QUICKBOOKS ACCOUNTANT

Welcome Guide

Welcome to QuickBooks Accountant

We remade QuickBooks Accountant, inspired by input from you, our users.

This guide gives you a roadmap to the changes we've made. Let's get started.

Contents

NAVIGATING

Get around in QuickBooks Accountant

Let's start with some QuickBooks Accountant navigation tools:

1 Navigation bar

Get to your Client List, your firm's books, and more.

2 Client QuickBooks menu

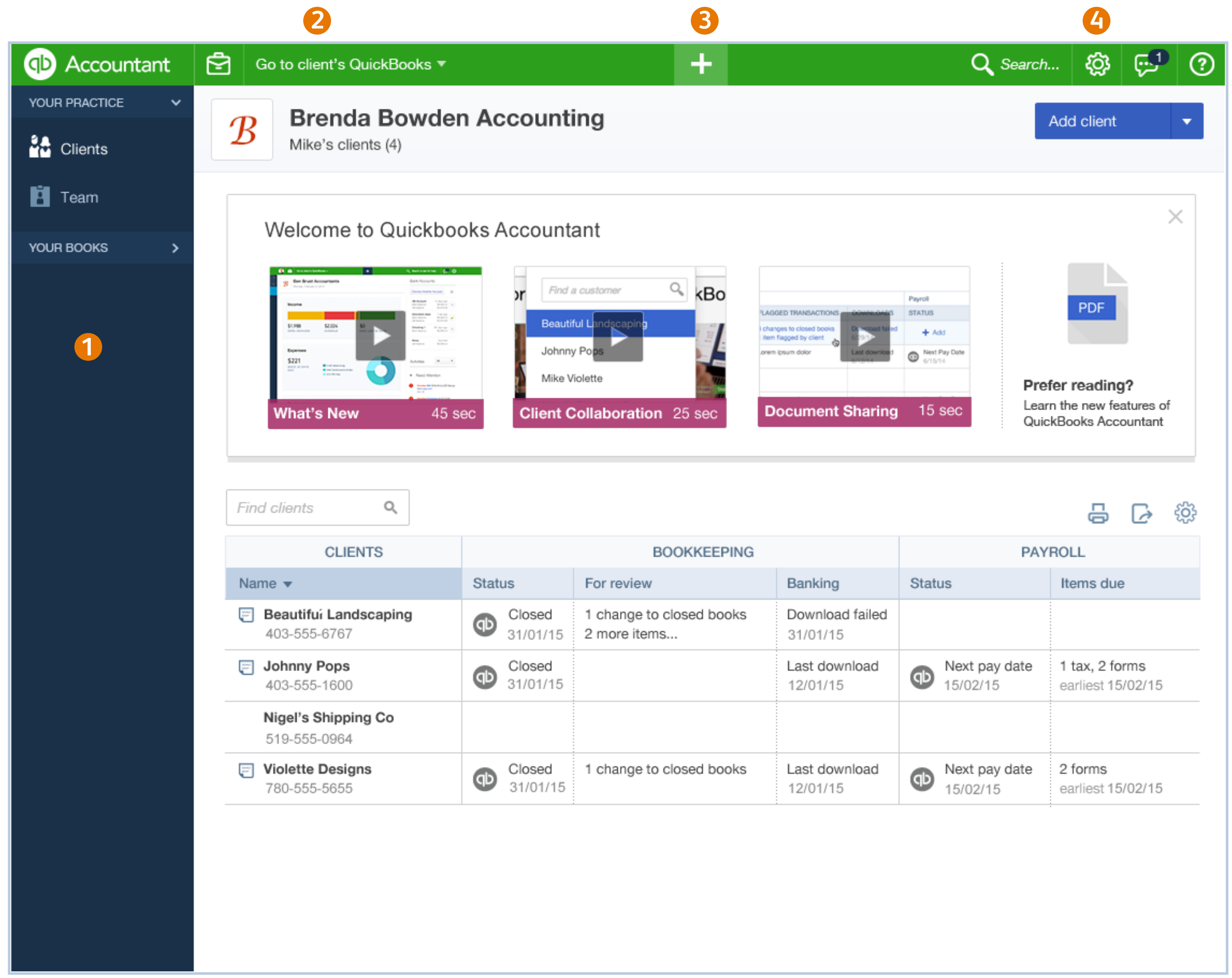
Choose a client to go right into their QuickBooks account.

3 Create (+) icon

Create a new client, new QuickBooks Accountant user, or a new request.

4 Green Gear icon

Get to Settings, Lists, Tools and Your Company menus–lots to do and explore here!

