January 19, 20, 21: QuickBooks Online Certification Boot Camp

Jan 19: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QBO product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 3
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00 - 9:20am	10:00 - 10:20am	11:00 - 11:20am	12:00 - 12:20pm	**Kick Off: Welcome and Event Overview** (20 min) -NO CPE
9:20-9:35am	10:20-10:35am	11:20-11:35am	12:20-12:35pm	Networking Lounge and Exhibit Hall Open 15 min
9:35-10:55am	10:35 - 11:55am	11:35 - 12:55pm	12:35 - 1:55pm	**QuickBooks Online Module 1: Solutions for Clients** **Who:** Seeking product training, certification for first time, or lapsed (80 min - 1.5 CPE) Speaker: Bryce Forney
10:55-11:10am	11:55-12:10pm	12:55-1:10pm	1:55-2:10pm	Networking Lounge and Exhibit Hall Open 15 min
11:10-12:30pm	12:10-1:30pm	1:10- 2:30pm	2:10- 3:30pm	**QuickBooks Online Module 2: Client Onboarding** **Who:** Seeking product training, certification for first time, or lapsed (80 min - 1.5 CPE) Speaker: Mariette Martinez
12:30-12:45pm	1:30-1:45pm	2:30-2:45pm	3:30-3:45pm	Networking Lounge and Exhibit Hall Open 15 min

Jan 19: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QBO advanced level product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 3
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00 - 9:20am	10:00 - 10:20am	11:00 - 11:20am	12:00 - 12:20pm	**Kick Off: Welcome and Event Overview** (20 min) -NO CPE
9:20-9:35am	10:20-10:35am	11:20-11:35am	12:20-12:35pm	Networking Lounge and Exhibit Hall Open 15 min
9:35-11:25am	10:35 - 12:25pm	11:35 - 1:25pm	12:35 - 2:25pm	**Advanced QuickBooks Online Module 1: Advanced Categorization** **Who:** Seeking advanced product training, advanced certification for first time, or lapsed (110 min) 2 CPE Speaker: Stacy Kildal
11:25-11:40am	12:25-12:40pm	1:25-1:40pm	2:25-2:40pm	Networking Lounge and Exhibit Hall Open 15 min
11:40-1:00pm	12:40-2:00pm	1:40 - 3:00pm	2:40- 4:00pm	**Advanced QuickBooks Online Module 2: Advanced Features** **Who:** Seeking advanced product training, advanced certification for first time, or lapsed (80 min) 1.5 CPE Speaker: MB Raimondi
1:00-1:15pm	2:00-2:15pm	3:00-3:15pm	4:00-4:15pm	Networking Lounge and Exhibit Hall Open 15 min

Jan 19: TRACK 3 - QUICKBOOKS ONLINE PAYROLL
Who: Seeking Product training & Payroll Certification

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 3
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00 - 9:20am	10:00 - 10:20am	11:00 - 11:20am	12:00 - 12:20pm	**Kick Off: Welcome and Event Overview** (20 min) -NO CPE
9:20-9:35am	10:20-10:35am	11:20-11:35am	12:20-12:35pm	Networking Lounge and Exhibit Hall Open 15 min
9:35-10:35am	10:35 - 11:35am	11:35 - 12:35pm	12:35 - 1:35pm	**Serving Clients with QuickBooks Payroll** **Who:** Seeking product training & Payroll certification (60 min) 1 CPE Speaker: Lynda Artesani
10:35-10:55am	11:35-11:55am	12:35-12:55pm	1:35-1:55pm	Networking Lounge and Exhibit Hall Open 20 min
10:55-12:55pm	11:55-1:55pm	12:55-2:55pm	1:55-3:55pm	**Payroll Specialist Fundamentals** **Who:** Seeking product training & Payroll certification (120 min) 2 CPE Speaker: Heather Satterley
12:55-1:10pm	1:55-2:10pm	2:55-3:10pm	3:55-4:10pm	Networking Lounge and Exhibit Hall Open 15 min

