FAQ: QuickBooks Self-Employed Integration with QuickBooks Online Accountant

1) What is QuickBooks Self-Employed, and what are the benefits of using it?

QuickBooks Self-Employed was built specifically for Schedule C tax clients, so they can stay organized and on top of their business finances all year long. It offers key features such as automatic mileage tracking, receipt capture, and expense categorization. You can refer your Schedule C tax clients to QuickBooks Self-Employed via our web site: https://quickbooks.intuit.com/accountants/self-employed/

Benefits for accountants
- Integration with QuickBooks Online Accountant
- Accountant toolbox and best practice guide
- One-click export of an editable Excel tax details report
- Save time when clients come to you with more organized data
- Help clients keep more of what they earn with greater visibility into their transactions and a comprehensive, accurate mileage log

Benefits for clients
- Separate business from personal spending with a swipe
- Automatic mileage tracking
- Easy receipt capture on the mobile app
- Set money aside for worry-free taxes with up-to-date quarterly tax estimate projections
- Create and send invoices quickly on-the-go, and get paid faster by enabling online payments
- At-a-glance cash flow visibility with business spending trends and up-to-date profit and loss details
- Set rules to put expense tracking and Schedule C categorization on autopilot
- Work anytime, anywhere with the mobile app
- Transactions downloaded straight from your bank, PayPal, Etsy or credit card accounts
- Reports – mileage log, P&L statement, transaction log, annual tax summary and detailed tax excel report

2) What is the new QuickBooks Self-Employed integration with QuickBooks Online Accountant? What are some of the benefits?

The new integration gives you the ability to work with your QuickBooks Self-Employed clients within QuickBooks Online Accountant, just like you can with your QuickBooks Online clients, making it easier for you to stay up-to-date on your client's cash flow, business spending and tax obligations. Being able to collaborate directly with your clients means access to their data anytime, anywhere. With this easy access to your client's data, you can help advise them and file their taxes without the hassle of sending files back and forth. We know how critical you are to your clients' success and that it's important to build a solution that fits seamlessly into your current workflow processes.

QuickBooks Self-Employed is the tool that helps Schedule C tax clients come to you with clean and organized data, so you can make an even bigger difference in your clients' lives, all while growing your practice and saving significant time when it matters the most.

3) How can I access my client's QuickBooks Self-Employed data via my QuickBooks Online Accountant account?

At this point, in order to connect with your QuickBooks Self-Employed clients via QuickBooks Online Accountant, your client must invite you as his/her accountant user. Instructions on how he/she can invite you below.