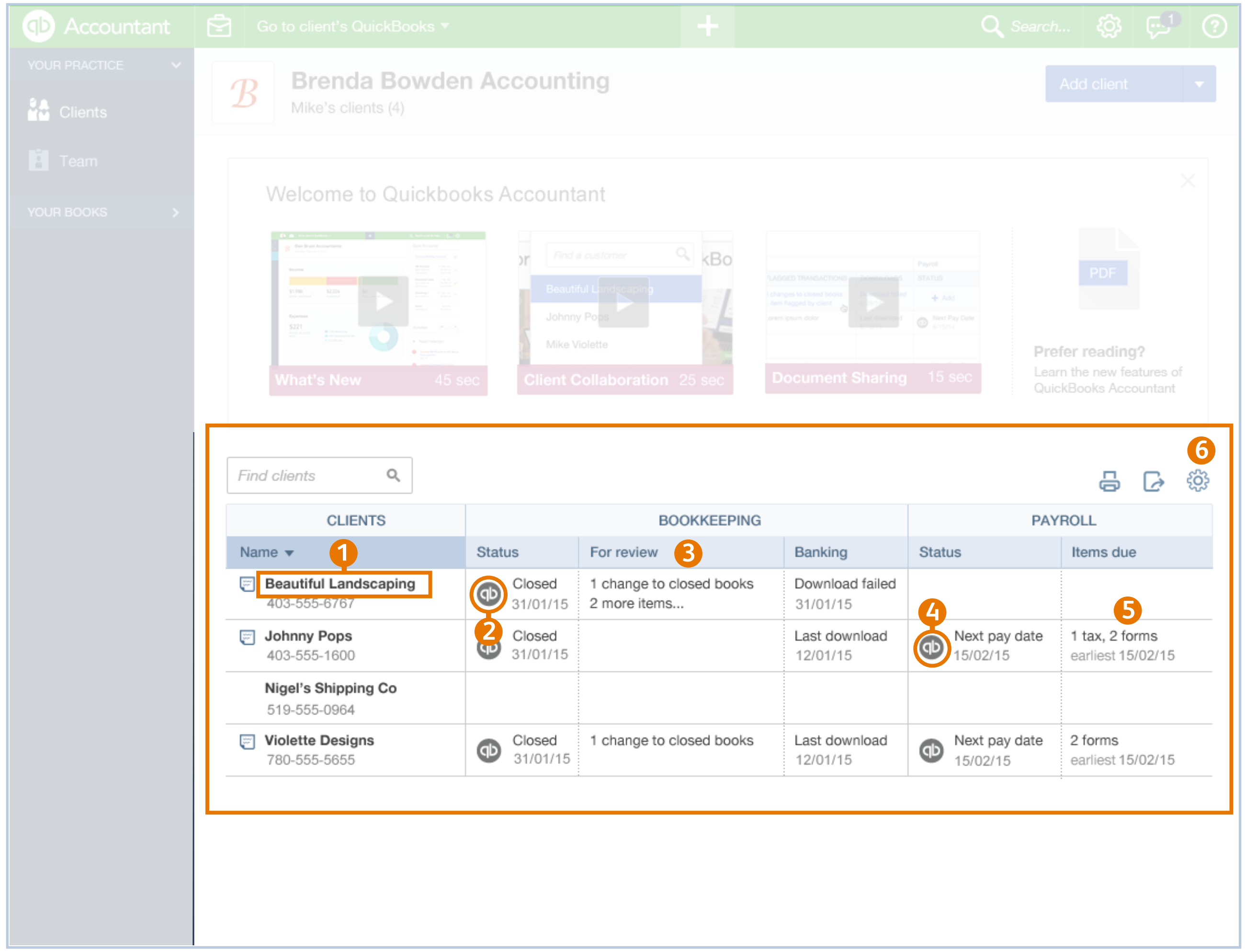


NAVIGATING

The client dashboard

The client dashboard is the jumping-off point for many tasks you do for your clients. You can see important things coming up in your clients' books, payroll, and taxes in the client dashboard.

1. Click to get details about a client.
2. Click to go to client's books.
3. See bookkeeping activities.
4. Click to go to client's payroll.
5. See payroll activities.
6. Customize your client dashboard.



QUICK TIP

From the gray gear icon (number 6), you can add a Tax column to your client dashboard, remove Payroll, and make other changes to optimize the client dashboard for your practice.

WORKING WITH CLIENTS

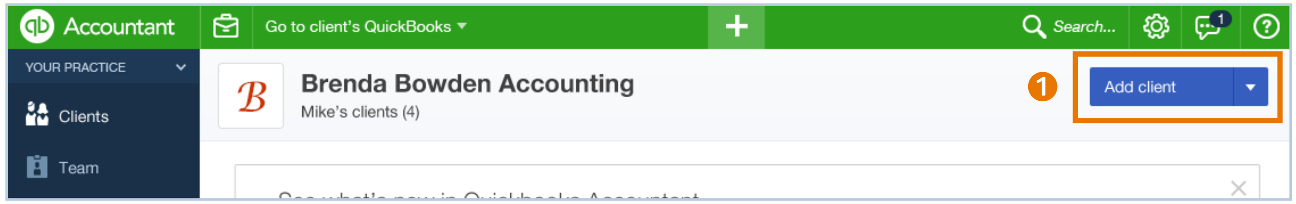
Add clients

Here's how you add all your clients to QuickBooks Accountant:

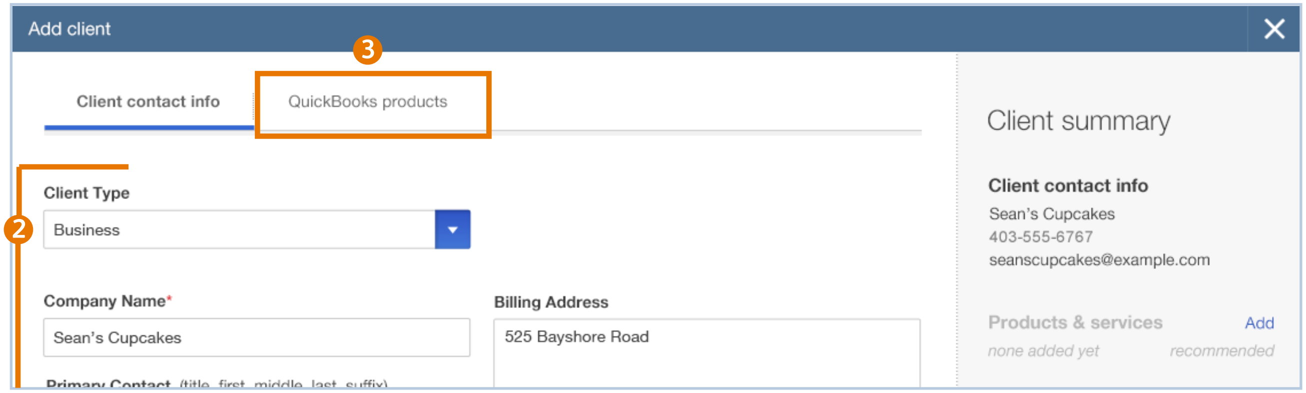
1. Click the big blue Add Client button.
2. Fill out this client's contact info. If this client doesn't use QuickBooks Online, click Save. You're done.
3. Choose a QuickBooks product (with or without Payroll) to subscribe this client to. (Optional)
4. Choose Wholesale (you get billed) or Retail (client gets billed) billing.
5. Choose the Master Admin for this client's QuickBooks Online account.
6. Click Save.

QUICK TIP

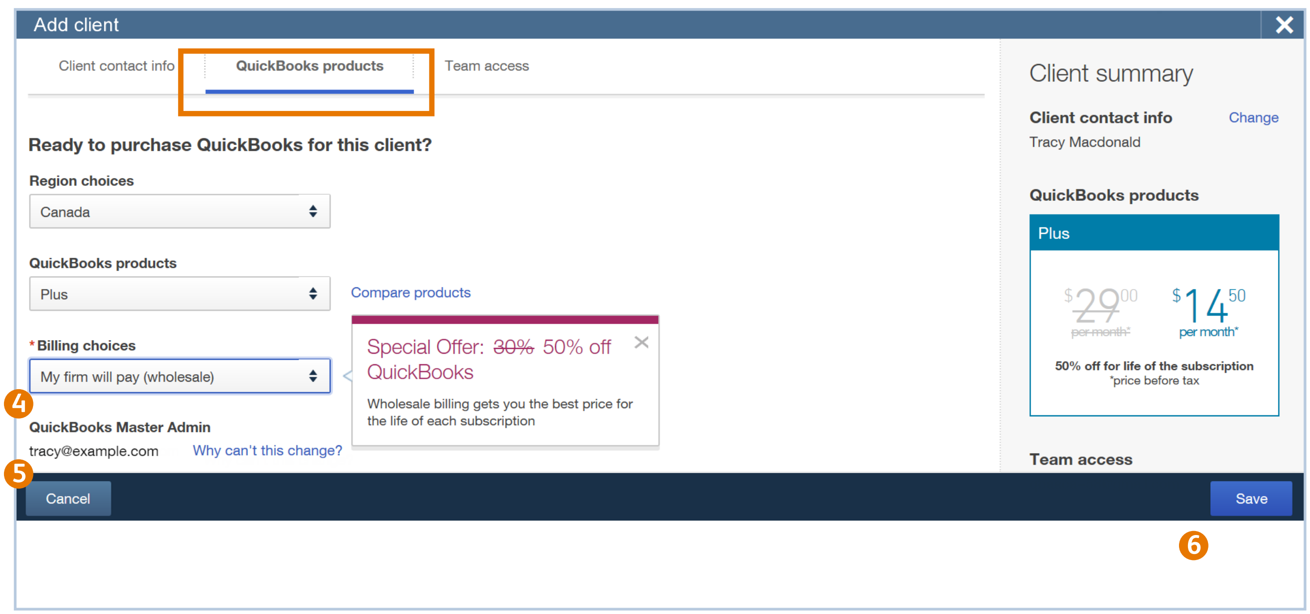
Wholesale billing lets you both make a profit and pass on a never-expiring discount to your clients for QuickBooks Online with or without Payroll.