Jan 20: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QBO product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 4
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-10:00am	10:00-11:00am	11:00-12:00pm	12:00-1:00pm	**QuickBooks Online Live - A Day In The Life** **Bonus Training: Learn what its like to be part of QB Live** (60 min - 1 CPE) Speaker: Michelle Long
10:00-10:15am	11:00-11:15am	12:00-12:15pm	1:00-1:15pm	Networking Lounge and Exhibit Hall Open 15 minutes
10:15-12:05pm	11:15-1:05pm	12:15-2:05pm	1:15-3:05pm	**QuickBooks Online Module 3 & 4:** **Special Onboarding Tasks, Managing Client Work** **Who:** Seeking product training, certification for first time, or lapsed (110 min - 2 CPE) Speaker: Bryce Forney
12:05-12:25pm	1:05-1:25pm	2:05-2:25pm	3:05-3:25pm	Networking Lounge and Exhibit Hall Open 20 minutes
12:25-2:35pm	1:25-3:35pm	2:25-4:35pm	3:25-5:35pm	**QuickBooks Online Module 5 & 6:** **Supporting Your Small Business Clients and Banking & Tools** **Who:** Seeking product training, certification for first time, or lapsed (130 min - 2 CPE) Speaker: Stacy Kildal
2:35-2:50pm	3:35-3:50pm	4:35-4:50pm	5:35-5:50pm	Networking Lounge and Exhibit Hall Open 15 minutes

Jan 20: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QBO advanced level product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 4
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-10:55am	10:00-11:55am	11:00-12:55pm	12:00-1:55pm	**Advanced QuickBooks Online Module 3 & 4:** **Advanced Banking & Reports** **Who:** Seeking advanced product training, advanced certification for first time, or lapsed (115 min) 2 CPE Speaker: Heather Satterley
10:55-11:15am	11:55-12:15pm	12:55-1:15pm	1:55-2:15pm	Networking Lounge and Exhibit Hall Open 20 minutes
11:15-12:45pm	12:15-1:45pm	1:15-2:45pm	2:15-3:45pm	**Advanced QuickBooks Online Module 5 & 6:** **Inventory & Sales Tax** **Who:** Seeking advanced product training, advanced certification for first time, or lapsed (90 min) 1.5 CPE Speaker: MB Raimondi
12:45-1:00pm	1:45-2:00pm	2:45-3:00pm	3:45-4:00pm	Networking Lounge and Exhibit Hall Open 15 minutes
1:00-2:20pm	2:00-3:20pm	3:00-4:20pm	4:00-5:20pm	**Advanced QuickBooks Online Module 7:** **Special Transactions** **Who:** Seeking advanced product training, advanced certification for first time, or lapsed (80 min) 1.5 CPE Trainer: Michelle Long
2:20-2:35pm	3:20-3:35pm	4:20-4:35pm	5:20-5:35pm	Networking Lounge and Exhibit Hall Open 15 minutes

Jan 20: TRACK 3 - QUICKBOOKS ONLINE PAYROLL
Who: Seeking Payroll product training & Payroll Certification

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-10:00am	10:00-11:00am	11:00-12:00pm	12:00-1:00pm	**QuickBooks Online Live - A Day In The Life** **Bonus Training: Learn what its like to be part of QB Live** (60 min - 1 CPE) Speaker: Michelle Long
10:00-10:15am	11:00-11:15am	12:00-12:15pm	1:00-1:15pm	Networking Lounge and Exhibit Hall Open 15 minutes
10:15-11:45am	11:15-12:45pm	12:15-1:45pm	1:15-2:45pm	**QuickBooks Online Payroll:** **Product Line-Up & First Steps to Set Up** **Who:** Seeking product training & Payroll Certification (90 min) 1.5 CPE Speaker: Stacy Kildal
11:45-12:05pm	12:45-1:05pm	1:45-2:05pm	2:45-3:05pm	Networking Lounge and Exhibit Hall Open 20 min
12:05-2:05pm	1:05-3:05pm	2:05-4:05pm	3:05-5:05pm	**QuickBooks Online Payroll:** **Paying, Filing, Adjusting Payroll Tax Liabilities** **Who:** Seeking product training & Payroll certification (120 min) 2 CPE Speaker: Liz Scott
2:05-2:20pm	3:05-3:20pm	4:05-4:20pm	5:05-5:20pm	Networking Lounge and Exhibit Hall Open 15 minutes

