



Running your business
from the car using
QuickBooks Online



#QBConnect

@royalwise

OWN
THE
FUTURE

About today's speaker



Alicia Katz Pollock
learn.Royalwise.com

Member of:

Intuit Trainer/Writer Network
QuickBooks ProAdvisor, Elite Level

Trainer:

Weekly live classes and webinars on QuickBooks, Excel, and business productivity software

Author of:

New Book! "Specialty Retail: Gas Stations and Convenience Stores" on Amazon.com

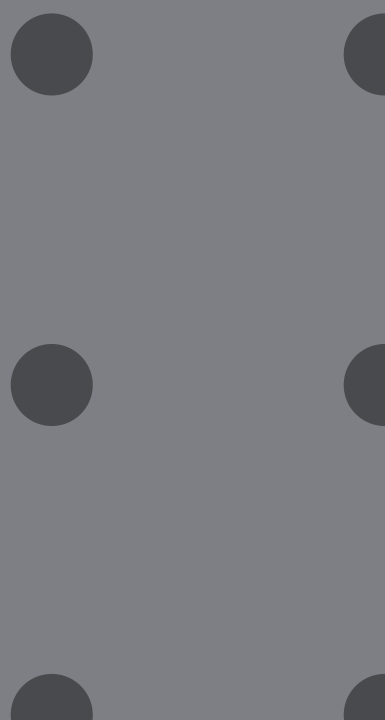
"Master QuickBooks Online: From Setup to Tax Time" on Amazon.com

The Mentorship Membership™ program at learn.Royalwise.com



This session is interactive!

If you already use QuickBooks Online (QBO), you are welcome to pull out your smartphone or tablet and log into the QBO app now.



Agenda

Using the QuickBooks Online app on an iPad

App-only features

Submitting expenses with Receipt Capture

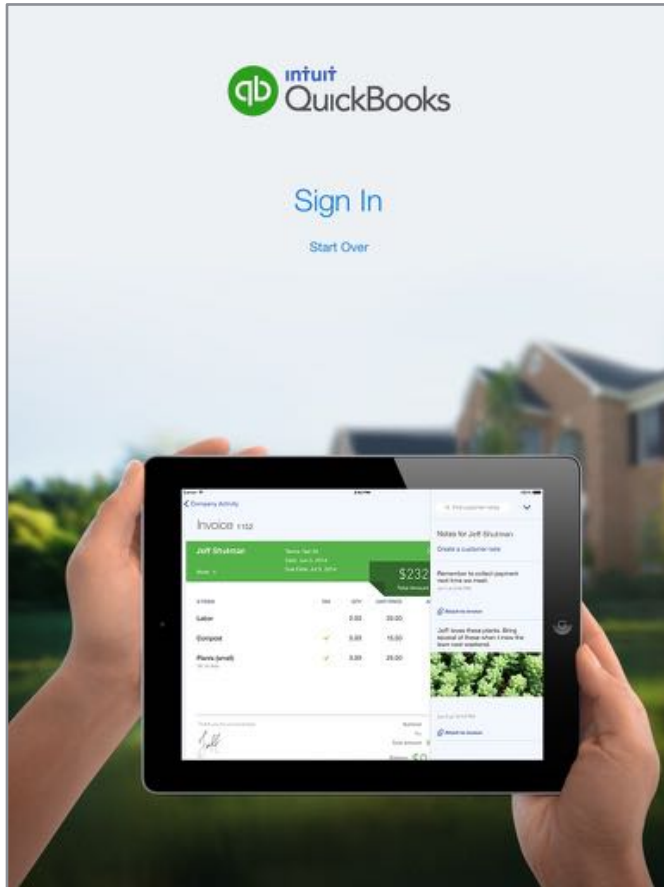
Creating estimates & invoices with signatures

Using QuickBooks Payments to accept credit cards

3rd Party service apps

Why Use the Mobile App?