QB ACCOUNTANT HOME > ADD CLIENT BUTTON



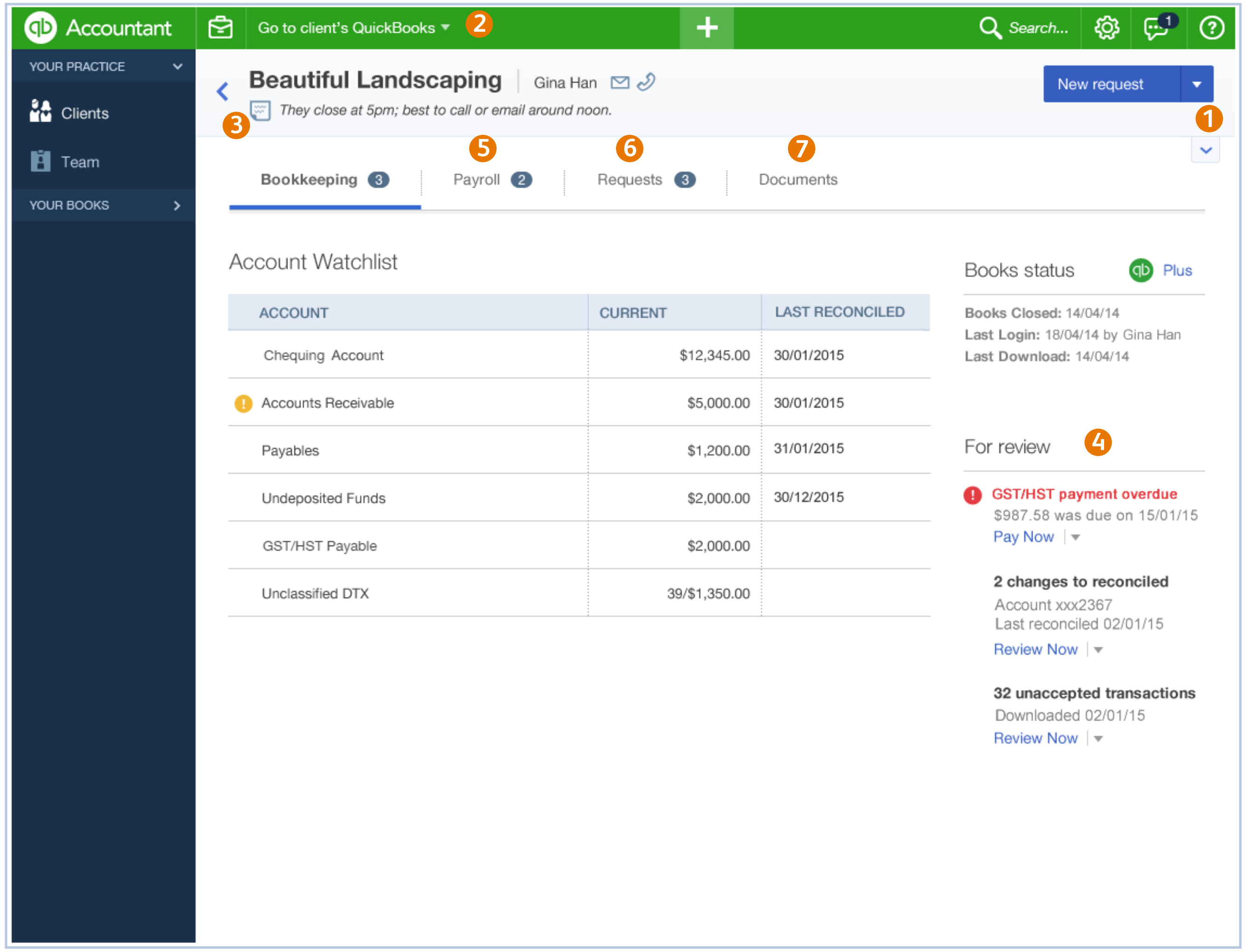
ADD CLIENT > FILL OUT CLIENT INFO > CHOOSE QUICKBOOKS PRODUCT



ADD CLIENT > QUICKBOOKS ONLINE PRODUCTS > CHOOSE BILLING OPTION

Dig into client details

Click the name of any client in the client dashboard to see lots of information about that client.



There's lots to see and do on this page:

1. See this client's contact info.
2. Go straight to the right place in this client's QuickBooks to do this task.
3. Make or change notes about your client.
4. See accounts that need review.
5. See payroll tax payments and recent forms filed.
6. Check recent requests for documents.
7. Store shared and private documents inside QuickBooks Accountant.

