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Intuit, Inc. – QuickBooks Online Accountant

800-267-8379

<http://accountants.intuit.com/accounting/quickbooks/online-accountant/>

Best Fit: Professionals seeking a web-based professional write-up solution that integrates directly with their clients' versions of QuickBooks Online.

Strengths

- Multiple client management in single online program
- Accountant Center with tools for books review and clean up
- Simple connection to clients' QuickBooks Online
- Reporting options include PDF, Excel output
- Client invoicing and e-payment functions
- Customizable work screens and widgets

Potential Limitations

- Although online system allows access to all client data, no portals for sharing other files
- Does not integrate with desktop version of QuickBooks

From the February 2013 [review of Client Write-Up](#) systems.

With more and more businesses moving to cloud/web-based bookkeeping solutions, and the most popular being QuickBooks Online, it was a natural move for Intuit to develop a professional version of the system. QuickBooks Online Accountant was commercially released in October 2012, and is designed for professionals serving multiple business clients, with multiple tools for write-up functions such as account

reconciliation, ledger and journals management, and payroll compliance via

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charts of accounts, journals and ledgers, are immediately available to the accounting firm user.

Accountants and clients access and work on the same set of data. Users can then manage all clients without having to have multiple passwords, just their own for their own system, and users can easily switch between clients. Also, since the professional and client-side programs are web-based, they are always up-to-date and the same "version," so no longer will there be issues with files being saved wrong or with QuickBooks file transfer and management.

The client selection screen is the initial home screen, and users can filter or edit contact information or add new clients (with invitation accepted). Pull-down menus for settings and help are available at the top of the screen.

After selecting a client to work in, the system opens the Accountant Center, which provides the most common accounting and management functions, such as accounting periods, reports and tools that allow users to find and fix errors in batch, and offers customization of the location of modules with simple drag-and-drop action. Online banking and reconciliation functions are simplified and directly connect with a client's financial institutions.

The system shows how many transactions have to be processed, and allows manual updating of the account information. Among the features offered in QuickBooks Online Accountant is the ability to undo bank reconciliations, reclassify transactions, write-off invoices, integration with GoPayment and expanded client listings.

QuickBooks Online Accountant is a one user application and QuickBooks Online Plus offers five users and has settings for limiting users from accessing certain clients, features, data or reports.

Core Write-Up Features: 4.5 Stars

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instead of individually, with the program opening a list of invoices on one screen. Users can also batch reclassify. Recurring transactions and entries can be set to automatically post. Since the program directly integrates with the clients' version of QuickBooks Online, all data is live.

As a program with always up-to-date data, a variety of snapshot views offer easy to understand charts, graphs and summaries of key business indicators, as well as access to financial ratios, benchmarking and additional analyses. Also included are functions for automatic invoicing, delayed billing, the ability to create and send purchase orders, inventory tracking, management of multiple locations and budgeting and planning.

The system can manage multiple bank accounts and offers check writing functions with options for MICR printing, with client logos included. For payroll and payroll compliance, firms or clients can use Intuit's online payroll solutions. Users can set up automatic alerts to remind them of client issues and deadlines, such printing sales transactions or other tasks, and the program also offers messages from Intuit.

Reporting & Financial Statements: 4.5 Stars

The system includes full financial statement generation with the ability to further edit financial sets by saving them to Excel format, while additional reports are available for budgets, class tracking, inventory management by FIFO only, and location tracking. Reports can be customized as needed, and special company scorecards and snapshots provide benchmarking and quick comparisons against other similar business entities. Reports offer the ability to drill-down to underlying transactions.

The program includes an adjusted trial balance report, and provides full AR management with built-in invoicing and the ability to receive electronic payments from clients using GoPayment.

Import/Export/Integration: 4.5 Stars

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directly integrate with the desktop version of QuickBooks, but integrates with Intuit Tax Online at a basic level. Users can also export trial balance or other data to Excel for import into other systems.

Help/Support System: 4.5 Stars

The program provides multiple help options, including a help index, accountant tips, and guides for program functions. The company's online support website offers FAQs, Live Chat, getting started tips, resources and other resources, including access to the Intuit Community forum for users. Free live technical support is offered during the first 30 days of use, but QuickBooks ProAdvisor members get free continuing support and additional training options.

Summary & Pricing

The new QuickBooks Online Accountant is a welcome addition for firms who are moving their clients to web-based systems, and provides streamlined multi-client management tools for write-up and client journal and ledger management. The direct linking with client financial institutions makes account reconciliations more accurate and up-to-date, and various other data tools offer good functions for firms providing monthly accounting management services.

Currently, QuickBooks Online Accountant is free for 180 days, after which ProAdvisor members have no charge to continue using the system. Other professionals will also be able to continue using it free if they have at least one current QuickBooks Online client being managed in the system.

2013 Overall Rating: 4.5 Stars

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