

1) What is QuickBooks Self-Employed, and what are the benefits of using it?

QuickBooks Self-Employed was built specifically for Schedule C tax clients, so they can stay organized and on top of their business finances all year long. It offers key features such as automatic mileage tracking, receipt capture, and expense categorization. You can refer your Schedule C tax clients to QuickBooks Self-Employed via our web site: <https://quickbooks.intuit.com/accountants/self-employed/>

Benefits for accountants

- Integration with QuickBooks Online Accountant
- Accountant toolbox and best practice guide
- One-click export of an editable Excel tax details report
- Save time when clients come to you with more organized data
- Help clients keep more of what they earn with greater visibility into their transactions and a comprehensive, accurate mileage log

Benefits for clients

- Separate business from personal spending with a swipe
- Automatic mileage tracking
- Easy receipt capture on the mobile app
- Set money aside for worry-free taxes with up-to-date quarterly tax estimate projections
- Create and send invoices quickly on-the-go, and get paid faster by enabling online payments
- At-a-glance cash flow visibility with business spending trends and up-to-date profit and loss details
- Set rules to put expense tracking and Schedule C categorization on autopilot
- Work anytime, anywhere with the mobile app
- Transactions downloaded straight from your bank, PayPal, Etsy or credit card accounts
- Reports – mileage log, P&L statement, transaction log, annual tax summary and detailed tax excel report

2) What is the new QuickBooks Self-Employed integration with QuickBooks Online Accountant? What are some of the benefits?

The new integration gives you the ability to work with your QuickBooks Self-Employed clients within QuickBooks Online Accountant, just like you can with your QuickBooks Online clients, making it easier for you to stay up-to-date on your client's cash flow, business spending and tax obligations. Being able to collaborate directly with your clients means access to their data anytime, anywhere. With this easy access to your client's data, you can help advise them and file their taxes without the hassle of sending files back and forth. We know how critical you are to your clients' success and that it's important to build a solution that fits seamlessly into your current workflow processes.

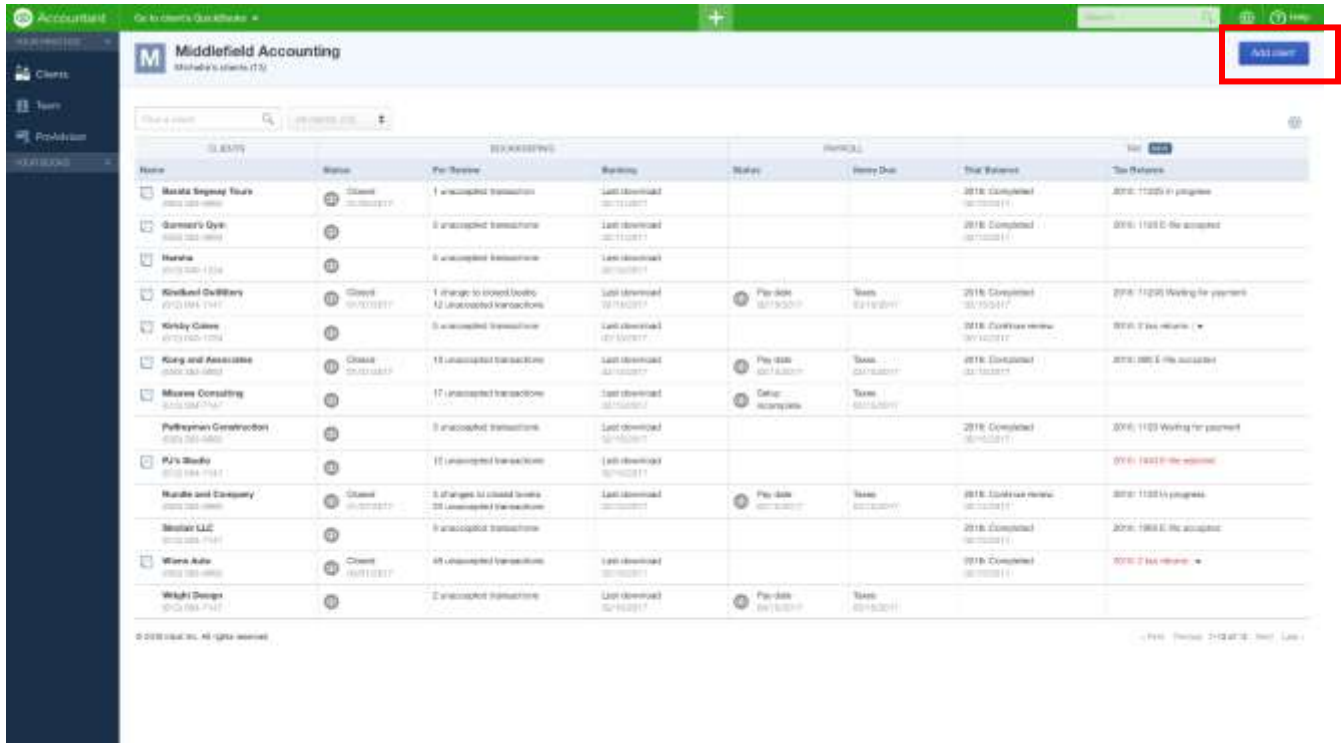
QuickBooks Self-Employed is the tool that helps Schedule C tax clients come to you with clean and organized data, so you can make an even bigger difference in your clients' lives, all while growing your practice and saving significant time when it matters the most.