Work in client books

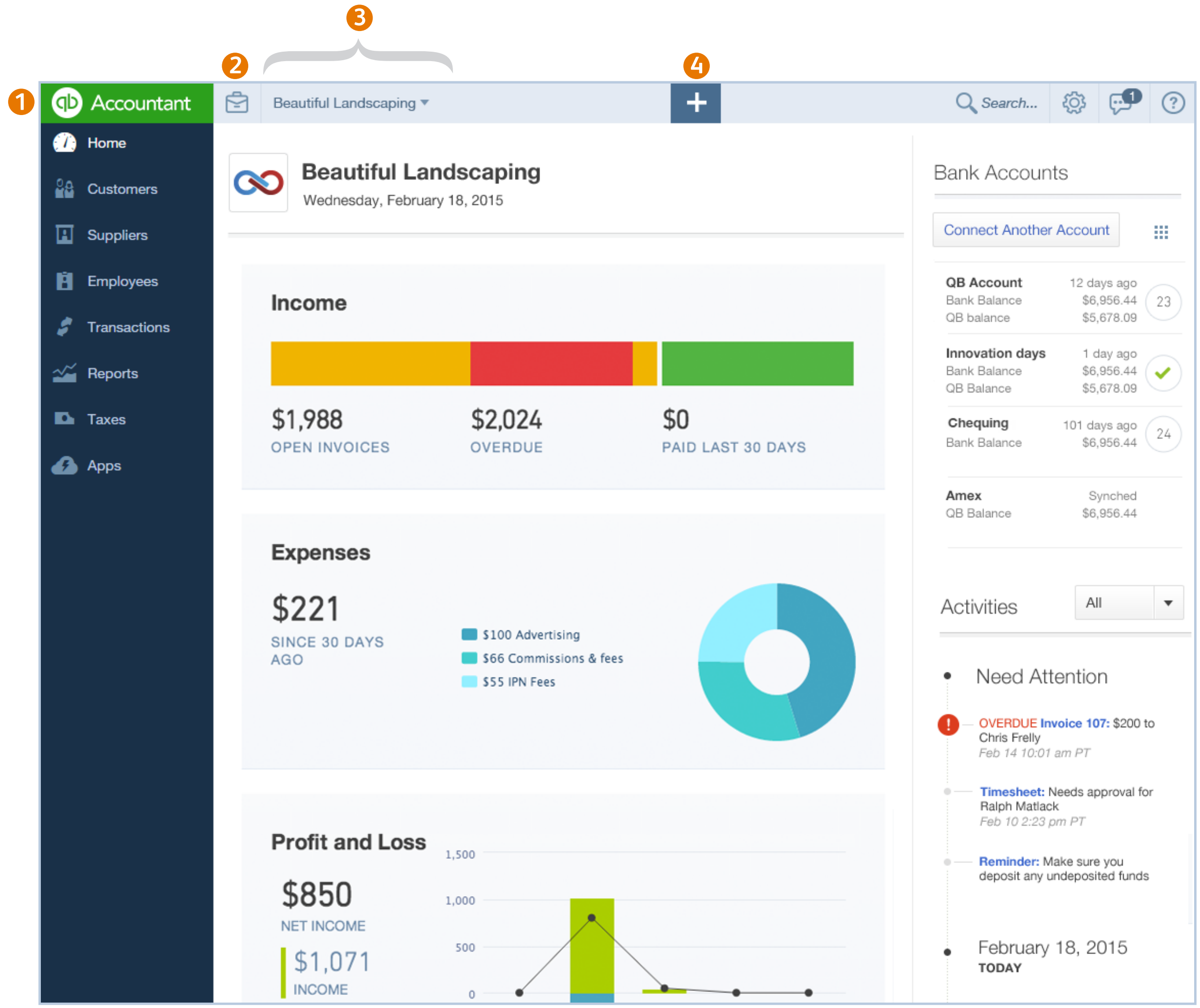
Let's start with some QuickBooks Accountant navigation tools:

1. Return to QuickBooks Accountant home.

2. Open the Accountant toolbox to access some of your most commonly used tools.

3. Choose a different client to go directly to their books.

4. Create new items in your client's books.



Work on a client’s payroll

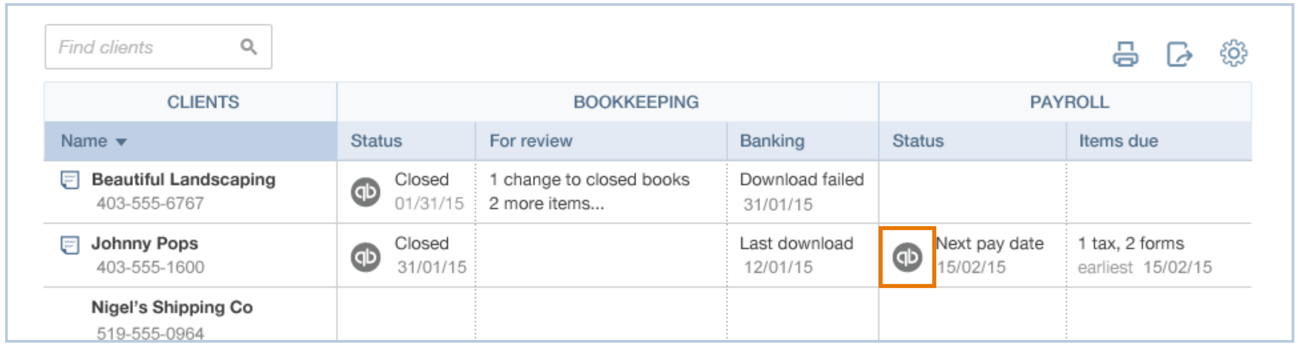
From the client dashboard, you can see a client’s last paycheque date and the next payroll item coming due.

Client QuickBooks Payroll

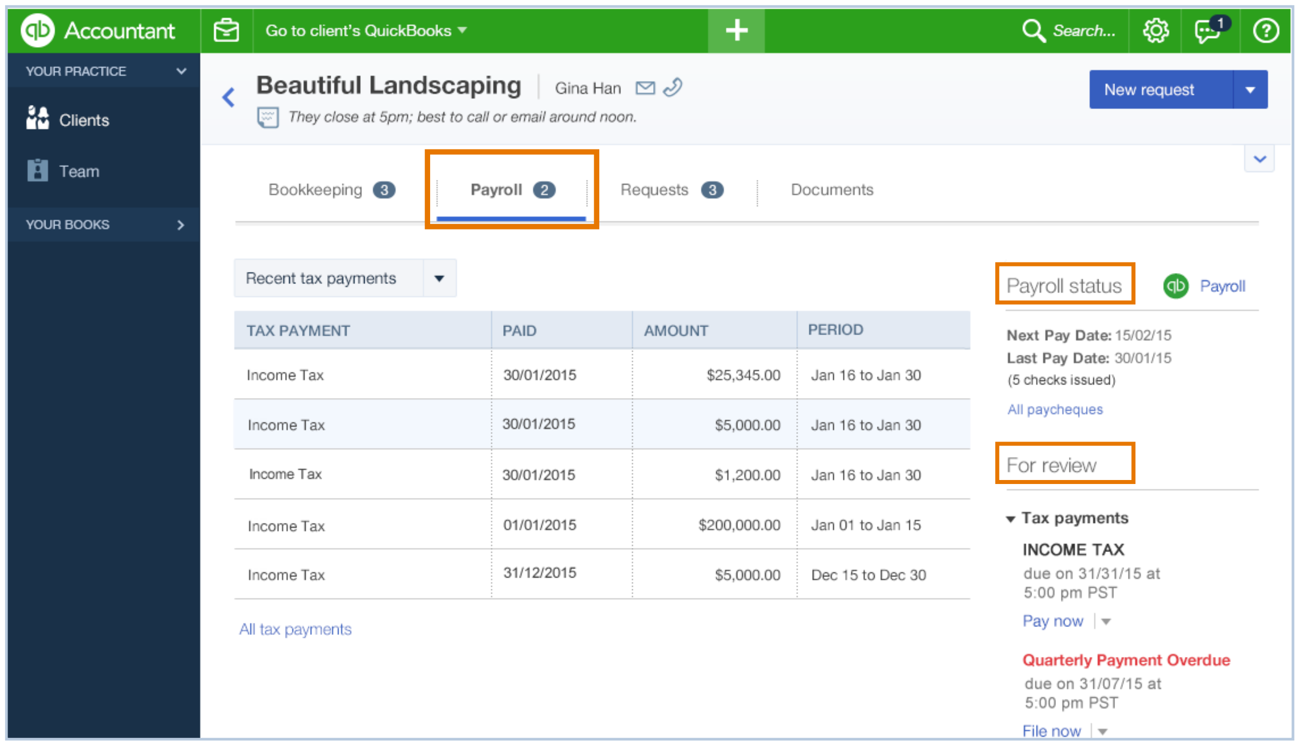
Click the QB icon to drill into a client’s QuickBooks Payroll account. To get to a client’s Payroll details, click that client’s name in the dashboard. Then click the Payroll tab.

