

# THE QUICKBOOKS ONLINE ECOSYSTEM

May 2024





# How to use this guide

Your clients have a lot of decisions to make, and they look to you for guidance on the right solutions to help run their business.

Here, you'll find an overview of the QuickBooks Online ecosystem of products and solutions, plus their benefits to your firm and clients of any size or industry.

You can refer to this guide anytime you need help recommending QuickBooks products. With it, you'll learn how a tailored QuickBooks Online solution of features, tools, and apps can work together to help each client get more visibility into their business so they can reach their goals.

Whether your clients need a full accounting solution or additional functionality, **you and your client can collaborate using the same real-time data—so you can make better, more informed decisions together.**

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QUICKBOOKS ONLINE ECOSYSTEM

# A scalable solution for your clients and your firm

Using different platforms to serve your clients can leave your firm pressed for time when transitioning between client workloads or onboarding new staff members.

You can rely on the QuickBooks Online ecosystem to work seamlessly in real time and integrate with third-party apps to maximize efficiency for your firm and your clients. This one-stop solution combines the power of accounting, payroll, time tracking, payments and other tools.<sup>1</sup> With it, you can strengthen your team, get more done, collaborate with clients, give them a clear view of where their business stands, and drive more success for everyone.

Using the QuickBooks ecosystem allows you to operate more efficiently, deepen engagements, focus on understanding clients' businesses, and develop strategies to help them grow.

# What's in the QuickBooks Online ecosystem?

Build a QuickBooks Online solution for each of your clients by choosing what best suits their needs.<sup>1</sup>

## Financial management

- QuickBooks Online
- QuickBooks Online Advanced

## Workforce management

- QuickBooks Online Payroll
- QuickBooks Contractor Payments
- QuickBooks Time

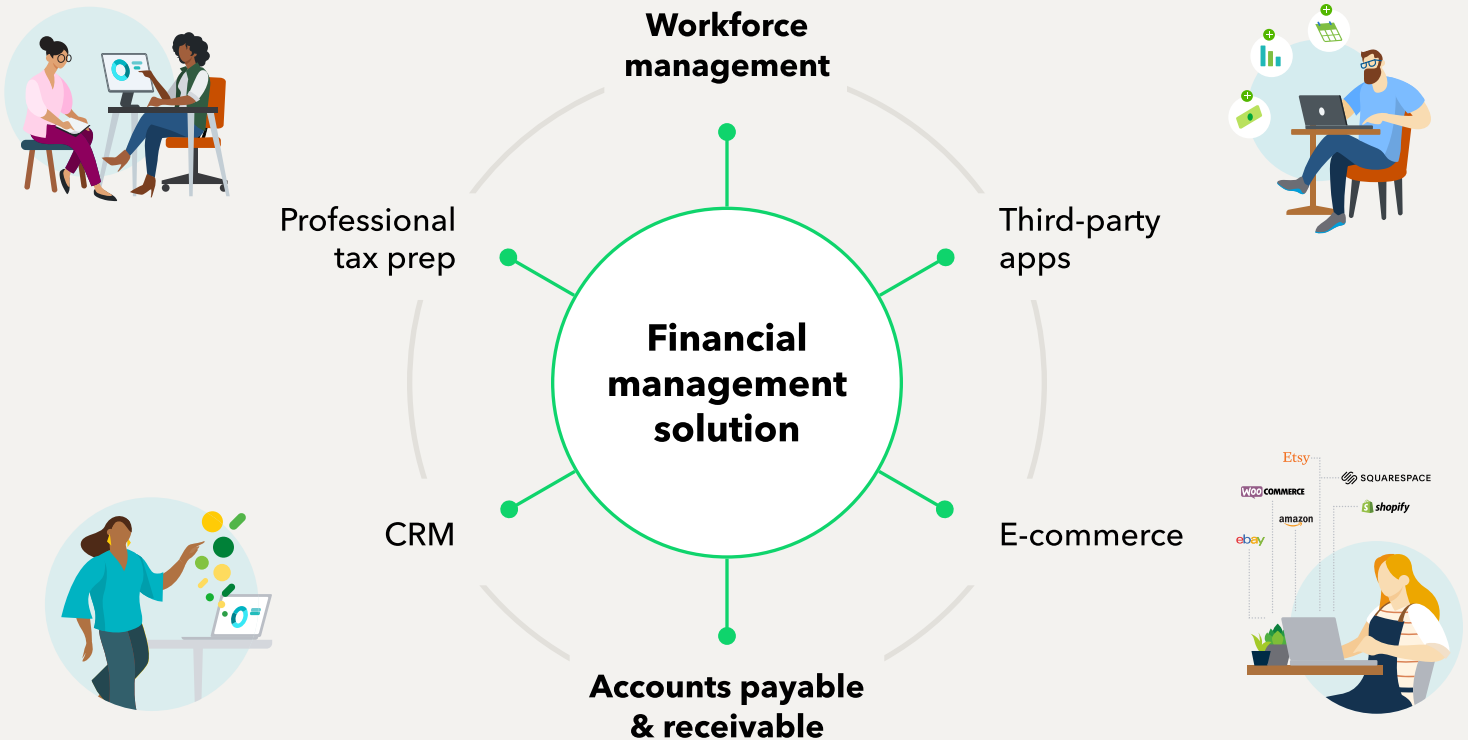
## Accounts receivable & payable

- QuickBooks Payments
- QuickBooks Checking
- QuickBooks Bill Pay

## Business & industry specifics

- ProConnect Tax
- Mailchimp CRM
- E-commerce sales management
- Third-party apps

## The QuickBooks Online ecosystem



Your clients can combine accounting, payroll, and time tracking in QuickBooks to save 3.93 hours per week<sup>2</sup>

See which QuickBooks Online solution is best for each client with this quick product finder quiz.

Take quiz

## Benefits for your firm



### Simplify the workday

- ✓ **Collaborate with clients in real time** using a cloud-based platform from anywhere, anytime
- ✓ **Manage your clients' businesses and your firm's books** through a single sign-in, with QuickBooks Online Accountant



### Grow your practice with confidence

- ✓ **Offer clients exclusive pricing** on products and supplies through the ProAdvisor Preferred Pricing program<sup>3</sup>
- ✓ **Make it easier to hire and manage your team** by serving clients from one integrated platform that's familiar to accounting professionals
- ✓ **Increase capacity** with automated workflows to drive efficiency and productivity, so you can focus on building your advisory practice
- ✓ **Consider more clients and increase realization** by customizing solutions for more industries using QuickBooks Online connected tools and 750+ third-party apps<sup>1</sup>
- ✓ **Get no-cost support** like 24/7 ProAdvisor assistance and product-specific training, plus dedicated resources for accountants

