

Ultimate client onboarding guide to QuickBooks online

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Introduction

Imagine, for a moment, that I can see exactly what my clients see in their accounting systems: up-to-date bank and credit card transactions coded correctly in the general ledger, receipt images attached to transactions, and all of the details in accounts receivable and payroll shown in real time. When clients call and ask how a transaction affects their profits or taxes, I can see what's going on, whenever I want, without having to dial into a computer, requesting a backup or driving to their office.

With **QuickBooks® Online Accountant** and **QuickBooks® Online (QBO)**, we have this ...and much more, including tools to clean up messes, make adjusting journal entries and even organize team tasks within a firm. But, these are the benefits to us - what do clients get? Reliable and up-to-date information, less work to get their bookkeeping done, and timely reports so they can run their business!

Now, imagine a prospective client contacts you asking questions about moving to QBO. You immediately think of how great it will be for both of you, but as the prospect asks questions about setting it up, do you start to cringe at the thought of doing the demo, proposal and onboarding? Do you want to implement a flat fee, but are nervous it could leave you holding the bag for a longer implementation?

If this sounds familiar, then you have come to the right place! In this "Ultimate Client Onboarding Guide," you are going to find resources, articles, videos and advice on how to make the onboarding of clients exciting, with less drudgery and less sweating the small stuff. With a plan in hand, you'll have confidence in your process and will be able to provide a better experience for your clients that will invoke even further trust in your firm.

How to present QuickBooks online to your clients

By Carla Caldwell

As QuickBooks ProAdvisors®, we have seen the power of **QuickBooks® Online** (QBO) for our own firms in easily accessing client data and using accountant-specific tools. For our clients, we know about the bank and credit card feeds, anywhere/anytime access, ease of data entry, and integration of apps - but we need to make sure we discuss the areas of the application that are most beneficial for your clients' particular needs.

For example, clients who are invoicing customers on a recurring basis need to know how recurring invoices or recurring sales receipts work in QBO. Know what your clients are struggling with and where their processes can improve, then highlight those areas as you show them QBO.

*NOTE: use the **Test Drive of QuickBooks Online** for a functioning version of QBO that will look more like what the client experiences, complete with sample data.*

In addition, weave into the conversation - or perhaps point it out on the third page of this **customizable Quickbooks brochure** - that QBO clients are more successful when working with a ProAdvisor or accounting professional.

Discuss the areas of the application that are most beneficial for your clients' particular needs.

While talking to our clients face to face is important, we also need to be more socially active in discussing QBO and its benefits. Let's face facts: some of our clients may just not be ready to go to QBO now, but as they hear about features and benefits, you will find that many come back asking about something you said online or in person to get even more information. Sometimes, the pain has to get so strong that they are really ready to move! For some tips on what to say, check out this [QuickBooks Messaging document](#) provided by Intuit® to help you get started.

Finally, let's get real about which types of clients are currently a great fit for QBO. If clients are working online, want to grow their business or value working with their accounting professional on a more regular basis than once a year (or you know they really need to!), then they definitely could be a great fit for QBO.

If clients are working online, want to grow their business or value working with their accounting professional on a more regular basis, then they definitely could be a great fit for QBO.

Regarding specific industries, most every industry is a good fit, especially with integrated apps (Did you know that there are nearly 500?!).

Here are a few examples of industries that are great fits for QuickBooks Online:

- Service-based businesses such as graphic designers, architects and attorneys.
- Medical professionals who handle medical billing out of another system, and then enjoy the ease of categorization of their expenses in QBO.
- Restaurants, e-commerce businesses, and other businesses that have sales systems. These businesses can integrate with QBO for expense tracking and financial statement creation.

The bottom line is to understand our clients.

So, who is not a good fit for using QBO? Extremely complex small businesses or those with a very high volume, although we are seeing many may use integrated apps to handle that part of their business, including serialized inventory or high-volume retail. Remember, most businesses can still use QBO for their main accounting functions, and make it easier for you to provide complete financial reports for them. On the payroll side, we recommend QuickBooks Online for under 50 employees.

The bottom line is to understand our clients.

