

Using QBOA to Manage & Automate your Practice

About Me



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

Why this topic?

"Did _____ get done?!?!?"

OMG! How did that get missed?

How can I keep my finger on the pulse?

I know I need to manage my business too

There's got to be a better way to do this

Agenda

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



What is Practice Management?

Practice Management

What does it mean to you?

Poll



Practice Management

The systems & processes that bring

- Clients



Practice Management

The systems & processes that bring

- Clients
- Team



Practice Management

The systems & processes that bring

- Clients
- Team
- Deadlines



Practice Management

The systems & processes that bring

- Clients
- Team
- Deadlines
- Processes/Tasks

all under one roof!



Practice Management - 4 Components





Practice Management using QBOA Work

Accessing QBOA Work

The screenshot displays the Intuit Accountant interface. On the left sidebar, the 'Work' menu item is highlighted in yellow, with a red arrow pointing to it. The main content area shows the 'Ingrid Intuit' client profile, with the 'Bookkeeping' tab selected. Below the tabs is a search bar labeled 'Find a client'. A table lists client work items with columns for 'CLIENT / CONTACT', 'BOOKS REVIEW', 'LEAD', and 'ACTIONS'.

CLIENT / CONTACT	BOOKS REVIEW	LEAD	ACTIONS
qb Budgets, Reports & CashFlow Planner	🕒 🕒 🕒	IH	Edit client ⌵
qb Himmelman Advanced QBO	🕒 🕒 🕒	IH	Edit client ⌵
qb One User Test - Client Primary Admin	Start September review	IH	Edit client ⌵
qb QBO Advanced Copy	🕒 🕒 🕒	IH	Edit client ⌵

Accessing QBOA Work

qb Accountant

GO TO QUICKBOOKS Accountant Tools

Help

Feedback? Add client

Overview shows all of your customers in YOUR BOOKS

Bookkeeping = QBO Clients Only

Overview Bookkeeping

Find a client

CLIENT / CONTACT	EMAIL / PHONE	BANKING	WORKPAPERS	TAX RETURNS	LEAD	ACTIONS
Aalia Wolf Aalia Wolf	Aalia_Wolf@exam...			Create tax return		Edit client ▾
Abel Reilly Abel Reilly	Abel_Reilly@exa...			Create tax return		Edit client ▾
Aisling Mac... Aisling Macke...	Aisling_Mackenzi...			Create tax return		Edit client ▾
Alfie-Jay W... Alfie-Jay Welch	Alfie-Jay_Welch@... 905-555-8765			Create tax return		Edit client ▾

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

qb Accountant

GO TO QUICKBOOKS Accountant Tools Help

Ingrid Intuit Feedback? Notifications Manage templates Create client request **Create project**

Tuesday, October 3

All Barclay Moran Tasks From QuickBooks

TODAY: 0 **THIS WEEK: 4** **NEXT WEEK: 0** **NEXT 30 DAYS: 3**

OCT 4 BUDGETS, REPORTS & CASHFLOW PLANNER
Review Sales Tax
Project : Monthly Review
To do

OCT 4 BUDGETS, REPORTS & CASHFLOW PLANNER
Review bank reconciliation
Project : Monthly Review
To do

OCT 4 BUDGETS, REPORTS & CASHFLOW PLANNER
Send notes to Bookkeeper for any fixes
Project : Monthly Review
To do

OCT 6 BUDGETS, REPORTS & CASHFLOW PLANNER
Close books
Project : Monthly Review
To do

NOV 1 BUDGETS, REPORTS & CASHFLOW PLANNER
Review Sales Tax
Project : Monthly Review
To do

NOV 1 BUDGETS, REPORTS & CASHFLOW PLANNER
Review bank reconciliation
Project : Monthly Review
To do

NOV 1 BUDGETS, REPORTS & CASHFLOW PLANNER
Send notes to Bookkeeper for any fixes
Project : Monthly Review
To do

Create Project

Create project

Show tips

Project template
No template

Project name *
Your project's name

Firm or client *
Select

First due date *
03/10/2023

Repeat

Repeats
Monthly on day 3rd of every 1 month(s)

Ends
Never

Upcoming
NOV 3 DEC 3 JAN 3

Assigned to
Me

Details
Be as detailed as you want. You've got lots of room.

Tasks
For you and your team. Tasks aren't sh

Add a task

Toggle on/off as needed

If recurring, update these fields

Select correct Team member

Add tasks

Create a template

The screenshot displays the Intuit Accountant interface for a client named "Ingrid Intuit". The main view shows a calendar with tasks for "Random project" and "Enter Payables from Dext". An "Edit project" modal is open on the right, showing fields for "Project name", "Status", "Due date", "Assigned to", and "Details". A callout box with the text "Open a project, select Create template" points to the "Create template" button at the bottom of the modal. Other buttons include "Duplicate" and "Save".