3) How can I add my QuickBooks Self-Employed client via my QuickBooks Online Accountant account?

As an accountant, you can now add your QuickBooks Self-Employed clients via QuickBooks Online Accountant's "Add Client" flow. Instructions on how you can add your clients are below.

Accountant: Add your QuickBooks Self-Employed client:

- A. Log into your QuickBooks Online Accountant account. At the top right corner, click on **Add Client**.



- B. Enter in your client's information and select **QuickBooks Self-Employed** subscription (either under Direct Discount or Wholesale Discount view). Click **Save**. Your newly added client's information will now show up on the QuickBooks Online Accountant Client List. See screenshots on next page.

Direct Discount View:

Client contact information

Business Individual

Business name * Email *

Display name as Mobile

[+ Add more info](#)

QuickBooks subscription [Compare](#)

Wholesale discount (firm is billed) Direct discount (client is billed)

Self-Employed <small>NEW</small>	
\$10/mo after 12 months	\$4/mo
<small>With QuickBooks Self-Employed, only your client can be Master Admin.</small>	
Essentials	
\$30/mo after 12 months	\$21/mo
Plus <small>MAX PROS</small>	
\$40/mo after 12 months	\$28/mo
TOTAL	\$4/mo

[Save](#)

Wholesale Discount View:

The screenshot shows a web form for setting up a QuickBooks subscription. It is divided into two main sections: 'Client contact information' and 'QuickBooks subscription'.

Client contact information

Radio buttons for Business and Individual.

Fields: Business name *, Email *, Display name as, Mobile.

+ Add more info

QuickBooks subscription [Compare](#)

Radio buttons for Wholesale discount (firm is billed) and Direct discount (client is billed).

Self-Employed New

For Schedule C clients who need a simple solution to track mileage and expenses. [Learn more](#)

