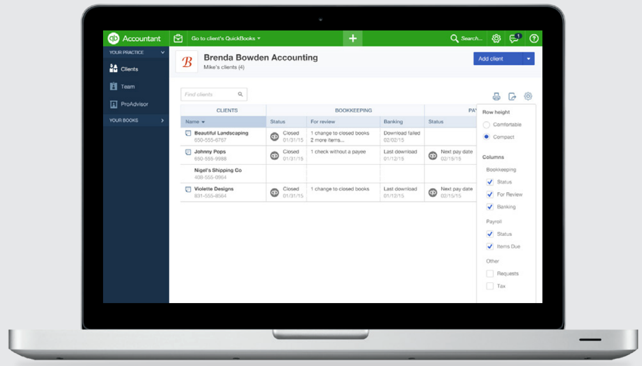
QuickBooks Online Accountant

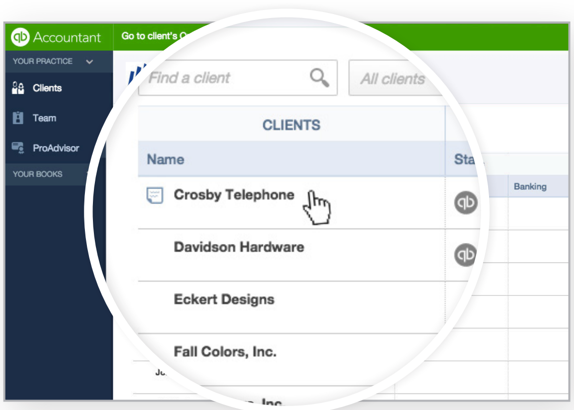
QuickBooks® Online Accountant is designed to help you free up more hours each day and still stay focused on your clients' businesses.

Client Details

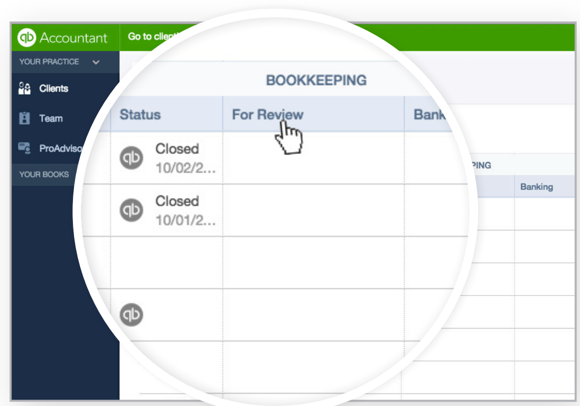
Quickly check details about client-related activities before going into each client's books.



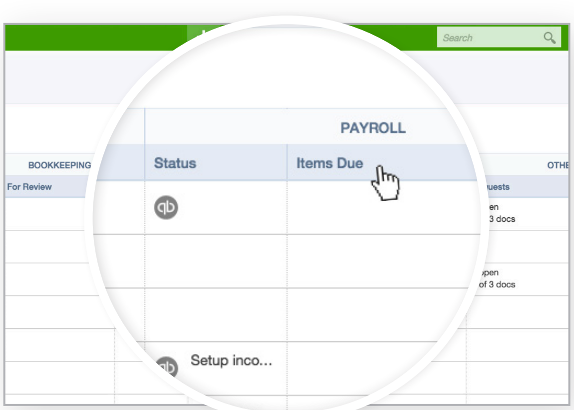
4 simple ways to review Client Details right from your Dashboard:



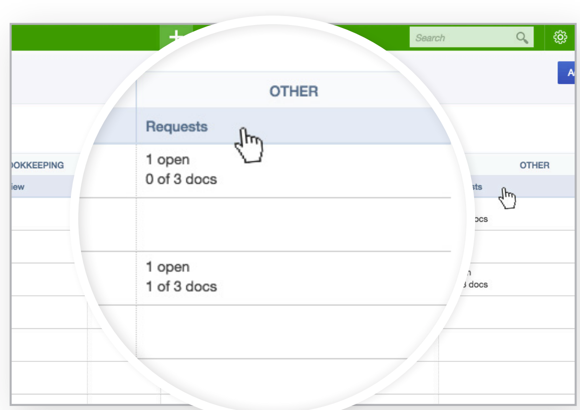
1. In the Clients column, click on the client's name to sort from A to Z or Z to A.



2. In the Bookkeeping column, click on "For Review" to see what has changed in the books. Or, click on "Banking" to see when transactions were last downloaded.

