



Giersch Group

The Accountant's
Guide to Moving
Clients Online

PART 1:

Why choose online?

Brush up on the benefits of moving online and find out how to match your clients with the QuickBooks® product that will best suit their needs.

Table of Contents

We'll help you be a trusted advisor 2

Apps help you do more with QuickBooks Online 3

Make a recommendation that's perfect for *your* clients 4

 Appointment-based businesses 5

 Retail and eCommerce businesses 6

 Professional and field services businesses 7

Identify the right product for your clients 8

Ready to talk to your clients about moving online? 9

Two ways to help your clients get the best deal on QuickBooks Online 10

Other guides
in this series:

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

We'll help you be a trusted advisor

It's not easy to grow a small business. Every day, your clients face complex financial decisions, increasing demands on their time and growing competition—and they rely on you to help them overcome these challenges.

That's when you can rely on us. We've packed QuickBooks Online with smart, automated features, each designed to help you and your clients eliminate busywork and stay focused. All with the convenience of remote access—allowing you and clients to connect and work practically anywhere.

Here are four key benefits of switching from QuickBooks Desktop to QuickBooks Online:



Get answers anytime

Easily access your clients' books from anywhere, on any connected device.¹



Total security

Never worry about saving files to an external device. QuickBooks Online is always backed up and accessible, no matter where you are.



The latest software

The cloud automatically updates your software to the latest version, so you and your clients always have the most current features.



Less data entry

QuickBooks Online automatically downloads and categorizes bank and credit card transactions.²

Apps help you do more with QuickBooks Online— more efficiently, more intelligently, and more easily

The average business uses 18 apps to enhance its QuickBooks solution. You and your clients can choose from over 350 apps, each designed to help you overcome

a unique business challenge.³ Some popular options for clients moving from QuickBooks Desktop to QuickBooks Online include:



Sync with Square

Automatically import Square sales-related transactions into QuickBooks Online.



Bill.com

Manage bills, invoicing and cash flow. Digitize the accounts payable and receivable process.



MinuteDock

Built-in invoicing tool to invoice time and seamlessly synchronize contacts, accounts and time entries.



Transaction Pro Importer

Easily import many list and transaction types into QuickBooks Online from any text or Excel file.



Expensify

Receipt management, business expenses and mileage synced to QuickBooks Online.



TSheets Time Tracker

Effortlessly track employee time for payroll, invoicing and job costing. Integrates fully with QuickBooks Online.



Sync with PayPal

Save time by automatically importing PayPal sales transactions, fees, taxes and discounts into QuickBooks Online.



Fundbox

Get an advance on outstanding invoices. Money in your bank account as early as the next business day.



SOS Inventory

Sales orders, assemblies and serial inventory to streamline order management and eliminate duplicate data entry.

Do business anywhere



Make a recommendation that's perfect for *your* clients

Every small business has different needs. As your clients' trusted advisor, you're in the best position to understand those needs and recommend the accounting solution that will help get your clients where they want to be.

That's where we can help. The next section is organized by industry, so you can turn straight to the page that applies most to your clients—and get all the information you need to offer individualized advice.

Which industry applies most to your clients?



Appointment-based businesses

Businesses that offer services by appointment, such as a doctor's office, salon or driving school.

Sound familiar?
Skip to [page 5](#).



Retail and eCommerce businesses

Businesses that sell or resell products, such as food trucks, eBay sellers or coffee shops.

Want to know more?
Skip to [page 6](#).



Professional and field services businesses

Businesses that get paid by the project, job or gig, such as contractors, photographers or wedding planners.

Are these your clients?
Skip to [page 7](#).

Appointment-based businesses



Here's how businesses that offer services by appointment can benefit by moving online.



Do you have appointment-based clients?

Appointment-based businesses include:

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

Help these businesses minimize busywork and maximize *paid* work.

Appointment-based business owners are constantly busy. Finding time between appointments to focus on their business can be difficult. They need a fast, simple way to manage their books.

