



Discover the New QuickBooks Online Accountant and ProAdvisor Program

Written by: Kaydee Peterson

CPE Information



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 within 14 business days from today's training.
- You must keep this copy for your records.

Course Agenda / Learning Objectives



After attending this course, you will be able to utilize:

- The new Client Dashboard feature to access client books and understand firm roles.
- The new Accountant Toolbox feature to write off Invoices, undo prior reconciliations and reconcile client's books.
- The "books to tax" feature to start a client tax return in one-click.
- The newly enhanced ProAdvisor Program including navigating through QuickBooks Online Accountant and accessing member benefits
- The benefits of the ProAdvisor Program to advance from one level to the next.
- The wholesale pricing model to grow your practice and better serve your clients.

Course Materials



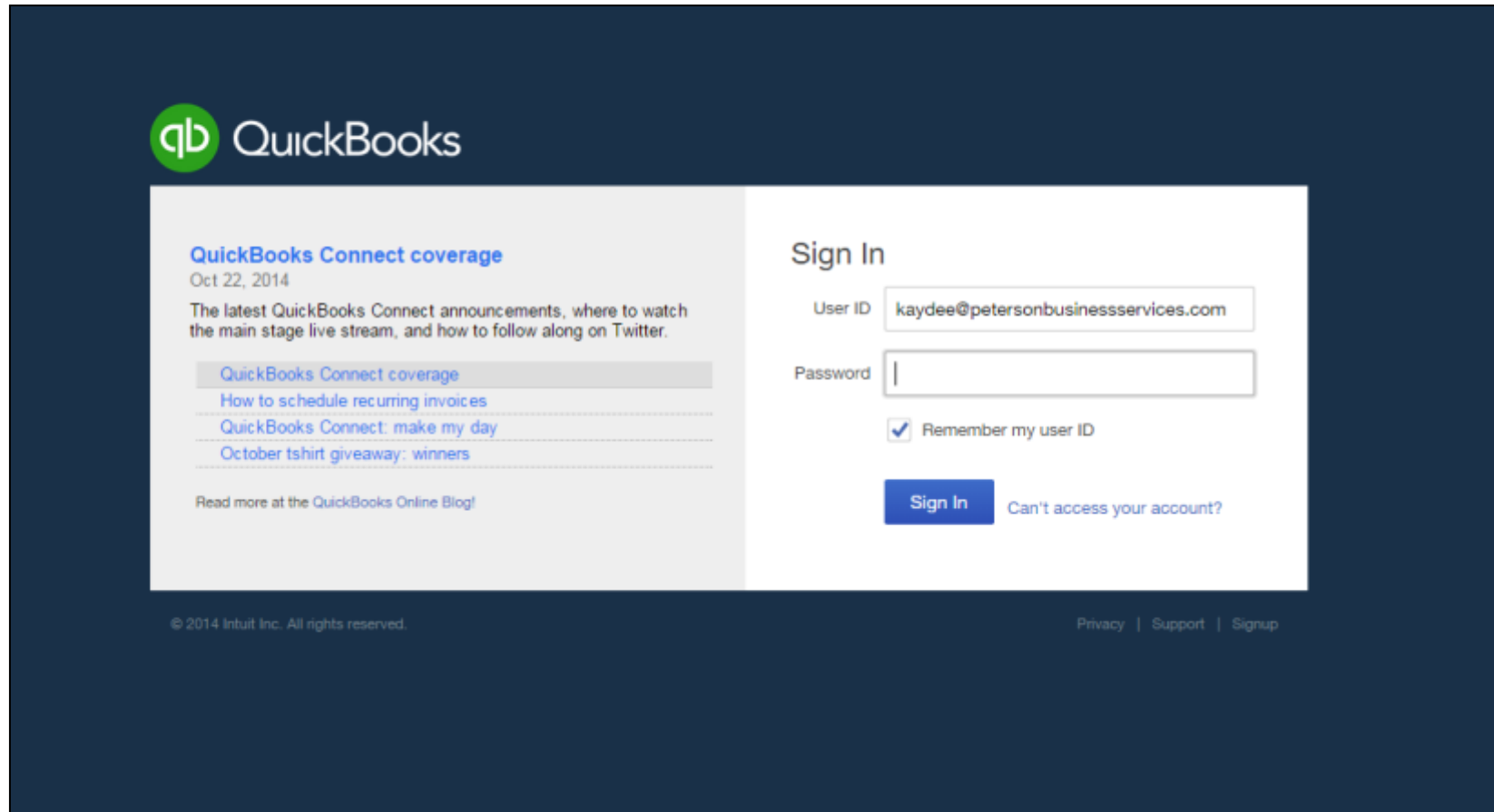
Access to Course Materials and Handouts

See link in Chat window!



QuickBooks Online Accountant

Logging In



The screenshot shows the QuickBooks login interface. On the left, there is a sidebar with the QuickBooks logo and a section titled "QuickBooks Connect coverage" dated Oct 22, 2014. This section includes links for "QuickBooks Connect coverage", "How to schedule recurring invoices", "QuickBooks Connect: make my day", and "October tshirt giveaway: winners". Below these links is a link to "Read more at the QuickBooks Online Blog!". On the right, the "Sign In" form is displayed. It contains a "User ID" field with the email "kaydee@petersonbusinessservices.com", a "Password" field, and a checked checkbox for "Remember my user ID". A blue "Sign In" button is present, along with a link for "Can't access your account?". At the bottom of the page, the copyright notice "© 2014 Intuit Inc. All rights reserved." is on the left, and links for "Privacy", "Support", and "Signup" are on the right.

