

Using QBOA to Manage & Automate your Practice

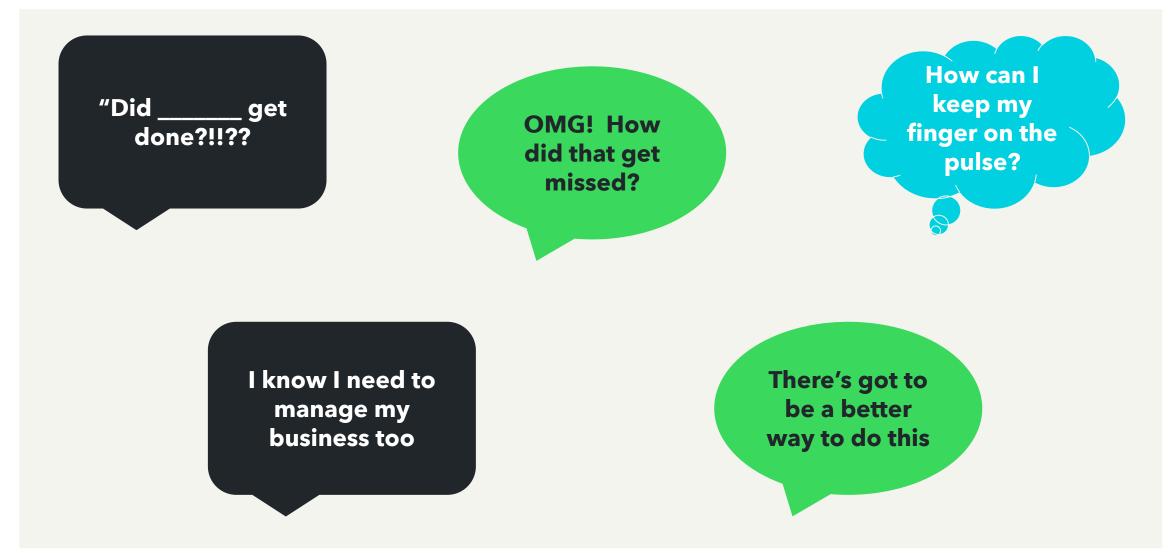
About Me



Ingrid Himmelman Principal Professional Services Consultant

- Intuit Canada, Principal Professional Services Consultant
- Specialize in system and process implementation, change management, project management

Why this topic?



Agenda

- What is Practice Management?
- In Product Demo of QBOA Work
- How to implement Practice
 Management



What is Practice Management?

What does it mean to you?

Poll





The systems & processes that bring

• Clients





The systems & processes that bring

- Clients
- Team





The systems & processes that bring

- Clients
- Team
- Deadlines





The systems & processes that bring

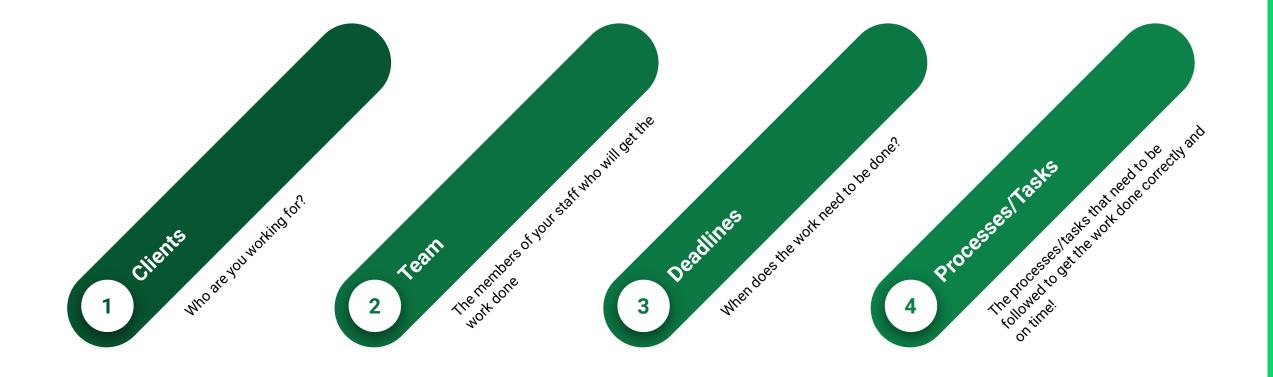
- Clients
- Team
- Deadlines
- Processes/Tasks

all under one roof!