Invite an accountant

1. From the gear menu, select **Accountant**.

   Note: QuickBooks Self-Employed clients can also access the accountant invite screen from the quarterly taxes tab (upper right hand corner) and the home tab (card).
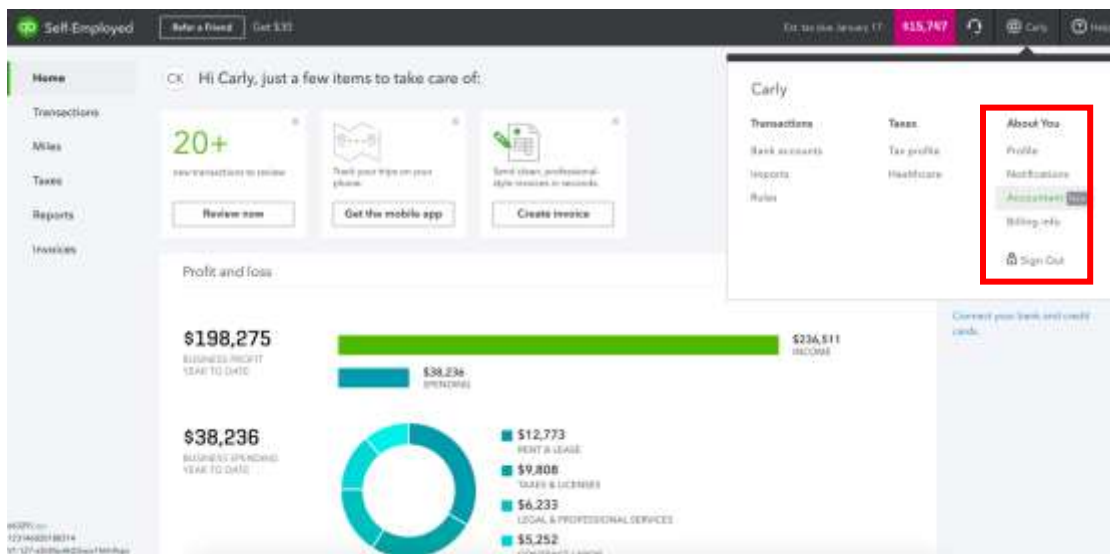
2. In the *Invite your accountant* field, enter the accountant's email address. Click **Send invite.**
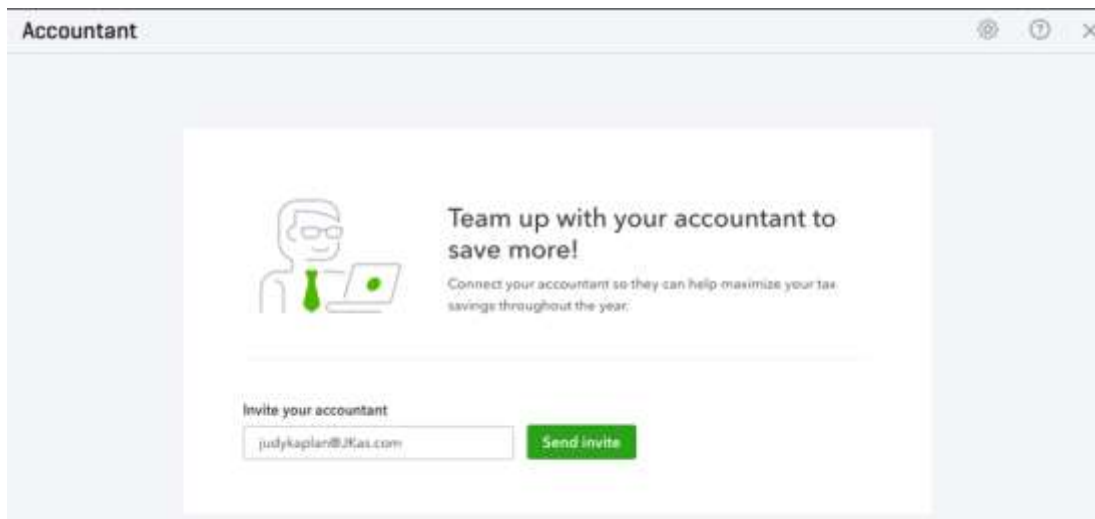
3. Once you see a confirmation display "Your accountant was invited", click **Done**.
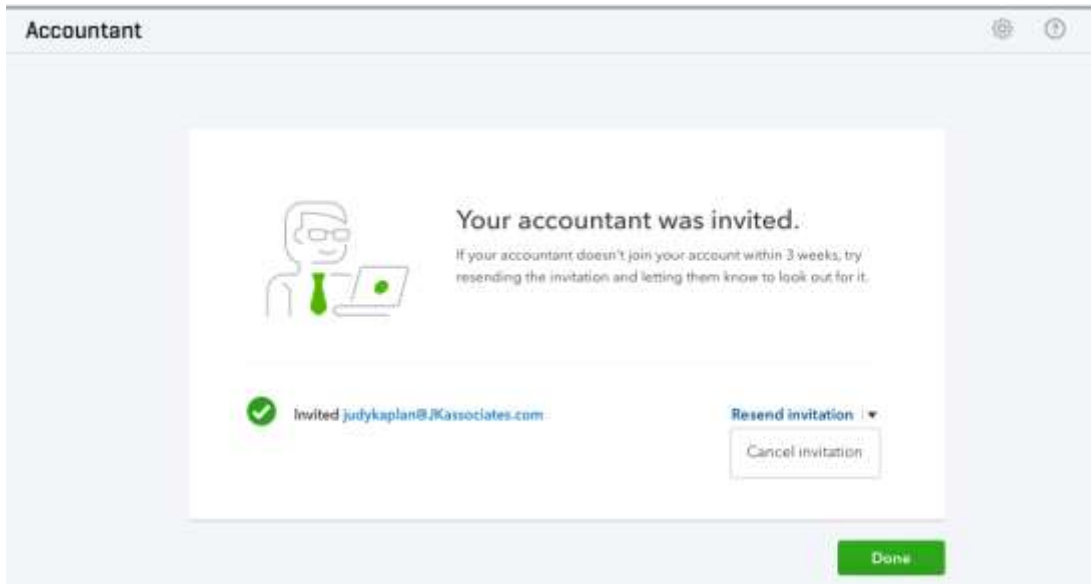
4) **Once my client invites me to his/her QuickBooks Self-Employed account, how can I access his/her data?**

There are 2 ways to access your client's QuickBooks Self-Employed data in QuickBooks Online Accountant.

