**QuickBooks**<sup>®</sup> **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.

20 Clients	Brenda Bowd Mike's clients (4)	en Account	ing			Add client •
E Team	Find clerity 9					
ProAdvisor	0.00		BOOWNEEPING			60 12 10
YOUR BOOKS >	Name w	Status	For review	Banking	Status	Contestation
	Beautiful Landscaping 050-055-0707	Clesed 01/01/15	1 charge to closed books 2 more items	Download failed 02/02/15		Compact
	Johnny Peps 050-555-0588	Clesed on on one	1 check without a payee	Last deveload 01/12/15	Next pay date     00/15/15	Columns
	Nigel's Shipping Co 408-555-0954					Bookkeeping
	Violette Designs 831-555-8554	Closed photos	1 change to closed books	Last download 01/12/15	Next pay date	Status     For Review
						Banking Payrol     Status     forms Due     Other     Requests     Tax

## 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.



**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.



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.



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

## From the Client Details page you can:

VOUR PRACHOE Clients Clients Texm Prone (555) 567-8991 Fax (555) 567-1111 Mobile (555) 567-1111 Mobile (555) 567-1111 Mobile (555) 567-7777 Bookkeeping 1 Payroll 4 Requests Books closed: 10/03/2014 Last sign In: 05/28/2015 Last d/ Ac. "Ount Watchlist Account Checking	Accountant	Go to client's rati after 3pm.
Clients  Clients  Contact Service  Clients  Contact Service  Contact Service  Clients  Contact Service  Con	YOUR PRACTICE V	T C
ProAdvisor     YOUR BOOKS >     Bookkeeping      Payroll      Requests     Books closed: 10/03/2014 Last sign in: 05/28/2015 Last dr     Ac "tourt watchlist     Accoult     Checking	Clients	Email         info@rachelshaircuts.com           Phone         (555) 567-8991           Fax         (555) 567-1111
VOUR BOOKS > Bookkeeping 1 Payroli (2 Requests Books closed: 10/03/2014 Last sign in: 05/28/2015 Last dr Ac. "Pount watchlist Account watchlist Checking	ProAdvisor	Mobile (555) 567-7777
Checking		Bookkeeping Payroll A Requests Books closed: 10/03/2014 Last sign in: 05/28/2015 Last dr Ac. "20unt watchlist
		Checking

#### Check contact information

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

.fter 3pm.	2m		
info@eeebolobe	Alisa Alexar	with access:	
(555) 567-8991	rcuts.		iments
(555) 567-1111 (555) 567-7777			
			none

### Review employee access

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

P Accountant Gr	Rachel's Haircuts	+	Search Q
Clients	Call after 3pm. http://www.second.com/second		
È Team	Email info@rachelshaircuts.com	Billing address	
ProAdviso	Phone (555) 567-8991 Fax (555) 567-1111	Springfield, NY USA	
	<b>Mobile</b> (555) 567-7777		
Ac	count watching		Review in Quic
AC	COUNT	CURRENT LAST RECONCILED	5 changes to close
Ch	recking	\$12,588.97	Review now
	counts Receivable	\$-16,762.40	Books to Tax
Ac			
Bi	Je Cross	\$-115.00	Start now
Ac Bl	ue Cross	\$-115.00 \$-269.78	Start now
Ac Bli CA	ue Cross A PIT / SDI A SUI / ETT	\$-115.00 \$-269.78 \$-517.51	Start now

#### 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.

	arter 3pm.	
Accountar YOUR PRACTICE	Bookkeeping 1 Payroll 3	ý
E Tear	Books closed: 10/03/2014 Last sign in: 05/28/201	
	Account watchlist	Documents
	ACCOUNT	whicad: none
	Checking	
	Accounts Receivable	
	Slue Cross	
	CA PIT / SDI	

#### Bookkeeping

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

Clients	Bookkeeping 1 Payroll 4	Reque
🖞 Tean	Next pay date: 04/17/2015 Last pay date: 12	/19/2014 Al Documents
OUR BO	Recent tax payments	shecks   Run payroll
	TAX PAYMENT	PAID
· · · · · ·	CA PIT / SDI	12/18/2
, in the second s		
Ň	-al Taxes (941/944)	11 ,0/2014





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**!