A small business owner who does professional services manually created invoices for her clients each month, emailing them out to the client. With QBO, she now sends them automatically as repeating online invoices, with QuickBooks Payments turned on. Now, instead of waiting weeks to receive checks in the mail that she must take to the bank, her customers click a button, pay the invoice, and the business owner receives emails letting her know each time an invoice is paid. Her cash flow is greatly improved, and she now can focus more on the service to her client and less on servicing her business.

Another small business owner runs a family-owned physical therapy office. It was running just fine on QuickBooks Desktop, but the owner thought having online access might be helpful in order for her to take half days on Friday and work from home. Her conversion took less than an hour, including her payroll, and she never missed a beat. A couple months later, she found out that her son had to have major surgery and she would be out of the office for a month caring for him. She was still able to run payroll, maintain her books easily and never missed a beat. Her focus was on her son (who is doing fantastic!) and she had less to worry about back at the office since she was able to do things when and where she needed.

Helping your clients realize that you understand their needs and struggles, and why you are recommending QBO, will not only give them confidence, but also move you to the role of trusted advisor; better yet, you'll have your clients for life!

Helping your clients realize that you understand their needs and struggles will not only give them confidence, but also move you to the role of trusted advisor.

Proposing your services to move clients to QuickBooks online

By Erin Walsh Dyer

Having the conversation with your clients to move them to **QuickBooks Online** (QBO) is just part of the onboarding process; you'll also have to make some key changes in your own practice, which begins with switching to a cloud-based practice.

Moving to the cloud or working more in the cloud than you already are says a lot about how we do business. Automation is king, which means less keyboard time and, ultimately, less billable hours. We have to rethink how we calculate our price and propose our services to prospective clients.

Step 1: Identify the need.

Let's start by discussing why the client is looking for you. In most cases, business owners and their staff will contact an accounting professional because there is a problem beyond their ability. Basically, there is a pain point. It could be they don't understand the software, don't have any accounting basics, are running behind, or they just want to run their business and leave the accounting to the professionals.

During your initial consultation - which could very well be on the phone or through web meeting software like the one we use, Zoom.us - we need to find out what this pain point is. I find that during the first 10 or 15 minutes of most of our consultations, clients simply vent about

their frustrations. I listen and take notes. Once they finish telling me the issues they are having, I use a checklist to gain further insight into the issues and begin shaping my proposal.

New Client Checklist

How to use this form:

Try using this handy New Client details form in your initial meeting with your new client to establish their needs. Select the features your new client needs. Then cross check to the four columns in the middle to decide which subscription is best for their business needs. The ✓ shows what is included in each subscription.

New Client Details

Name of Company:	
Legal Name:	
Contact Name:	
Phone Number:	
Website:	

Once they finish telling me the issues they are having, I use a checklist to gain further insight.

What is going on now?

- Fill out the "New Client details" section of the **New Client Onboarding Checklist**.
- In addition, ask, "What are your bottlenecks?"
- Probe a bit more by asking, "Are there any other inefficiencies?"

Step 2: Understand the goals.

After this short interview, we should have a good idea of the software in play, the client's experience and, of course, frustrations. Now it's time to change the conversation and help them see there is hope. Ask this question: "If all the issues you've mentioned were gone, what would open up for you?" Then ask the additional questions below.

- What is the dream?
- How would you like to spend your work day?
- What do you want to achieve in the next:
 - 30 days
 - 180 days
 - 60 days
 - 2 years
 - 5 years

You would be surprised about how many of your new clients have not asked themselves these questions. Getting the conversation turned to the "dream" helps them realize there is someone out there who can help. You have given them hope, and the new cloud model has shifted our role in the relationship with our clients. We are no longer data processing machines. Because of automation and online access, our time is now freed up to be their collaborator and work as part of their team.

Now that there is hope in the conversation, let's get you paid for all the value you have already given them.

Step 3: Determine the value.

Believe it or not, hope has value. Relieving stress and other burdens from our clients' work day has value - and value is the new way of pricing our services. But, keeping track of your time by hour or minute is so easy, right? Why do we have to change?

If we become more efficient using apps and automation, our billable time decreases and we make less money; nobody wants that. However, let's work less and keep our earnings where they are or even grow them. Work smarter, not harder.