qbo.intuit.com

The New Client List



Accountant Go to client's QuickBooks + Search

McGinnis & Associates
Kaydee's customers (22) Add client

Find a customer

CLIENTS		BOOKKEEPING		PAYROLL		TAX	
Name	Status	For Review	Banking	Status	Items Due	Books To Tax	Tax Return
Bob's Bagels							
Bobby Sam McGinnis	qb						
Cafe Terance 650944300	qb Closed 12/31/2...	270 unaccepted transa... 2 more items...	Last download 09/07/2014	qb	Next pay date 10/17/2014		
Casino Royale Ltd	qb			qb			
Creative Marketing (650) 366-8526							
Desert Landscaping	qb						
Dr. No LLC	qb						
Franklin Automotive (650) 944-5858	qb	264 unaccepted transa...	Last download 08/20/2014				
Goldeneye LLC	qb Closed 09/30/2...	2 changes to closed bo... 106 unaccepted transa...	Last download 09/25/2014				
Goldfinger Ltd							

Edit columns

- Bookkeeping
 - Status
 - For Review
 - Banking
- Payroll
 - Status
 - Items Due
- Tax
 - Books to Tax
 - Tax Return
- Other
 - Requests
- Rows
 - 50 items
 - 150 items
 - 300 items
 - Compact

Accessibility and Insights



McGinnis & Associates
Kaydee's customers (22) Add client

Find a customer

CLIENTS		BOOKKEEPING			PAYROLL		TAX		OTHER
Name	Status	For Review	Banking	Status	Items Due	Books To Tax	Tax Return	Requests	
Bob's Bagels									
Bobby Sam McGinnis									
Cafe Terance 650944300	Closed 12/31/2...	270 unaccepted transa... 2 more items...	Last download 09/07/2014	Next pay date 10/17/2014				4 open requests 0 of 4 documents received	
Casino Royale Ltd									

- Client Detail Page
- QuickBooks Company
- Intuit Tax Online

Client Detail Page



Accountant Go to client's QuickBooks + Search ? Help

YOUR PRACTICE
Clients
Team
ProAdvisor
YOUR BOOKS

Kallie Cookies

Click to add a note...