Jan 21: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QBO product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 2.5 credits
8:30 - 9:00am	9:30-10:00am	10:30-11:00am	11:30-12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-10:30am	10:00-11:30am	11:00-12:30pm	12:00-1:30pm	**QuickBooks Online Module 7 & 8:** **Reporting and Analytics & Closing the Accounting Cycle** Who: Seeking product training, certification for first time, or lapsed (90 min - 1.5 CPE) Trainer: Bryce Forney
10:30-10:45am	11:30-11:45am	12:30-12:45pm	1:30-1:45pm	Networking Lounge and Exhibit Hall Open 15 minutes
10:45-12:25pm	11:45-1:25pm	12:45-2:25pm	1:45-3:25pm	**QuickBooks Online Certification Exam Prep** Who: Seeking QBO Certification for the first time, or lapsed (100 Min - 2 CPE) Trainer: Stacy Kildal
12:25-12:40pm	1:25-1:40pm	2:25-2:40pm	3:25-3:40pm	Networking Lounge and Exhibit Hall Open 15 minutes
12:40-1:40pm	1:40-2:40pm	2:40-3:40pm	3:40-4:40pm	**Now that I am Certified, What's Next?** Who: QBO Certified for the first time (60 Min - 1 CPE) Trainer: Mariette Martinez
1:40-1:55pm	2:40-2:55pm	3:40-3:55pm	4:40-4:55pm	Networking Lounge and Exhibit Hall Open 15 minutes

Jan 21: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QBO advanced level product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 4.5 credits
8:30-9:00am	9:30-10:00am	10:30-11:00am	11:30-12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-11:10am	10:00-12:10pm	11:00-1:10pm	12:00-2:10pm	**Advanced QuickBooks Online Module 8:** **Period end** Who: Seeking advanced product training, advanced certification for first time, or lapsed (130 min) 2.5 CPE Trainer: Michelle Long
11:10-11:30am	12:10-12:30pm	1:10-1:30pm	2:10-2:30pm	Networking Lounge and Exhibit Hall Open 20 minutes
11:30-12:45pm	12:30-1:45pm	1:30-2:45pm	2:30-3:45pm	**Advanced QuickBooks Online Module 9:** **Complex Conversions** Who: Seeking advanced product training, advanced certification for first time, or lapsed (75 min) 1.5 CPE Trainer: Heather Satterley
12:45-1:00pm	1:45-2:00pm	2:45-3:00pm	3:45-4:00pm	Networking Lounge and Exhibit Hall Open 15 minutes
1:00-2:30pm	2:00-3:30pm	3:00-4:30pm	4:00-5:30pm	**QuickBooks Online Advanced Certification Exam Prep** Who: Seeking Advanced Certification for first time, or lapsed. (90 min) 1.5 CPE Trainer: MB Raimondi
2:30-2:45pm	3:30-3:45pm	4:30-4:45pm	5:30-5:45pm	Networking Lounge and Exhibit Hall Open 15 minutes

Jan 21: TRACK 3 - QUICKBOOKS ONLINE PAYROLL
Who: Seeking Payroll product training & Payroll Certification

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5
8:30 - 9:00am	9:30 - 10:00am	10:30 - 11:00am	11:30 - 12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-10:30am	10:00-11:30am	11:00-12:30pm	12:00-1:30pm	**QuickBooks Payroll Certification Exam Prep** Who: Seeking QuickBooks Payroll Certification for first time (90 min) 1.5 CPE Trainer: MB Raimondi
10:30-10:45am	11:30-11:45am	12:30-12:45pm	1:30-1:45pm	Networking Lounge and Exhibit Hall Open 15 min
10:45-12:15pm	11:45-1:15pm	12:45-2:15pm	1:45-3:15pm	**QuickBooks Time Fundamentals Part 1: Activating and Setup** Who: Seeking product training & Payroll Certification (90 min) 1.5 CPE Trainer: Liz Scott
12:15-12:35pm	1:15-1:35pm	2:15-2:35pm	3:15-3:35pm	Networking Lounge and Exhibit Hall Open 20 min
12:35-2:05pm	1:35-3:05pm	2:35-4:05pm	3:35-5:05pm	**QuickBooks Time Fundamentals Part 2: Recording and Managing Time** Who: Seeking product training & Payroll Certification (90 min) 1.5 CPE Trainer: Liz Scott
2:05-2:20pm	3:05-3:20pm	4:05-4:20pm	5:05-5:20pm	Networking Lounge and Exhibit Hall Open 15 minutes

