

“Trial Balance is a fantastic platform for doing year-end work in an organized and efficient way.”

Kevin Simpson
CPA, Web Books LLC
Toledo, Ohio



It all starts with saving time

From his web-based accounting firm in Toledo, Ohio, Kevin Simpson has been a long-time advocate of online tools that make him more efficient. So have his clients. *“Ninety-eight per cent of our clients are already on QuickBooks Online,”* says Kevin, *“and the remainder will be shortly.”*

And now, after over a decade of growing his firm, Kevin is enjoying even greater time-saving benefits. *“I think Trial Balance is a key asset to the QuickBooks Online platform,”* he says. *“It’s something that I’ve been looking for, and hoping for, for years.”*

A real game-changer

Kevin describes how Trial Balance cuts out time-consuming and error-prone manual entry. *“The old method for doing year-end work papers required a spreadsheet and different reports that we’d often have to plan out in paper.”*

But Trial Balance overcomes all that. *“Trial Balance,”* Kevin states, *“is a fantastic tool for accounting firms.”* And, he emphasizes, it benefits not only him but his entire firm. *“It’s a fantastic platform for bringing everybody together to do the year-end work in an organized and efficient way,”* he says.

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“The faster we can close a set of books at the end of the year, the least amount of cost it is to my client.”

A few of Kevin’s favorite features

How exactly is Kevin able to save so much time? Let him count the ways.

“The Activity Timeline is great,” he says. *“It provides me with confidence that the changes being made to the books are correct.”*

Tax Mappings, Kevin points out, *“helps you discern whether you mapped it that way the prior year, and if you’re being consistent again this year.”*

And *Exporting to Intuit Tax Online* is, according to Kevin, *“by far the most efficient approach to tax prep.”*

Built from a pro’s perspective

How is it possible for already powerful accounting software to be so dramatically improved? Well, Kevin can answer that too: he was among a group of experienced accountants who offered Intuit their professional insights *“I’ve been able to help with the development of Trial Balance,”* he says.

In fact, it’s part of Intuit’s DNA to constantly talk to customers and partners. Kevin explains: *“Everything that we’ve been looking for and asking for, they’ve been diligently working to build into this platform.”*

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“Trial Balance is great for accountants because now we can do all the year-end work in one place right inside of QuickBooks Online.”