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behind the latest product offering from Intuit. The company went back to the drawing board to redesign its online solution for accountants, QuickBooks Online Accountant.

Taija Sparkman • Nov. 05, 2014



Accountants want two things: to save time and grow their business. That's the idea behind the latest product offering from Intuit. The company went back to the drawing board to redesign its online solution for accountants, QuickBooks Online Accountant.

"QuickBooks Online Accountant is a completely new product that we built from the ground, specifically for the cloud. It's been reimagined so accountants can confidently help their clients succeed," said Ariege Misherghi, Group Product

Manager, QuickBooks Online Accountant. “With the new features, our customers

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Online Accountant. The enhanced solution makes it easier for accountants to access the tools they need to gain insight into clients' businesses while simplifying current processes. QBOA has several new features, such as an accountant toolbox, client dashboard, the ability to grant restricted access to employees, client document center and integration with the ProAdvisor Program. Accountants can also find short clips and a PDF showing what's new and different in QBOA.

The client dashboard displays a list of clients and provides direct insights into any items that require your attention, such as reconciliations or changes to clients' transactions. It also features a payroll tab, making it simpler to manage payroll from the same window.

The client document center, available in early 2015, helps accountants streamline the information collection process by tracking document requests. Accountants can use the document request function to select the client and specify the required documents. The dashboard will show the requested and received items for each client, letting accountants know what they still need to take action.

“In order for accountants to perform any tasks for their clients, they need information. However, it can be hard to track what you asked for, what you actually received and what you still need, and to do that for each client. The document center simplifies the process and lets you see all of that with the click of a button,” said Misherghi.

Perhaps the biggest redesign comes with the integration of Intuit's QuickBooks ProAdvisor Certification Program. All new in 2015, accountants can completely manage their certification from inside QBOA, making it even easier for accountants to become ProAdvisors. Key features of the ProAdvisor Program integration within the new QuickBooks Online Accountant includes a ProAdvisor Dashboard, training and certification, an online directory profile and access to numerous resources. Users

can view their ProAdvisor member level, the number of QuickBooks Online clients

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certification exams or serving their QBO clients. ProAdvisors and their firms will have access to free online products, training, certifications, support and discounts. ProAdvisors can obtain three levels of membership: Silver, Gold and Diamond – the same as the current program – by passing certification exams or serving a number of QBO clients. Accounting professionals that serve zero to four clients will attain Silver level; those serving 5-19 will attain Gold and those serving 20 or more clients will attain Diamond level.

The new QuickBooks ProAdvisor Program also introduces a new QuickBooks Online Advanced Certification, designed for ProAdvisors who are interested in serving online clients only. In addition, a new set of ProAdvisor certification badges will be available for certified ProAdvisors to use in marketing materials including business cards, websites and brochures starting in early December.

Through the QuickBooks ProAdvisor Program, ProAdvisors will also be able to sign up for a Bill.com corporate account. As part of a new partnership between Intuit and Bill.com, ProAdvisors can create an account for up to three users, without incurring any subscription fees and will also earn points for using Bill.com and making referrals to their clients that can be redeemed for cash, gift cards or charitable donations.

QuickBooks Online Accountant 2015 will be available to new users, starting in December 2014, with a global rollout scheduled for early 2015. Current users will be migrated over time. While the redesigned version offers enhanced features and additions, it will continue to be free for accountants. QuickBooks ProAdvisors who serve desktop clients can purchase a bundle, which includes desktop software, certifications and support, for an additional fee.

“What makes Intuit special is our approach to building products. We are driven by our mission to improve our customers’ financial lives so profoundly that they can’t

imagine going back to the old way,” said Misherghi. “We do this through our three-

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