## Benefits for your clients



### Simplify the workday

- ✓ **Work seamlessly** by accessing all integrated tools through a single sign-in
- ✓ **Keep data current** with real-time integrations and powerful automation
- ✓ **Improve accuracy** by syncing data from connected tools automatically
- ✓ **Get a real-time view on performance** by tracking more business data



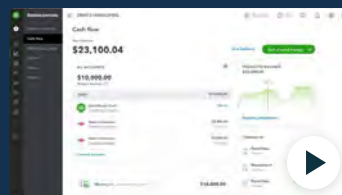
### Collaborate & scale with efficiency

- ✓ **Get fewer interruptions and more collaboration** using one set of data, eliminating check-ins and allowing teamwork with accountants and remote employees in real time<sup>4</sup>
- ✓ **Answer specific needs** and innovate with confidence by adding third-party apps to the QuickBooks platform

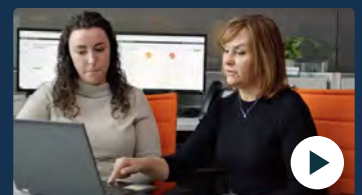


**CAS practices reported a median growth rate of 16% over the previous year** in net client fees per professional, according to findings from the 2022 CPA.com & AICPA PCPS Client Advisory Services (CAS) [Benchmark Survey](#)

The QuickBooks Online ecosystem can help you and your clients achieve business milestones



▶ [A connected suite of tools to keep things running smoothly](#) (1:05)



▶ [Connected tools for better business management](#) (3:08)

## FINANCIAL MANAGEMENT

# Solutions to support your firm and your clients

No matter how good a financial management strategy is, using separate tools and processes to accomplish it leaves too much room for manual error and disruption.

QuickBooks Online is the financial management hub at the center of the QuickBooks ecosystem. Transactions are automatically imported, allowing your clients to send invoices, get paid, pay bills, run payroll, track time, and manage their cash flow.<sup>1</sup>

All the data syncs in real time, giving you better visibility into clients' business performance. With efficient financial management, you'll have more time to create accurate, customized reports and advise clients on their next move.

### **In this section:**

[QuickBooks Online](#)

[QuickBooks Online Advanced](#)

QUICKBOOKS ONLINE

# Help clients spend time on their passions, not their finances

Sync your clients' business data and insights all in one place, so you always know exactly where they stand. Whether your client's just starting out or has more complex business needs, QuickBooks Online helps you understand and deliver value for their business in less time.



## Benefits to your firm

- ✓ **Know where money is going** when all of your clients' bank and credit card transactions sync automatically to QuickBooks to help you seamlessly track income and expenses
- ✓ **Help clients plan for what's next** by projecting their cash flow 30 or 90 days in advance
- ✓ **Make smarter business decisions** by using tags to track what's important, and running custom reports on your tags for an instant view of the insights that matter most



## Benefits to your clients

- ✓ **More time to drive growth and profit** by streamlining tasks with automation like tracking income, expenses, transactions, receipts, and organizing and managing bills
- ✓ **Simplified collaboration** with easy-to-use communication tools to track requests, share info, and partner on strategy
- ✓ **Stay on top of the business from anywhere** with mobile alerts for key events, like when invoices are paid<sup>5</sup>
- ✓ **Get paid and pay others in less time**, with tools to invoice customers, organize and pay bills,<sup>6</sup> and accept payment with sales tax calculated automatically<sup>7</sup>

Explore [QuickBooks Online](#) pricing and features for your clients.



**QuickBooks Online is simply the best solution for small- to medium-sized business. The integration solutions expand as the business grows. You get the functionality of a larger mid-size market solution at a much better price point.**

Paula Finestone, Accountant

Add this product and more from QuickBooks Online Accountant

Sign in

See [how to add a client](#) in QuickBooks Online Accountant

Find the right solutions for each client

Take quiz

QUICKBOOKS ONLINE ADVANCED

# Support complex business needs with customizable features

As a business grows to 10 or more employees, its needs can change. The enhanced features and integrations in QuickBooks Online Advanced enable you to support those changing needs.

Learn how the QuickBooks Online ecosystem [helps medium-sized clients thrive](#).



## Streamline to strategize

- ✓ Streamline project and client management with QuickStart templates and communication tools all in one cloud-based platform
- ✓ Import and send hundreds of invoices and expenses at once, plus enter and edit multiple bills and checks in a few quick steps
- ✓ Get US-based [ProAdvisor support](#)<sup>8</sup> for you and [Priority Circle](#) membership for your clients with dedicated, 24/7 product support and on-demand training<sup>9</sup>



## Provide meaningful insights

- ✓ Up your advisory game and help clients make informed decisions with timely, tailored insights and robust industry data, benchmarking tools, and views into their local and regional markets<sup>10</sup>
- ✓ Give clients a holistic view of their business with real-time KPIs and a cost calculator to help track and adjust in-progress jobs to maximize project profitability
- ✓ Seamlessly send data back and forth between Advanced and Excel using Spreadsheet Sync, for more accurate business data and custom insights<sup>11</sup>



## Help clients do more

- ✓ Get each team of up to 25 users into QuickBooks securely with custom roles and permissions
- ✓ Provide dashboards and workflows that scale with your client's business and make cash flow more efficient by creating automated reminders and rules-based approvals
- ✓ Customize a tailored solution with premium apps in addition to 750+ industry-specific apps that integrate with the QuickBooks Online ecosystem<sup>12</sup>

Explore [QuickBooks Online Advanced](#) pricing and features for your clients.



[How to run and grow a real estate development business](#)  
(3:20)



**QuickBooks Online Advanced is just the tool we needed to help our clients take their businesses to the next level.**

Matthew Fulton, Managing Partner, Parkway Solutions, Ventura, CA

Add this product and more from QuickBooks Online Accountant

[Sign in](#)

Find the right solutions for each client

[Take quiz](#)



## WORKFORCE MANAGEMENT

# Help clients manage employees & contractors in one place

To focus on the business at hand, your clients need the peace of mind that they have the right tools and support to manage and pay their teams.