QBO on a Smartphone or Tablet

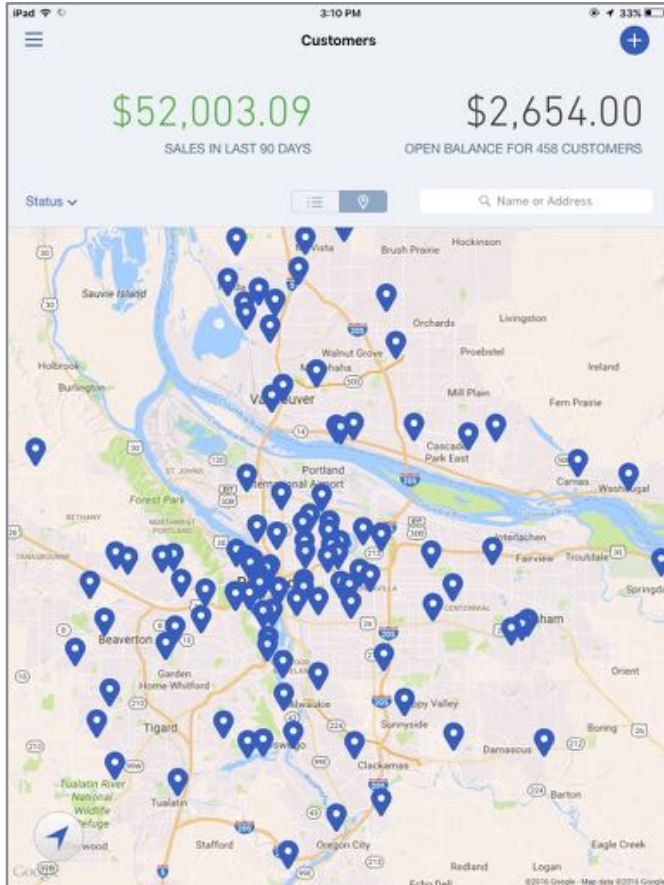


- No need to drag around a laptop
- Work while waiting in line
- All employees can enter transactions
- Use built-in camera to record receipts
- Swipe credit cards while onsite

**Streamlined essentials
that go where you go...
and your employees,
too!**

KEY TAKEAWAY: This ain't yo' mama's 10-key!

Mobile App feature: Interactive maps



- Zoom in, tap for more info
- Customer location map
- Look up where a customer lives
- Open in Maps app

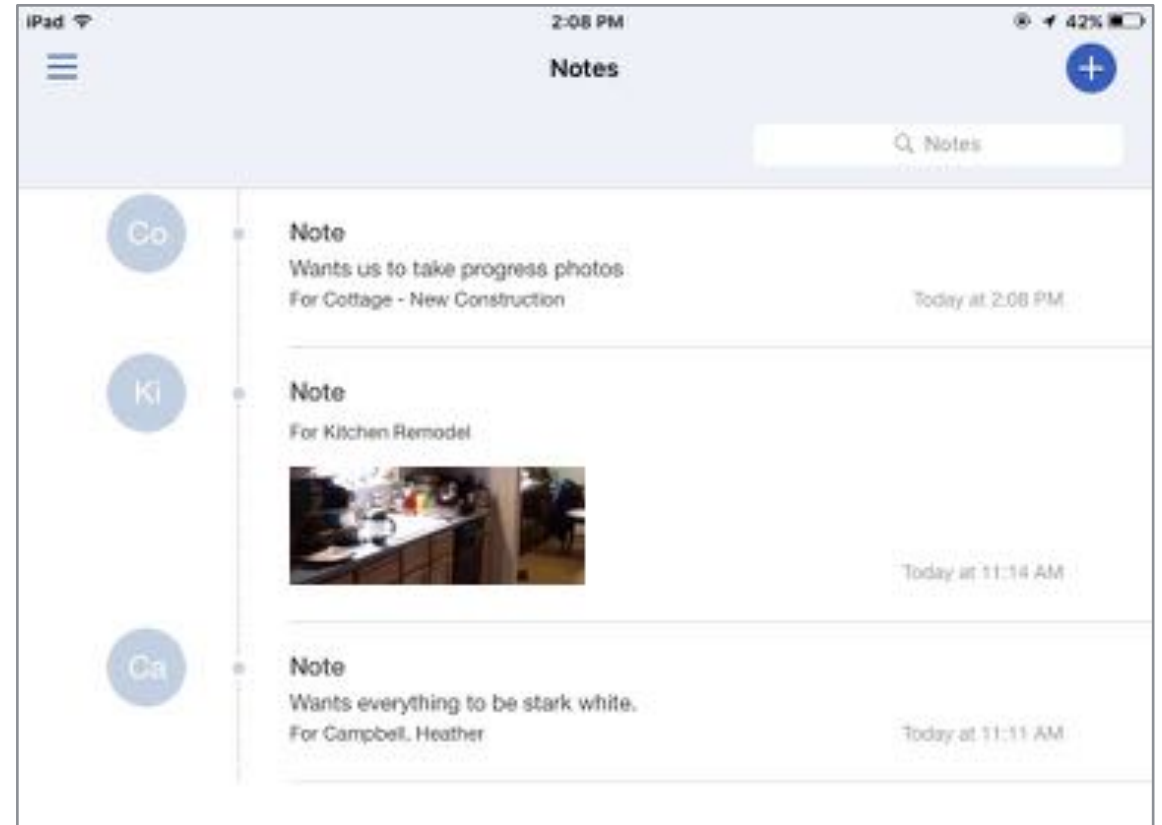
All customer addresses automatically appear on a visual map.