That's where QuickBooks Online shines. Its features are designed to help these businesses stay on top of expenses and work efficiently with teams. Best of all, your clients will have more time for bookings thanks to easy, intuitive access to the information they need—exactly when they need it.

Plus, your appointment-based clients can enhance QuickBooks Online by adding apps.

Each app is designed to meet your clients' specific needs, and each integrates fully with QuickBooks Online. Popular options include:



Aero Workflow

Manage work. Manage staff.
Manage clients.



Fathom

Create insightful dashboard
and performance reports.



TSheets

Effortlessly track employee time.



Method:CRM

Keep CRM data in one place.

Want to know more about the advantages of moving appointment-based businesses online?

Download the in-depth guide at intuitaccountants.com/appt-based.

Retail and eCommerce businesses



Find out how working online can meet the unique needs of businesses that sell or resell products.



Do you have retail and eCommerce clients?

Common retail and eCommerce businesses include:

- Food trucks
- eBay sellers
- Breweries
- Coffee shops
- Restaurants
- Hardware stores
- Furniture stores
- App sellers
- Etsy sellers
- Boutique shops

Recommend the right tools to manage cash flow and grow profitability.

Your retail and eCommerce-based clients rely on up-to-the-second financial data to manage inventory and make crucial business decisions. That's why over 30,000 of these businesses across the United States rely on QuickBooks Online.

It's packed with features designed with retail and eCommerce businesses in mind. Your clients will have what they need to automatically import data from their sales tools, stay on top of payroll, and seamlessly manage inventory. Plus, they'll be able to reach their goals faster thanks to a crystal-clear view of their financial health.

Plus, help retail and eCommerce businesses get more done by adding apps to QuickBooks Online.

These apps will help your clients overcome the specific challenges of selling products and managing inventory. Each one integrates fully with QuickBooks Online.



QuickBooks POS

The #1 accounting point of sale solution for retail businesses.



SOS Inventory

Sales orders, assemblies and serial inventory to streamline order management and eliminate duplicate data entry.



Fathom

Insightful dashboard and performance reports.

Take a closer look at the advantages of moving retail and eCommerce businesses online.

Download the in-depth guide at intuitaccountants.com/retail-based.

Professional and field services businesses

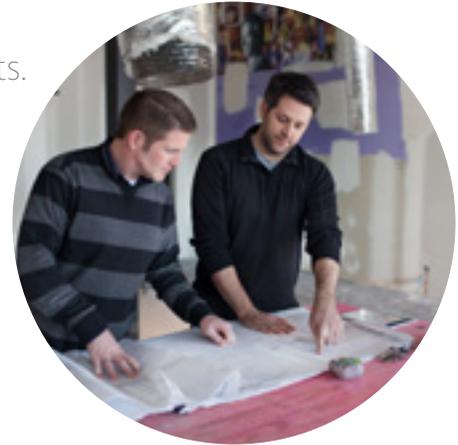


Find out which QuickBooks Online features are tailored to the needs of your project-based clients.

Do you have professional and field services clients?

Common professional and field services businesses include:

- Consultants
- Photographers
- Architects
- Entertainers
- Wedding planners
- Interior designers
- Caterers
- Landscapers
- Lawyers
- General contractors



Recommend the solution that can keep up with on-the-go clients.

Professional and field services businesses are always moving from one job to another, which leaves little time for manual data entry. They need an accounting solution that integrates with their business, automatically providing them with a clear picture of their financial health at any given moment.

QuickBooks Online is designed to provide what professional and field services businesses need. A fast, up-to-date view of their cash flow, seamless integration with their bank, simple customized invoicing—it's all built right in, ready to work as fast as your clients do. Create delayed charges and credits to help keep track of work that is going to be billed later. And QuickBooks Online Plus includes time tracking.

Plus, help clients manage job costing, construction management, and reporting with Knowify, BuilderTREND, and Fathom apps.

With full QuickBooks Online integration, these apps are designed to help your clients do more in less time.



Knowify

Powerful job costing, bid and contract management, order management and more.



BuilderTREND

End-to-end construction management with easy-to-use scheduling and production tools.



Fathom

Insightful dashboard and performance reports.