Help clients support and retain top talent with QuickBooks Online and its suite of connected tools. You'll have intuitive time-tracking that streamlines payday tasks, detailed costs for payroll and benefits reflected automatically in your chart of accounts, and payment tools to help you include contractors. Whether you or your client manages payroll, you can set payroll taxes to be filed and paid automatically—with 100% accurate calculations guaranteed.<sup>13</sup>

### **In this section:**

[QuickBooks Online Payroll](#)

[Contractor Payments](#)

[QuickBooks Time](#)

BUNDLE WITH QUICKBOOKS ONLINE

STANDALONE PAYROLL

QUICKBOOKS ONLINE PAYROLL

# Make workforce management seamless for clients



Help clients thrive with accurate, efficient payroll services and expert guidance they can trust.<sup>1</sup> Clients can assign work with confidence and translate payroll data into insightful reports in QuickBooks Online Payroll, a single platform that integrates payroll and workforce management with accounting.<sup>14</sup>

- ✓ **Help clients save money** with a solution that includes time tracking, scheduling, and reporting for one price<sup>15</sup>
- ✓ **Streamline payroll taxes** by having them calculated, filed, and paid,<sup>16</sup> with guaranteed accuracy<sup>13</sup>
- ✓ **Choose preferences for payroll**, to run either automatically or after a quick approval, with unlimited payroll runs at no extra charge<sup>17</sup>
- ✓ **Share deep profitability insights with clients** using job costing and payroll reports to provide accurate real-time data and evaluate expenses against income

Explore [QuickBooks Online Payroll](#) pricing and features for your clients

## Help clients:



### Save time

- ✓ **Minimize manual work** by soliciting W9s and paying contractors from QuickBooks, and automatically sending copies of their 1099s after filing<sup>18</sup>
- ✓ **Keep teams happy and hold cash longer** with same-day direct deposit<sup>19</sup>



### Work in real time

- ✓ **Collaborate from anywhere** with an activity feed of notes, photos, and project updates
- ✓ **Automate notifications** to remind workers to clock in or out when entering or leaving the job site<sup>20</sup>



### Get peace of mind

- ✓ **Get tax penalty protection** of up to \$25,000 to resolve an IRS penalty—regardless of who caused the error<sup>21</sup>
- ✓ **Rely on expert support** with 24/7 access for troubleshooting and resources<sup>22</sup>



QuickBooks Payroll lets you view and approve employee hours and run payroll in less than 5 minutes.<sup>23</sup>

## When you ask, we listen

Feedback from accountants inspired these features:

- Store and manage HR-related documents in employee profiles
- Store and manage W-9 information in Contractors list
- File Form 943, the Employer's Annual Federal Tax Return for Agricultural Employees

Add this product and more from QuickBooks Online Accountant

Sign in

Find the right solutions for each client

Take quiz

BUNDLE WITH QUICKBOOKS ONLINE

STANDALONE PAYROLL

QUICKBOOKS ONLINE PAYROLL

# Taking care of the team goes beyond a paycheck

When your clients can attract and retain top talent, they can focus on growing their business with their best team rather than spending time and money on higher turnover. Give your clients tools to provide fully integrated, big-business benefits on a small-business budget.<sup>1</sup>



Retirement plans and employer-covered healthcare are among the top 3 benefits employees prefer.<sup>24</sup>

## Health insurance plans by Allstate<sup>25</sup>

- ✓ **Access affordable plans:** Your clients can access custom quotes and find cost-effective insurance options that fit their and their employees' needs
- ✓ **Seamless integration:** Effortlessly integrate insurance with QuickBooks Payroll for automated deductions and recording
- ✓ **Expert support:** Clients will receive expert support to find the right plans for their business and enroll employees

## Retirement plans by Guideline<sup>26</sup>

- ✓ **Get low costs, no fees, and potential credits:** Clients may be eligible for tax credits to cover their setup and administration expenses
- ✓ **Fully integrated with QuickBooks Payroll:** Sync employee data, automate deductions, and track eligibility
- ✓ **Set up a 401(k) plan in 20 minutes:** Guideline takes care of investments, government filings, and you can manage clients' 401(k) from a dashboard

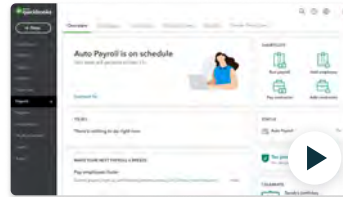
## Workers' comp policies by NEXT Insurance<sup>27</sup>

- ✓ **Keep cash longer:** Pay as you go rather than in one lump sum
- ✓ **Pay and help protect your team:** Get automatic calculations, simplify annual audits, and manage it all in one place
- ✓ **Integrate an existing policy:** NEXT can help set up your clients and connect their policies with QuickBooks Payroll

## Expert HR advice powered by Mineral, Inc<sup>28</sup>

- ✓ **Essential HR services at no added cost:** Clients using Payroll Premium or Elite get expert HR support from our provider Mineral
- ✓ **Make onboarding new employees a breeze:** Clients can access employee handbooks, onboarding checklists, offer letters, and more
- ✓ **Easy access to HR advice:** Call or message for professional guidance from certified HR advisors
- ✓ **Dedicated HR advisor:** Available to clients using Payroll Elite

## See QuickBooks Online Payroll in action



[QuickBooks Online Payroll](#) (2:13)



[QuickBooks Online Payroll Elite](#) (3:24)



3 out of 4 accountants surveyed recommend QuickBooks Online Payroll to their clients.<sup>29</sup>



Explore [QuickBooks Online Payroll pricing](#) and features for your clients

Add this product and more from QuickBooks Online Accountant

Sign in

Find the right solutions for each client

Take quiz

PAYROLL RESOURCES

# Explore how QuickBooks Online Payroll can support your client's needs



## Webinars

[Payroll specialist fundamentals](#)

[QuickBooks Online Payroll part 1: Product line-up & first steps to set up](#)

[QuickBooks Online Payroll part 2: Paying, filing, adjusting payroll tax liabilities](#)

[QuickBooks Online Payroll Certification Exam prep](#)



## Videos

[See why this accounting firm loves QuickBooks Online Payroll](#)

[QuickBooks Online & Payroll make managing two stores easy for Bella Grace Paper](#)

[Big-business HR & benefits on a small-business budget](#)

[How to add payroll for clients in QuickBooks Online Accountant](#)



## Articles

[Workforce tools complement QuickBooks Online for success](#)

[QuickBooks Online Payroll benefits to accountants and their clients](#)



[Access payroll training](#) in QuickBooks Online Accountant to learn how to calculate and process payroll for your clients.



[Get certified in QuickBooks Online Payroll](#), which includes access to risk and compliance training.

## QuickBooks Online Payroll resource library

QuickBooks **ProAdvisors**<sup>®</sup> and accounting professionals who offer payroll services to their clients sometimes need help setting up, managing, and troubleshooting **QuickBooks**<sup>®</sup> **Online Payroll**. Visit our comprehensive resource library with videos, knowledge base articles, videos, live training, and more.