KEY TAKEAWAY: See where your customers are located when you want to open a new branch, or know where to advertise

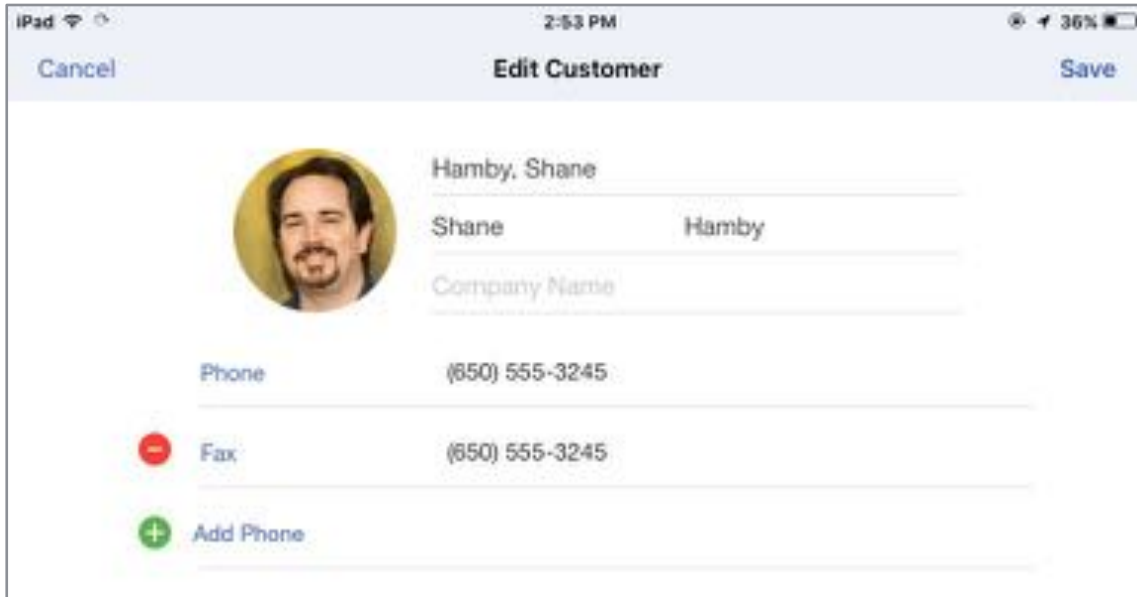
Mobile App feature: Notes & attachments

- Notes made in the Mobile App show up under Customer Details in the browser
- Take notes to share with colleagues
- Text or pictures

KEY TAKEAWAY: Additional ability to store info



Mobile App feature: Customer pictures

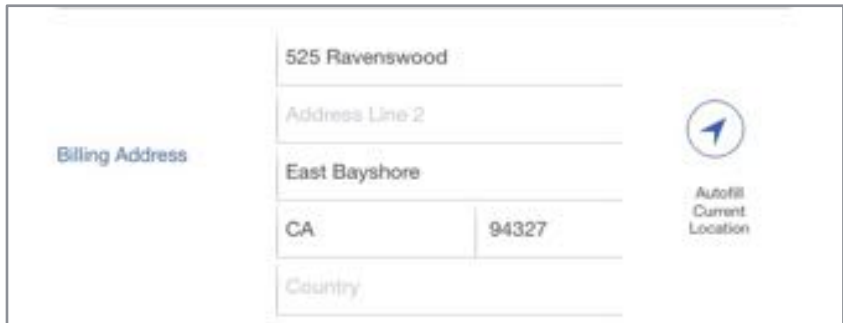


Keep track of who's who

- Take a picture of the customer
- Picture will show up on all related transactions

KEY TAKEAWAY: Remind yourself who they are before you get there

Mobile App feature: Autofill addresses



The screenshot shows a 'Billing Address' form with the following fields and suggestions:

525 Ravenswood	
Address Line 2	
East Bayshore	
CA	94327
Country	

On the right side of the form, there is a circular icon with a location pin and the text 'Autofill Current Location'.

