



QuickBooks Self-Employed Integration with QuickBooks Online Accountant FAQs

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.

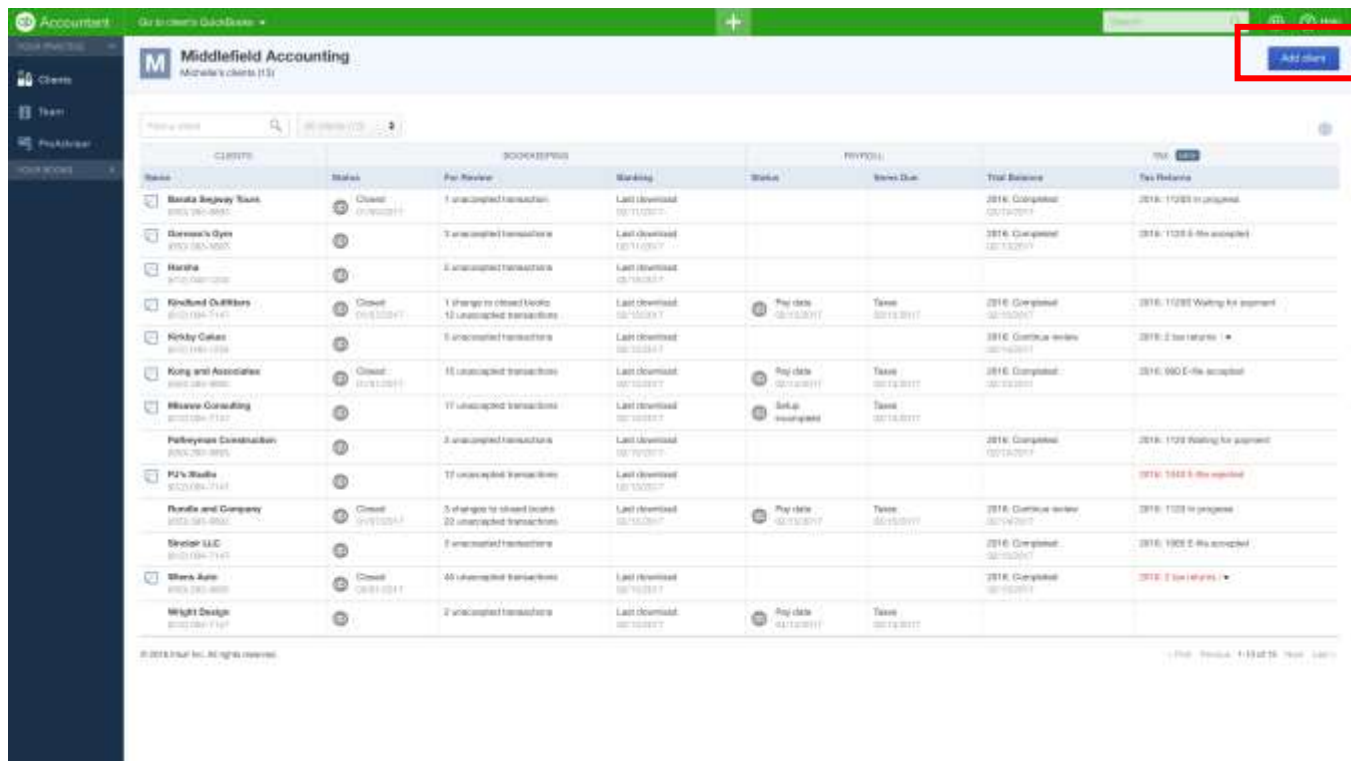
QuickBooks Self-Employed is the tool that helps Schedule C tax clients come to you with clean and organized data, so you can make an even bigger difference in your clients' lives, all while growing your practice and saving significant time when it matters the most.

3) How can I add my QuickBooks Self-Employed client via my QuickBooks Online Accountant account?

As an accountant, you can now add your QuickBooks Self-Employed clients via QuickBooks Online Accountant's "Add Client" flow. Instructions on how you can add your clients are below.

Accountant: Add your QuickBooks Self-Employed client:

1. Log into your QuickBooks Online Accountant account. At the top right corner, click on **Add Client**.



2. Enter in your client's information and select **QuickBooks Self-Employed** subscription under Direct Discount. Click **Save**. Your newly added client's information will now show up on the QuickBooks Online Accountant Client List.