[View library](#)

BUNDLE WITH QUICKBOOKS ONLINE

INCLUDED WITH QUICKBOOKS ONLINE PAYROLL

CONTRACTOR PAYMENTS

# Clients pay contractors, you stay ready for tax time

Your clients can use Contractor Payments to pay contractors quickly<sup>30</sup> and provide the records you need for tax season.<sup>1</sup>



- ✓ **Stay tax-time ready and compliant** with tools that let clients create unlimited 1099s and send copies to their contractors and vendors<sup>31</sup>
- ✓ **E-file 1099-NEC & 1099-MISC forms** in a few clicks, and store the records in one place<sup>18</sup>
- ✓ **Eliminate manual data entry** with contractor and vendor payment data that flows automatically to QuickBooks Online

## Help clients:



**Pay contractors and vendors fast** with unlimited payments and next-day direct deposit<sup>32</sup>

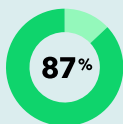


**Onboard contractors and vendors quickly** by inviting them to set up and provide W-9 and bank deposit information securely



**Update their books automatically** with payments that sync with QuickBooks Online<sup>33</sup>

Explore [Contractor Payments](#) pricing and features for your clients



87% of customers trust QuickBooks to pay and e-file 1099 forms for their contractors.<sup>34</sup>



## Add this product and more from QuickBooks Online Accountant

Sign in

▶ See how contractor payments works (1:40)

BUNDLE WITH QUICKBOOKS ONLINE

INCLUDED WITH QUICKBOOKS PAYROLL PREMIUM & PAYROLL ELITE

QUICKBOOKS TIME

# Give stronger profitability advice with accurate, real-time data

Give your clients a time tracking solution with their whole business in mind.<sup>1</sup> Employee timesheets and workers' regular time, overtime, double-overtime, and time off<sup>35</sup> automatically appear in QuickBooks Online, making processing payroll more efficient.<sup>36</sup>



**Save time** with quick timesheet review, editing, and approval for clients



**Track actuals against estimates** for each project using up-to-the-minute data at a glance<sup>37</sup>



**Compare profit margin across jobs** to see the most worthwhile projects, and optimize budgets, deadlines, and resources using productivity insights

Explore [QuickBooks Time](#) pricing and features for your clients



Clients can add over 10% more billable time to their invoices with QuickBooks Time.<sup>38</sup>



## Help clients:

- ✓ **Get every dollar they deserve** by streamlining payroll runs and tracking every second worked
- ✓ **Create, save, and pull real-time reports** to gain deep insight into project costs, so they can make the most of each hour
- ✓ **Make time-tracking and scheduling more flexible** by tracking time from mobile app,<sup>39</sup> desktop, or tablet-based punch clock on-site<sup>40</sup>—plus, resource and schedule new jobs from any device<sup>41</sup>
- ✓ **Stay in the know and in control** with GPS tracking<sup>42</sup> to see who's working and what job they're doing, plus get automatic alerts for schedule changes, breaks, overtime, and timesheet approval deadlines<sup>43</sup>

ACCOUNTS PAYABLE & ACCOUNTS RECEIVABLE

# Give clients a better handle on their cash flow

A business works best when it has a healthy cash flow. Depending on multiple tools and manual work can increase the chance of error and delays.

Help your clients track and manage their incoming and outgoing payments so they can see their bottom line anytime from one place.

**In this section:**

[QuickBooks Payments](#)

[QuickBooks Checking](#)

[QuickBooks Bill Pay](#)

QUICKBOOKS PAYMENTS **BUNDLE WITH QUICKBOOKS ONLINE**

# Automate more accounting to promote clients' growth

QuickBooks Payments integrates with your client's bank to lighten the load of managing the books.<sup>33</sup>



- ✓ **Work with books that stay reconciled** when sales are recorded in real time and payments are automatically matched to invoices, no matter how clients' customers pay<sup>44</sup>
- ✓ **Set recurring invoices** to suit your schedule, with payments that are online, mobile, or over the phone
- ✓ **Create reports** in QuickBooks Online using real-time payments data

More about QuickBooks Payments

[▶ How to set up QuickBooks Payments \(3:24\)](#)

**Article:** [Recommend QuickBooks Payments to your clients and help them save time](#)

**Webinar:** [Getting started with QuickBooks Online Payments](#)

## Help clients:

**Provide flexible, contact-free payment options:** Send pay-enabled, online invoices<sup>45</sup> and accept payments by card, digital wallet, eCheck, or bank transfer, plus take [in-person payments](#) with our card reader and GoPayment app<sup>46</sup>

**Stay in control of their cash:** Know when customers view and pay invoices with real-time tracking, plus get eligible payments deposited next-day<sup>47</sup> or instantly for 1.75% more<sup>48</sup>

**Protect themselves against disputes:** Get up to \$10,000 per transaction in chargeback protection through QuickBooks, for an additional fee as low as 0.99% on card transactions<sup>49</sup>

**Reduce busywork:** Send a customer a link to request payment for their purchase—plus, set recurring invoices to be sent and paid on your schedule

Explore [QuickBooks Payments](#) pricing and features for your clients

QUICKBOOKS CHECKING **BUNDLE WITH QUICKBOOKS PAYMENTS**

## Banking that syncs seamlessly with QuickBooks

Your clients can have a business bank account built into QuickBooks, with perks made just for them:<sup>50</sup>

- ✓ **Bookkeeping made easier:** QuickBooks matches payments for your clients and lets them attach receipts to debit card transactions,<sup>50</sup> and you can stay informed with read-only access
- ✓ **Instant deposit, no extra fee:** For every payment clients receive online or through a card reader, funds appear in their checking account right away for no added fee, if eligible<sup>48</sup>
- ✓ **Clients can set aside money to save** from every deposit, using virtual envelopes to save for things like taxes, payroll, and rainy day funds<sup>51</sup>
- ✓ **Money that works 70x harder:** Earn interest at 5.00% APY on envelope balances,<sup>52</sup> which is over 70x the U.S. average.<sup>53</sup>

Explore [QuickBooks Checking](#) features for your clients

[▶ QuickBooks Checking: Small business banking reimaged \(1:31\)](#)

QUICKBOOKS BILL PAY **BUNDLE WITH QUICKBOOKS ONLINE**

## Streamline your clients' bill pay, all in one place

Customize your AP service with tools that help you and your clients save time and limit liabilities.<sup>6</sup>

- ✓ **Amplify your AP expertise:** From outstanding payables to reports, help clients manage their business finances and improve decision making
- ✓ **Create bills automatically:** Import your clients' vendor invoices in bulk and QuickBooks can pre-fill bills for you to review and save
- ✓ **Simplify vendor management:** Invite clients' vendors to the QuickBooks Business Network, where they can add their own payment info for direct payment—saving you time and worry<sup>54</sup>
- ✓ **Pay vendors how you like:** You and your client can pay multiple vendors at a time and multiple bills in one payment, using your choice of ACH payment or paper check
- ✓ **Effortlessly organized books:** When you or your client pay vendors and contractors through QuickBooks, we'll record the transaction and match it for you in your clients' books<sup>55</sup>

Explore [QuickBooks Bill Pay](#) pricing and features for your clients



BUSINESS & INDUSTRY SPECIFICS

# Create customized solutions for every client

A business can use tools and apps in its processes, but adding them without integrating the data means more work with little payoff.