AutoFill current location when making a new Customer

The GPS will fill in the address for you (iPad only)

KEY TAKEAWAY: No need to type an address with your thumbs

Mobile App feature: Charts

Interactive charts and graphs show your data in instantly-digestible, attractive images



Tablet Reports and Graphs:

- P&L, Balance Sheet
 - Invoices by Month
 - Invoices by Status
 - Invoices by Customer

Phone:

- P&L Report and Graph
- Balance Sheet report



When Service Meets Bookkeeping

Create Estimates on the spot

Estimate 1001			
02.10 Demo Demolition	2.00	2,000.00	4,000.00
03 Excavation Excavation	1.00	1,500.00	1,500.00
04 Concrete Concrete	1.00	1,000.00	1,000.00
06 Floor Framing Floor Framing	1.00	2,000.00	2,000.00
07 Wall Framing Wall Framing	1.00	2,000.00	2,000.00
08 Roof Framing Roof Framing	1.00	1,500.00	1,500.00
11 Siding Siding	3,000.00	0.00	0.00
13 Windows & Trim Windows & Trim	3,000.00	0.00	0.00
Subtotal		13,000.00	
Tax		0.00	
Shipping		0.00	
Total Amount		\$13,000.00	

Accepted by: *Shane Hamby* | Sep 4, 2016

History

Don't write on paper on a clipboard, and then recreate it when you get back to the office.

- No double-entry
- Electronic record, with signature

KEY TAKEAWAY: Why do the work twice?

...and get an approval signature!



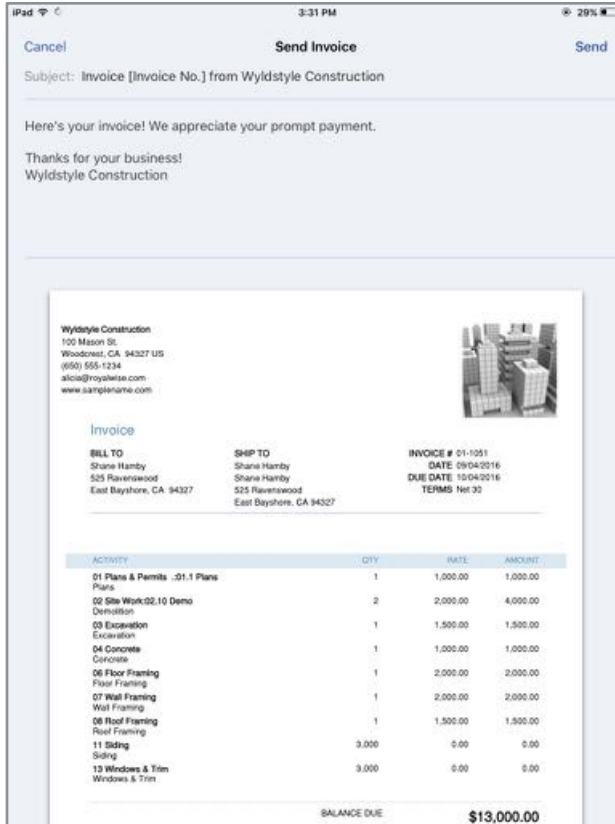
- No hoops to jump through
- Expedite the process

Get a legally-binding signature without snail-mail, faxes, or e-sign services

KEY TAKEAWAY:

It looks like Kindergarten, but as long as they recognize it, you're fine.

Email Invoices & Sales Receipts



- No paperwork at your desk
- Billing is immediate

**Finish the paperwork
before you get back
in the truck**

KEY TAKEAWAY:
Why wait for the bookkeeper? Speed up your A/R!



QBO allows me to do things that I had a hard time doing with paper invoices.

It allows me to capture my customer's information. When I'm done with my work, I can email them the receipt.

I don't have to enter my paper invoices like I did on QuickBooks Desktop.

It has saved me time and money.