Payroll Details

On the Payroll details tab, you can see recent payroll tax payments and form filings.



ACCOUNTANT HOME PAGE > CLIENT DASHBOARD > PAYROLL STATUS



CLIENT DASHBOARD > PAYROLL TAB

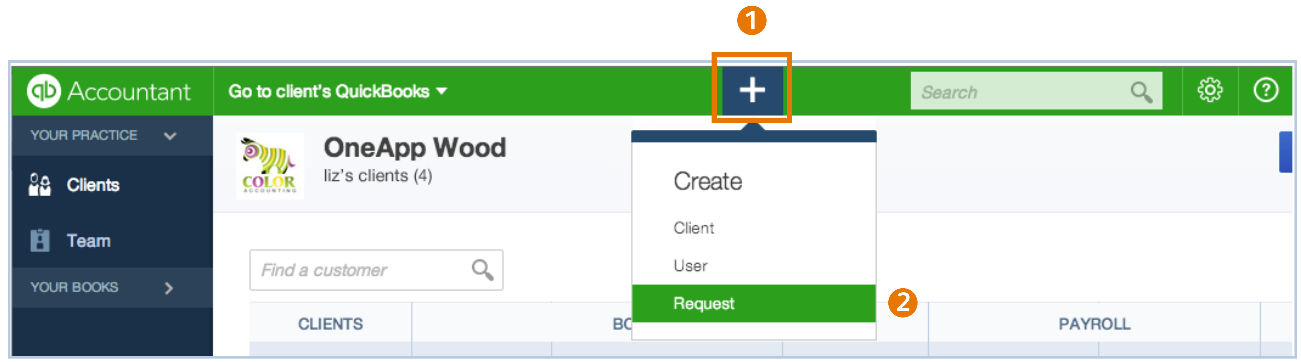
Request documents

You can request and share documents with your clients right inside of QuickBooks Accountant.

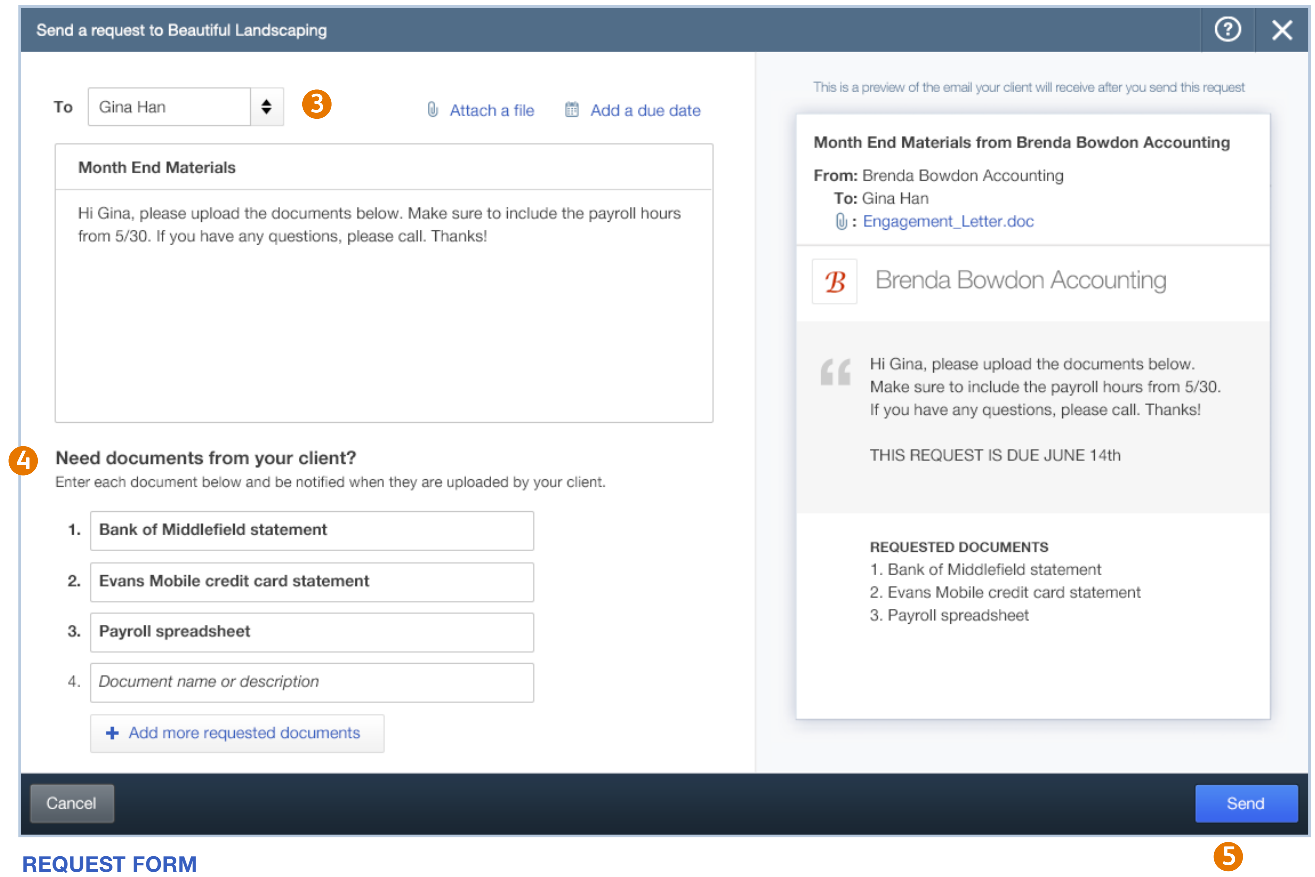
Note: The Master Admin for your QuickBooks Accountant account must set up a Box account before you can request or receive documents.

Here's how you request documents:

1. Click the Create (+) icon.
2. Choose Request.
3. Choose the client to request a document from.
4. Fill out the form. Choose a due date.
5. Send your request. Your client gets the email you can see on the right side of the Request window.