Add client

Client contact information

Business Individual

Business name *
Harsha Lyft Driver

Email *
harshajagadish.lyft@gmail.com

Display name as
Harsha Lyft Driver

Mobile

+ Add more info

QuickBooks subscription [Compare](#)

Wholesale discount (firm is billed) Direct discount (client is billed)

Self-Employed \$10/mo after 12 months \$4/mo	
With QuickBooks Self-Employed, only your client can be Master Admin.	
Essentials \$30/mo after 12 months \$21/mo	
Plus \$40/mo after 12 months \$28/mo	
TOTAL	\$4/mo

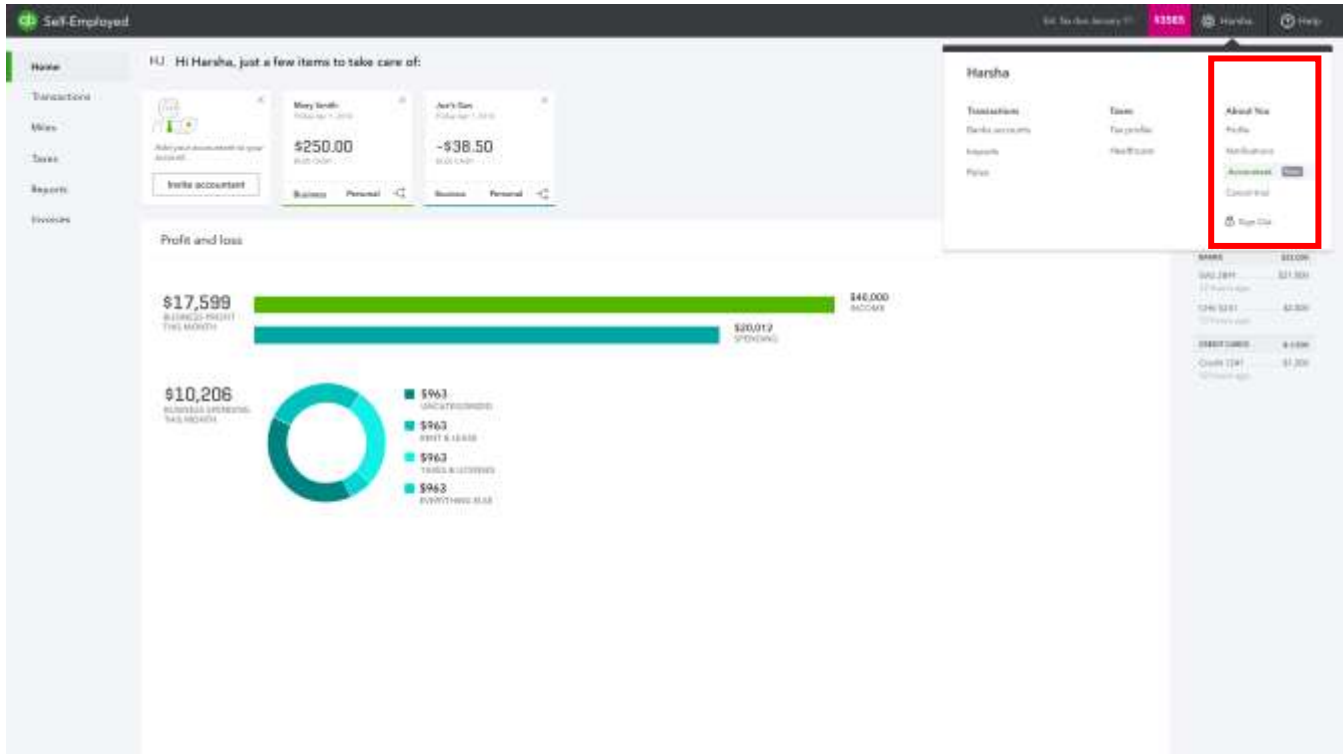
Save

In addition, your QuickBooks Self-Employed client can invite you to access his/her data by following the instructions below.