Bookkeeping 2 Requests Documents

New request

Account watchlist

ACCOUNT	CURRENT	LAST RECONCILED
Barter Transactions	\$0.00	
My Checking (XXXXXX 1111)	\$699.00	
My Savings (XXXXXX 2222)	\$822.00	
My Visa (XXXXXX 7777)	\$-90,810.17	
Accounts Payable (A/P)	\$-17.25	

Review in QuickBooks

263 unaccepted transactions
Downloaded 08/20/2014
[Review now](#)

1 check without payee
[Review now](#)

Books status

Books closed: no
Last sign in: 09/29/2014 by
intutshane+140911-3@gmail.com Your
Accountant
Last download: 08/20/2014
[Start Books to Tax](#)

Requests



Create new request ✕

Select a user ▾ Due date

Email address

Subject

Message and questions

Attach a file

Need documents from your client?
Enter each document below and be notified when they are uploaded by your client.

1.

2.

3.

[+ Add more documents](#)

This is a preview of the email your client will receive after you send this request.

Enter a subject to see a live preview

From: McGinnis & Associates
To: Cafe Terance

FROM: McGinnis & Associates

Enter a message to see a live preview

Cancel Send request

Documents

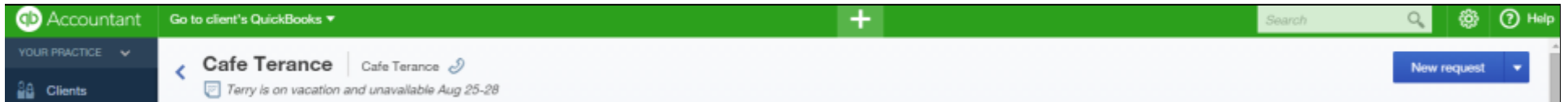


The screenshot displays the qb Accountant interface for a client named 'Beautiful Landscaping'. The main window shows a document management area with buttons for 'Upload Document' and 'New Folder'. A document titled 'Chase Bank Statement' is open in a preview window, showing account activity for October 13, 2010, with a balance of \$48.89. Below the preview, a table lists various documents uploaded to the account.

	TYPE	UPLOADED BY	LAST MODIFIED	ACTIONS
Edit	PDF	Shannon Randolph	3 days ago	View
	Image	Shannon Randolph	May 24, 2014	Print Download
	Folder	Ben Brust	May 20, 2014	Open
	Folder	Shannon Randolph	May 6, 2014	Open
	DOC	Ben Brust	January 20, 2014	View

Additional interface elements include a search bar, 'New Request' button, and 'with box' branding at the bottom.

QuickBooks Accountant Toolbar





- Client List Shortcut
- Client Switcher
- Quick Create
- Search
- Gear Icon

Team Management



Team [Add user](#)

NAME	JOB TITLE	CLIENTS	EMAIL	ACCESS	STATUS
Ariege Misherghi		22	ariege@gmail.com	Master Administrator	Active
Simon Santiago		11	simon_santiago@intuit.com	Full	Invited
clayton_adams@intuit.com		22	clayton_adams@intuit.com	Full	Active
clayton_adams@intuit.com		9	clayton_adams@intuit.com	Full	Inactive (Pending Invite)
Linsay Ransom		11	syed_ali@intuit.com	Full	Invited
Jyothi Trishuleshwar		22	jyothi_trishuleshwar@intuit.com	Full	Active
Shane MacFarlane		21	shane_macfarlane@intuit.com	Full	Active
Dan Lowell		11	daniel_lowell@intuit.com	Full	Invited
Linsay Ransom		11	linsay_ransom@intuit.com	Full	Invited
Katrina Carlier		11	katrina_carlier@intuit.com	Full	Invited

Add/Edit Users



Add user

1 USER PROFILE 2 FIRM ADMINISTRATION AND BOOKS 3 CLIENT ACCESS

Specify client access

Find a client

CLIENT	<input checked="" type="checkbox"/>
Bob's Bagels	<input checked="" type="checkbox"/>
Bobby Sam McGinnis	<input checked="" type="checkbox"/>
Cafe Terance	<input checked="" type="checkbox"/>
Casino Royale Ltd	<input checked="" type="checkbox"/>
Creative Marketing	<input checked="" type="checkbox"/>
Desert Landscaping	<input checked="" type="checkbox"/>
Dr. No LLC	<input checked="" type="checkbox"/>

Client access

Granting user access to a client gives them full (admin) permissions to that client's QuickBooks Online file.