ACCOUNTANT HOME PAGE > CREATE (+) ICON



REQUEST FORM

QUICK TIP

You can request up to 10 documents at once.

Track a document request

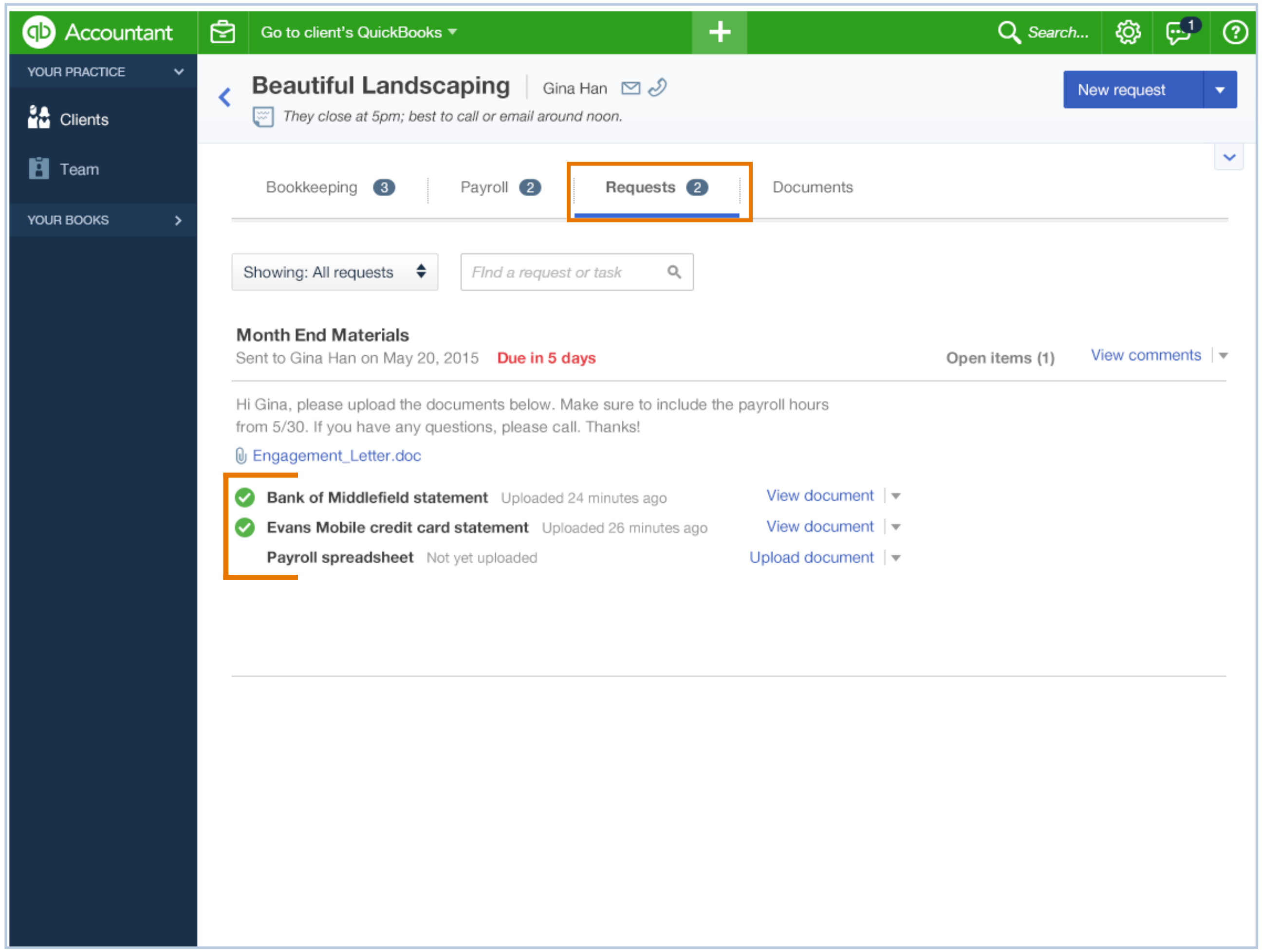
When your client sends you back the document you requested, you'll get notified in QuickBooks Accountant.

Here's how you access that document:

1. In the Client List, click the client's name.

2. On the client's page, click the Requests tab.

You'll see your request, whether your client has uploaded the documents you need, and when they uploaded each document.