QuickBooks Online Module 1: Solutions for Clients

This session introduces the different QuickBooks Online subscription and billing options. Explore the questions you need to ask to assess client needs and determine apps to use with QuickBooks Online. Discover the Client Overview screen and the options to migrate clients from other accounting systems.

- Assessing clients QuickBooks Online needs, and the factors to consider
- The options to migrate clients from other accounting systems to QuickBooks Online
- The different QuickBooks Online subscriptions, and recommending the right solution to clients
- The billing options and discounts available with QuickBooks Online
- Using the Client Overview screen in QuickBooks Online
- The benefits of using apps with QuickBooks Online, and recommending the right app to clients

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 80 Minutes
Recommended CPE: 1.5

QuickBooks Online Module 2: Client Onboarding
This session looks at the key stages of onboarding new clients. Find out how to customize the chart of accounts and set up Product and Services and additional lists. Discover the steps involved in adding customers and vendors and setting up bank feeds.

- The key stages when onboarding clients in QuickBooks Online
- The benefits of customizing the chart of accounts in QuickBooks Online
- Customizing account names and numbers, and merging and inactivating accounts in the chart of accounts in QuickBooks Online
- The restrictions on editing accounts in the chart of accounts in QuickBooks Online
- Setting up products and services, and adding vendors in QuickBooks Online
- Setting up additional lists in QuickBooks Online

- Setting up customer lists in QuickBooks Online
- Setting up vendor lists in QuickBooks Online
- Setting up bank feeds and other connection options in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 80 Minutes
Recommended CPE: 1.5

QuickBooks Online Module 3 & 4: Special Onboarding Tasks, Managing Client Work
This session covers a range of special client onboarding tasks. Find out how to set up QuickBooks Online Payments, the Bill Pay feature, and basic sales tax. Discover the options to set up user permissions and customize invoices. Explore the benefits of QuickBooks Time and QuickBooks Online Payroll, and how to manage apps added to QuickBooks Online. In addition, learn about managing your work and your team. Find out how to add team members, assign client leads, and set permission levels. Explore the Client and the Work dashboards, and how you can create projects and client requests and manage client subscriptions.

- Performing basic sales tax setup in QuickBooks Online
- Setting up QuickBooks Payments
- Using the Melio app, and the Bill Pay feature
- Adding and managing apps on behalf of your clients in QuickBooks Online
- The benefits of using QuickBooks Time and QuickBooks Online Payroll
- The different subscription levels of QuickBooks Time and QuickBooks Online Payroll
- Customizing invoices in QuickBooks Online
- Assigning and managing user permission settings in QuickBooks Online
- Switching between the Accountant and Business views in QuickBooks Online
- Using the Client dashboard
- Managing client subscriptions in QuickBooks Online
- Assigning and managing permission levels for your team in QuickBooks Online
- Using QuickStart project templates in QuickBooks Online
- Creating and managing client requests in QuickBooks Online
- Using the Work feature in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 110 Minutes
Recommended CPE: 2

QuickBooks Online Module 5 & 6: Supporting Your Small Business Clients and Banking & Tools

This session introduces a range of processes and hands-on activities to help support small businesses. Discover how to record various transactions such as undeposited funds, vendor credits, or estimates. Explore many functions available in QuickBooks Online, including the Pay down credit card feature and tools for troubleshooting issues. In addition, learn all about managing bank transactions in QuickBooks Online. Find out how to manage bills and receipts, create simple bank rules, and set up recurring transactions. Discover how to reconcile accounts and resolve discrepancies, or use tagging with transactions.