Administrator access to client QuickBooks

Your Books



Accountant | McGinnis & Associates | Search | Help

YOUR PRACTICE > | YOUR BOOKS >

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

Get started with QuickBooks | Welcome Guide

1-MIN TOUR: An overview of QuickBooks | 1-MIN TOUR: Get paid faster with Intuit Payments | 1-MIN TOUR: Paying employees with Intuit Payroll

McGinnis & Associates
Monday, October 27 2014

Income

How to enter invoices

\$0	\$0	\$0
OPEN INVOICES	OVERDUE	PAID LAST 30 DAYS

Expenses

How to enter expenses

\$0 LAST 30 DAYS

- \$0 Category 1
- \$0 Category 2
- \$0 Category 3
- \$0 Category 4

1/2

Bank accounts

Connect an account

Credit Card	\$0.00
Bank	\$0.00

Activities

All

August 13, 2014
75 DAYS AGO

- Employee: edited Aug 13
- Employee: edited Aug 13
- Employee: added Aug 13

Accountant Toolbox



The screenshot shows the Accountant Toolbox menu in QuickBooks Online. The top navigation bar is green with the 'qb Accountant' logo on the left and 'McGinnis & Associates' on the right. Below the navigation bar, there are two main sections: 'YOUR PRACTICE' and 'YOUR BOOKS'. The 'YOUR PRACTICE' section includes links for Home, Customers, Vendors, Employees, Transactions, Reports, Taxes, and Apps. The 'YOUR BOOKS' section is currently expanded, showing a list of tools under the heading 'Accountant Tools'. The tools listed are: Reclassify Transactions, Voided/Deleted Transactions, Write Off Invoices, Journal Entries, Close Books, Reconcile, Accountant Reports, My Custom Reports, Reports Tools, Chart of Accounts, and New Window. The background of the screenshot shows a blurred view of the QuickBooks interface, including the 'Books' and 'We' tabs and the 'ociates' text.

qb Accountant McGinnis & Associates

YOUR PRACTICE >

YOUR BOOKS v

Home

Customers

Vendors

Employees

Transactions

Reports

Taxes

Apps

Accountant Tools

BOOKS TO TAX

Reclassify Transactions

Voided/Deleted Transactions

Write Off Invoices

Journal Entries

Close Books

Reconcile

Accountant Reports

My Custom Reports

Reports Tools

Chart of Accounts

New Window

Books | We

ociates

OPEN INVOICES

Client Switcher



The screenshot displays the qb Accountant software interface. At the top, the qb logo and the word "Accountant" are on the left, and a dropdown menu for "McGinnis & Associates" is on the right. Below the top bar, there are two main sections: "YOUR PRACTICE" and "YOUR BOOKS". The "YOUR PRACTICE" section is expanded, showing a list of navigation options: Home, Customers, Vendors, Employees, Transactions, Reports, Taxes, and Apps. The "YOUR BOOKS" section is collapsed. The "Client Switcher" dropdown menu is open, showing a search bar with the placeholder text "Find a client" and a list of client names: Bobby Sam McGinnis, Cafe Terance, Casino Royale Ltd, Desert Landscaping, Dr. No LLC, Franklin Automotive, and Goldeneye LLC. The background of the interface shows a partial view of the "Income" section with a yellow bar.