Understand *all* the ways that your professional and field services clients can benefit from moving online.

Download the in-depth guide at intuitaccountants.com/service-based.

Identify the right product for your clients

Compare QuickBooks Online	Simple Start	Essentials	Plus
Number of people who can simultaneously use QuickBooks Online	1	3	5
Includes free access for up to 2 accountants ⁴	X	X	X
Number of built-in business reports	20+	55+	80+
Integrate with available applications	X	X	X
Track your income and expenses	X	X	X
Print checks and record transactions	X	X	X
Download transactions from your bank and credit card accounts ⁵	X	X	X
Access your data online from a PC, Mac, tablet or smartphone ⁶	X	X	X
Back up your data online automatically ⁷	X	X	X
Import from Excel ⁸ or QuickBooks Desktop ⁹	X	X	X
Same security and encryption as banks ¹⁰	X	X	X
Manage and pay bills		X	X
Control what your users can access		X	X
Set up invoices to automatically bill on a recurring schedule		X	X
Enter bills and schedule payments for later		X	X
Compare your sales and profitability with industry trends		X	X
Create and send purchase orders			X
Support multicurrency		X	X
Track inventory			X
Prepare and print 1099s			X
Categorize your income and expenses using class tracking			X
Create budgets to estimate future income and expenses			X
Give employees and subcontractors limited access to enter time worked			X
Track billable hours by customer			X

Add Payroll—both solutions are built within QuickBooks Online	With Payroll	With Full Service Payroll	With Payroll	With Full Service Payroll	With Payroll	With Full Service Payroll
Easy paychecks; just enter hours	X	X	X	X	X	X
Calculate paychecks and payroll taxes	X	X	X	X	X	X
Includes payroll tax forms	X	X	X	X	X	X
Unlimited free direct deposit	X	X	X	X	X	X
Live, U.S.-based expert support during setup		X		X		X
We file and pay taxes for you—accuracy guaranteed ¹¹		X		X		X
Easy data transfer from previous payroll provider		X		X		X
Mail W-2s to employees at year-end		X		X		X

Ready to talk to your clients about moving online?

We'll help you guide the conversation, making it easy for your clients to see how working online will help empower them to overcome everyday business challenges and achieve their goals.

“You'll have more time to do the work you love.”

Here's how to start the conversation with clients who value saving time.

- ✓ **Your data will always be up to date and in sync.**
No more chasing emails or spending hours entering numbers.
- ✓ **You'll be able to easily track profit and expenses.**
Clearly see the state of your business in just a few clicks.
- ✓ **You'll have the freedom to work where and when you want.**
Access your books anytime, from anywhere.
- ✓ **You'll see that more automation equals less data entry.**
Automatically download bank and credit card transactions.

“Your bottom line will improve.”

Here's how to start the conversation with clients who value growing profits.

- ✓ **You'll always have the latest version.**
QuickBooks Online includes automatic updates.
- ✓ **You'll eliminate many unnecessary expenses.**
Connect to financial institutions for free.
- ✓ **You'll receive free cloud storage.**
Automatic, secure backup is included with QuickBooks Online.
- ✓ **You'll be able to offer access to more users.**
Up to five users can have access.

“You'll get the advice you need to reach your goals faster.”

Here's how to start the conversation with clients who value deeper business advice.

- ✓ **You'll get the best value possible from my expertise.**
QuickBooks Online lets me quickly identify the state of your business.
- ✓ **You'll be able to take advantage of integrated apps.**
Extend the power of QuickBooks Online.
- ✓ **You'll be able to easily stay up to date on the health of your business.**
Generate regular reports that track profit and loss, vendor expenses and more.