• Recording undeposited fund transactions in QuickBooks Online
• Troubleshooting issues related to workflows in QuickBooks Online
• Tools that help identify issues with client workflows
• Creating estimates in QuickBooks Online
• Converting estimates to purchase orders and invoices in QuickBooks Online
• The benefits of Credit memos, and using them in QuickBooks Online
• Creating Customer statements in QuickBooks Online
• Using Vendor Credits in QuickBooks Online
• Recording deposit transactions in QuickBooks Online
• Using QuickBooks Payments
• Setting up and using Payment Links in QuickBooks Online
• Using journal entries and adjusting journal entries in QuickBooks Online
• Using the Pay down credit card feature in QuickBooks Online
• Using the Transfer functionality in QuickBooks Online
• Adding and managing bills and receipts in QuickBooks Online
• Excluding bank transactions and reinstating excluded transactions in QuickBooks Online
• Creating simple bank rules in QuickBooks Online
• Reconciling the bank in QuickBooks Online
• Resolving issues related to reconciled transactions in QuickBooks Online
• The benefits of recurring transactions, and creating them in QuickBooks Online

- Setting up and using tags in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 130 Minutes
Recommended CPE: 2

QuickBooks Online Module 7 & 8: Reporting and Analytics & Closing the Accounting Cycle

This session is all about the different reports in QuickBooks Online. Discover which reports to use to answer common business questions or customize reports for clients. Find out how to run and analyze the Profit and Loss and Balance Sheet reports, or prepare management reports. In addition, learn about the processes involved at period end. Find out how to use the Month-end review menu and the key tasks in preparing the books for year end. Discover the Reclassify transactions and Write off invoices tools and find

- Running the Profit and Loss report and the Balance Sheet in QuickBooks Online
- Chart options available in the Performance Center
- Selecting the best report in QuickBooks Online to answer clients' common business questions
- Customizing reports in QuickBooks Online to meet the needs of clients
- Ways of customizing and working with managements reports in QuickBooks Online
- The processes involved in, and tracking the progress of the month-end review in QuickBooks Online
- Using the Reclassify transactions tool in QuickBooks Online
- Writing off invoices in QuickBooks Online
- The key tasks involved in preparing a client's books for year- or period end in QuickBooks Online
- Best practices for working with mileage for year- or period end in QuickBooks Online
- Closing the books in QuickBooks Online
- Accessing the Exceptions to Closing Date report in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified

Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 90 Minutes
Recommended CPE: 1.5

QuickBooks Online Certification Exam Prep
This session will help you decide if becoming a Certified ProAdvisor in QuickBooks Online is right for you. Attendees will learn what it means to be certified and how the benefits can increase year-on-year to help you grow your practice. We'll also explain what topics the exam will test you on, how the exam works, and deep dive into several topics that ProAdvisors may struggle with.

Learning Objectives
Understand the benefits of QuickBooks Online certification
Understand how the certification exam works and what topics are covered

Details:
Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients with QuickBooks Online
Prerequisites: Completed QuickBooks Online product training or has at least 6 months experience using QuickBooks Online with clients
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Computer Software & Applications
Course Level: Intermediate
Course Length: 100 Minutes
Recommended CPE: 2

Advanced QuickBooks Online Module 1: Advanced Categorization

This session covers advanced categorization options to optimize reports such as Class, Location, and Job tracking. Explore the benefits of each categorization method and how to enable or set up these options. Find out what you need to consider when tracking options are enabled.

• Using advanced categorization to optimize reports in QuickBooks Online
• Setting up and optimizing Class tracking and related reports in QuickBooks Online
• Setting up and optimizing Location tracking and related reports in QuickBooks Online
• Optimizing and configuring job tracking and related reports in QuickBooks Online
• Setting up projects and using QuickBooks Online Projects functionality with current Sub-customers

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 110 Minutes
Recommended CPE: 2

Advanced QuickBooks Online Module 2: Advanced Features
This session covers the more advanced features available in QuickBooks Online. Find out how to work with billable expenses and billable time, or
how budgets work in QuickBooks Online. Discover how to use delayed charges, progress invoicing, and price rules.