Adding a Client



Add client

Client contact info | QuickBooks products

Title	First name	Middle	Last name	Suffix	Billing address map
<input type="text"/>	<input type="text" value="First"/>	<input type="text" value="Middle"/>	<input type="text" value="Last"/>	<input type="text"/>	<input type="text" value="Street"/>

Company

City/Town State

ZIP Country

*Display name as

Shipping address [map](#) Same as billing

Phone	Mobile	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email

Website

Notes

Enter your notes regarding this client here

Client summary

Client contact info

QuickBooks products [Add](#)

none added yet

Team access

- Andi Ancheta
- Andrew Goldfinch
- Ariege Misherghe
- Bridgette Haymaker
- Cathy Iconis
- Chris Davey
- clayton_adams@intuit.com
- Dan DeLong
- Deuce Bigalow
- Felix Cat
- Heather Kirkby
- Heather Satterly
- John Smith
- Jyothi Trishuleshwar
- Kallie Friedman
- Kaydee Peterson
- Kylie Tuosto
- Laura Redmond
- Liza Levitt
- MB Raimondi
- MB Raimondi
- Michelle Long
- Paul Preparer

Wholesale Billing – New Clients



Add client

Client contact info | **QuickBooks products**

Ready to purchase QuickBooks for this client?

QuickBooks products
Essentials with Payroll

***Billing choices**
My firm will pay (wholesale)

QuickBooks Master Admin
kaydee@petersonbusinessservices.com

Special Offer: ~~30%~~ 50% off

QuickBooks

Wholesale billing gets you the best price for the life of each subscription

Client summary

Client contact info
Kaydee's Candy Shop

QuickBooks products

Essentials with Payroll

~~\$58~~⁹⁹ per month* \$29⁵⁰ per month*

50% off for life of the subscription
*See terms of Payroll price

Team access
Andi Ancheta
Andrew Goldfinch

Migrate to Wholesale Billing



qb Accountant Go to client's QuickBooks + Search [Settings] [Help]

Your Account
McGinnis & Associates

Personal information [Edit personal information](#)

Name	Kaydee Paterson	Email	kaydee@petersonbusinessservices.com
		Communication	Email, mail, phone

Wholesale billing [Edit billing information](#)

QuickBooks subscription		Payroll subscription	
Status	Billing information needed	Status	Billing information needed
Next bill date	---	Next bill date	---
Bill total	---	Bill total	---

Wholesale clients [Move clients to wholesale](#)

COMPANY	ID	STATUS	QUICKBOOKS VERSION	PRICE	PAYROLL	ACTIONS
---------	----	--------	--------------------	-------	---------	---------

Books to Tax



Books to Tax: Beautiful Landscaping

Mappings 5 Adjustments

Book balances 25 / 27 accounts mapped

ACCOUNT	TYPE
Buildings	Fixed Asset
Warehouse Equipment	Fixed Asset
Checking	Bank
Savings	Bank
Petty Cash	Bank
Undeposited Funds	Other Current Asset
Inventory Asset	Other Current Asset

Assets

ACCOUNT	AMOUNT
Checking	
Accounts Receivable (A/R)	
Undeposited Funds	
Inventory Asset	
Vehicles	
Buildings	
Total	

Tax Return: Beautiful Landscaping-1

Form 1120S

Schedule K, Shareholders' Pro Rata Share Items (continued)

	17a	17b	17c	Total amount
17a Investment income				
b Investment expenses				
c Dividend distributions paid from accumulated earnings and profits				
d Other items and amounts (attach statement)				

Schedule L, Balance Sheets per Books

	Beginning of tax year		End of tax year	
	(a)	(b)	(c)	(d)
1 Cash				129,874
2a Trade notes and accounts receivable			3,118	
b Less allowance for bad debts				
3 Inventories				92,525

intuit Tax Online

- intuit Tax Online
- Highlights
- Tax Returns**
- Clients
- E-file Dashboard
- Purchase Center 2014
- Purchase Center 2013
- 2014 is Available!

New to Intuit Tax Online?

To learn more, go to the Tax Returns Hub and view some short videos.



Changes to the QuickBooks ProAdvisor Program

Why the Change?