Essentials

\$30/mo 50% off for life of the subscription **\$15/mo**

Plus Most Popular

\$40/mo 50% off for life of the subscription **\$20/mo**

+ Add payroll

TOTAL **\$0/mo**

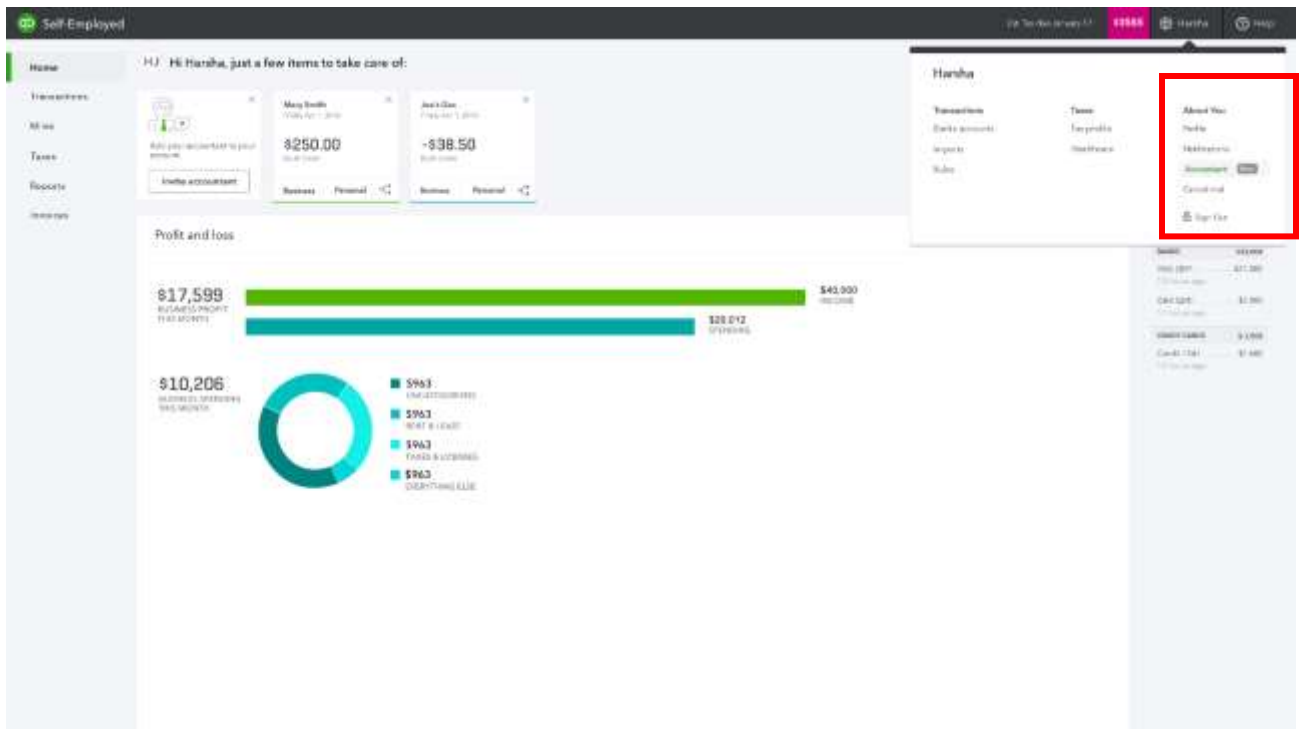
Save

In addition, your QuickBooks Self-Employed client can invite you to access his/her data by following the instructions below.

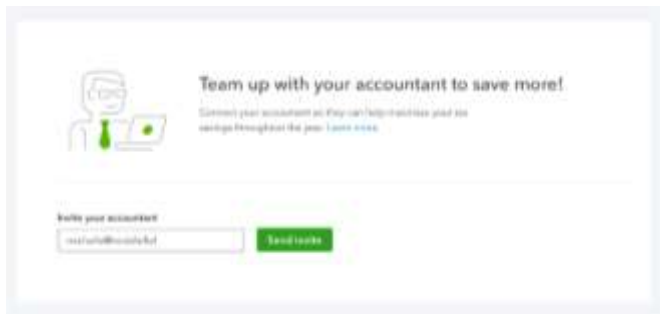
Client: Invite an accountant to access QuickBooks Self-Employed data:

- A. From the gear menu, select **Accountant**.

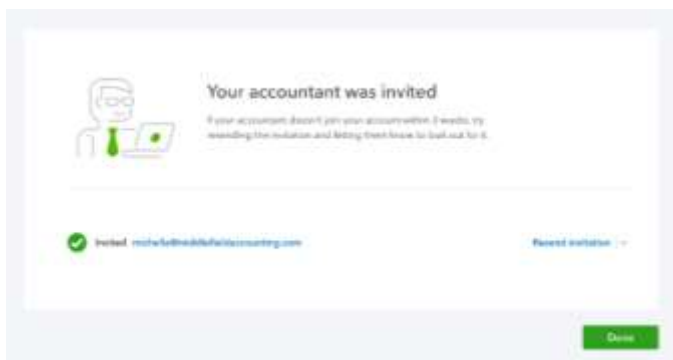
Note: QuickBooks Self-Employed clients can also access the accountant invite screen from the quarterly taxes tab (upper right hand corner) and the home tab (card). See screenshot on next page.



B. In the *Invite your accountant* field, enter the accountant's email address. Click **Send invite**.



C. Once you see a confirmation display “Your accountant was invited”, click **Done**.



4) Once I add my QuickBooks Self-Employed client via QuickBooks Online Accountant, how can I access his/her data?