Accountant Accountant Tools

Ingrid Intuit Wednesday, October 4

Feedback? | Notification

Client: All | Team: Everyone

TODAY: 3 | **THIS WEEK: 2**

AUG 31 ALFIE-JAY WELCH
Random project
To do
0 of 2

OCT 5 BUDGETS, REPORTS & CASHFLOW PLANNER
Enter Payables from Dext
To do
0 of 1

AUG 31 ALTON ROSAS
QBO Time Tracking
To do
0 of 3

SEP 19 AALIA
Qual Retu
To do
0 of 1

Edit project

Show tips

For **Budgets, Reports & CashFlow Planner**
You're editing a single project in a series. [Edit Series](#)

Project name *
Enter Payables from Dext

Status: To do | Due date *: 05/10/2023 | Repeat

Assigned to: Barclay Moran

Details
Be as detailed as you want. You've got lots of room.

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

OCT 5 Go to Dext & process payables | To do

Add a task

Manage templates

GO TO QUICKBOOKS Accountant Tools

Work
Templates

Custom templates
Streamline your workflow with your own reusable project templates.

NAME	LAST USED
Annual Contract Renewal	
QBO Time Tracking	

Quickstart templates
Use our standard templates as a starting point. Adjust tasks, due date

NAME
Bookkeeping
Client onboarding
Payroll
Year-end

Edit custom template

Template name*
QBO Time Tracking Repeat

Due date repeats
Quarterly on day 10th

You can adjust the first due date and end date when you create a project using this template.

Details
They are adding time tracking into QBO so that all ee's record hours on their phones every day.

Tasks
Add tasks to your template to track each step of the work. You can adjust due dates when you use this template.

- Book training date
- Set up users in QBO
- Training date

Add a task

Create client request

ifications **Manage templates**

Fill out first!

Client *

Budgets, Reports & CashFlow Planner

Title

Request

Due date

13/10/2023

Details

Request

Documents

Share with client
They'll have access to this request from their portal.

Notify client
Your client will receive a notification about this request to their email and/or phone number.

Work Tab

Working with tasks

The screenshot displays the Intuit Accountant Work Tab interface. The main area shows a task list for 'Ingrid Intuit' on Friday, October 6. The tasks are filtered by 'All' clients, 'Barclay Moran', 'Tasks', and 'To do' status, with a view of 'Due last 30 days'. The task list includes:

DUE DATE	FOR	NAME	STATUS	ASSIGNED TO	TYPE
04/10/2023 Overdue	Budgets, Reports & CashFlow Planner	Review bank reconciliation	To do	Barclay Moran	Task
04/10/2023 Overdue	Budgets, Reports & CashFlow Planner	Review Sales Tax	To do	Barclay Moran	Task
04/10/2023 Overdue	Budgets, Reports & CashFlow Planner	Send notes to Bookkeeper for any fixes	To do	Barclay Moran	Task
05/10/2023 Overdue	Budgets, Reports & CashFlow Planner	Go to Dext & process payables	To do	Barclay Moran	Task
06/10/2023	Budgets, Reports & CashFlow Planner	Close books	To do	Barclay Moran	Task

The right sidebar is titled 'Edit project' and shows a project tip for 'Budgets, Reports & CashFlow Planner'. It includes a 'Project name' field with 'Monthly Review', a 'Status' dropdown set to 'To do', and a 'Due date' field set to '06/10/2023'. Below this is an 'Assigned to' dropdown set to 'Barclay Moran'. A 'Details' section contains a text box with the instruction: 'Perform a review of the bookkeeping for the month for the above client. Make sure that all tasks are complete'. The 'Tasks' section lists the tasks from the main view with their due dates and status:

- OCT 4: Review Sales Tax (To do)
- OCT 4: Send notes to Bookkeeper for any fixes (To do)
- OCT 6: Close books (To do)

An 'Add a task' button is located at the bottom of the sidebar.

Updating Tasks

Edit project ×

Show tips
 For **Alfie-Jay Welch**

Note: The top of the page is devoted to updating the Project

Project name *
 Random project

Status
 To do

Due date *
 31/08/2023

Assigned to
 Me

Details
 Be as detailed as you want. You've got lots of room.

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

AUG 15 Call client To do

Task name*
 Provide training to staff

Due date *
 18/08/2023

Assigned to
 Me

Status
 To do

+ Add details Remove Collapse

Add a task

To update tasks, go to the lower half of the page. Update any field as required. Click Save when done

Create template Duplicate **Save**



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

- Pick a simple process where you can start small
- Your team can use this to practice, find success and prepare training modules & documentation

Test

- 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

Celebrate

- Communicate wins
- Sharing the success, and building out your team of advocates will drive future success

Plan next steps

- **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

Expand & Track

- **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 QBOA](#)
 - [Manage and track your work with client requests, projects, and tasks](#)
- YouTube
 - [QBOA Practice Management - Work Tab](#)

Thank you

Questions?