Training



Software



Support



Certifications



Connections

A Re-Imagined Program



- 1** A Single Global ProAdvisor Program
- 2** Two Ways To Partner & Grow
- 3** New Certification & New Badges
- 4** Built Into QuickBooks Online Accountant

One Global Program...



intuit

QuickBooks®

ProAdvisor Program

... With More Benefits Than Ever



New & Better Products



Better Pricing & Discounts



New, Exclusive App Partnership



One Program – Two Paths



Free	Paid (\$549)
<p><u>Support Online Clients</u></p> <p>Access to QuickBooks Online Accountant</p> <p>QBO/A Support</p> <p>QBO Training & Certification</p> <p>QBO Discounts for clients</p> <p>Discounts on Online Payroll & Payments</p> <p>Intuit Tax Online</p>	<p><u>Support Online and Desktop Clients*</u></p> <p>All the Online benefits plus</p> <p>The latest QB Desktop Software (QBA, QBES, Mac & POS)</p> <p>Accountant Desktop Support</p> <p>QB Desktop Training & Certification</p> <p>Discounts on Desktop Software, Payroll & Payments</p>

***Available in the US, UK & Canada only.**

~ See attached ProAdvisor Member Benefits job aid for detailed information.

Two Ways to Climb Tiers



LEVELS	Silver	Gold*	Diamond*
Certifications	Not Certified	Certification QBO or QB Desktop**	Advanced Certification**
OR			
# Of Paid QB Clients***	0	5	20

***Program benefits accrue at firm level and certifications at the individual level**

****Find-a-ProAdvisor listing only available for Certified ProAdvisors.**

*****The QBO Clients have to be paid clients that appear on the QBOA Client List (this is by firms level, not individual ProAdvisor)**

ProAdvisor Support



	Silver	Gold	Diamond
*Online Only - Phone	QBO Support	QBO Support	VIP QBOA Support
*Online Only - Chat	QBOA Chat	QBOA Chat	QBOA Chat
Desktop & Online - Phone	>90 days: Accountant Support <90 days: QuickBooks Support	Accountant Support	VIP Accountant Support
Desktop & Online - Chat	Accountant Chat	Accountant Chat	Accountant Chat

***Online Only ProAdvisors must pay for desktop software support. Add-on Accountant support is available to both Online and Desktop ProAdvisors for \$199.**

Certification & Badges



When Does it Change?



December – Program Launch

- New Portal in ProAdvisor Member Website and within QuickBooks Online Accountant
- Optional Onboarding Video
- Go to portal to see if your membership level has changed!



**PROADVISOR
PORTAL**



**ONBOARDING
VIDEO**

ProAdvisor Portal



The screenshot displays the ProAdvisor Portal interface. At the top, the user is identified as a "Gold member" with a "5 clients" badge. The interface includes a navigation sidebar on the left with options for "Clients", "Team", "ProAdvisor", and "YOUR BOOKS". The main content area features a "Benefits of Certification" section with a "Take Exam" button for "QuickBooks Online". Below this, there is a list of "Optional Training Courses" with five items, each including a title, a link to an "Activity Handbook", and a credit value. On the right side, there are sections for "Basics of ProAdvisor Program" and "Basics of Certification", each with a video player and a "Watch the video" link.

ProAdvisor Gold member
Get all Silver benefits plus, with certification, unlock directory listing and many more benefits.

Ready to advance?
[Get certified](#)
[Watch the video](#)

SILVER | **GOLD** ✓ 5 clients | DIAMOND

Certification | Profile | Training | Discounts | Resources | Notifications 3

Benefits of Certification

Take optional training before each exam, or attend the [live webinar training](#). Once you're certified, get your certificate and badge, and join the Find-a-ProAdvisor directory!

QuickBooks Online [Take Exam](#)

Optional Training Courses

There are five optional online, self study Certification courses with corresponding Activities Handbooks designed for accounting professionals or consultants who have a solid understanding of accounting principles. These courses offer Continuing Professional Education (CPE) credits.

Course Title	Credits
1. Getting Started: Product Overview, Navigating and Setting up QuickBooks Online Activity Handbook	1.5 credits
2. Recording Transactions in QuickBooks Online Activity Handbook	1 credit
3. Reporting and Troubleshooting Common Client Errors Activity Handbook	2 credits
4. Expanding Usability of QuickBooks Online Activity Handbook	1 credit
5. The Accountant Tools: QuickBooks Online Accountant Activity Handbook	1 credit

Basics of ProAdvisor Program

[Read our FAQs](#) to learn more about the basics of the QuickBooks ProAdvisor Program.