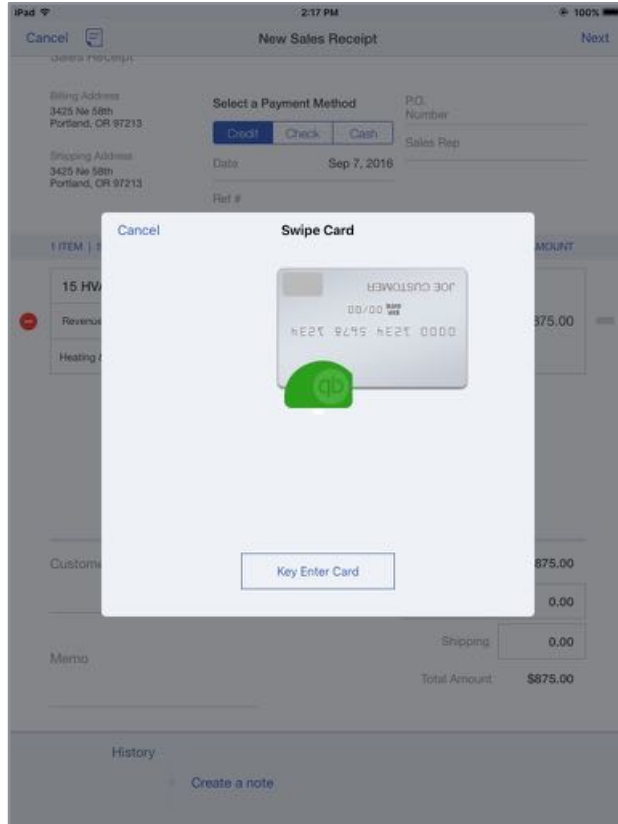
Scott Trantel, Trantel Heating & Cooling, Portland, OR





Your Mobile Office

Intuit QuickBooks Payments



- Lower rates than Square
- Swipe the card to get the lowest rates
- Reduce A/R
- Customer love

**Accept Credit Cards
on the spot**

KEY TAKEAWAY: ProAdvisors get a 1.5% + .25 swipe rate for themselves and their clients

Receipt Capture

Uploaded receipt



Receipt details
Double-check the details and add any missing info

Payee
Restaurant

Bank/Credit account *
SWA Biz Card - 1950-Alicia's SWA

Payment date *
04/08/2019

Account/Category *
Meals and Entertainment

Description
Woodard Group mtg at Momentums Cl

Amount *
19.20

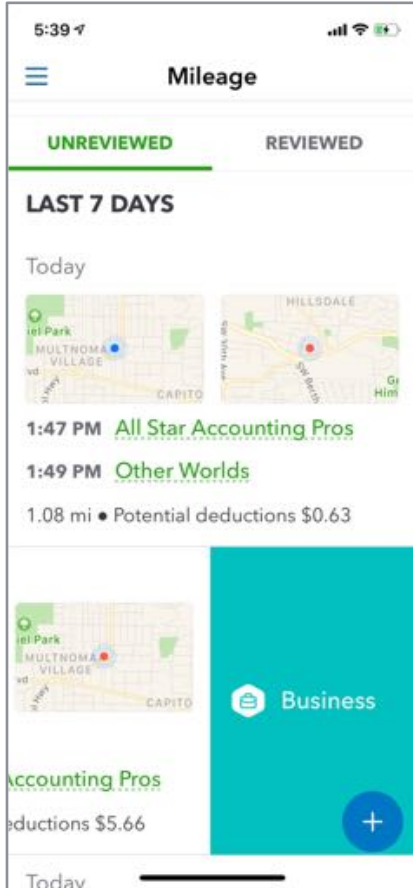
Memo
Add note (optional)

Added 11:27 AM 04/15/2019 by katpaalick@gmail.com

- Enter an expense, complete with paper trail, while you're still in the restaurant or store
- Attaches image to transaction in QBO
- Digital copies for IRS
- Employees don't lose receipts
- No need to enter back in the office

KEY TAKEAWAY: How much time do you spend chasing down, digitizing, or storing receipts?