• Activating billable expenses
• Using billable expenses for invoicing and tracking
• Using QuickBooks Online to set up, record, and invoice billable time
• Running time reports
• Creating and using delayed charges and credits
• Viewing unbilled charges
• Using progress invoicing in QuickBooks Online
• Using price rules in QuickBooks Online
• Creating budgets in QuickBooks Online
• How budgets and budget reports work in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 80 Minutes
Recommended CPE: 1.5

Advanced QuickBooks Online Module 3 & 4: Advanced Banking & Reports
This session covers using advanced banking features and advanced report features in QuickBooks Online to highlight key areas of clients' company performance. Discover more about bank rules and how to import or export them and how suggested rules work. You will also learn about different report types and the benefits of tagging in QuickBooks Online in more depth. Find out how to create scheduled reports and how to use the Performance Center.

• Investigating problems with bank activity in QuickBooks Online
• Troubleshooting problems with bank feeds
• Working with bank rules in QuickBooks Online
• How the Suggested rules feature in QuickBooks Online works
• Solving common client problems with suggested rules, category suggestions, and bank feeds
• How reports work in QuickBooks Online - and how to utilize them
• Creating scheduled reports in QuickBooks Online
• Using the Performance Center to create meaningful commercial insight
• Maximizing the value of custom charts in the Performance Center
• Uses and limitations of tagging in QuickBooks Online
• Using tags in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 115 Minutes
Recommended CPE: 2

Advanced QuickBooks Online Module 5 & 6: Inventory & Sales Tax
This session introduces the features available in QuickBooks Online to set up, track, and manage inventory, including inventory and valuation adjustments. In addition, you will learn about various advanced sales tax activities. Discover how QuickBooks Online records, tracks, and calculates sales tax. Explore how to set up tax agencies and custom sales tax, and file sales tax forms. Find out what to do to correct a payment error or make an adjustment on a sales tax return.

- The role of inventory management in QuickBooks Online
- Enabling inventory tracking in QuickBooks Online
- Setting up new inventory products and categories
- Buying, selling, and adjusting inventory
- Adjusting for donated inventory in QuickBooks Online
- How sales tax is calculated in QuickBooks Online
- Setting up and using sales tax in QuickBooks Online
- Filing sales tax successfully in QuickBooks Online
- Adjusting sales tax in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 90 Minutes
Recommended CPE: 1.5

Advanced QuickBooks Online Module 7: Special Transactions
This session covers a range of advanced methods of recording transactions in QuickBooks Online. Discover how to use templates for recurring transactions and daily sales summaries. Find out about handling zero dollar transactions and customer or vendor retainers and what to do when a payment fails.

- When recurring transactions can be used and using templates for recurring transactions
- Setting up a daily sales summary in QuickBooks Online
- Creating zero dollar expenses in QuickBooks Online
- Handling failed payments or insufficient funds in QuickBooks Online
- Handling customer retainers in QuickBooks Online
- Customizing reports that show open customer retainers
- Handling vendor prepayments and deposits in QuickBooks Online
- Running reports that show uncleared vendor prepayments

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 80 Minutes
Recommended CPE: 1.5

Advanced QuickBooks Online Module 8: Period End

This session covers a range of end-of-period activities. Find out more about reviewing lists and account balances or troubleshooting issues with inventory balances and undeposited funds. Discover more about tools such as Writing off invoices, Prep for taxes, and Reclassify transactions. Explore how to prepare Forms 1099 and identify changes to closed periods.

- Reviewing and troubleshooting QuickBooks Online lists
- Troubleshooting accounts on the balance sheet
- Troubleshooting Profit and Loss account balances
- Troubleshooting issues with undeposited funds
- Using the Write off invoices tool

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 130 Minutes
Recommended CPE: 2.5

Advanced QuickBooks Online Module 9: Complex Conversions

This session covers helping clients migrate their company data into QuickBooks Online. Find out how to convert an account from QuickBooks Desktop to QuickBooks Online and what to do to import lists and accounts. Explore the process of entering beginning balances to start a new QuickBooks Online company from scratch.