The QuickBooks Online ecosystem lets you create thousands of custom solutions. With robust features from fully integrated tools and apps, you can help a small business that needs industry-specific functionality or a large one that needs a cost-effective ERP alternative. As your client's trusted advisor, you can expand your CAS practice by building a tailored ecosystem to help them grow with confidence.

**In this section:**

[Intuit tools](#)

[Third-party apps](#)

INTUIT TOOLS **BUNDLE WITH QUICKBOOKS ONLINE**

# Add more business capabilities for you and your clients

Accountants and clients can integrate additional Intuit tools with QuickBooks Online to do even more with their businesses—and see it all in one place.<sup>1</sup>

## **ProConnect Tax** helps streamline your tax workflow

- ✓ **Create tax returns quickly from anywhere** with a browser-based tax tool
- ✓ **Automate compliance and focus on your clients** with access to over 5,700 forms, 25,000 error-spotting diagnostics, and 30+ more time-saving features
- ✓ **Optimize firm operations** by assigning client returns, monitoring return status and team workloads, and filtering staff names

## **Mailchimp** helps clients manage and market to their audiences

- ✓ **Build comprehensive customer profiles** by syncing invoices, transaction history, and total revenue
- ✓ **Send the right message at the right time** by segmenting your audience
- ✓ **Access customer profiles** to see invoice, transaction data, and engagement history across marketing channels, 1:1 messages, survey interactions, and more

## **E-commerce** syncs orders and payouts from your client's online sales channels

- ✓ **Sync e-commerce data** from platforms like Shopify, eBay, and Amazon with QuickBooks to see income and expenses all in one place<sup>56</sup>
- ✓ **Get a bird's eye view** of your payouts, sales, and expenses by matching payouts with bank deposits, while separating revenue from taxes and fees
- ✓ **See trends at a glance** when you stay on top of cash flow, run accurate reports, and get insights into your revenue, expenses, and profitability



**Apps have helped us solve so many pain points, allowing us to serve clients like never before.**

Timothy L. Wingate Jr., EA

THIRD-PARTY APPS **BUNDLE WITH QUICKBOOKS ONLINE**

# Find solutions for every business on our open API platform

We value and champion app developers through initiatives like our developer growth pilot program, because we believe they can help you and your clients thrive. You'll find apps that add functionality for construction, non-profit, service-based industries, and much more.<sup>56</sup>

## Help clients:

- ✓ **Work smarter, not harder** by using integrated apps that add functionality so they can do each task just once and sync all their data to the same place
- ✓ **Encourage innovation by adding functionality from 750+ apps** to answer your clients' specific business and industry needs
- ✓ **Get more capacity and capability** to advise existing clients and take on new clients of any size with apps that meet a broad set of needs
- ✓ **Have a clearer holistic view of their business** by syncing more data from more departments in real time
- ✓ **Enrich your client's books and reporting** by collecting all-new data points from third-party apps



**The reason that apps are so valuable is because they fulfill a need inside the firm to be more efficient and effective in what they do, so they can focus on the real needs of the client.**

Carla Caldwell, Caldwell Consulting & Training

## Learn more about third-party apps

Get the guide, [Third-party apps for the unique needs of your business](#)

## See the apps that help QuickBooks do more

[Explore the options](#)

## RESOURCES

# Assistance for accountants

We consider accounting professionals to be some of our most important partners, because we share the same mission: to help businesses grow and prosper. Cultivating this partnership includes creating dedicated accounting resources to ensure you have the latest relevant information at your fingertips.

### **In this section:**

[QuickBooks ProAdvisor program](#)

[Resources for moving online](#)

[Accountant resources](#)

QUICKBOOKS PROADVISOR PROGRAM

# Professional growth at any stage of your career

Earn points and rewards for the things you may already do—like training, adding clients, and attaching software. The [ProAdvisor](#) program offers benefits and resources that only get better as you grow.



**The Find-a-ProAdvisor directory gives me the opportunity to get in front of potential clients by showing them my expertise and contact info without spending a dime.**

Timothy L. Wingate Jr., EA



**I love that I can access free training whenever I want. I often reference the training materials more than once.**

Sherrell T. Martin, Nitram Financial Solutions, National Harbor, MD



**Find-A-ProAdvisor basically launched my whole book of business, and I have nothing but glowing things to say about it.**

Nick Swedberg, Senior Manager, Boyum Barensheer, Bloomington, MN

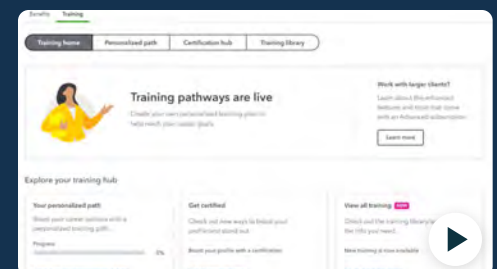
- ✓ **Offer ProAdvisor preferred pricing** to your clients on products and supplies
- ✓ **Differentiate your practice with free QuickBooks training** designed by and for accounting professionals, including on-demand, virtual, or in-person courses that earn you CPE credits
- ✓ **Get access to QuickBooks Online and Payroll Elite for free** through QuickBooks Online Accountant when you become a ProAdvisor
- ✓ **Publicize your practice** after certification in our Find-a-ProAdvisor directory of professionals<sup>57</sup>
- ✓ **Get premium help** from our top customer support agents<sup>58</sup>



## Build your training path

Expand your practice, earn CPE credit, and get certified in **QuickBooks Online**, **QuickBooks Online Advanced**, and **QuickBooks Online Payroll** with a custom, self-paced training plan.

Get started



▶ Pro Advisor self-paced training tutorial (1:52)

RESOURCES FOR MOVING ONLINE

# Solutions for moving clients online

Get helpful resources for each step of the migration process to QuickBooks Online. The [QuickBooks Online Migration Toolkit](#) gives you the resources, guides, and tips you need to help each client make a smooth transition. Whether you want to migrate clients' data yourself or prefer personalized help, you've got options.



[QuickBooks Online, Payroll, and Payments make Joe Goode Performance Group run more efficiently](#) (2:49)

## Wondering which of your clients should make the switch?

Get our guide, [A new way of thinking about who's right for QuickBooks Online](#).



## How to move to QuickBooks Online from a different product

If your clients use other financial software, and would be better suited to QuickBooks Online, here's some guidance on how to make the move.

[Convert from Sage 50](#)

[Convert from Xero](#)

## Migrating from Desktop Payroll to Online Payroll is easier than ever

Here are the most recent updates to the migration process.