Mileage tracker



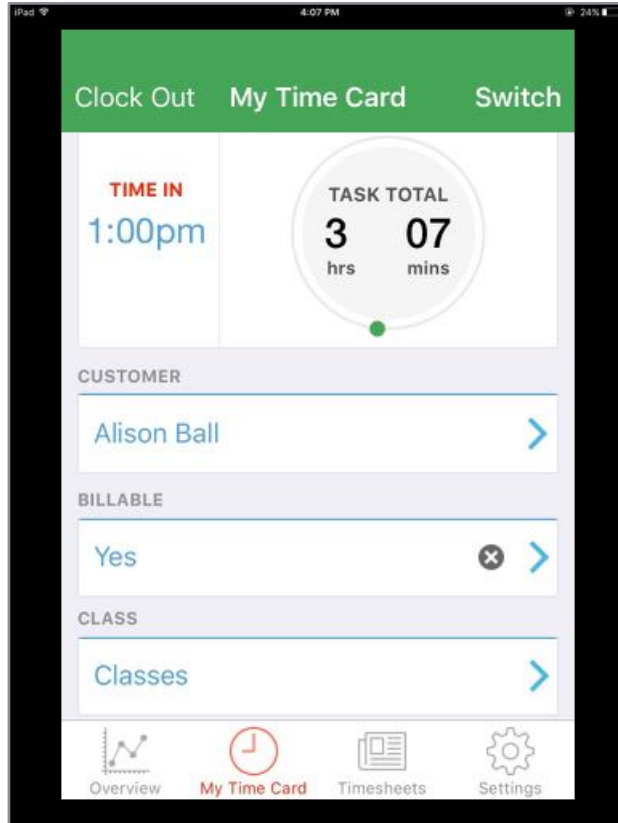
- Automatically records every trip
- Swipe left for business, swipe right for personal
- Valid documentation for IRS
- No need to keep paper logs
- No need for 3rd party mileage apps

KEY TAKEAWAY: Only works for Master Administrator



3rd Party Service Apps

Time cards in the field: T-Sheets

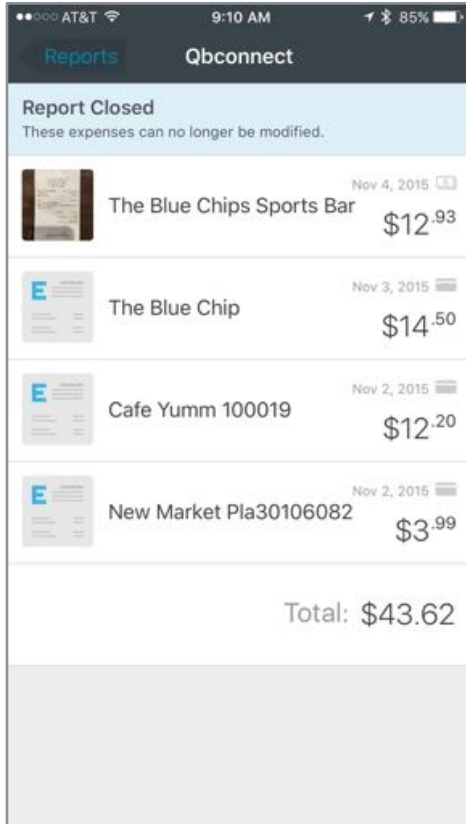


- Time cards managed from website
- Approve time in QBO
- Imported into Payroll
- Services assigned to clients
- Billable or non-billable
- Allows job costing
- Assign to Classes
- Entries are geotagged

Employees can clock in and clock out using their cell phones

KEY TAKEAWAY:
Punching the clock becomes fun again.

Expenses in the field: Expensify



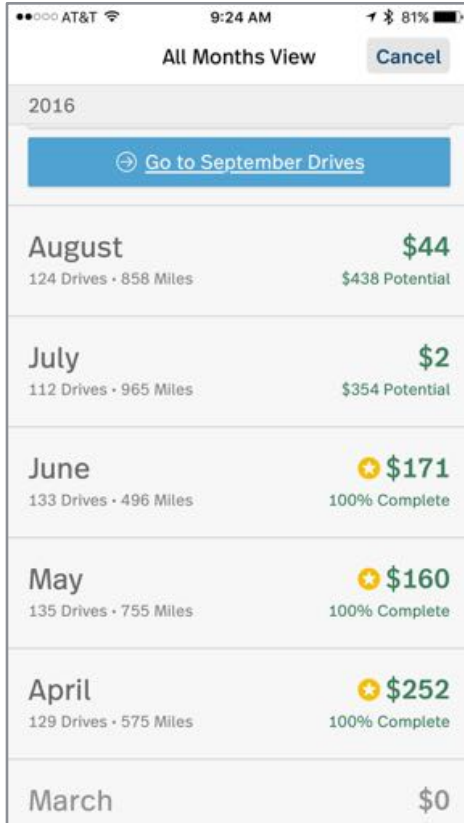
- Take pictures of receipts...with OCR to autofill the text
- Manage employee credit cards
- Track auto mileage
- Store travel itineraries
- Submit expense reports with a few taps

Employees can create expense reports using their cell phones

KEY TAKEAWAY:

No forms to fill out and submit. Paperless expense reporting!