- Converting an account from QuickBooks Desktop to QuickBooks Online
- Importing lists and data into a QuickBooks Online company
- Starting a new QuickBooks Online company by entering beginning balances

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 75 Minutes
Recommended CPE: 1.5

QuickBooks Online Advanced Certification Exam Prep
This session will help you decide if becoming an Advanced Certified ProAdvisor in QuickBooks Online is right for you. Attendees will learn what it means to be advanced certified and how the benefits can increase year-on-year to help you grow your practice. We'll also explain what topics the exam will test you on, how the exam works, and deep dive into several topics that ProAdvisors may struggle with.

Learning Objectives
Understand the benefits of QuickBooks Online Advanced certification
Understand how the certification exam works and what topics are covered

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 90 Minutes
Recommended CPE: 1.5

Serving Clients with QuickBooks Payroll
In this session, you will learn about the different types of Payroll related services and best practices for incorporating Payroll advisory into your practice.

Learning Objectives:
- Understand the different types of Payroll services to offer
- Understand best practices and key questions to ask when advising clients on payroll

Details:
Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Online Payroll
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Business Management & Organization
Course Level: Intermediate
Course Length: 60 Minutes
Recommended CPE: 1

Payroll Specialist Fundamentals
Payroll is a critical business function that most small businesses don't have the time to master or complete on their own. Many choose to bring in an outside expert to take care of their payroll functions. These experts, known as payroll specialists, provide a wide range of accounting and payroll services for small businesses.

This session provides insight into the services a payroll specialist performs for small businesses. Topics covered include managing employee records, time, and attendance; deciding on compensation and benefits packages; distributing payment to employees; payroll reporting and compliance; and more. This training is ideal for accounting professionals who are new to payroll services but are interested in supporting clients with their payroll needs.

Learning Objectives:
- Define the different types of worker classifications
- Understand federal and state legal compliance requirements
- Understand how to properly review pay schedules, workweeks, and standard hours
- Identify employee termination procedures and policies
- Identify the required employee documents that must be maintained by employers
- Understand how to calculate gross payroll costs
- Understand the federal and state taxes that affect payroll
- Understand the different types of benefits and their tax compliance implications
- Understand how to properly explain, record, and/or file taxes and wages

Details:
• Who Should Attend? Accounting Professionals who plan to offer or currently support small

business clients using QuickBooks Online Payroll
- Prerequisites: None
- Delivery Method: Group-live Internet
- Field of Study: Non-Technical - Computer Software & Applications
- Course Level: Intermediate
- Course Length: 120 Minutes
- Recommended CPE: 2

QuickBooks Online Payroll: Product Line-Up & First Steps to Set Up

This session will help accounting professionals understand the similarities and differences between the QuickBooks Online Payroll Core, Premium, and Elite subscriptions.

Attendees will learn the necessary steps to choose the right subscription level, turn on and use the set-up wizard. You will also learn how to add employees, including turning on direct deposits and understanding the essential features necessary for running payroll. Additional set-up features, including QuickBooks Time, Auto fill, paying contractors, and voiding and deleting payroll checks, will be covered in this section. Note: This course is run as a webinar "QuickBooks Online Payroll – Part 1."

Learning Objectives:
- Recognize which QuickBooks Online subscription level is right for clients
- Recognize the Payroll Center's new features
- Identify how to add employees
- Describe how to set up direct deposit and run payroll
- Recognize the benefits of Auto Payroll and how QuickBooks Online Payroll and QuickBooks Time work together

Details:
- Who should attend? Bookkeeping professionals and QuickBooks Online Certified ProAdvisors
- Prerequisites: None
- Delivery Method: Group-live Internet
- Field of Study: Non-Technical - Computer Software & Applications
- Course Level: Intermediate
- Course Length: 90 Minutes
- Recommended CPE: 1.5

QuickBooks Online Payroll: Paying, Filing, Adjusting Payroll Tax Liabilities.

In this session, you will develop a working understanding of paying, filing, and adjusting payroll tax liabilities and necessary year-end tasks, using QuickBooks Online Payroll. Using advanced payroll reports, learners will understand how QuickBooks Time time tracking integration, Class tracking, and Projects can generate job costing reports.

