

4 common QuickBooks Online misperceptions and how to convince your clients otherwise

Many of your desktop clients are a great fit for the cloud. Yet misperceptions about QuickBooks Online may be preventing them from making the switch.

Don't let misguided concerns keep them from enjoying benefits like greater flexibility, time savings, and easier collaboration.

Here are four of the most common QuickBooks Online misperceptions that QuickBooks Desktop clients have, and how to address them.



Misperception #1: Security

Reality: QuickBooks Online takes security very seriously

With QuickBooks Online, your clients receive the benefit of proactive, industry-recognized security features. An unsecured Internet connection allows hackers and identity thieves to take control of your computer and steal important information. A firewall within QuickBooks acts as a barrier to help prevent malicious programs or individuals from gaining access to your computer. In addition, the Audit Log in QuickBooks Online tracks each user's activities, allowing you to quickly review changes over time.

QuickBooks Online's data servers sit behind layers of network security and are not directly connected to the Internet. Your private information is available only to authorized users using authorized computers. To further protect your data QuickBooks Online uses SSL technology, the same technology that is used for card transactions over the Internet.

For additional information regarding data security, you can reference: [Quickbooks.intuit.com/datasecurity](https://quickbooks.intuit.com/datasecurity)

Misperception #2: Ease of Use

Reality: Multiple users can easily work in QuickBooks Online¹

Clients have probably heard about “anytime, anywhere access,” but they may not realize that multiple users can be signed into QuickBooks Online at the same time.

QuickBooks Online requires no additional network setup to enable multi-user mode. Users can log in and get right to work whether they’re using a PC or a Mac, or signing in on their phone or tablet using our mobile apps. Moreover, activities performed by one user can be seen by others immediately.

QuickBooks Online also eliminates the need to exchange data files back and forth between users. You and your clients never need to wonder if you’re working with the most up-to-date data, and won’t have to find advanced ways to securely share files.



Misperception #3: Learning the software

Reality: QuickBooks Online can be incredibly easy for clients to set up and use

QuickBooks Online has a different layout than desktop, but your clients may actually find it easy to navigate. The layout is similar to other web-based tools such as email or banking apps, and should be familiar for anyone who has basic internet experience. We also offer tutorials and free webinars to help users get up and running: quickbooks.intuit.com/tutorials. And because QuickBooks Online is accessible across multiple devices and operating systems, users have much more flexibility in how they work.

Collaborating with your clients is also much simpler in the cloud. Rather than having your clients try to explain where they went wrong, you can simply sign in and see what they’ve done. Many accounting professionals credit this sort of continuous collaboration with saving them costly and time-consuming clean up at the end of the year.

QuickBooks Online is also a great solution for your clients who find it difficult to maintain desktop software updates and handle their own data storage. With QuickBooks Online, they simply sign in and get to work. Updates and data storage are done for them, meaning no more wasting time on the phone with IT or looking for lost files.

Misperception #4: Features

Reality: QuickBooks Online has more features than ever before.

QuickBooks Online has come a long way in the last several years. Today, your clients will discover a huge array of smart, efficient features that can help streamline their work.

Here are just a few of the latest improvements and additions:

- Bank rules let you and your client control, customize, and automate how QuickBooks categorizes transactions in the bank feed, saving time and improving accuracy.
- Invoice tracking and next-day funding with QuickBooks Payments helps clients keep a close eye on cash-flow and get paid faster.
- Automated sales-tax calculations help keep your clients compliant on sales forms.
- Project tracking helps your clients organize their jobs and measure profitability.
- Progress invoicing lets businesses invoice incrementally and accept payment throughout the course of a project.
- Contractor onboarding lets your clients invite their 1099 contractors to fill out and e-sign their W-9 form, eliminating the pain of chasing documents.

QuickBooks Online also updates automatically every month, so your clients always have the latest features.

Your clients may not realize that there are multiple subscription levels to choose from: **Simple Start**, **Essentials**, **Plus**, and **Advanced**. If your clients aren't getting what they need from one solution, simply upgrading to another tier could be just the ticket.

Product Features:

Simple Start	Essentials	Plus	Advanced
Track income & expenses Capture & organize receipts Maximize tax deductions Invoice & accept payments Run basic reports Send estimates Track sales & sales tax	All the features of Simple Start and: Manage bills Track time Multiple users (up to 3)	All the features of Essentials and: Multiple users (up to 5) Track projects Track inventory Manage 1099 contractors	All the features of Plus and: Smart reporting powered by Fathom™² Batch import invoices Custom user permissions Premium care with Priority Circle

Share the savings

Share exclusive QuickBooks Online savings with your clients and help them transition. Visit quickbooks.intuit.com/toolkit/share2 to access the offers.

1. QuickBooks Online Simple Start includes 1 user license. QuickBooks Online Essentials includes 3 user licenses. QuickBooks Online Plus includes 5 user licenses. QuickBooks Online Advanced includes 25 user licenses.

2. QuickBooks Online Advanced includes one license of Smart Reporting powered by Fathom at no additional charge. Fathom supports up to 3,000 active or inactive accounts in the QuickBooks Online chart of accounts, and up to 20 classes for the importing, reporting, and analysis of QuickBooks data.