Auto mileage: MileIQ



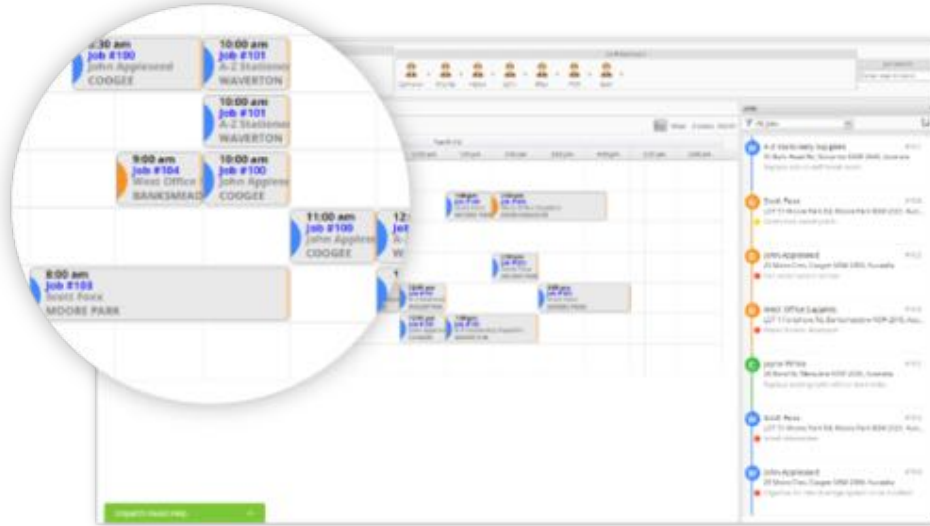
All Months View		Cancel
2016		
Go to September Drives		
August	124 Drives • 858 Miles	\$44 \$438 Potential
July	112 Drives • 965 Miles	\$2 \$354 Potential
June	133 Drives • 496 Miles	★ \$171 100% Complete
May	135 Drives • 755 Miles	★ \$160 100% Complete
April	129 Drives • 575 Miles	★ \$252 100% Complete
March		\$0

- Tracks without even opening the app
- See destinations on a map
- Name & automate frequent locations
- Swipe to mark as Business or Personal
- Enter specific names or purposes
- Web interface too
- Generates reports with just a few taps

Track auto mileage without having to write down each date, location, and miles driven

KEY TAKEAWAY:
Keeping a trip log without keeping a trip log.

Scheduling and dispatch



KEY TAKEAWAY:

Schedule changes are immediate, and immediately apparent

ServiceM8

Jobber

FSM

KickServ

- Drag-and-drop scheduling
- Remind clients of appointments
- Dispatch staff to job locations
- Send notifications to employees
- Book specific hours or service windows

What should you do next?

- Install the QBO app on your smartphones and tablets
- Test out creating a live Estimate or Invoice, and get a signature
- Take pictures of your clients
- Take pictures of your receipts
- Turn on Mileage tracker
- Sign up for QuickBooks Payments, then create a Sales Receipt with credit card payment
- Create accounts with Expensify and MileIQ
- Integrate T-Sheets, ServiceM8, or other 3rd party apps into your workflow
- Talk to your accountant or bookkeeper if you need any advice.



Questions?

About today's speaker



Alicia Katz Pollock

Royalwise Solutions, Inc.