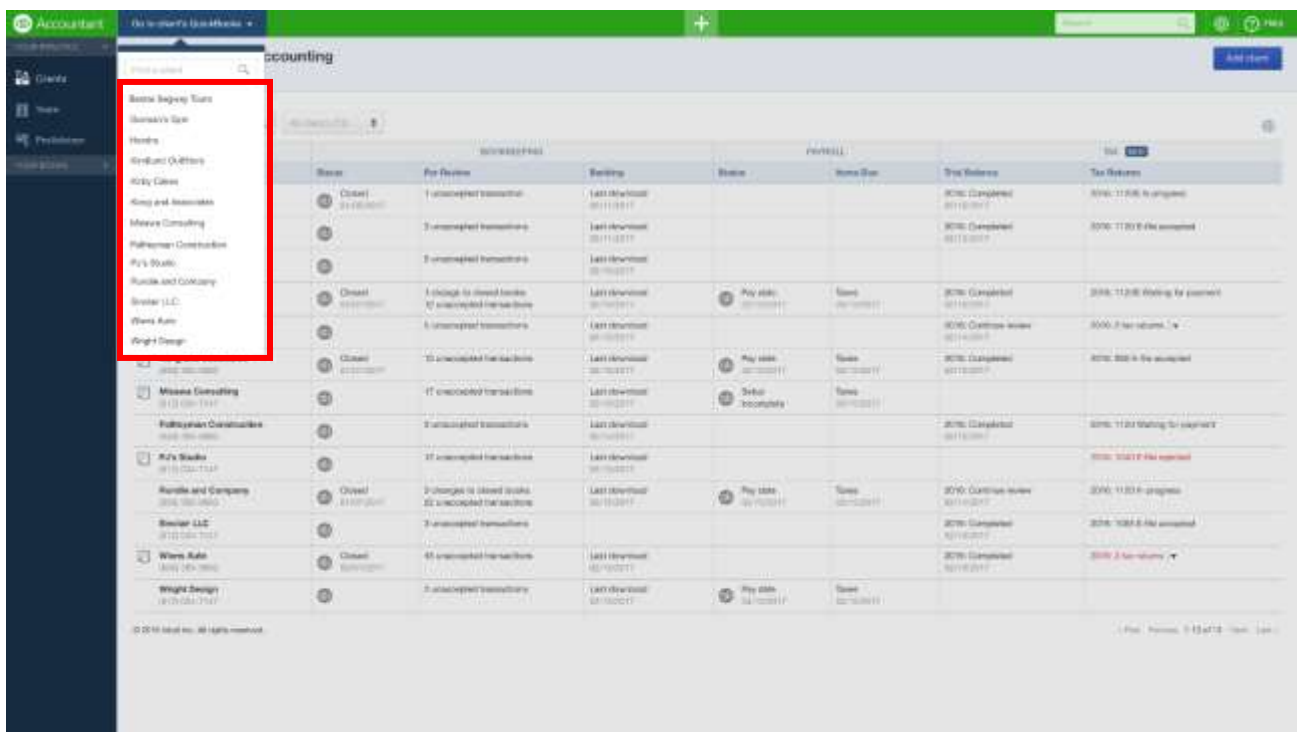
There are 2 ways to access your client's QuickBooks Self-Employed data in QuickBooks Online Accountant.

Access a client's data via the Accountant Client Chooser:

- A. Click the **Go to client's QuickBooks** drop-down, located in the top left side of the screen.

Note: If you are already working in another client's QuickBooks account, this dropdown will display the name of the client whose books you are in. You can still click the dropdown and navigate to your self-employed client accounts in this scenario.

- B. Select a client data to access:



Note: All QuickBooks Online client companies will open within the QuickBooks Online Accountant interface, except for QuickBooks Self-Employed clients, as they will open in a new browser tab/window.

Access a client's data from the QuickBooks Online Accountant Client List:

- A. From the left sidebar menu, select **Your Practice > Clients**.
- B. Within your Client List, you will now see your QuickBooks Self-Employed clients listed among your QuickBooks Online clients. To determine which version of QuickBooks your client is using, you can hover over the gray QB ball in the status column:

Client	Status	For Dates	Banking	Plan	Next Due	Total Balance	Due Amount
Bertha Begonia Tours	QuickBooks Online	1 unrecorded transaction	Last downloaded 02/14/2017			2016 Completed	2016 \$120.00 in progress
Berman's Gym	QuickBooks Online	5 unrecorded transactions	Last downloaded 02/14/2017			2016 Completed	2016 \$100.00 in account
Wanda	QuickBooks Self-Employed	5 unrecorded transactions	Last downloaded 02/14/2017				
Wendell Outfitters	QuickBooks Online	10 unrecorded transactions	Last downloaded 02/14/2017	Plan One	Next 02/15/2017	2016 Completed	2016 \$100.00 in progress
Windy Colors	QuickBooks Online	1 unrecorded transaction	Last downloaded 02/14/2017			2016 Complete status	2016 \$100.00 in account
Wing and Associates	QuickBooks Online	11 unrecorded transactions	Last downloaded 02/14/2017	Plan One	Next 02/15/2017	2016 Completed	2016 \$80.00 in account
Wissac Consulting	QuickBooks Online	17 unrecorded transactions	Last downloaded 02/14/2017	Setup incomplete	Next 02/15/2017		
Wolfgang Construction	QuickBooks Online	3 unrecorded transactions	Last downloaded 02/14/2017			2016 Completed	2016 \$100.00 in progress
Wolfe Studio	QuickBooks Online	12 unrecorded transactions	Last downloaded 02/14/2017				2016 \$100.00 in account
Woods and Company	QuickBooks Online	5 unrecorded transactions	Last downloaded 02/14/2017	Plan One	Next 02/15/2017	2016 Complete status	2016 \$100.00 in progress
Woods LLC	QuickBooks Online	5 unrecorded transactions	Last downloaded 02/14/2017			2016 Completed	2016 \$100.00 in account
Woods Auto	QuickBooks Online	41 unrecorded transactions	Last downloaded 02/14/2017			2016 Completed	2016 \$100.00 in account
Wright Design	QuickBooks Online	2 unrecorded transactions	Last downloaded 02/14/2017	Plan One	Next 02/15/2017		

Note: All QuickBooks Online client companies will open within the same tab in your browser, except for QuickBooks Self-Employed clients, which will open in a new tab or window.

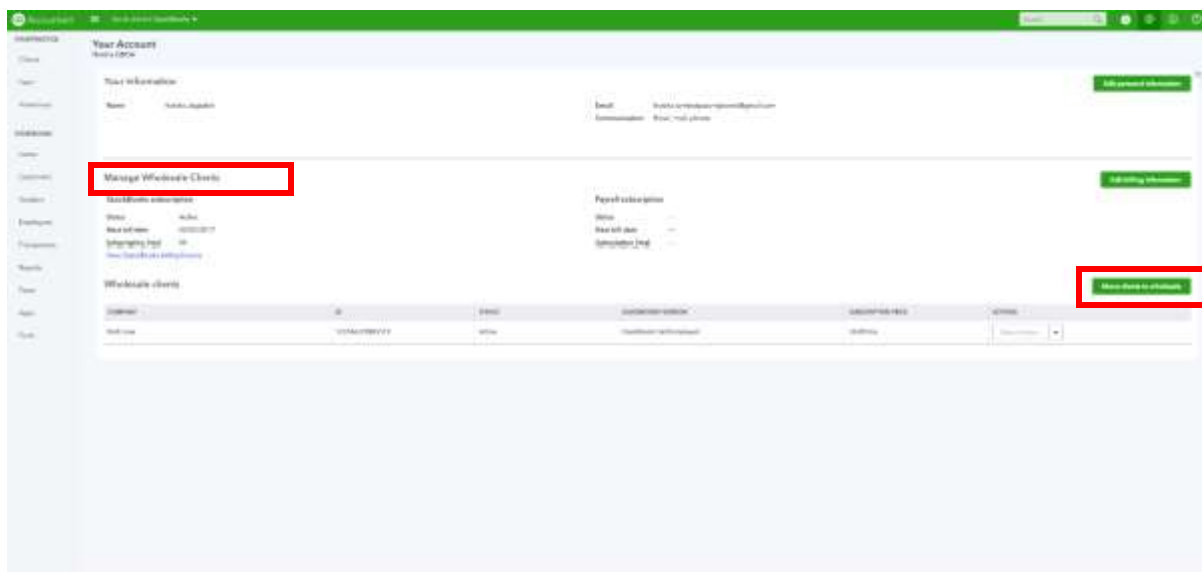
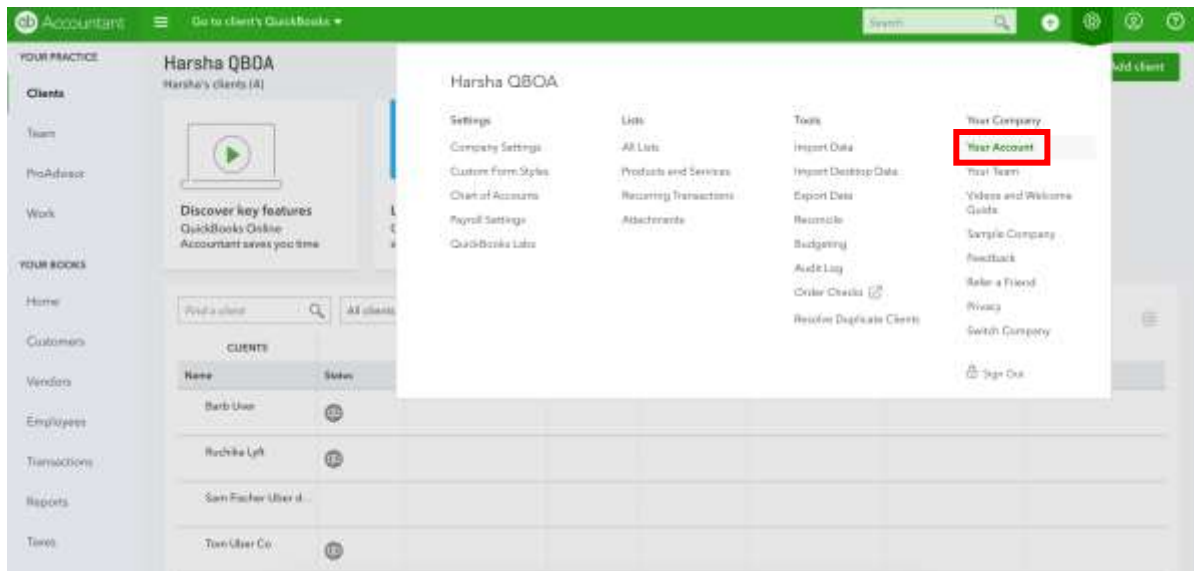
5) Is wholesale billing available for QuickBooks Self-Employed?

