



Giersch Group

The Accountant's  
Guide to Moving  
Clients Online

## PART 3: Resources to help clients optimize their move online

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Accelerate your clients' successful transition to QuickBooks® Online with these helpful resources.



Prepare your clients  
for online success.

Help your clients discover what QuickBooks Online can do for their businesses. From quick-start tutorials to lively forums with other small business owners, your clients will find the practical tips, support and next steps they need to get up and running, fast.

Other parts  
in this series:

#### Part 1



Why choose online?  
[intuitaccountants.com/online](https://intuitaccountants.com/online)

#### Part 2

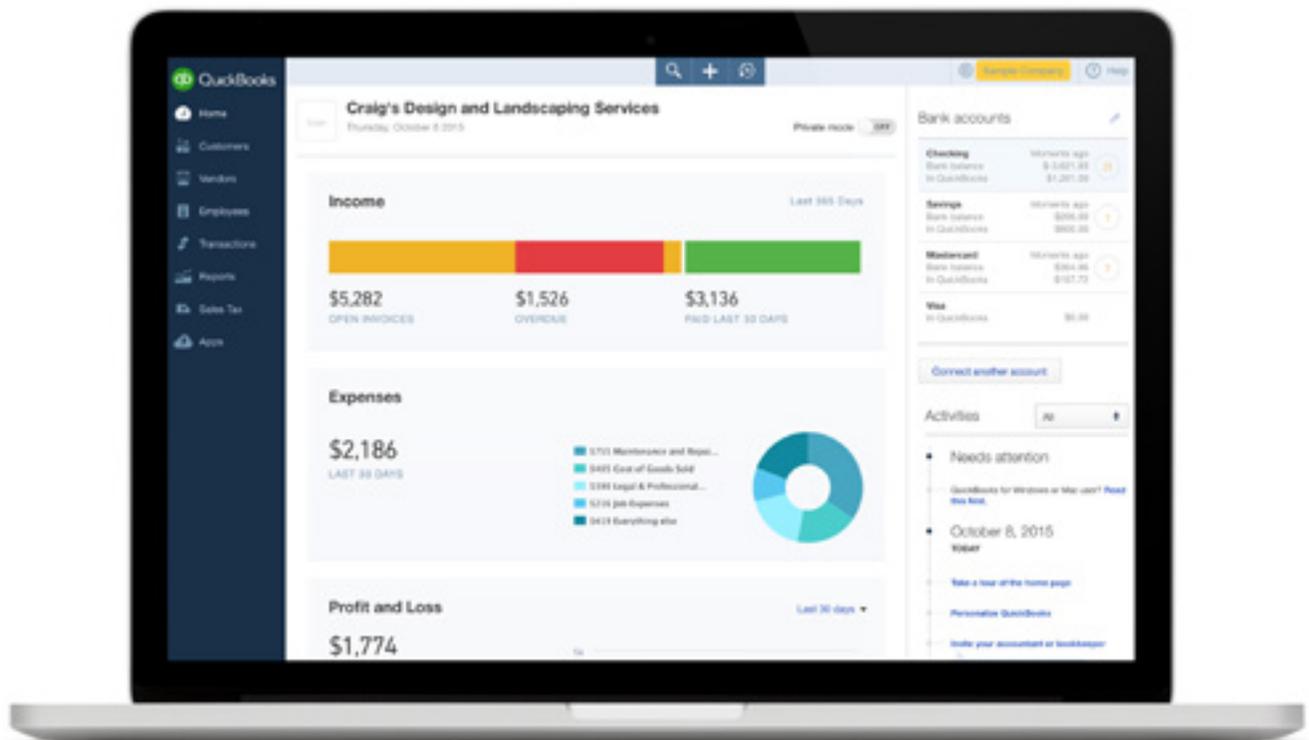


How to convert QuickBooks Desktop  
data to QuickBooks Online  
[intuitaccountants.com/convert](https://intuitaccountants.com/convert)

## Invite clients to take a test drive

Your clients can familiarize themselves with QuickBooks Online by taking our free sample company for a spin. They'll be able to try out each feature, experiment with time-saving tools, and discover how easy it is to reduce busywork and increase business growth by working online.

Share this link with your clients: [intuitaccountants.com/sampleco](https://intuitaccountants.com/sampleco)

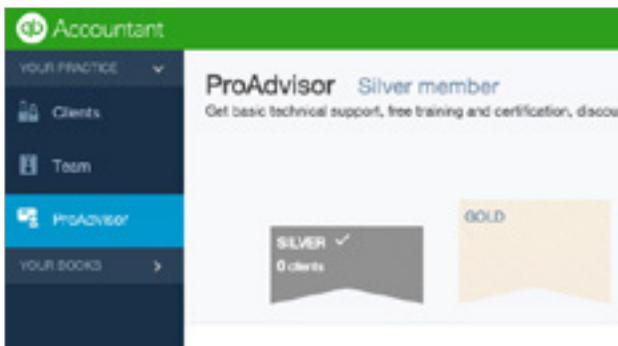


# Share QuickBooks Online training materials with your clients

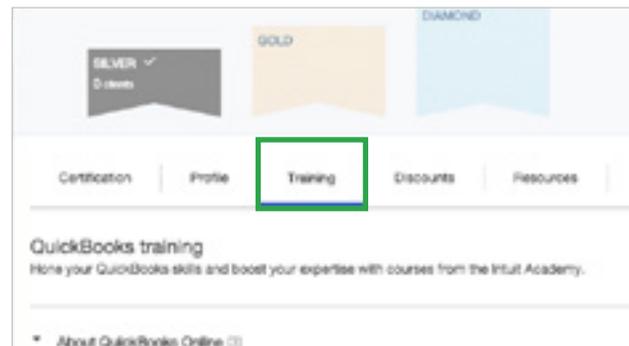
Access downloadable training materials for your clients from the ProAdvisor Center within QuickBooks Online Accountant. You can even customize the materials with your credentials.

