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connect small business owners and accountants through the QuickBooks Cloud.

Taija Sparkman • Oct. 07, 2014



Intuit's Small Business vision remains at the core of its business, as it continues to connect small business owners and accountants through the QuickBooks Cloud. Intuit aims to make it as seamless as possible for users to connect and access their data regardless of the device they use, which is evident in the rollout of QuickBooks Accountants Desktop 2015 and the QuickBooks Online app for Mac.

“We know that our customers all work with a variety of devices and operating

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simpler ways for accountants to communicate with clients.

“QuickBooks 2015 is all about helping the client succeed by allowing them to do three key things: be more efficient, gain better insights and let their expertise shine,” said Tumacder.

The latest version of QB Desktop simplifies the data transfer process between accountant and client by making it easier for clients to send the necessary information to their accountant. Accountants previously spent a lot of time walking clients through the steps to send their company file, as it could be a confusing process. Now, with the addition of the “Send Portable Company File,” Intuit has strived to make it almost intuitive for clients. This new option is located under the File menu, by selecting Send File>Send Portable Company File, and integrates with the cloud storage platform customers are already using, such as Dropbox or Google Drive. QB will remember the previous storage location for next time and automatically appends a Date/Time stamp to the file name.

With the new Accountant Toolbox, available in QuickBooks Pro and Premier, accountants are able to access the tools they need from their client's version. This is helpful for accountants that frequently go to their clients' offices, but may not always have their version with them. By logging into the toolbox with their QuickBooks email and password, accountants can now work just as efficiently from their clients' offices as they would from their own.

QuickBooks Accountants also offers several visual redesigns that will make it simpler for accountants to gain insights into their clients' company metrics. A new “Insights” tab is now available from the homepage and allows accountants to view their clients' profits and losses and open and overdue receivables, as well as create PDFs to share with clients. The updated reports functionality now allows

accountants to add comments directly to the report. Accountants can also email

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Accountants will also find it's easier for them to manage their clients in the new version. All of their accounting and tax clients appear in once streamlined client list and they are now able to manage unlimited client employees. They can also assign specific tasks to their clients and employees, as well as employees of their own firm. Other new features include the ability to receive a single bill for all of their wholesale clients and easily generate a tax return from the data already managed in QBOA.

The Mac App for QBO was released in August and is a hybrid app, giving users the accessibility of the cloud version with all the power of the desktop app. Users will notice the interface is very similar to QBO, but it allows them to interact with it similar to any other Mac desktop app. Features include keyboard shortcuts, native printing from the app, the ability to stay logged into the app, Back/Forward toggling between windows, multiple windows open at the same time, and a company dropdown menu to easily switch between companies. A QuickView function on the Mac toolbar shows important alerts even when QB isn't open, allowing users to navigate directly to the necessary window within QB.

"If you were to do a features checklist, QuickBooks Online and QuickBooks Mac are pretty close to each other. However, with the QuickBooks Mac App, we've given our customers the added functionality of connecting connects all three of their Apple devices – Mac, iPhone and iPad," said Tumacder.

Intuit continues to add additional functionality for its 683,000 online subscribers via Intuit apps and other third-party apps through its open API platform. The number of users migrating from desktop to online continues to double, and Intuit projects that 78% of its small business customers will be fully adapted to the cloud by 2020.

"Our goals are to help accountants save time and grow their practice, while connecting every small business professional with an accounting professional. We

are able to do this by focusing on making QuickBooks a product that every

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