Yes, we now offer wholesale discount for QuickBooks Self-Employed at 50% off the list price every month for the life of the subscription, which equals \$5/month. The wholesale discount allows you to bundle QuickBooks Self-Employed into the services that you provide to your Schedule C clients with exclusive discounts. You can learn more about the benefits of wholesale billing at <https://quickbooks.intuit.com/accountants/resources/discounts-wholesale/>.

To add QuickBooks Self-Employed clients via wholesale discount, please log into your QuickBooks Online Accountant account and use the **Add Client** flow (as outlined under Question #3).

6) Can I migrate my current QuickBooks Self-Employed clients from direct billing to wholesale billing? If so, how?

Yes, you can now migrate your current QuickBooks Self-Employed clients to wholesale billing. Click on the **Gear icon > My Account > Move clients to wholesale**. See screenshot next page.



7) Is there anything else I need to know?

Yes! With this new integration, we are excited to introduce an Accountant Toolbox, which makes it easier for you to get straight into your client’s data, review important documents, and learn more about how you can set your clients up for success in QuickBooks Self-Employed.

8) Will I now have access to the Accountant Toolbox for my QuickBooks Self-Employed clients?

Yes, with this new integration, accountants can now access the Accountant Toolbox for QuickBooks Self-Employed clients.

Accessing the Accountant Toolbox:

Click the **toolbox** icon, located in left portion of the QuickBooks Self-Employed title bar.

The screenshot displays the QuickBooks Self-Employed dashboard. In the top navigation bar, the 'Accountant tools' icon (a toolbox) is highlighted with a red square. Below the navigation bar, the 'Accountant tools' dropdown menu is open, listing options such as 'Profit and loss report', 'Tax details report', 'Quarterly tax prep', 'Annual tax prep', 'Download transactions', 'Manage tabs', and 'View tax prep tool'. The main dashboard area shows a 'Profit and loss' report with a bar chart comparing 'BUSINESS PROFIT THIS MONTH' (\$17,599) to a target of \$40,000. Below this, a donut chart shows 'BUSINESS SPENDING THIS MONTH' (\$10,206) broken down into four categories: 'INCOME TAXES' (\$963), 'RENT & UTILS' (\$963), 'TRAVEL & EXPENSES' (\$963), and 'PROPERTY CLM' (\$963). The right sidebar includes an 'Accountant' section for 'Michelle' and an 'Accounts' section listing various accounts with their balances.