How do we measure our value? Here are some really great resources on this topic. I have to admit it took me awhile to wrap my head around this one. Once I finally learned, it became easy and I will never go back. Take a look at these resources.

- [Value pricing resources](#)
- [How to measure the value of your services](#)

Value is the new way of pricing.

Step 4: Create the options.

Back to our consultation: now that they have hope, I give clients the option to choose between several offerings. Having service options that can manage multiple scenarios is a really good strategy. I usually let the client choose between the three service options below and always quote a flat fee for each of these:

Option 1: We do the work. During the meeting, you may have already established that the client would like to be hands off. This means we will take on the entire scope of work.

Option 2: Client does the work. In some cases the client just needs a little push in the right direction. Coaching the client through their daily workflows is very beneficial. They learn it once and repeat their processes.

Option 3: Team effort. Some clients like to stay involved in their accounting on a certain level, so figure out what they want to continue managing. Make sure they are good at it and coached properly through their workflows, and then you can take on the rest.

Giving them options helps them feel in control right away and they are part of the solution. Plus, they usually choose what I would have recommended anyway.

Fig. 1

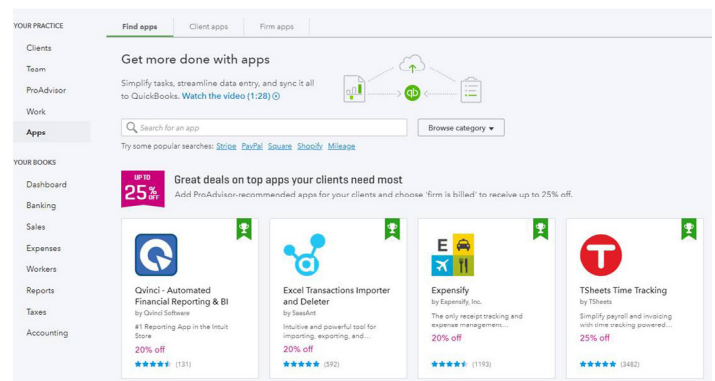
Product Features Required				
What features does your client need?	Self Employed	Simple Start	Essentials	Online Plus
<input type="checkbox"/> Estimated Taxes (Schedule C)	✓			
<input type="checkbox"/> Mileage Tracking	✓			
<input type="checkbox"/> Invoices	✓	✓	✓	✓
<input type="checkbox"/> Online Invoices	✓	✓	✓	✓
<input type="checkbox"/> Custom Invoices		✓	✓	✓
<input type="checkbox"/> Sales Receipts		✓	✓	✓
<input type="checkbox"/> Product & Service Items		✓	✓	✓
<input type="checkbox"/> Estimates		✓	✓	✓
<input type="checkbox"/> Sales Tax		✓	✓	✓
<input type="checkbox"/> Statements		✓	✓	✓
<input type="checkbox"/> Convert from QuickBooks Desktop		✓	✓	✓
<input type="checkbox"/> Import lists from Excel		✓	✓	✓

Step 5: Select the Software.

An important thing to consider is what software your clients need. It could be that during the conversation, you establish that there might be a better software that could solve an issue or two. Below is a snapshot of the features in all editions of QuickBooks Online and QuickBooks Self-Employed (Fig.1). Remember QuickBooks Payroll and QuickBooks Payments are add-ons built right into QBO and can be added with a couple of clicks. Sometimes the right solution makes all the difference.

In other cases, QuickBooks Online may not solve for every issue the client has, so it's **QuickBooks Apps** (Fig. 2) to the rescue. These apps can integrate with QBO and provide not only accounting solutions, but industry-specific and other solutions as well. Here are a few that might make your day and your client's day a lot easier. You can locate hundreds of amazing apps on Apps.com, or by directly clicking the Apps tab from within QuickBooks Online Accountant.

Fig. 2



Step 6: Present the proposal.

We've given the client hope for a better, more efficient way of managing their finances and suggested ways to improve some efficiencies beyond accounting. Wow, what an amazing solution provider you have become! Now, let's engage your new client.

Intuit has some great [sample engagement letters](#) you can download and modify for your purposes.