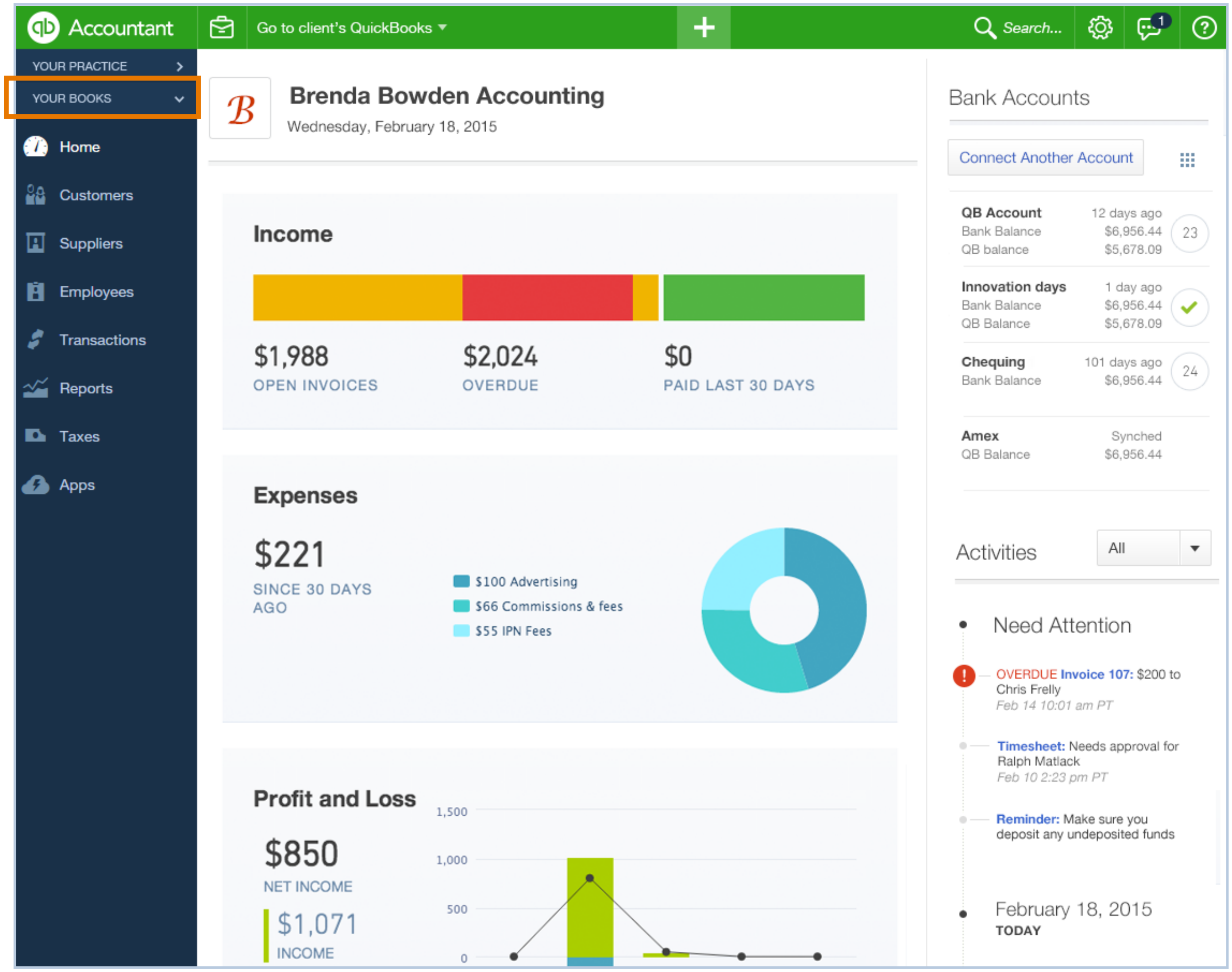
QUICK TIP

To see all your shared and private documents in a list, click the Documents tab.

Manage your own firm

You get a free subscription to QuickBooks Online with Payroll to manage your own firm when you sign up with QuickBooks Accountant.

Click Your Books in the navigation bar to manage your own firm's books and payroll.



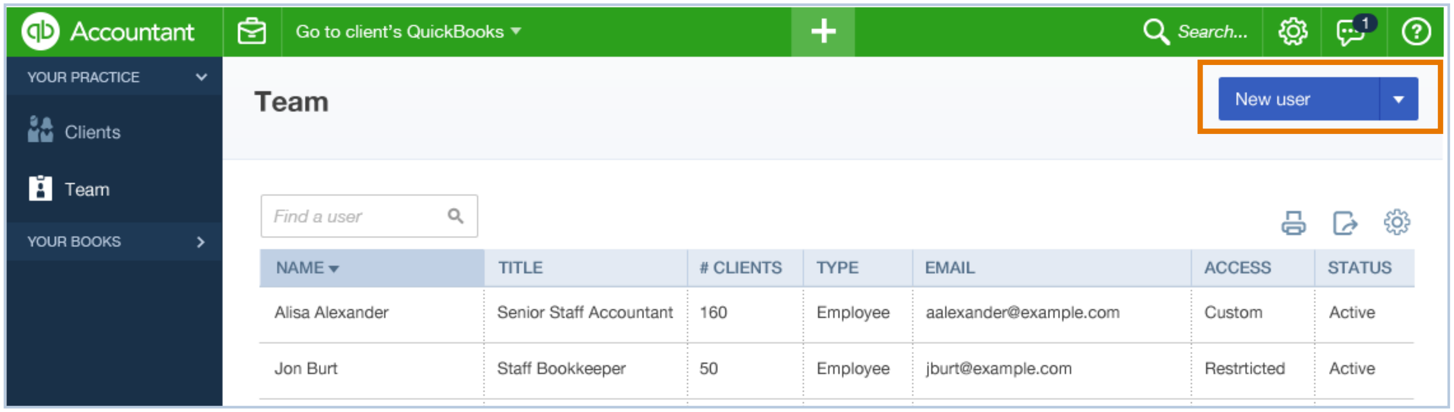
QUICK TIP

When you enter clients into your practice, they are automatically added to your QuickBooks as customers.

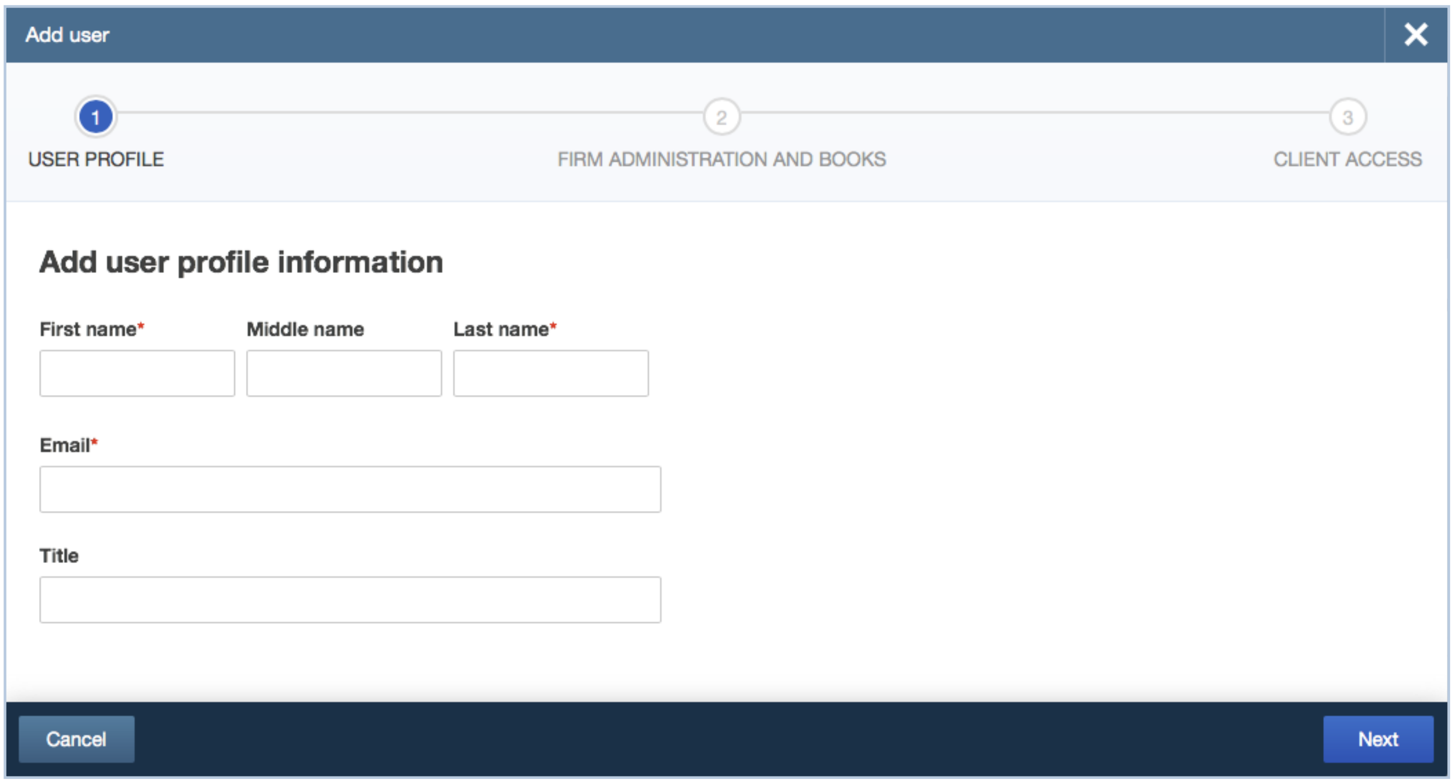
Add a user to QuickBooks Accountant

Here's how you add a coworker to your QuickBooks Accountant team:

1. On the navigation bar under Your Practice, click Team.
2. Click New user.
3. Enter this user's profile info and click Next.