Access a client data via the Accountant Client Chooser

1. Click the **Go to client's QuickBooks** drop-down, located in the top-left side of the screen.

   Note: If you are already working in another client's QuickBooks account, this dropdown will display the name of the client whose books you are in. You can still click the dropdown and navigate to your self-employed client accounts in this scenario.

2. Select a client data to access.
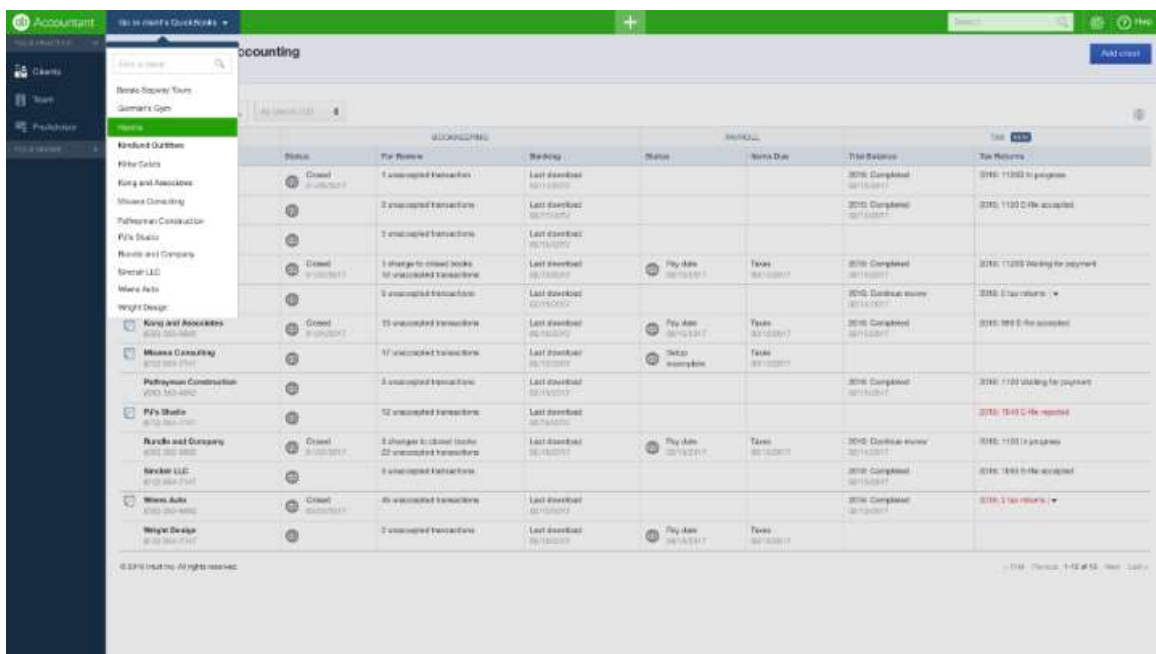
Note: All QuickBooks Online client companies will open within the QuickBooks Online Accountant interface, except for QuickBooks Self-Employed clients, as they will open in a new browser tab/window.

Access a client data from the QuickBooks Online Accountant Client List

1. From the *Navigator* menu, select **Your Practice > Clients**.
2. Within the Bookkeeping *Status* column, click the QuickBooks icon that corresponds with the client or company file you are looking to open.

Note: All QuickBooks Online client companies will open within the same tab in your browser, except for QuickBooks Self-Employed clients, which will open in a new tab or window.

5) Is wholesale billing available for QuickBooks Self-Employed?

At this point, we do not offer wholesale billing for QuickBooks Self-Employed, though this feature will be coming soon. In the meantime, it is easy to refer your clients with the best discount on the market: 60% off for the first 12 months ($4/month) via this link: https://quickbooks.intuit.com/accountants/self-employed/#pricing

6) Is there anything else I need to know?

Yes! With this new integration, we are excited to introduce an Accountant Toolbox, which makes it easier for you to get straight into your client's data, review important documents, and learn more about how you can set your clients up for success in QuickBooks Self-Employed.

7) Will I now have access to the Accountant Toolbox for my QuickBooks Self-Employed clients?

With this new integration, accountants can now access the Accountant Toolbox for QuickBooks Self-Employed clients.

Accessing the Accountant Toolbox

Click the **toolbox** icon, located in left portion of the QuickBooks Self-Employed title bar.