Practice Management - 4 Components





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Practice Management using QBOA Work

Accessing QBOA Work

D Accountant	E GO TO QUICKBOOKS ∨ 🖻 Accountar	nt Tools	(?) Help	***	Q D	\$	
+ New YOUR PRACTICE	Ingrid Intuit Ingrid's clients			Feedb	back?	Add clie	ent
Clients Team	Overview Bookkeeping Find	a client Q V					\$
ProAdvisor 🔰 >	CLIENT / CONTACT	BOOKS REVIEW		LEAD	1	ACTI	IONS
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BOOKMARKS	One User Test - Client Primary Admin	Start September review		IH	Edit	client	~
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Accessing QBOA Work

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In-Product Demo

Work

Feedback? to Create project

- Feedback?
- Notifications make your choices
- Manage templates -
- Create client request
- Create project start here



Work

View choices

- Whose tasks All, Clients or Firm
- All or specific Team members' tasks
- Types or Projects/Tasks/Requests
- From Quickbooks
- Cards, List or Calendar View



Notes

Feedback - exactly what it says. If you have thoughts/desires/frustrations - speak up!! Notifications - you can choose what you want to have show up in your inbox. Proceed with caution or you could flood your inbox Manage templates - have repeated projects/processes? - Templates will help you to quickly create new projects as you bring on new clients. Create client request - only for QBO clients - but you can send request to the Primary Admin PLUS it will appear in the My accountant tab

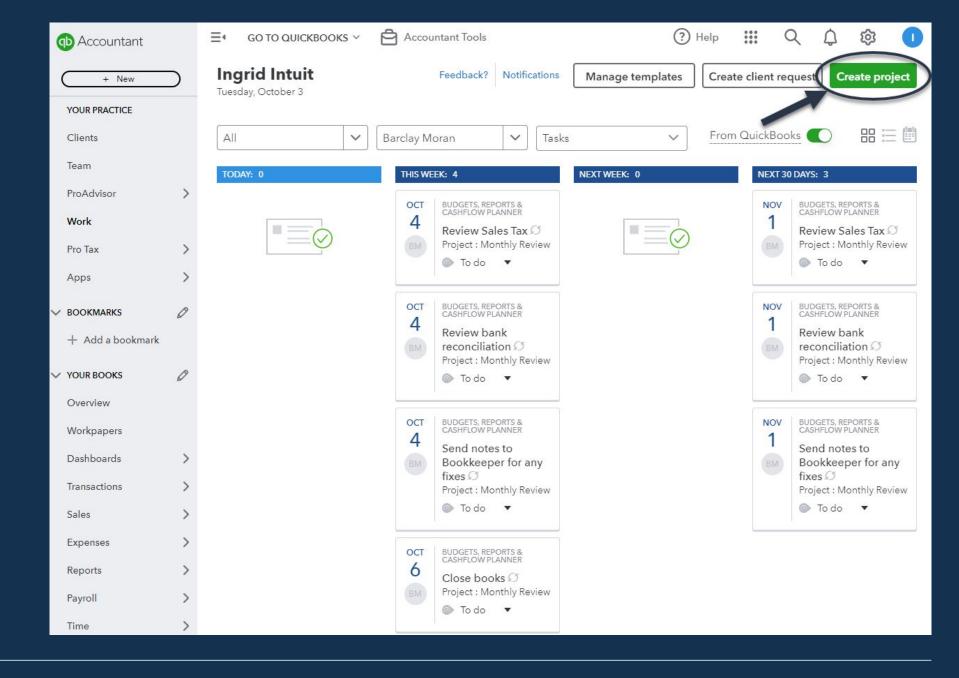
All - shows your firm's projects, tasks and/or requests that have been created/assigned. You can choose to filter for specific groups - Clients, or just your Firm Everyone - do you want to see Everyone's outstanding tasks or someone specific on your team - use the dropdown to filter for a specific person. All types - you can look at EVERYTHING (projects, tasks and requests), or you can collapse the list by selecting from the dropdown From Quickbooks - toggle on/off. Shows if there are banking transactions that need to be addressed Different views - depending on your focus, you can change the view.

- Card standard view
- List you have more options for filtering in this view
- Calendar great for getting a holistic view of your practice month by month.



Work Tab

Get started





Create Project

Create project	×
Show tips	
Project template No template	
Project name * Your project's na Firm or client * Firm or client * Select 03/10/2023	Toggle on/off
Repeats Monthly V on day V 3rd V of Ends Upcoming	every 1 month(s
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	ct correct n member
Details	
Be as detailed as you want. You've got lots of roo	om.
Tasks For you and your team. Tasks aren't sh	
Add a task Add tasks	Intuit Confidential and Prop

Create a template

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+ New YOUR PRACTICE	Ingrid Intuit Feedback? Notific Wednesday, October 4	Show tips O For Budgets, Reports & CashFlow Planner
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Work	31 Random project 5	Status Due date *
Pro Tax	To do To do	To do 🗸 05/10/2023 🛱 🕥 Repeat
Apps	0 of 2	Assigned to
V BOOKMARKS	AUG ALTON ROSAS 31 QBO Time Tracking OCT BUDGETS, REPORTS & LOW PLANNER	Barclay Moran 🗸
+ Add a bookmark	(BM) To do thly Review 2	Be as detailed as you want. You've got lots of room.
V YOUR BOOKS	o do ▼	
Overview	sep AALIA Open a project,	
Workpapers	19 Qua select Create	Tasks
Dashboards		For you and your team. Tasks aren't shared with clients.
Transactions	0 of 1	OCT Go to Dext & process payables To do III
Sales		
Expenses		Add a task
😥 Menu settings		Create template Duplicate Save

