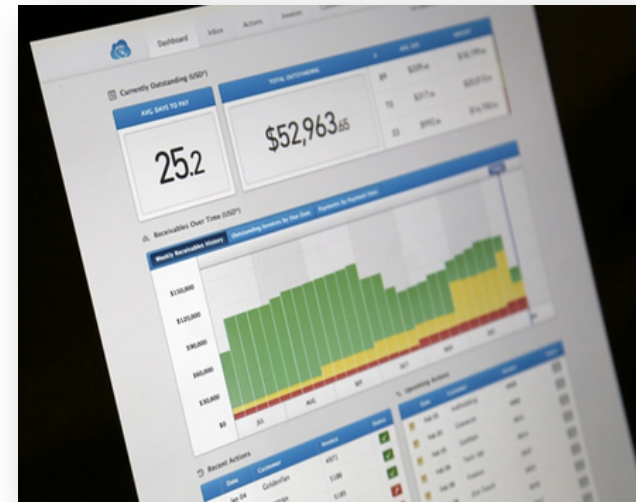
## Time tracking software you & your employees will love

flexible, mobile time tracking &  
management

seamless data sync to QuickBooks

timesheet approval reminders & quick  
approval process

customized PTO, permissions and access  
settings



## Running Small Business in the Cloud



- Acquiring Customers



- Managing Projects



- Managing Inventory



- Tracking Time and Expenses



- Paying Bills



- Getting Paid



The screenshot displays the QuickBooks Accountant interface. At the top left, the 'qb Accountant' logo is visible. The top right shows the company name 'ABC Trucking' with a dropdown arrow. A dark blue sidebar on the left contains navigation icons for Home, Customers, Vendors, Employees, Transactions, Reports, Sales Tax, and Apps. The main content area is titled 'Apps' with the subtitle 'Expand the power of QuickBooks'. Below the title are two tabs: 'All Apps' (selected) and 'My Apps'. A 'Featured' section is shown below the tabs, containing a carousel of app cards. The first card is for 'Square QuickBooks On...' with a 5-star rating and 13 reviews. The second card is for 'PayPal Integration B...' with a 5-star rating and 0 reviews. A third card is partially visible on the right with a 1-star rating.

qb Accountant




ABC Trucking

## Apps

Expand the power of QuickBooks

All Apps | My Apps

### Featured

		
Square QuickBooks On...	PayPal Integration B...	Re
★★★★★ 13 Reviews	★★★★★ 0 Reviews	★

## QuickBooks ProAdvisor Program – FREE!

Support Online Clients for free. Plan includes:



### Software

QuickBooks Online Accountant to support your QuickBooks Online clients



### Exclusive Discounts

Discounts on Intuit Tax Online, QuickBooks Payments, QuickBooks Licenses, and QuickBooks Self-Employed



### Certification

- QuickBooks Online
- New! QuickBooks Online Advanced



### Training

Become an expert in QuickBooks Online and earn up to 6.5 CPE credits by taking the QuickBooks Online certification training.



### Support

With unlimited U.S. based QuickBooks® Online chat and phone support to back you up, you'll have the answers you need—when you need them.<sup>2</sup>



### Increase your exposure

Get certified and get listed on the Find-A-ProAdvisor website, visited by over 600,000 small businesses each year. Use the official Certified ProAdvisor logo to promote your practice.<sup>5</sup>

Sign up at [proadvisor.intuit.com](http://proadvisor.intuit.com)

After attending this course you should be able to:

**Understand** the needs for integrated apps to help small businesses work efficiently

**Identify** Intuit's payroll & payment offerings that integrate with QuickBooks Online

**List** available third party solutions that increase productivity

**Perform** the process of adding an app to QuickBooks Online



Intuit  
QuickBooks.

CONNECT

2015

*November 2-4, 2015*

*San Jose Convention Center*

**Make sure you save your seat for QuickBooks Connect 2015.**

Just give us your name and email address and we'll notify you directly  
when we have more details and when registration is open.

**Sign up to be notified when registration opens: [www.qbcon2015.com](http://www.qbcon2015.com)**



**Get Ready to Enter the CPE Keyword provided during today's webinar.**

**Don't Forget....CPE Certificates:**

- E-mailed directly to you within 14 business days from today's training
- You must keep this copy for your records



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- Available via your thank you email

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