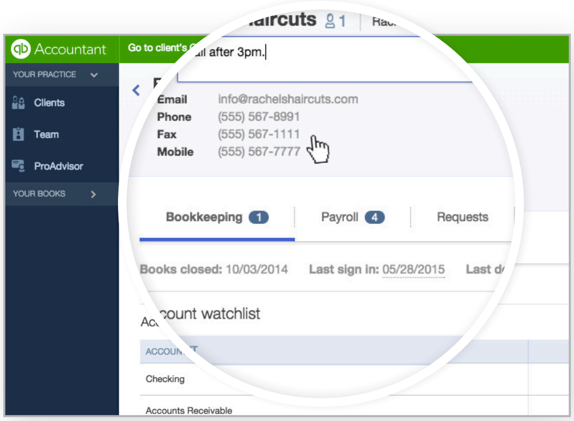


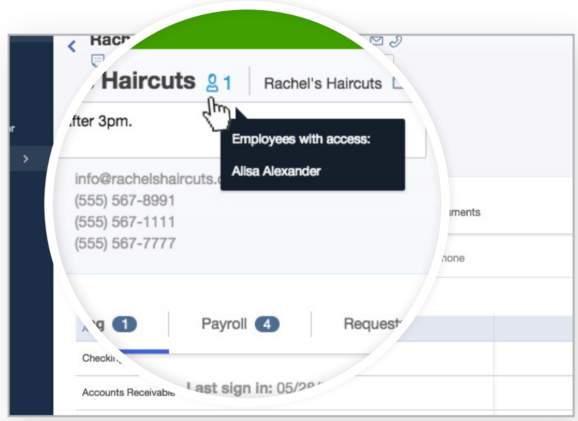
3. If you have clients subscribed to Payroll, in the Payroll column click on "Status" to see upcoming pay dates for their employees, or click on "Items Due" to see upcoming payroll tax dates.



4. In the "Other" column, click on "Requests" to view clients that you have requested documents from.

From the Client Details page you can:



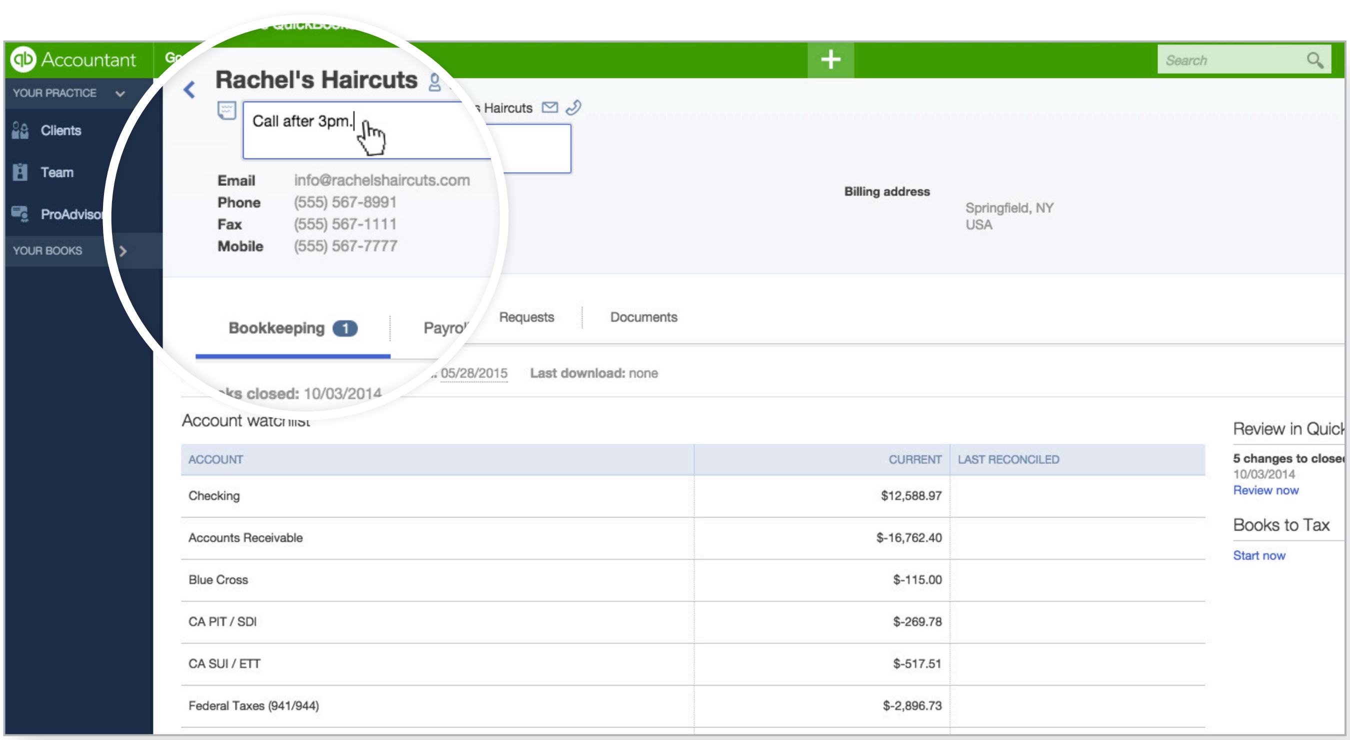


Check contact information

See important client information like phone number, email and mailing address.