Basics of Certification

Take optional training before taking each exam. Once you're certified, get your certificate and badge, and join the Find-a-ProAdvisor directory!

Why Get Certified? 00:01:24

Basics for Getting QuickBooks Certified [intuit](#)
By Michelle Long, CPA [Certified ProAdvisor](#)
QuickBooks

Benefits of certification

Take optional training before each exam, or attend [live webinar training](#). Once you're certified, get your certificate and badge, and join the Find-a-ProAdvisor directory!

▼ **QuickBooks Online**  **CERTIFIED**

[More info](#)

[Download badge](#)

Optional Training Courses

There are five optional online, self study Certification courses with corresponding Activities Handbooks designed for accounting professionals or consultants who have a solid understanding of accounting principles. These courses offer Continuing Professional Education (CPE) credits.

1. Getting Started: Product Overview, Navigating and Setting up QuickBooks Online 1.5 credits

[▶ Video](#) | [▶ Activity Handbook](#)
2. Recording Transactions in QuickBooks Online 1 credit

[▶ Video](#) | [▶ Activity Handbook](#)
3. Reporting and Troubleshooting Common Client Errors 2 credits

[▶ Video](#) | [▶ Activity Handbook](#)
4. Expanding Usability of QuickBooks Online 1 credit

[▶ Video](#) | [▶ Activity Handbook](#)
5. The Accountant Tools: QuickBooks Online Accountant 1 credit

[▶ Video](#) | [▶ Activity Handbook](#)

▶ **QuickBooks Online Advanced**

[Take Exam](#)

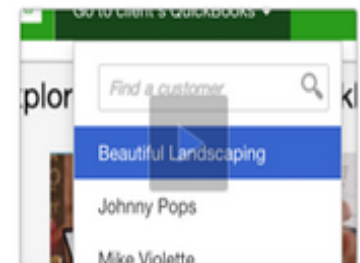
The basics and more

Explore training options to reach the next level, [or read our FAQs](#) to learn more about the benefits of certification.



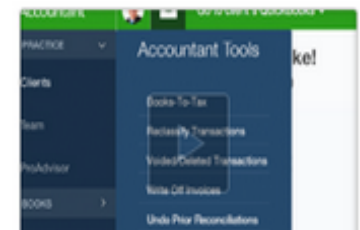
Why Get Certified?

1:24



Certification Basics

1:05





Get listed on the Find-a-ProAdvisor website

Increase your exposure to small businesses and generate new leads and referrals.

Public



[Preview Profile](#)

About you



Brenda Bowdon

Brenda's Accounting



Contact info

Company address

4581 Finch Street
Bayshore, CA 94326



Email

brenda@example.com

Phone

415-555-1212

Mobile

415-555-1212

Website

Improve your ranking

Get noticed in [Find-a-ProAdvisor](#) with a few quick tips.

Get advanced certification Boost your ranking points and grow your practice.

Add a profile photo Increase ranking points and put a face to your name.

Get reviews Encourage satisfied clients to rate and review you.

Read the full article

[8 Ways to Improve Your Find-a-ProAdvisor® Ranking](#)

Find-a-ProAdvisor



Brenda Bowdon

Brenda's Accounting

Location: Palo Alto, CA 94032

Distance: 3.91 miles

Phone: (650) 555-2361

Email: brenda@example.com

About

A full service practitioner lorem ipsum dolor ivamus iaculus dolor sit amet, consectetur adipiscing elit. Donec in est imperdiet orci

Qualifications



Since 2014



Since 2014



2014



Certification

Profile

Training


Discounts

Resources

Notifications **2**


Discounts for you

See below to get what you need at discounted prices. Or check out [Intuit-approved apps](#) to handle time and expense tracking, billing, and more.