- ✓ **More bank information**, like employer account and direct deposit details and limits, now migrates to QuickBooks Online Payroll
- ✓ **More Paid Medical Family Leave (PFML)** details now migrate to Online Payroll
- ✓ **QuickBooks Workforce accounts** now migrate to Online Payroll
- ✓ **Standalone Payroll migration** now available for clients who want to continue using Desktop for accounting
- ✓ **Have an expert set up payroll** once you provide info<sup>59</sup>



Get free migration help and a personalized setup session<sup>60</sup>

Schedule a call

# Accountant resources

Get insights, support, training, and advice for accounting professionals by visiting these links:



## [Support for accountants](#)

Answers you can use, from articles to videos to live support

## [Monthly product updates](#)

QuickBooks product news you can relay to your clients

## [In the Know webinar](#)

A series hosted by our product experts, about the latest and greatest QuickBooks product feature upgrades

## [Help Hub](#)

Articles, community discussions with QuickBooks users, video tutorials, and more

## [Accountant University](#)

Self-paced training and live events to help you boost your skills

## [Firm of the Future blog](#)

Insights and advice for accounting and bookkeeping professionals

## [Accountant Resource Center](#)

Additional resources for QuickBooks Online Accountant and related products

# Free calculators

## [Paycheck calculator](#)

Calculate pay for hourly wage earners and salaried employees to get an accurate picture of their gross pay, including overtime, commissions, bonuses, taxes, and more

## [Timesheet calculator](#)

Calculate an employee's total gross pay from weekly or bi-weekly employee timesheets using total hours with overtime and lunch breaks

## [Employee cost calculator](#)

Help determine whether your client can take on new team members, by answering a few questions to calculate the full cost of a new hire

## Important pricing details and product information

QuickBooks and Intuit are a technology company, not a bank. Banking services provided by our partner, Green Dot Bank.

Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services. For more information about Intuit Payments' money transmission licenses, please visit <https://www.intuit.com/legal/licenses/payment-licenses/>.

- © 2024 Intuit. Additional terms, conditions and fees may apply with certain features and functionality. Eligibility criteria, credit, and application approval may apply. Feature availability varies by product and platform. Terms, conditions, pricing, special features, and service and support options subject to change without notice.
- 3.93 hours per week:** Based on an Intuit survey of 2040 QuickBooks Online Payroll customers in February 2023. Results are based on customer reported savings per week. On average, respondents who report time savings save 3.93 hours per week.
- ProAdvisor pricing:** Learn more about [ProAdvisor preferred pricing](#) and the [ProAdvisor Preferred Pricing revenue share program](#).
- More collaboration:** You can connect up to the following for each product: 1 billable user and 2 accounting firms for QuickBooks Online Simple Start, 3 billable users and 2 accounting firms for QuickBooks Online Essentials, 5 billable users and 2 accounting firms for QuickBooks Online Plus, 25 billable users and 3 accounting firms for QuickBooks Online Advanced. Accounting firms must connect using QuickBooks Online Accountant.
- Anywhere access - QuickBooks Online Mobile:** The QuickBooks mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. Mobile access is included with your QuickBooks Online Accountant subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.
- QuickBooks Bill Pay:** QuickBooks Bill Pay account subject to eligibility criteria, credit, and application approval. Not available in U.S. territories or outside the U.S. Subscription to QuickBooks Online required.
- Automatic Sales Tax:** Underlying sales tax rates are estimated based on the location information associated with each individual transaction. Additional factors that may impact sales tax rates include product type, date, and customer type. Tax information needs to be validated prior to submitting to the IRS.
- ProAdvisor support:** Support hours are subject to change without notice. Phone and messaging support for Premium level is available 24/7. Support hours exclude occasional downtime due to system and server maintenance, company events, observed U.S. holidays and events beyond our control. Intuit reserves the right to limit each telephone contact to one hour and to one incident. Intuit reserves the right to change these hours without notice.
- Priority Circle:** Membership in Priority Circle and its benefits are available only to customers located in the 50 United States, including DC, who have an active, paid subscription to QuickBooks Online Advanced. Eligibility criteria may apply to certain products. When customers no longer have an active, paid subscription, they will not be eligible to receive benefits. Phone and messaging Premium support is available 24/7. Support hours exclude occasional downtime due to system and server maintenance, company events, observed U.S. holidays and events beyond our control. Intuit reserves the right to change these hours without notice. Terms, conditions, pricing, service, support options, and support team members are subject to change without notice.
- Industry Benchmarks:** Feature availability varies and is dependent on available data. Only supports businesses which use accrual accounting.
- Spreadsheet sync:** Automatic refresh requires setup and will update workbooks or individual sheets every time you open the workbook or login to Spreadsheet Sync. See more details [here](#).
- QuickBooks app integration:** Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees. For more information see [apps.com](#).
- Accuracy Guaranteed:** Available with QuickBooks Online Payroll Core, Premium, and Elite. We assume responsibility for federal and state payroll filings and payments directly from your account(s) based on the data you supply. As long as the information you provide us is correct and on time, and you have sufficient funds in your account, we'll file your tax forms and payments accurately and on time or we'll pay the resulting payroll tax penalties. Guarantee terms and conditions are subject to change at any time without notice.
- QuickBooks Online Payroll** Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services.
- QuickBooks Time integration:** QuickBooks Time integrates with QuickBooks Online ("QBO"), QuickBooks Online Payroll ("Payroll") and QuickBooks Desktop ("Desktop"). Requires an active QBO, Payroll or Desktop account. Additional fees may apply. Time tracking included in the QuickBooks Online Payroll Premium and Elite subscription services. Features vary. The QuickBooks Time mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Time mobile access is included with your QuickBooks Time subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.
- Automated tax and filings:** Automated tax payments and filing available for state and federal taxes. Enrollment in e-services is required for tax payments and filings only. Automated tax payments and filings for local taxes available in QuickBooks Online Payroll Premium and Elite only.
- Auto Payroll:** Available if setup for the company is complete. At least one employee has completed setup and has consistent payroll that qualifies for automation (i.e. salaried or hourly with default). Company must complete bank verification if an employee has direct deposit as the payment method, and the first payroll must run successfully. The account must not have a hold.
- Automated 1099 e-file & delivery:** Prepare your 1099s in QuickBooks at no extra charge. If you choose the 1099 E-File Service, Intuit will e-file your Federal 1099 information with the IRS, and then print and mail a copy directly to your contractors; fees apply. As part of the paid 1099 E-File Service, we also give your contractors online access to their 1099s. State filing not included. You should check with your state agency on any state filing requirements.
- Same-day direct deposit:** Available to QuickBooks Online Payroll Premium and Elite users only. Payroll processed before 7 AM PT shall arrive the same business day (excluding weekends and holidays). Requires setup of direct deposit and bank verification. May be subject to eligibility criteria. Deposit delays may vary because of third party delays, risk reviews, or issues beyond Intuit's control. Available only for employees, not available for contractors.
- Location-based timesheet notifications:** Available in QuickBooks Time Elite only. Optional feature. Account admins may require users to set their location settings to "Always" in order to clock-in and track time using the QuickBooks Time mobile app. Pre-set up required. QuickBooks Times requests GPS points for users when they are off the clock to determine if users have entered a geofence. QuickBooks Time does not save GPS points on its servers and they remain on the user's device. Admins do not have access to employee location data when workers are off the clock. Additional terms and fees may apply.
- Tax penalty protection:** If you receive a tax notice and send it to us within 15-days of the tax notice we will cover the payroll tax penalty, up to \$25,000. Additional conditions and restrictions apply. Only QuickBooks Online Payroll Elite users are eligible to receive [tax penalty protection](#).
- 24/7 expert product support:** 24/7 customer support is included with your paid subscription to QuickBooks Online Payroll Elite. Chat support available 24/7. U.S. based phone support is available Monday through Friday 6 AM to 6 PM PT and Saturday 6 AM to 3 PM PT. Non-US based phone support is available Monday through Friday 6 PM to 6 AM PT, on Saturday 3 PM to 6 AM PT and on Sundays. Your subscription must be current. Intuit reserves the right to limit the length of the call. Terms, conditions, features, pricing, service, and support are subject to change without notice.
- Payroll in less than 5 minutes:** Median time spent by QuickBooks Online Payroll users reviewing and approving payroll as of December 2022.
- Top 3 preferred benefits:** Based on a survey of 1,000 employed Americans and 1,000 business owners conducted by market research company OnePoll, in accordance with the Market Research Society's code of conduct. [Forbes, Feb 6, 2023](#)
- Health benefits:** Health Insurance information is provided by Intuit Insurance Services Inc., a licensed insurance broker, through a partnership with Allstate Health Solutions. Requires acceptance of Allstate's [Terms of Use](#) and [Privacy Policy](#). Intuit Insurance Services is owned and operated by Intuit Inc. and is paid a percentage fee of insurance policy premiums by Allstate Health Solutions in connection with the services described on this page.