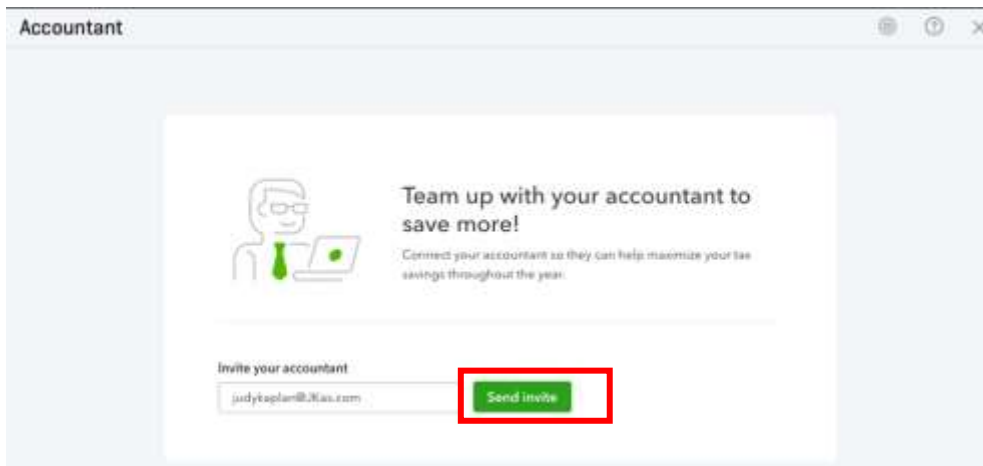
Client: Invite an accountant to access QuickBooks Self-Employed data:

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

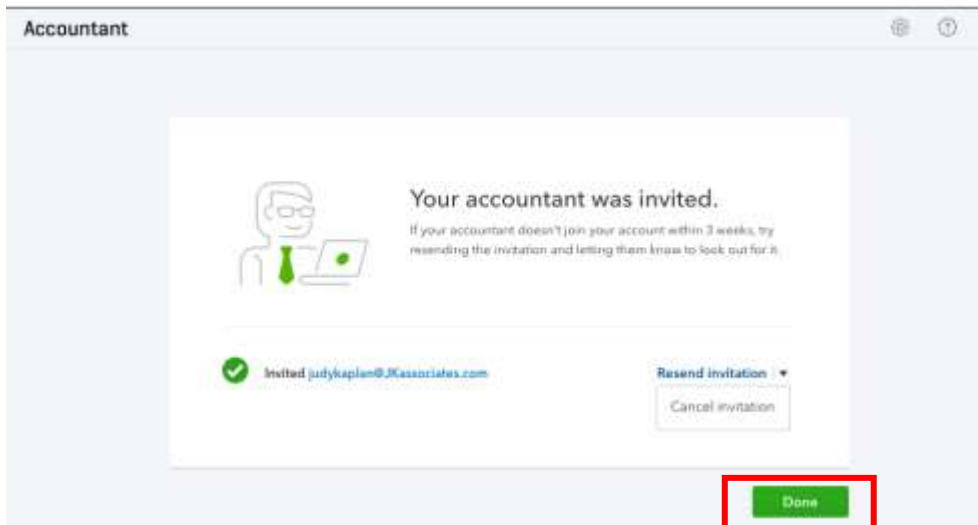
Note: QuickBooks Self-Employed clients can also access the accountant invite screen from the quarterly taxes tab (upper right hand corner) and the home tab (card).



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 I add my QuickBooks Self-Employed client via QuickBooks Online Accountant, how can I access his/her data?

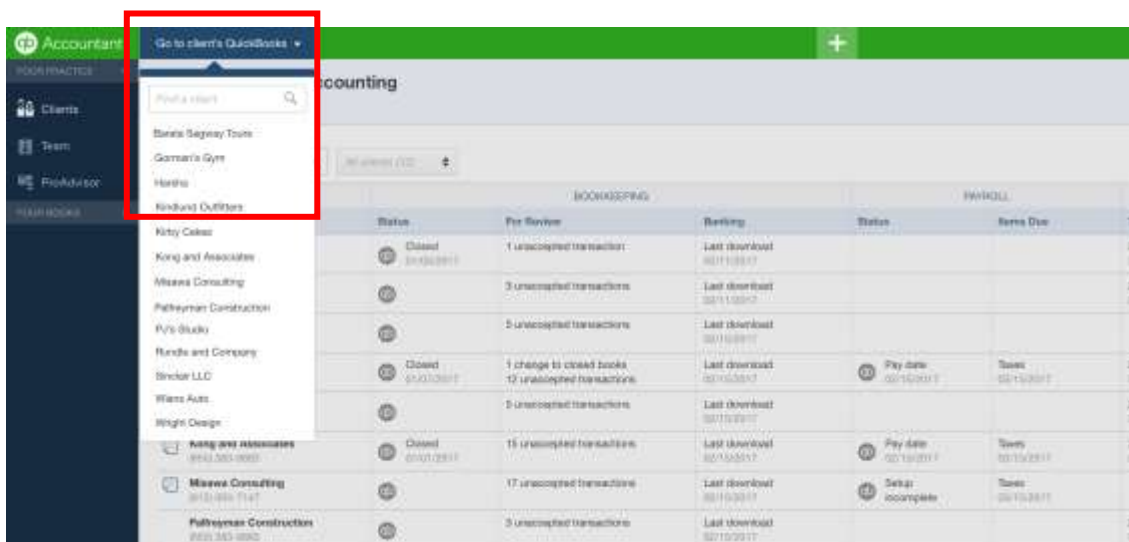
There are 2 ways to access your client’s QuickBooks Self-Employed data in QuickBooks Online Accountant.