Or, you could use an app such as Practice Ignition. This app has engagement letters, too, but takes this step to a whole other level. Practice Ignition syncs your QBO Product Service list and allows you to manage all your contracts in one location. You can email your proposal, the client e-signs and, instantly, an invoice is posted in your QBO. Amazing. [Practice Ignition](#) will also remind you of expiring engagements so you can renew them quickly and easily.

I hope you now have your next steps for engaging your QBO clients. Congratulate yourself on embracing this new age of accounting. Our time is precious and we should use our cloud accounting tools to improve our client's workday—and also our own.

Welcome to the cloud!

Our time is precious and we should use our cloud accounting tools to improve our client's workday—and also our own.

Setting up new clients and converting clients to QuickBooks online

By Erin Walsh Dyer

Congratulations on securing your new client. Now it's time to set them up! Whether you're setting up a new client or moving your first client from QuickBooks Desktop or Mac to QuickBooks Online, the process is not as difficult as you may think. This section is designed to walk you through the process, step by step, with easy-to-follow checklists.

Clients New to QuickBooks


If your client is new to the QuickBooks family, setting up QuickBooks Online (QBO) is just a few clicks away. This checklist starts by working from the QuickBooks Online Accountant (QBOA) dashboard.

Log into QBOA and look for the symbol at the top right. This is the Quick Create menu. Make sure you are not in a client's file. You must be at the Your Practice screen or the workflows below will not be there.

New set-up

Create new QBO subscription

- **QBOA > Quick Create > Client**
- Follow prompts
- Choose subscription & who will pay the subscription fees

Pretty simple, right? The new QBO file should already be listed on your client dashboard in QBOA. Click the  next to your client's company name to open the file. There are some settings you will need to look at on behalf of your client.

Company Information

- **Gear > Your Company > Account and Settings > Company**

Import Lists (optional)

- **Gear > Tools > Import Data**

Payroll Set Up

- **Left Navigation > Workers > Employees > Get Started**

Customize Sales Templates

- **Gear > Your Company > Account and Settings > Sales**

Connect Apps

- **QBOA > Apps > Find Apps**

Connect QB Payments

- **Gear > Your Company > Account and Settings > Payments**

Connect Bank Feeds

- **Banking > Add Account**

Set up Users and permissions

- **Gear > Your Company > Manage Users**

Converting clients from QuickBooks desktop to QuickBooks online

If your client is a QuickBooks Desktop user, there is a wonderful conversion tool in both Desktop and Mac editions. Once the conversion tool has done its job, there are additional steps.


*NOTE: The conversion outlined here is a transition from Desktop Pro or Premier. If you are converting from **Enterprise** or **Mac**, click these links to view additional conversion steps.*

*If you need more detailed information on this topic, look at Module 1 of the QBO Advanced Certification course. It truly deep dives conversion. This video with PDF guide "Complex Conversions" is available in your QuickBooks ProAdvisor® tab or just click this link. **QBO Advanced Cert: Module 1**. I would recommend watching this at least once for an overall understanding of what could or could not happen during a conversion. Also, please be aware that if your clients want to convert inventory, they will be converting to FIFO costing in QBO. This same resource provides information on what to expect when converting inventory.*

Most of the time conversion is quite easy. Walk through it together with your client. I've split the process into three phases: Pre-Conversion, Conversion and Post-Conversion.

Most of the time conversion is quite easy. Walk through it together with your client.

Pre-Conversion

This Pre-Conversion checklist starts by working from the QuickBooks Online Accountant (QBOA) dashboard. Log into QBOA and look for the  symbol at the top right. This is the **Quick Create** menu. Make sure you are not in a client's file. You must be at the **Your Practice** screen or these workflows below will not be there.


From the **Quick Create** menu, you will be adding the client into QuickBooks Online Accountant. Download the **QuickBooks Online Conversion Checklist** and follow all steps.

Conversion

Go to QuickBooks Desktop and verify the file is ready to move over to QuickBooks Online. The conversion tool is in the Company Menu in QuickBooks Pro and Premier.

Continue to follow the steps in the **QuickBooks Online Conversion Checklist** (Conversion section). If you are using Enterprise or Mac, you can still convert. Click these **Enterprise** or **Mac** links to review additional resources on those topics.