## Important pricing details and product information (continued)

26. **Guideline 401(k):** 401(k) offerings are provided and administered by Guideline, an independent third party and not provided by Intuit. Intuit is not a 401(k) plan administrator, fiduciary or other provider. Requires acceptance of Guideline's Client Relationship Summary and Privacy Policy. Additional 401(k) plan fees will apply. Employees may manage their contributions directly with Guideline. Admin and payroll access required to sign up for a 401(k) plan with Guideline. Guideline expert services are provided by and administered by Guideline, an independent third party and not provided by Intuit. Guideline live US-based support is available M-F, 6 AM-4 PM PT.
27. **Workers' comp:** Workers' comp administration: Benefits are powered by NEXT Insurance and require acceptance of NEXT Insurance's [Privacy Policy](#) and [Terms of Use](#). Additional fees will apply. There is a monthly fee (currently, \$5 per month) for QuickBooks Online Payroll Core users for the QuickBooks Workers' Comp Payment Service. This non-refundable fee will be automatically added to each monthly Intuit invoice at the then-current price until you cancel. The fee is separate from any workers' comp insurance policy premium by NEXT Insurance. Workers' Compensation Service requires an active and paid QuickBooks payroll subscription. Eligibility criteria applies to transfer active insurance policy broker of record, including insurance carrier, policy renewal date, and payment method. Workers compensation insurance is not available in OH, ND, WA and WY.
28. **HR services:** HR support is provided by experts at Mineral, Inc. Requires acceptance of Mineral's [Privacy Policy](#) and [Terms of Service](#). HR support center is available only to QuickBooks Online Premium and Elite subscriptions. HR advisor support is only available in QuickBooks Online Payroll Elite. HR support is not available to accountants who are calling on behalf of their clients.
29. **3 out of 4 accountants:** Based on an Intuit survey of 2040 QuickBooks Online Payroll customers in February 2023.
30. **QuickBooks Online Payroll & Contractor Payments:** Subscription to QuickBooks Online Payroll is required. Subject to eligibility criteria, credit and application approval. Payments processed before 5PM PST the day before, arrive the next business day (excluding weekends and holidays). Individual deposit times may vary because of third party delays, risk reviews, or issues beyond Intuit Payment Inc.'s control.
31. **Unlimited 1099s:** 1099s are e-filed only for the current filing year and for payments recorded in the system. Excludes amendment.
32. **Next-day direct deposit:** Payroll processed before 5 PM PT the day before shall arrive the next business day (excluding weekends and holidays). Requires setup of direct deposit and bank verification. May be subject to eligibility criteria. Deposit delays may occur because of third party delays, risk reviews, or issues beyond Intuit's control. Available for contractors and employees. Additional fees may apply to direct deposit for contractors.
33. **QuickBooks Payments:** QuickBooks Payments account subject to eligibility criteria, credit and application approval. Subscription to QuickBooks Online is required. Not available in U.S. territories or outside the U.S.
34. **87% of customers:** Based on an Intuit survey of 2040 QuickBooks Online Payroll customers in February 2023.
35. **Time-off management:** Compliance with applicable laws is the responsibility of the business. This feature is for information purposes only and should not be considered legal, accounting or tax advice, or a substitute for obtaining such advice specific to your business.
36. **Accurate (payroll):** QuickBooks Time requires you to provide correct information and that users clock in and clock out accordingly. Pre-setting required. This feature is not intended to calculate payroll taxes. Overtime is calculated based on current state and federal laws and regulations. Compliance with application laws is the responsibility of the business. This feature is for information purposes only and should not be considered legal, accounting or tax advice, or a substitute for obtaining such advice specific to your business.
37. **Project estimates vs actuals reporting:** Available in QuickBooks Time Elite only.
38. **Over 10% more billable time:** Based on a survey of 595 customers in the U.S. in January 2023. On average, businesses that report an increase in billable time added 10.06%.
39. **Mobile apps:** The QuickBooks Time mobile companion apps work with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Time mobile access is included with your QuickBooks Time subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.
40. **Time Clock Kiosk:** QuickBooks Time punch time clock works on any tablet, desktop, or laptop with an internet connection. Not designed to work on mobile devices. Facial recognition feature makes use of biometric personal information. Optional feature, but some functionality may not be available if consent is declined or withdrawn.
41. **Any device:** QuickBooks Time requires a computer or a device with a supported internet browser and an internet connection (a high-speed connection is recommended). The QuickBooks Time mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. Mobile access is included with your QuickBooks Time subscription.
42. **GPS tracking:** QuickBooks Time mobile app allows users to share their location data while they are on the clock. Cell service required for GPS points accuracy. QuickBooks Time does not save GPS points for users when they are off the clock. Account admins may require users to set their location settings to "Always" in order to clock-in and track time using the QuickBooks Time mobile app.
43. **Overtime alerts:** Automated overtime identifies potentially incorrect overtime hours based on current laws and regulations; business owners have full control and can decline this suggestion in product. Compliance with application laws is the responsibility of the business. This feature is for information purposes only and should not be considered legal, accounting or tax advice, or a substitute for obtaining such advice specific to your business.
44. **Automatic Matching:** QuickBooks Payments: QuickBooks Online will only match bank deposits with transactions processed through QuickBooks Payments. Not all transactions are eligible and accuracy of matches is not guaranteed. QuickBooks Bill Pay: QuickBooks Online will only match bank withdrawals with transactions processed through QuickBooks Bill Pay. Not all transactions are eligible and accuracy of matches is not guaranteed.
45. **Pay-enabled invoices.** Requires a separate QuickBooks Payments account which is subject to eligibility criteria, credit and application approval. E-invoicing QuickBooks Payments is an optional fee-based service. Additional fees may apply. Additional terms and conditions apply.
46. **QuickBooks Card Reader:** Data access subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance. Product registration and QuickBooks Payments account required. Terms, conditions, and features subject to change.
47. **Next-day Deposit (Payments):** Next-day deposit feature subject to eligibility criteria. Payments processed before 3:00 PM PT typically arrive at your bank the next business day (excluding weekends and holidays). Deposit times may vary for other payment methods, third party delays or risk reviews.
48. **Instant Deposit:** Instant deposit is an additional service offered by QuickBooks Payments subject to eligibility criteria, including delayed eligibility for new users and availability for only some transactions and [financial institutions](#). The service carries a 1.75% fee in addition to standard rates for ACH, swiped, invoiced, and keyed card transactions. This 1.75% fee does not apply to payments deposited into a QuickBooks Checking account. Deposits are sent to the financial institution or debit card that you have selected to receive instant deposits. Scheduled instant deposits are run automatically; QuickBooks checks for eligible funds up to 5 times per day. Non-scheduled instant deposits are sent within 30 minutes. Transactions between 2:15 PM PT and 3:15 PM PT are excluded and processed next day. Deposit times may vary due to third party delays.
49. **Payments Dispute Protection:** Payments Dispute Protection ("PDP") is an additional service that covers you for certain payment disputes (i.e. "chargebacks") that your customer initiates through its card issuer associated with a credit or debit card transaction on the American Express, Discover, Mastercard or Visa networks and are processed by QuickBooks Payments while you are enrolled in PDP. You must be enrolled in PDP when both the customer's payment is processed and payment dispute is initiated to receive coverage. Payment disputes covered by PDP are subject to a per-payment dispute coverage limit of \$10,000 with a total annual coverage limit of \$25,000 for all payment disputes received on a rolling 365-day period. Payment disputes related to transactions processed by QuickBooks Payments prior to 3 PM PT on your enrollment day will not be covered if you enrolled in PDP after 3 PM PT. The PDP service fee ranges from .99% to 1.99%, based on eligibility criteria. Terms, conditions, and service fee subject to change without notice.