Access a client’s 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.

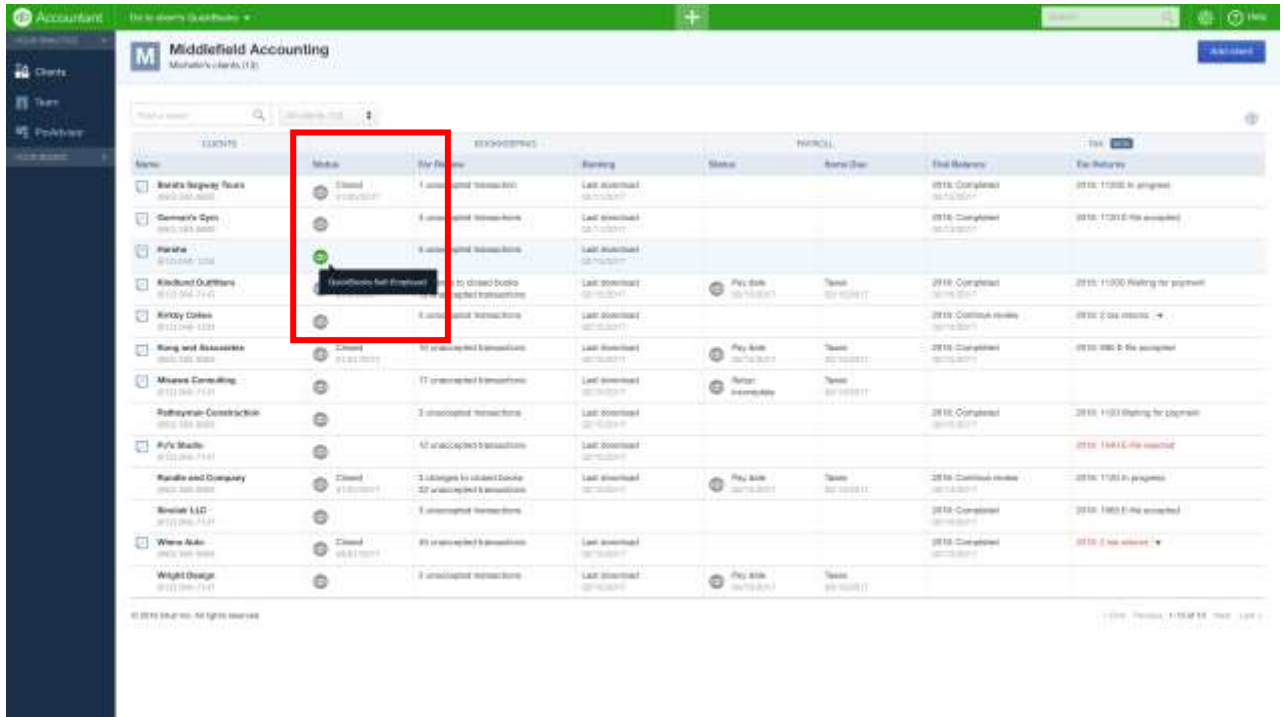
2. Select a client data to access.



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's data from the QuickBooks Online Accountant Client List:

1. From the left sidebar menu, select **Your Practice > Clients**.
2. Within your Client List, you will now see your QuickBooks Self-Employed clients listed among your QuickBooks Online clients. To determine which version of QuickBooks your client is using, you can hover over the gray QB ball in the status column.



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?

Currently, we do not offer wholesale billing for QuickBooks Self-Employed, but this feature will be coming soon in 2017. To add QuickBooks Self-Employed clients, please log into your QuickBooks Online Accountant account and use the **Add Client** flow (as outlined under Question #3).

6) Is there anything else I need to know?

