

APPOINTMENT-BASED

RETAIL AND eCOMMERCE

PROFESSIONAL AND FIELD SERVICES

Appointment-Based Businesses

AND THE ADVANTAGES OF MOVING ONLINE



Find out which QuickBooks® Online features are tailored to the needs of your appointment-based clients.

Do you have appointment-based clients?

Appointment-based businesses include:

- Doctors
- Salons
- Veterinarians
- Personal trainers
- Chiropractors
- Optometrists
- Driving instructors
- Mechanics



BUSINESSES THAT OFFER SERVICES BY APPOINTMENT HAVE UNIQUE ACCOUNTING NEEDS—YOU CAN HELP.

Your appointment-based clients are looking for:

How QuickBooks Online can help:



More efficient bookkeeping solutions

Appointment-based businesses are constantly busy. Finding time between appointments to focus on their business can be difficult. QuickBooks Online streamlines how they sync with their bank, accept payments and track expenses, giving them more time to deliver exceptional service and book paying customers.

✓ **Free more time for bookings**

Clients can eliminate manual data entry by syncing their bank with QuickBooks Online, which automatically downloads, categorizes and reconciles transactions.¹

✓ **Enjoy seamless integration**

Clients can accept payments quickly and easily using the sales tool they love best, because QuickBooks Online integrates with popular payment platforms like PayPal, Square, American Express and others.² QuickBooks Online also integrates with other scheduling and billing apps.

✓ **Stay on top of expenses**

Clients can easily record expenses to reduce stress at tax time. They can even use their phones to photograph and save receipts for additional time savings.



Easy-to-access updates on the state of their business

Managing busy appointment schedules can make it difficult to keep tabs on the business side of things. Appointment-based clients are looking for fast, easy ways to keep themselves and their teams informed about their business.

✓ **See their business health fast**

Clients will have a clearer picture of their profitability thanks to one-click access to critical reports, including Profit & Loss, Balance Sheet and dozens more.

✓ **Work efficiently with teams**

Clients can grant access to up to five users and set permission levels for each user, ensuring that everyone on their team can stay informed and deal with problems as they arise.

Your appointment-based clients are looking for:



Quick, anywhere access to their books

Appointment-based clients do a lot of their bookkeeping on the fly or in between appointments. They need solutions that let them work on their books as time permits, from wherever they happen to be.

How QuickBooks Online can help:

✓ **Access books quickly and easily**

Even on their busiest days, clients can stay on top of their books with anytime, anywhere access from their iPhone, iPad, Android device or browser.³

✓ **Work together *wherever, whenever***

Clients can collaborate with you or their teams whenever they grab a moment, no matter where they are, and synced files mean they will always be up to date.

Help appointment-based clients do even more with apps.

These apps are developed to help your clients meet a specific goal—and they integrate fully with QuickBooks Online, creating a seamless, highly efficient workflow tailored to individual needs. Take a look at these apps, which are especially popular among appointment-based businesses.



Aero Workflow

Work more effectively, efficiently and consistently by integrating tasks with the resources needed to do the work. Learn more at bit.ly/aero-workflow.



Method:CRM

Keep customer follow-ups and history all in one place with the top-rated CRM built for QuickBooks. Learn more at intuitaccountants.com/method.



TSheets

Effortlessly track employee time for payroll, invoicing and job costing. Integrates fully with QuickBooks Online. Learn more at intuitaccountants.com/tsheets.



Fathom

Create insightful dashboard and performance reports. Learn more at bit.ly/fathomapp.

Want to know more?

Download *The Accountant's Complete Guide to Moving Clients Online*.

Part 1



Why choose online?

intuitaccountants.com/online

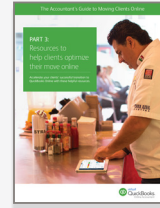
Part 2



How to convert QuickBooks Desktop data to QuickBooks Online

intuitaccountants.com/convert

Part 3



Resources to help clients optimize their move online

intuitaccountants.com/optimize

Ready to help a client make the move?



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¹ Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees.

² Each application is subject to terms, conditions and fees.

³ QuickBooks Online requires a computer with a supported Internet browser (see System Requirements for a list of supported browsers) and an Internet connection (a high-speed connection is recommended). The QuickBooks Online mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.