Here's how to access these training materials:

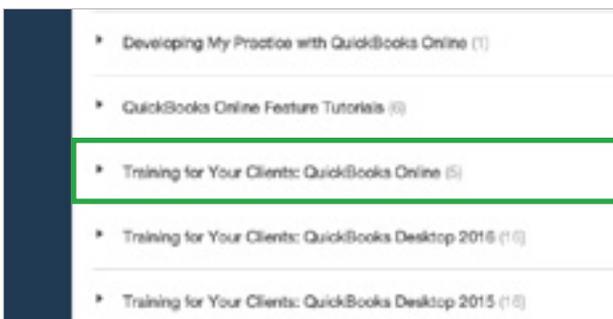
- 1 Click on the **ProAdvisor** tab in the left navigation panel of QuickBooks Online Accountant.



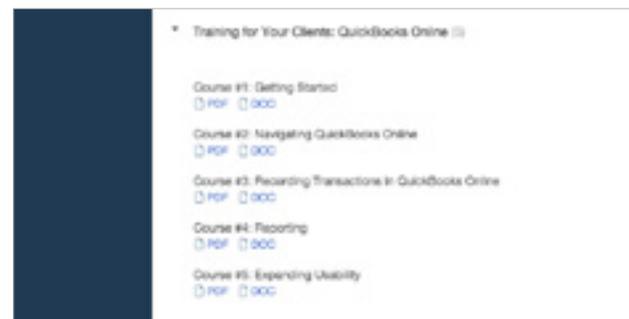
- 2 Click on **Training**.



- 3 Scroll down to **Training for Your Clients: QuickBooks Online**.



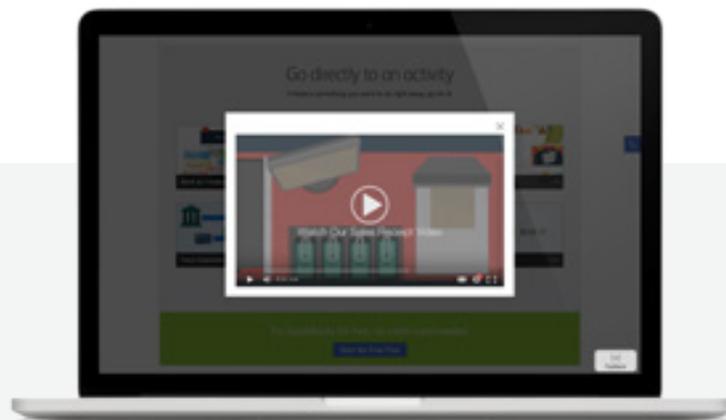
- 4 Download documents that you can share with your clients on topics such as Getting Started, Navigating QuickBooks Online, Recording Transactions and Reporting.



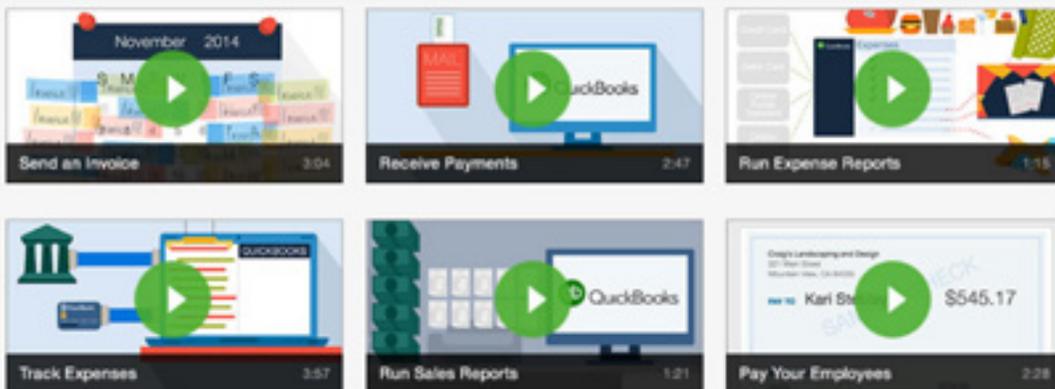
## Connect clients with the QuickBooks Import Resource Center

Offer clients a wealth of step-by-step tutorials, each designed to help them get started with the QuickBooks Online features that suit their specific needs. Plus, get valuable answers to FAQs about converting.

Share this link with your clients: [intuitaccountants.com/movedesktop](http://intuitaccountants.com/movedesktop)



Go directly to the feature that interests you and your clients most:



## Make your clients' transition easier with the QuickBooks Online App

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Available for both Windows and Mac, the free QuickBooks Online App enables your clients to get the benefits of QuickBooks Online with the speed and familiarity of desktop performance.

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### With the app, clients will be able to:

- Launch QuickBooks Online with one-click access so they can skip signing in.
- Easily open multiple windows and drag them to anywhere on their desktop or across multiple screens for optimal side-by-side viewing.
- Maximize productivity with keyboard shortcuts, a toolbar, and menu options they're familiar with from QuickBooks Desktop.
- Save time with automatic refresh. When clients edit an expense, an open report in another window automatically refreshes with the new data.

Invite your clients to download the app at [intuitaccountants.com/movedesktop](https://intuitaccountants.com/movedesktop).

## Connect with other small business owners

Tell your clients about our trusted network of small business owners just like them. Members of OWN IT are united by a desire to swap stories, share practical advice and help each other achieve success—and your clients have a standing invitation!

Share this link with your clients: [ownit.com/communities/ownit](https://ownit.com/communities/ownit)