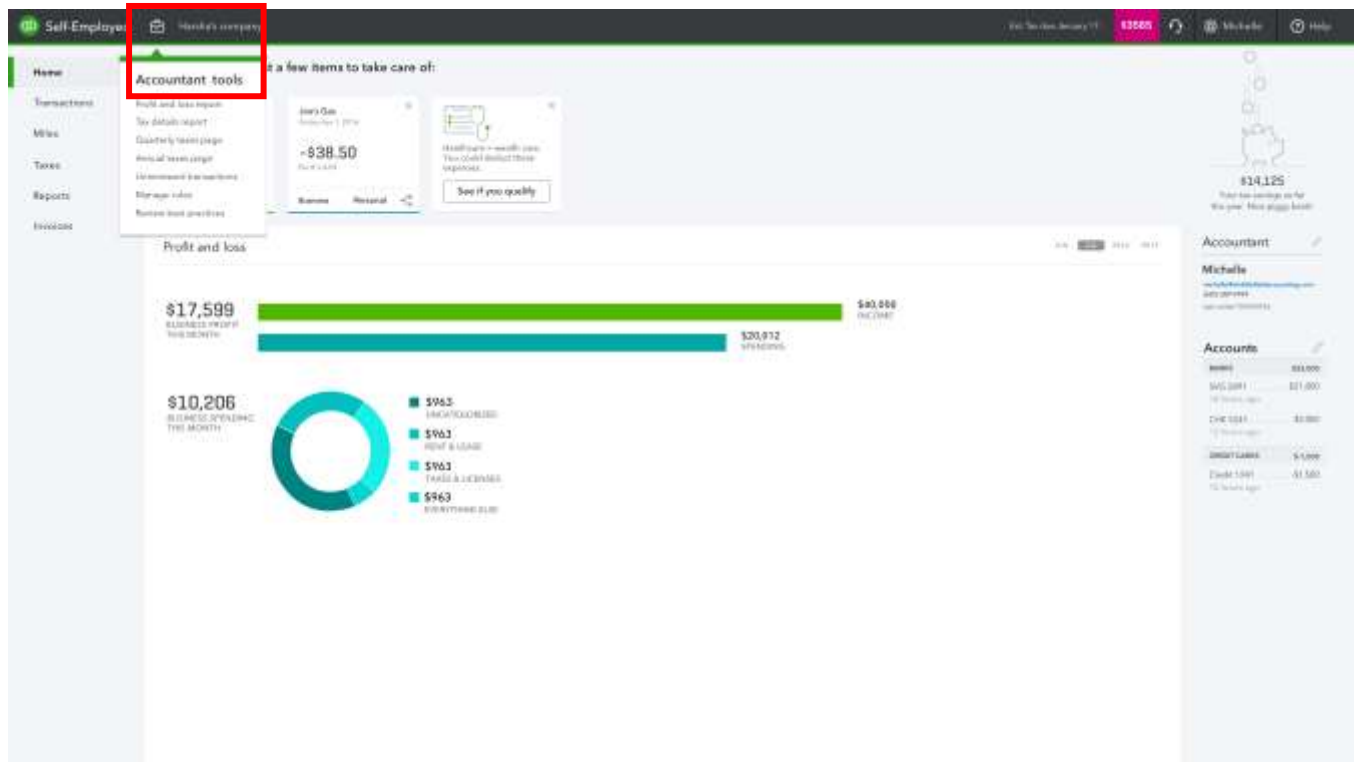
Yes! With this new integration, we are excited to introduce an Accountant Toolbox, which makes it easier for you to get straight into your client's data, review important documents, and learn more about how you can set your clients up for success in QuickBooks Self-Employed.

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.



The screenshot displays the QuickBooks Self-Employed dashboard. At the top, the navigation bar includes the 'Self-Employed' logo, a user profile icon for 'Michelle's company', and a balance of '\$3860'. A red box highlights the 'Accountant tools' icon in the top navigation bar. Below the navigation bar, the dashboard shows a 'Profit and loss' report with a bar chart comparing 'BUSINESS PROFIT THIS MONTH' (\$17,599) to 'INCOME' (\$80,888). A donut chart shows 'BUSINESS SPENDING THIS MONTH' (\$10,206) broken down into categories: UNPAID TOUGH (\$963), RENT & USAGE (\$963), TRAVEL & JOHNSON (\$963), and EVERYTHING ELSE (\$963). The right sidebar shows the 'Accountant' section for 'Michelle' and a list of 'Accounts'.