Review employee access

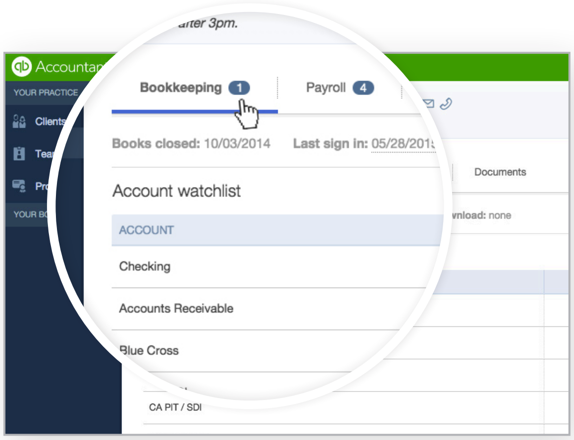
Check which employees in your firm also have access to the client.



Add notes

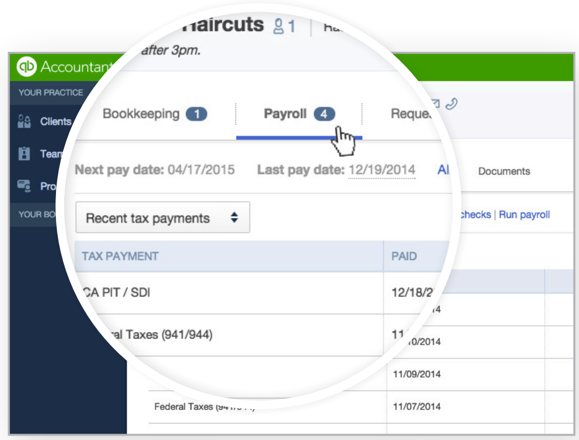
Add or review accountant-only notes about the client, such as "best time to call."

Or, take a deeper dive with detailed tabs.



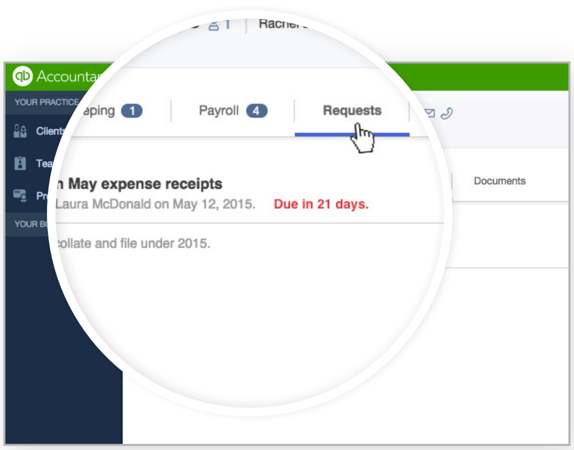
Bookkeeping

Get a summary of important information without opening a client's books.



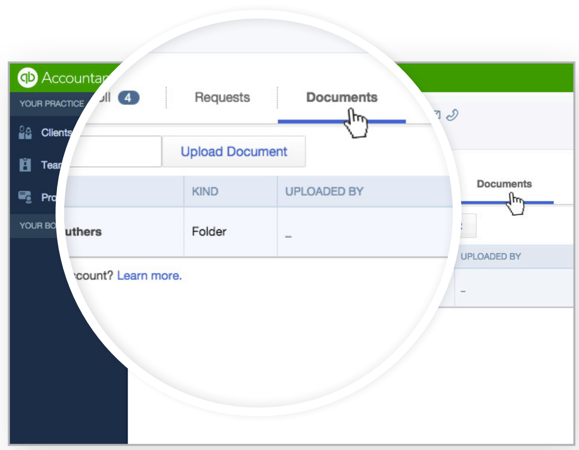
Payroll

See an up-to-date snapshot of payroll information.



Requests

Keep track of what messages have been exchanged.



Documents

View a repository of statements, spreadsheets and other documents to help manage your clients' books.

Stay focused on your clients' businesses through Client Details in **QuickBooks Online Accountant**!