Post-Conversion

You should have received the email from Intuit® letting you know the data has converted. In that same email, you can also access an **Import Summary** report to get more insights on the conversion. Now, log back into QBOA and click the  next to your client's company name to open the file with imported desktop data. You will need to have the QuickBooks Desktop file open as well. Now it's time to perform some tasks to make sure the conversion was successful, and then do a little housekeeping.

As previously mentioned, follow the steps in the **QuickBooks Online Conversion Checklist** (Post-Conversion section) to ensure you have successfully completed conversion.

Congratulations! Now you can collaborate and work with your client in real time. No more exchanging Accountant's Copies or thumb drives. There are so many benefits to transitioning our client to QuickBooks Online, and this is just one. Enjoy the new freedom that cloud accounting gives you both!

Training your clients for long-term success

By Carla Caldwell

You've determined which clients to move to QuickBooks Online (QBO), presented your proposal based on your clients' needs and even accomplished the conversion process from QuickBooks Desktop to QBO.

Now it's time to ensure your new client knows how to work with your firm. There is no cookie-cutter method, but there are certainly best practices.

You'll need them to know the following:

- Where they should send files.
- Who they contact for questions.
- How they can contact you with issues.
- How soon you'll reply to their requests and emails.
- Their responsibility and yours regarding transaction entry or responding to a payroll issue.

With clear expectations on how to work with your firm and their new software, not only will your clients have more confidence in your services; they will feel much more at ease with the entire process. More than that, this will also help you deliver a better experience than the clients ever expected!

You have likely already been training your clients in subtle ways throughout the onboarding process by helping them to know where to upload documents, how to attach a receipt to a transaction or how to set up bank

feeds in QBO. But, as with anyone learning something new, clients need to hear things from you and your team multiple times, and it often helps to do it in multiple ways: tell them, email them or share a video, for example.

Remember: your firm and its processes are new to them, not to mention using QBO, and every one of your team who interacts with your clients is responsible to guide the client through your processes. You'll also need a handoff process with other team members, depending on the roles and functions they perform for each client.

Clients need to hear things from you and your team multiple times, and it often helps to do it in multiple ways.

Some firms conduct one-on-one training, while others use videos created by the firm. Combining these together could be done by doing one-on-one training using an online tool, such as Zoom or GoToMeeting, and recording the call. A link could then be sent to a client to refer to later. Another option is to leverage the free videos created by Intuit®; you'll find them here. Finally, for firms onboarding many clients at once, some firms conduct their own classroom training, using training templates provided here on the ProAdvisor/ Training tab in QuickBooks Online Accountant. These are customizable for the firm, and could be a great resource to begin a more formal training program for clients or the business community at large.

Finally, remember that training is never over. Just as the client gets used to doing things a certain way, there may be a change in their business and process, your process, an additional app to use, or another awesome update in QBO that will make their business even better. There needs to be constant communication and training with clients about what they are doing or how you need them to do a function. Also include training - or you can call it marketing - on additional services you provide to other clients, or other ways you help other business owners and businesses to thrive.

As you embrace all of these tips, tricks and resources, it is an exciting time in your business. You have fantastic tools to provide great advice and insights into your clients' businesses and success than ever before.

Good luck!

There needs to be constant communication and training with clients about what they are doing or how you need them to do a function.

About the authors

Carla Caldwell

Carla Caldwell is the owner of Caldwell Consulting & Training. She works with business owners (especially non-profits) to bridge the gap between growing business and specific accounting solutions. Carla also helps accounting and bookkeeping firms implement the tools that help them be more successful - from value pricing and process development to the apps that support their systems. Learn why companies are using Caldwell Consulting & Training to get better organized, more efficient systems and stronger results.

Erin Walsh Dyer

Erin is the ultimate bookkeeper's friend! As a national trainer for Intuit®, Erin educates hundreds of accounting professionals every month for QuickBooks Accountant University, and in 2015 The Bookkeeper's Friend was named a top-20 Firm of the Future by Intuit. Prior to the launch of the Bookkeepers Friend, Erin was a highly sought-after instructor for Intuit QuickBooks Training (Real World Training). During this time she educated thousands of QuickBooks desktop students across the United States and Intuit Support teams. She was named Trainer of the Year by Real World Training in December 2012.

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