TEAM PAGE > NEW USER BUTTON



ADD USER

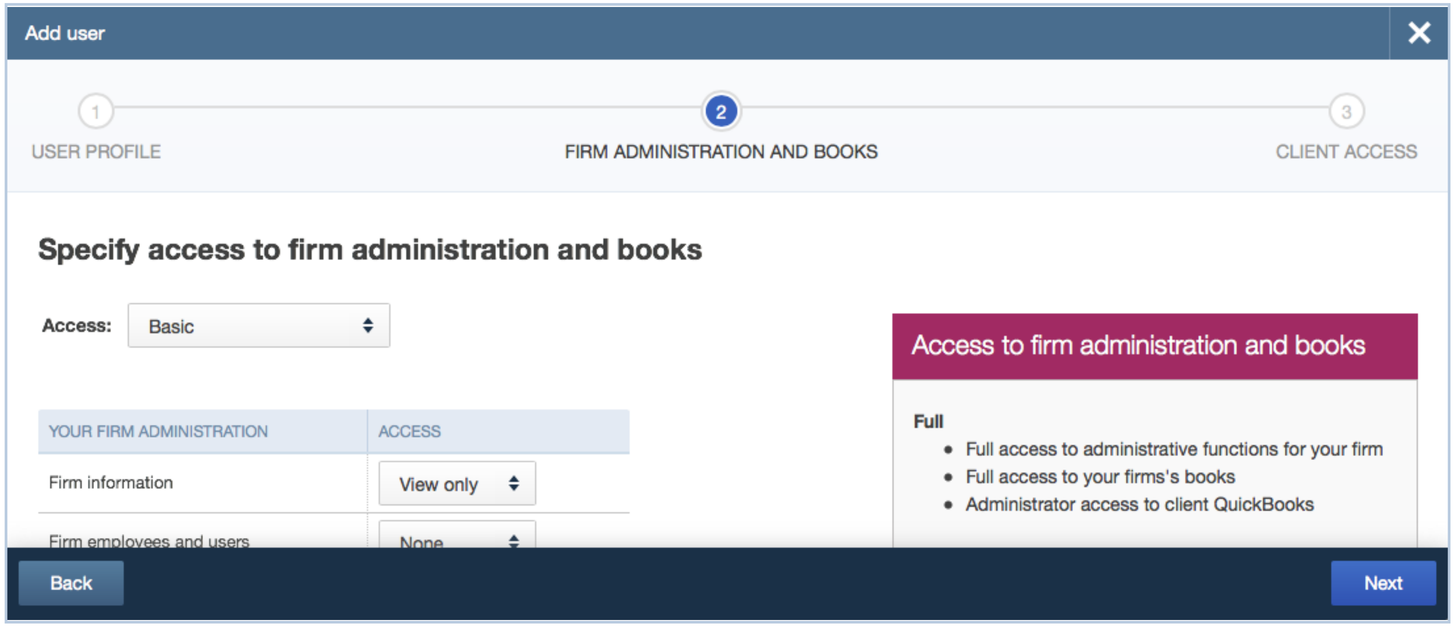
Give a user permissions and clients

1. Give this user Full or Basic access to QuickBooks Accountant.

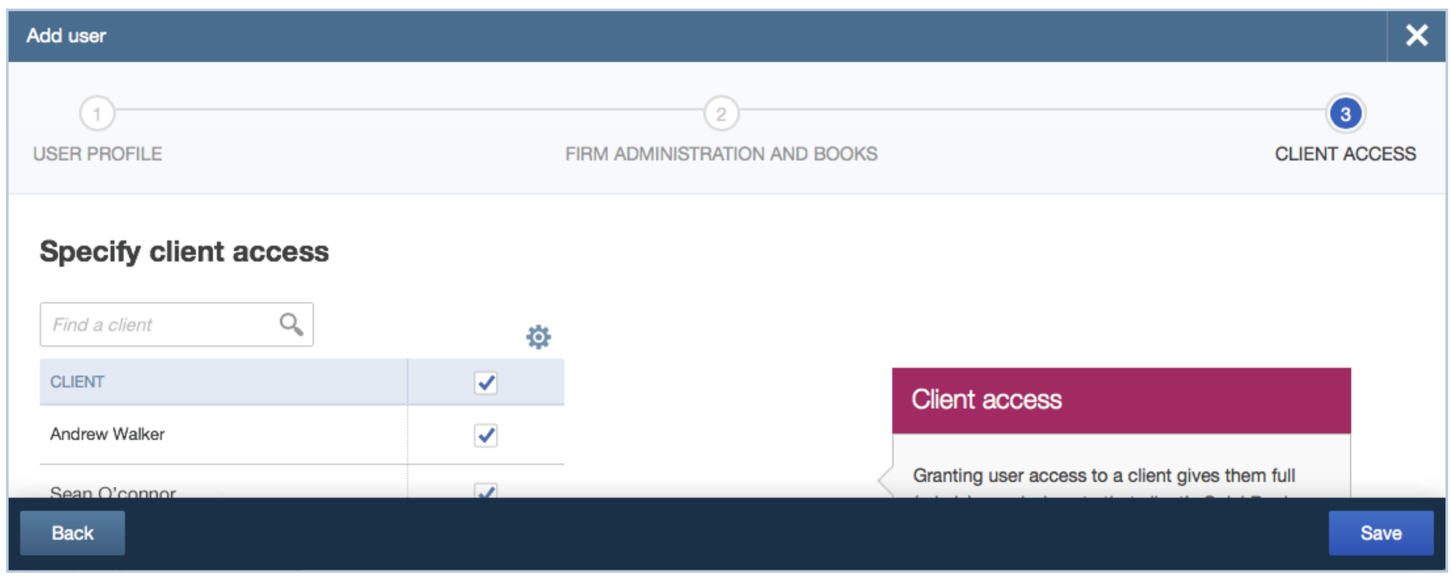
2. Choose whether this user can View or Manage different parts of your firm.

3. Click Next.

4. Specify which clients this user can access by checking the box next to each client name.



FIRM ADMINISTRATION AND FIRM BOOKS



CLIENT BOOKS

Get more information

This Welcome Guide is just the beginning!

When you have questions or need assistance with a task in QuickBooks Accountant (or QuickBooks Online), click the Help menu.

You can:

- Search for a help topic.
- Chat with a support agent.
- Join our Accountant Community.
- Check out useful links to more information.