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Notifications in QuickBooks Online

Accountant

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Scott Cytron • Sep. 07, 2018



Intuit's Accountant Segment launched its first set of Practice Management tools within QuickBooks Online Accountant (QBOA) in May 2017. Since then, the team has consistently added new capabilities – all of them based on customer feedback – to help make Practice Management features within QBOA even more impactful. Two of the newest features are Quickstart Templates, which help streamline common firm workflows, and Work Notifications, which provide real-time communications on projects and tasks.

“We knew there had to be a better way for firms to spend less time creating projects and managing their tools, and more time serving their clients,” said Harsha Jagadish, a product manager with QBOA. “With Practice Management features in QBOA, we

want to give accountants, bookkeepers and finance professionals the confidence that

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most project tasks were the same. Firms needed a common workflow they could rely on to get their client work done as efficiently as possible.

Quickstart Templates are designed to do just that: create a set of standard templates for the most common accounting workflows that firms can then use to create projects. Accessible from the Work tab in QBOA and created in consultation with leading global firms, the templates for users in the U.S. can be used to set up projects and tasks for monthly bookkeeping, payroll, client onboarding and year-end tax work.

With Quickstart Templates, accountants can:

- Save time with fast and easy setup of projects and tasks.
- Ensure consistency in work processes across a team.
- Tailor templates to a firm's unique needs by creating custom templates.

Work Notifications

After Practice Management features went live last year, the number one request from users was a way to automatically notify firm team members when there was a new project assigned to them.

“Flying blind is no fun and entirely unproductive when it comes to keeping up with client work. Without some kind of notification, how could you possibly know something was there to work on unless someone told you or took the time to send a message?” asked Jagadish. “Our goal, again, is to make sure firms work *on* their business instead of *in* their business, and we knew we had to make the process smooth and familiar.”

To address these concerns, the team added Work Notifications. With notifications, users receive automatic updates and reminders on projects and tasks via email or

Slack, enabling firms to stay on top of a team's progress and ensure everyone is

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Quickstart Templates and Work Notifications are available to QBOA users in the U.S., Canada, UK, Australia, France, South Africa and Singapore. For more information, view this [video demo](#) and plan to visit the Intuit booth at [QuickBooks Connect 2018](#) in San Jose, Nov. 5-7.

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