## Important pricing details and product information (continued)

51. **QuickBooks Checking account:** Banking services provided by and the QuickBooks Visa® Debit Card is issued by Green Dot Bank, Member FDIC, pursuant to license from Visa U.S.A., Inc. Visa is a registered trademark of Visa International Service Association. Green Dot Bank operates under the following registered trade names: GoBank, GO2bank and Bonneville Bank. Registered trade names are used by, and refer to, a single FDIC-insured bank, Green Dot Bank. Deposits under any of these trade names are deposits with Green Dot Bank and are aggregated for deposit insurance coverage up to the allowable limits. Green Dot is a registered trademark of Green Dot Corporation. ©2022 Green Dot Corporation. All rights reserved. QuickBooks products and services, including Instant Deposit, QuickBooks Payments, Cash flow planning / forecasting are not provided by Green Dot Bank. Users must apply for both QuickBooks Payments and QuickBooks Checking accounts when bundled.
52. **Envelopes:** You can create up to 9 Envelopes within your primary QuickBooks Checking account. Money in Envelopes must be moved to the available balance in your primary QuickBooks Checking account before it can be used. Envelopes within your primary QuickBooks Checking account will automatically earn interest once created. At the close of each statement cycle, the interest earned on funds in your Envelopes will be credited to each Envelope in proportion to the average daily balance of each Envelope. See [Deposit Account Agreement](#) for terms and conditions.
53. **Annual percentage yield:** The annual percentage yield ("APY") is accurate as of December 31, 2023, and may change at our discretion at any time. The APY is applied to deposit balances within your primary QuickBooks Checking account and each individual envelope. We use the average daily balance method to calculate interest on your account. See [Deposit Account Agreement](#) for terms and conditions.
54. **Over 70x U.S. average APY:** Average interest rate: The average interest rate is based on the Federal Deposit Insurance Corporation's national rate published the week of October 16, 2023. [Learn more.](#)
55. **QuickBooks Business Network:** Use of the QuickBooks Business Network for spam, marketing, or other activities which violate applicable Intuit Terms of Service is strictly prohibited. You may only view and connect with other QuickBooks Business Network members located in your geography. All Business Information is provided by QuickBooks customers and is not independently verified or endorsed by Intuit. Intuit reserves the right to limit your use of the QuickBooks Business Network, including your ability to connect with other members and be listed in the Network per our Intuit Terms of Service.
56. **Automatic matching:** QuickBooks Online will only match bank withdrawals with transactions processed through QuickBooks Bill Pay. Not all transactions are eligible and accuracy of matches is not guaranteed.
57. **QuickBooks app integration:** Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions, and fees. For more information see [apps.com](#).
58. **ProAdvisor directory:** You must be a Certified ProAdvisor to be listed on the Find-a-ProAdvisor online directory. [Review full ProAdvisor Program terms & conditions.](#)
59. **Phone and messaging support for Premium level:** Available 24/7. Support hours exclude occasional downtime due to system and server maintenance, company events, observed U.S. holidays and events beyond our control. Intuit reserves the right to limit each telephone contact to one hour and to one incident. Intuit reserves the right to change these hours without notice.
60. **Expert setup:** Available to QuickBooks Online Payroll Elite users only.
61. **Free assisted migration and personalized setup** from QuickBooks Desktop Pro, Premier, Mac, or Plus ("Desktop") to QuickBooks Online Simple Start, Essentials, Plus or Advanced ("QuickBooks Online"), or QuickBooks Desktop Payroll, Payments, or Time to QuickBooks Online Payroll, Payments, or Time is available to customers who sign up for Assisted Migration or personalized setup to QuickBooks Online and is subject to capacity. The Assisted Migration offer is eligible to Desktop customers that are migrating their data and setting up QuickBooks Online. The personalized setup offer is eligible to Desktop customers that are migrating their data, as well as those customers who elect not to migrate their data, who are starting new QuickBooks Online accounts, and setting up QuickBooks Online. Personalized setup is limited to a 1-hour session with a customer success product expert. Intuit reserves the right to limit the number of sessions and the length and scope of each session. Assisted migration results may vary based on business complexity and file size. Terms and conditions, features, support, pricing, and service options are subject to change without notice.