Royalwise.Com

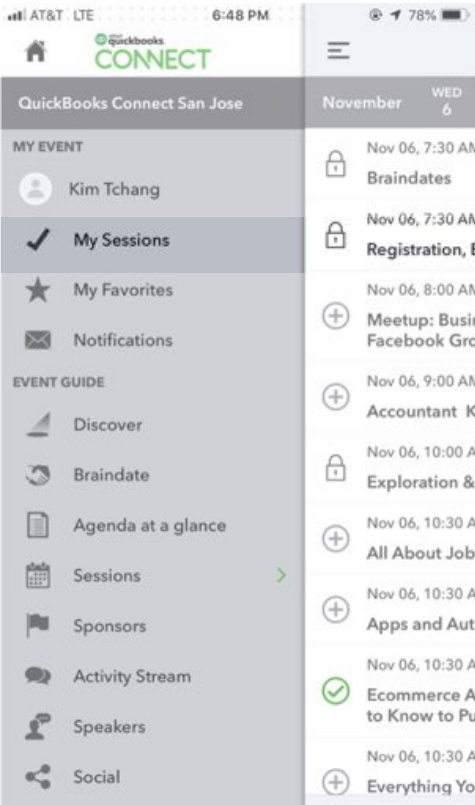
info@Royalwise.com

503-406-6550

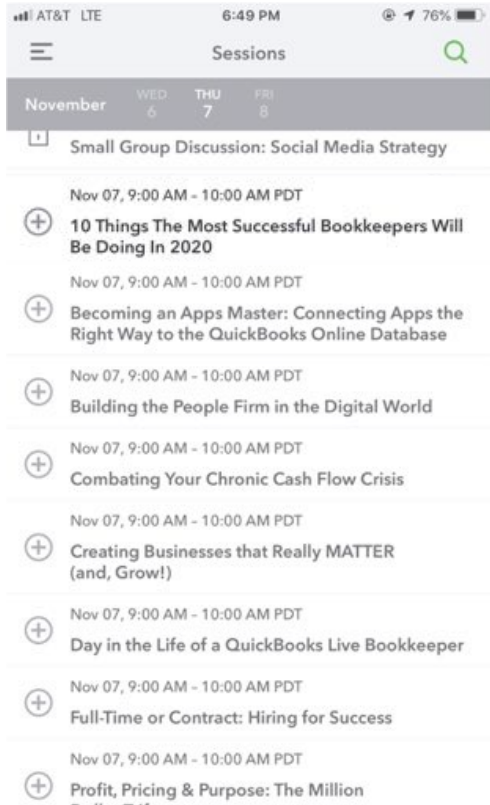
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

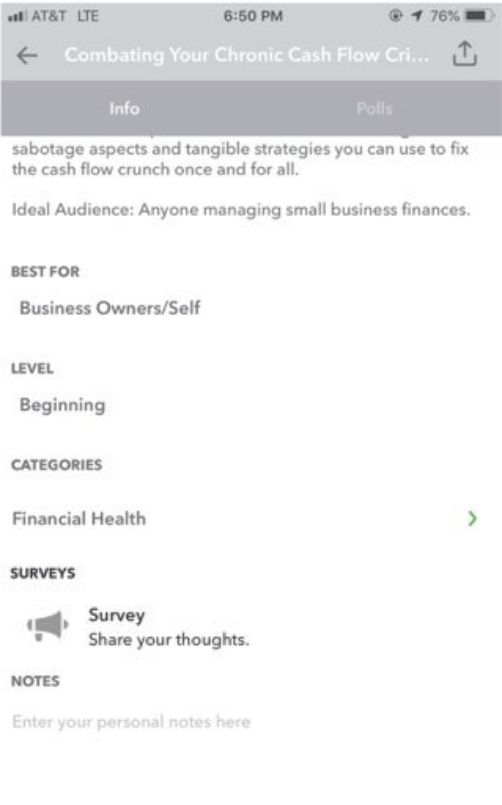
1. Select Sessions



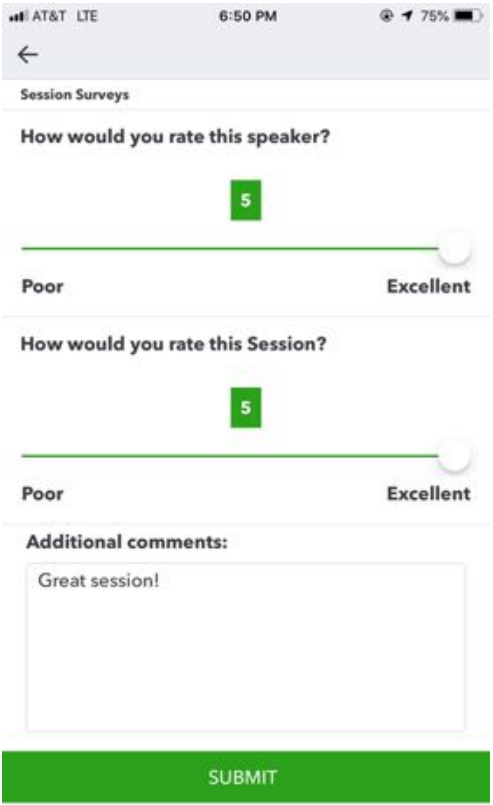
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is present. Below the search bar are filter buttons: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health', followed by an 'Expand all +' link. The agenda list shows sessions for November 7. The first session is 'Registration, Breakfast & Exploration' from 7:30-9:00 am. The second is 'Braindates' from 7:30-10:30 am, with a description: 'New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. Learn more.' It also notes 'Best for: All Audiences' and 'CPE Hours: not eligible'. The third session is 'Yoga' from 8:00-8:30 am. The fourth is 'Breakout Sessions' from 8:00-8:45 am, which includes several sub-sessions: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.



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