QuickBooks Self-Employed
Intuit, Inc.

Year-round tax-time relief for you and your Schedule C clients.



QuickBooks Payments
Intuit, Inc.

Get paid in more ways, faster. Special ProAdvisor rates.



Intuit Tax Online
Intuit, Inc.

Get seven free tax returns.



QuickBooks Licenses
Intuit, Inc.

License your business quickly and easily with step-by-step guidance.

Discounts for your clients

Purchase discounted products and services for your clients.



QuickBooks training

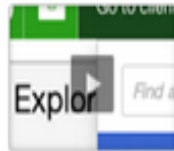
Hone your QuickBooks skills and boost your expertise with courses from the Intuit Academy.

▼ About QuickBooks Online (3)



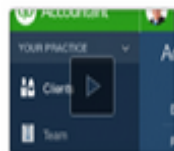
[Transitioning to an online practice utilizing QuickBooks Online](#) (1:07:00)

[Course Material](#)



[An introduction to the new user interface and design](#) (1:05:00)

[Course Material](#)



[Determining which QuickBooks Online is right for my clients](#) (1:07:00)

[Course Material](#)

▶ Getting started with QuickBooks Online (8)

▶ QuickBooks Online Basics (12)

▶ QuickBooks Online Advanced (6)



Certification

Profile

Training

Discounts

Resources

Notifications **2**

Resources

Get access to resources to add more clients, expand your list of services, and gain greater control over your business.

▼ Growing your practice (6)

[Value Pricing: Transforming Your Business \(5:00\)](#)

▶ Video

[9 Creative Ways to Recruit and Retain Clients \(1:07:00\)](#)

▶ Webinar

[11 steps to moving your practice online, by Stacy Killdal](#)

📄 PDF

[Sample Engagement Letters](#)

📄 PDF

[HR and employee management advice mobile app for your clients](#)

📄 PDF

▶ Moving your clients online (4)



Notifications

June 2015



Enhancements to your Account Management page

June 13, 2015

With our new simplified navigation, you can now easily view your payment methods, products, order history, billing activity, contacts and addresses in fewer clicks.

We've also introduced new functionality like the ability to create account nicknames in order to help you identify accounts faster. More enhancements are on the way.

New QuickBooks Online Certification Coming Soon

June 13, 2015

The new version of QuickBooks Online Certification will be available in early November, and it will replace the current version of the certification exam and training. QuickBooks Online Certifications will continue to be valid for 366 days from the date of exam completion. Learn more about the QuickBooks Online Certification validity, expiration and renewal policy [here](#).

If you started the current version of the QuickBooks Online certification exam and are in progress, you will have in early November to complete this exam and earn the "QuickBooks Online Certified" status. [Click here](#) to learn more about the benefits of the new QuickBooks Online Certification.

Things to Know



- ProAdvisors will no longer receive version protection emails
- A single Software Available alert will notify existing ProAdvisors when new software is available
- ProAdvisors will no longer receive a Membership Kit
- The regular new and renewal price for the ProAdvisor Program with Desktop Software is \$549
- The PAP price for Enhanced Payroll for Accountants is \$250
- All ProAdvisors (w/Desktop) regardless of tier receive a 30% discount on select desktop software*
- The extra 5% discount for ES & POS certified ProAdvisors has been discontinued

***POS Hardware & QBES Software not included, other exceptions may apply.**





Q & A

**Don't forget to stick around and
enter the CPE Keyword!**

Summary



You should now be able to utilize:

- The new Client Dashboard feature to access client books and understand firm roles.
- The new Accountant Toolbox feature to write off Invoices, undo prior reconciliations and reconcile client's books.
- The "books to tax" feature to start a client tax return in one-click.
- The newly enhanced ProAdvisor Program including navigating through QuickBooks Online Accountant and accessing member benefits
- The benefits of the ProAdvisor Program to advance from one level to the next.
- The wholesale pricing model to grow your practice and better serve your clients.

Time to Enter the CPE Keyword



**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

Gmail users - check your SPAM/Junk folder