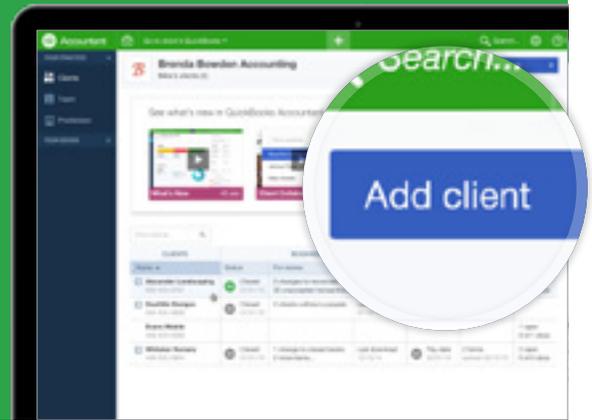
Two ways to help your clients get the best deal on QuickBooks Online

Choose the offer that best suits your clients: wholesale pricing or pass-along savings.

Manage your clients' subscription for them with wholesale pricing.

Offer them 50% off QuickBooks Online for the life of their subscription.¹²

With wholesale pricing, your clients save big on the MSRP of QuickBooks Online for life. It's as simple as that—no hassles, no price hike down the road.



Wholesale pricing also offers you:



Complete control

Add just one client, or all of them. The choice is yours.



Simple billing

You'll get monthly consolidated bills for all of your clients on wholesale pricing.



Flexible options

Offer clients wholesale pricing on QuickBooks Online Essentials or Plus. For additional savings, bundle with Payroll.

You can add both new and existing QuickBooks Online clients to wholesale pricing.

Visit intuitaccountants.com/QBOwholesale.

Or offer clients limited-time savings on QuickBooks Online.

Share accountant-exclusive discounts. To get started, visit intuitaccountants.com/discounts.



- 1 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.
- 2 Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees.
- 3 Each application is subject to terms, conditions and fees.
- 4 Small business clients can invite up to two accounting professionals such as a bookkeeper or an accountant to access their data. Once an accounting professional accepts the invitation, they will automatically get signed up for QuickBooks Online Accountant, allowing them to access their clients' data.
- 5 Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees.
- 6 QuickBooks Online requires a computer with Internet Explorer 10, Firefox, Chrome, or Safari 6 and an Internet connection (a high-speed connection is recommended). The QuickBooks Online mobile app works with iPhone, iPad, and Android phones and tablets. QuickBooks Online is accessible on mobile browsers on iOS, Android, and BlackBerry mobile devices. 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.
- 7 Data access is subject to Internet or cellular provider network availability and occasional downtime due to events beyond our control.
- 8 Microsoft Word and Excel integration requires Word and Excel 2003, 2007 or 2010.
- 9 Data can be imported to QuickBooks Online from the following QuickBooks desktop versions: Simple Start Edition; Pro 99 through 2015; Premier Edition 99 through 2015; Enterprise Solutions 99 through 2015; Basic 99 through 2005. Import from QuickBooks desktop must be completed within the first 30 days of setting up your new QuickBooks Online account.
- 10 128-bit Secure Sockets Layer (SSL) is the same encryption technology used by some of the world's top banking institutions to secure data that is sent over the Internet. Terms, conditions, pricing, features, service and support are subject to change without notice.
- 11 Accuracy Paychecks Guarantee: We assume responsibility for paychecks based on the data you supply. As long as the information you provide is accurate and on time, we guarantee that your paychecks will be accurate and on time—or we will give you the next monthly payroll fee for free and we will pay, if any, resulting bank fees. Inaccurate paycheck(s) claims must be submitted to Intuit within forty-five (45) days of the applicable pay date. Guarantee terms and conditions are subject to change at any time without notice. Tax Payments and Filings Guarantee: We assume responsibility for federal and state payroll filings and payments directly from your client's account(s) based on the data supplied. As long as the information provided us is correct and on time, and you have sufficient funds in your account, we'll file your client's tax forms and payments accurately and on time or we'll pay the resulting payroll tax penalties. Guarantee terms and conditions are subject to change at any time without notice.
- 12 Discount offer is valid for a limited time only. You can give your clients 50% off the then-current MSRP pricing of QuickBooks Online (includes Essentials and Plus) for the life of their subscription when you sign up for wholesale pricing within your QuickBooks Online Accountant account. The MSRP price is subject to change at any time in Intuit's sole discretion. Terms, conditions, pricing, features, service and support options are subject to change without notice.