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Manage templates

GO TO QUICKBOOKS V Accountant Tools	Edit custom template X
∢ ^{Work} Templates	Template name*
Custom templates Streamline your workflow with your own reusable project templates.	QBO Time Tracking Repeat
NAME LAST USED	Due date repeats
Annual Contract Renewal	Quarterly 🗸 on day 🗸 10th 🗸
QBO Time Tracking	You can adjust the first due date and end date when you create a project using this template.
Quickstart templates a Use our standard templates as a starting point. Adjust tasks, due date NAME	Details They are adding time tracking into QBO so that all ee's record hours on their phones every day.
Bookkeeping	Tasks
Client onboarding	Add tasks to your template to track each step of the work. You can adjust due dates when you use this template.
Payroll	
Year-end	Book training date III
	Set up users in QBO
	Training date 🔛
	Add a task

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Create a request X

Create client request

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		Bu	dgets, Reports & CashFlow Planner	~
~		Title		
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rs & NER - does e Joelle fication			Share with client They'll have access to this request from their	

Work Tab

Working with tasks

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+ New	Ingrid Intuit Fridsy, October 6	Feedback? Notific
YOUR PRACTICE	- may ouder o	For Budgets, Reports & CashFlow Planner You're ading a single project in a series. Edit Series
Clients	Ali V Barclay Moran V Tasks V To do V Due last 30 days V	too te sound e angle projectin e vertes concernes
Team		Project name *
ProAdvisor >	DUE DATE A FOR NAME STATUS ASSIGNED TO TYPE	Monthly Review
Work	Overdue Dudgets, reports & Lashnow Planner () review bank reconciliation () to du bancay woran lask	Status Due date *
Pro Tax >	04/10/2023 Overdue Budgets, Reports & CashFlow Planner () Review Sales Tax () To do Barclay Moran Task	To do V 06/10/2023 C Repeat
Apps >	04/10/2023 Overdue Budgets, Reports & CashFlow Planner 🕖 Send notes to Bookkeeper for any fixes 🕐 To do Barclay Moran Task	Assigned to Barclay Moran
V BOOKMARKS	05/10/2023 Overdue Budgets, Reports & CashFlow Planner () Go to Dext & process payables () To do Barclay Moran Task	
+ Add a bookmark	06/10/2023 Budgets, Reports & CashFlow Planner 🗇 Close books 💿 To do Barclay Moran Task	Details Perform a review of the bookkeeping for the month for the
V YOUR BOOKS		above client. Make sure that all tasks are complete
Overview		
Workpapers		Tasks
Dashboards >		For you and your team. Tasks aren't shared with clients.
Transactions >		Tak name* Due date * Review bank reconciliat 04/10/2023
Sales >		
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Reports >		
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Time >		OCT Review Sales Tax To do 💠
Projects		4 Review Sales lax Jo do ::
Taxes >		OCT Send notes to Bookkeeper for To do
> More (0)		4 any fixes
		6 Close books To do III
		Add a task



Updating Tasks

how tips O	pag	Note: The top o page is devoted updating the Pr o	
Random project	1.0		
Status	Due date	*	
To do	✓ 31/08/	2023	
Assigned to			
Me	~		
Details			

Tasks

For you and your team. Tasks aren't shared with clients.

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Task name*	Due d	ate *			
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Practice Management Getting started

Implementing Technology

People	Communication & Training
Process	Mapping & Documenting the change
Technology	Usually the easiest part!

Why?

- Why are you doing this?
- Who will be your Champion (workplace influencer), Sponsor (leadership support) and early adopters.
- What does success look like?

Basic Implementation Plan

Pilot	Test	Celebrate	Plan next steps	Expand & Track
 Pick a simple process where you can start small Your team can use this to practice, find success and prepare training modules & documentation 	 Using your starting workflow, train others and see how it goes Track questions & prepare responses Ask for feedback Ask for ideas on where to expand Check in frequently Document successes 	 Communicate wins Sharing the success, and building out your team of advocates will drive future success 	 Plan, communicate, train Look at your next process Communicate the why, and the plan Host training sessions Prepare FAQ's Talk to people about their experience 	 Repeat, repeat, repeat As you expand, keep communicating, listening to feedback, reassuring the resisters, emphasizing your "why", offering more training and answering

questions, etc.

Key Takeaways

- Introducing practice management can reduce stress & anxiety
- The QBOA Work feature is a great place to start with practice management
- Implementing practice management requires planning

Resources

Here are some other articles and videos for you to explore further.

- Articles
 - All Your Work, All in One Place: Work Tab in
 <u>OBOA</u>
 - <u>Manage and track your work with client</u> requests, projects, and tasks
- YouTube
 - <u>OBOA Practice Management Work Tab</u>