Attendees will also learn how to track time-off policies, tips, and gratuities and how to offer health benefits, including deductions and contributions. Note: This course is run as a webinar "QuickBooks Online Payroll – Part 2"

Learning Objectives:
- Explain how to process payroll tax deposits and adjust for penalties and interest
- Recognize key payroll activities at year-end
- Recognize how to set up health benefits
- Explain how payroll data can be used to determine profitability via Projects
- Be able to create the most commonly used payroll reports
- Determine how to record tips and gratuities

Details:
- Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Online Payroll
- Prerequisites: None
- Delivery Method: Group-live Internet
- Field of Study: Non-Technical - Computer Software & Applications
- Course Level: Intermediate
- Course Length: 120 Minutes
- Recommended CPE: 2

QuickBooks Payroll Certification Prep
This session will help you decide if becoming a Certified ProAdvisor in QuickBooks Online Payroll is right for you. Attendees will learn what it means to be certified and how the benefits can increase year-on-year to help you grow your practice. We'll also explain what topics the exam will test you on, how the exam works, and deep dive into several topics that ProAdvisors may struggle with.

Learning Objectives:
Understand the benefits of QuickBooks Payroll certification
Understand how the certification exam works and what topics are covered

Details:
- Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients with QuickBooks Online Payroll
- Prerequisites: QuickBooks Online Certified
- Delivery Method: Group-live Internet
- Field of Study: Non-Technical - Computer Software & Applications
- Course Level: Intermediate
- Course Length: 90 Minutes
- Recommended CPE: 1.5

QuickBooks Time Fundamentals Part 1: Activating and Setup
This session introduces QuickBooks Time and the different subscription options. Find out how different businesses can benefit from QuickBooks Time and how you can help your clients choose the right subscription for their needs. Attendees will also learn how to activate QuickBooks Time, integrate it with QuickBooks Online and help clients add their employees, contractors, and payroll items.

Learning objectives
Understand how QuickBooks Time integrates with QuickBooks online and the employee time-tracking workflow
Understand the benefits of using QuickBooks Time to track hours worked
Explain how to determine the right subscription for clients
Identify how to set up employees and contractors in QuickBooks TIme

Details:
- Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Time and/or QuickBooks Online Payroll
- Prerequisites: None
- Delivery Method: Group-live Internet
- Field of Study: Non-Technical - Computer Software & Applications
- Course Level: Intermediate
- Course Length: 90 Minutes
- Recommended CPE: 1.5

QuickBooks Time Fundamentals Part 2: Recording and Managing Time
In this session discover the different ways your clients' workers and crews can track time with QuickBooks Time, and how they can benefit from features such as GPS tracking, geofencing, and facial recognition. Attendees will also learn how clients can use QuickBooks Time to manage their employees, schedule and track employees' time and location, edit or approve timesheets, and run payroll within QuickBooks Online Payroll or export time entries generated in QuickBooks Time for third-party payroll providers.

Learning objectives
Understand how to track employees via QuickBooks Time mobile app, Manual Time Card and the Time Clock Kiosk
Understand how to create, review, update, and approve employees' time
Identify how to access reports to calculate payroll and project profitability

Details:
- Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Time and/or QuickBooks Online Payroll
- Prerequisites: None

- Delivery Method: Group-live Internet
- Field of Study: Non-Technical - Computer Software & Applications
- Course Level: Intermediate
- Course Length: 90 Minutes
- Recommended CPE: 1.5

QuickBooks Live: A Day in the Life

Have you heard about QuickBooks Live but you're not quite sure what it is exactly? Would you like to work for Intuit as a QuickBooks Live bookkeeper? Do you want to work remotely and set your own hours? Join Michelle Long to learn about what it is like to be a QuickBooks Live Bookkeeper and how it may be a great opportunity for you.

Learning Objectives:
- Understand the services QuickBooks Live bookkeepers provide for small businesses.
- Discover the requirements, qualifications, and benefits for QuickBooks Live bookkeepers.
- Learn about the new Bookkeeping Certification available

Course Level: Beginner

Prerequisites: None

CPE: 1

Field of Study: Personal Development - Non-technical

Delivery: Group Internet Based