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Feb. 05, 2021

qb Accountant

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QuickBooks Online Advanced for your books

Get more organized and complete tasks faster with powerful custom tools to run your firm.

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Bookkeeping

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Track and analyze data at any level with up to 48 custom fields

Automate manual processes like reminders and emails with workflows

Import and send hundreds of invoices and expenses at once with batch transactions

CLIENT / CONTACT	EMAIL / PHONE	BANKING	PREP FOR TAXES	TAX RETURNS	LEAD	ACTIONS
Angela's Antiques	angelasantiques@gmail.com	as of 2 days ago	Review data	2017 : 1065 2018 : 1065	AH	⋮
Anne White	annewhitecpa@gmail.com			Create tax return		⋮
Eric's Landscaping	Eric@landscaping.com	Status 0 unaccepted transactions	Review data	Create tax return		⋮
Fancy Buss	fancy@gmail.com	Status 0 unaccepted transactions	Review data	Create tax return	AH	⋮
Iguanas Burritozilla	qbc.us.qboa@gmail.com	Status 0 unaccepted transactions	Review data	Create tax return		⋮
La Victoria	qbc.us.qboa@gmail.com	Status 0 unaccepted transactions	Review data	Create tax return		⋮
Laurie Bream (SE)	qbc.us.qbo+se-launebream...	Status 0 unaccepted transactions	Review data	Create tax return	AH	⋮
Lisa's Windows	lisa@getnada.com +1 6509444262	Status 0 unaccepted transactions	Review data	Create tax return	LT	⋮
Mike	Williams@mike.com	Status 0 unaccepted transactions	Review data	Create tax return	AH	⋮
Miracle Workers Cleaning	qbc.us.qbo1@gmail.com	Status 0 unaccepted transactions	Review data	2017 : 1065 2018 : 1065	DS	⋮
Test Client	test@getnada.com	Status	Review data	Create tax	DS	⋮

What's new in QuickBooks Online Accountant (QBOA) and what does it have to do with QuickBooks Online Advanced (Advanced)?

Everything.

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our most robust QuickBooks Online product!"

What You Need Delivered, how You Want it

With QuickBooks Online Advanced, you can take advantage of custom reporting and fields to help grow your firm, and then scale your processes with features like Tasks and Batch Transactions. Here are some of the additional ways these innovations will improve your workflow:

- Work smarter with deeper insights
 - Track the details that matter most with enhanced custom fields
 - Visualize your performance with custom reports and charts
- Complete the tasks that matter faster
 - Speed up work with Batch Transactions
 - Define and automate tasks and workflows
- Get more organized
 - Integrate data with Google Sheets
 - Create custom roles for your team (coming soon)

The key to these coming changes are customization features to successfully run your unique firm: servicing your niches, maintaining your charts of accounts, and fulfilling the needs of your many and diverse customers. The last thing you need is a strictly out-of-the-box solution. Now you've got a lot more, including:

Custom fields. Track and analyze unique data at any granularity to better run your business. Intuit now supports 48 custom fields, with up to 12 fields each for customer, vendor, sales forms, purchase order, and other expenses. Users can sort, filter, group by, and display information in columns of fields in three reports: custom contact list, vendor contact list, and unpaid bills.

Custom chart builder. This frequently requested feature allows users to up-level

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expansion in Advanced, you can get even more granular with more pre-set roles to use and expand.

And, that's just the beginning. You can track business performance at a glance and gain deeper insights with customizable, presentation-ready reports with **Performance Center**. You can spend less time sending invoices and managing expenses by editing multiple bills and checks in just a few clicks with **Batch Transactions**. You will reduce manual processes like reminders, emails, and overdue notices with workflows and automate approvals and more with **Tasks**.

Ever since QuickBooks Online Advanced became available, many accountants and QuickBooks ProAdvisors have praised the features inside the software that help their clients make more informed decisions. For example, Lynda Artesani of Artesani Bookkeeping works with law firms to improve their reporting and has strong praise.

“Advanced gives me all the data analysis tools I need in the Performance Center to help my law firm clients grow smarter,” she said. “In addition, there is a custom field feature that allows me to tailor the program to the specific law practice type. Even more exciting, there is so much power behind the automation in QuickBooks Online Advanced! I use the accounts receivable workflows of payment reminders and overdue invoice memos, which not only saves time, but it is 100% accurate and very customizable to the clients.”

Get to Know Advanced

There are many ways to learn more about Advanced, including webinars and training. Training for Advanced is now just a few clicks away. To access self-paced learning modules and training webinars for Advanced, just log into QBOA, go to the ProAdvisor tab, and click on Training. Scroll down to the “Specialty Courses” section and look for “QuickBooks Online Advanced Specialty.” You can also learn more about

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