

Discover the benefits of QuickBooks Online Accountant and the QuickBooks ProAdvisor Programme

QuickBooks Online is the world's No.1 cloud accounting solution for small businesses.





About Intuit QuickBooks

We're a 30 year old start up from Silicon Valley with a reputation for innovation and reinvention. Our vision has always been to improve our customers' financial lives profoundly. Which is why we've been able to grow QuickBooks Online into the world's No.1 cloud accounting solution that our customers know and love today.

Everyday we connect with some of the smartest accountants, small businesses and tech developers around the globe. Striving for a better and more integrated future, we are committed to solving the most important problems for every one of our millions of users worldwide.

// I recommend QuickBooks daily. Not only is it great for my clients and me, but also I have gained clients because of QuickBooks! It's my be all and end all.

Samantha Biddlecome,
Accountant at Lollipop Bookkeeping

Setting you up for success in the new world of accounting

Dear Accounting Professional,

The adoption of digital is rapidly changing the way we live and work with all businesses now expecting real-time insights into the health of their company.

Unsurprisingly, 89% of small businesses thrive when they have accountancy support and this number is only set to grow. For accountants, digitalisation provides a fantastic opportunity to embrace automation of historically manual tasks and offer clients value-add advisory services to drive practice growth.

Our goal is to help you embrace the digital future to drive greater efficiencies and transform the way you collaborate with your clients.

The QuickBooks ProAdvisor Programme was developed with that goal in mind, enabling you to become a trusted advisor, market your practice and take advantage of the rewards such as dedicated support, training and personalised marketing tools.

At QuickBooks, we are fully committed to working in partnership with you, giving you the support, insight and guidance you need to meet your practice goals and deliver outstanding service for your clients.



Chris Evans,
VP and UK Country Manager at Intuit



78%

Small and medium businesses
in the UK have adopted the
Cloud for their business



Market trends

Technology is forever changing the way we work. And with 8,000 passionate Intuit staff around the world, we're constantly challenging ourselves and innovating the latest technologies to help our customers grow their businesses.

Machine learning

As you input information, QuickBooks' machine learning system will deliver an experience tailored to you. For example, when you connect your bank account, QuickBooks starts to learn how you match transactions to sales and expenses, so in the future it matches them automatically, saving you even more time.

Network effect platform

QuickBooks generates a vast amount of insight from our customers and uses this information to connect accountants, small businesses and developers to create an innovative system. This digital platform is a place for 24/7 interactions.

// QuickBooks combines online collaboration and great customer service.

QuickBooks user,
Move on Accountants

// QuickBooks saves both me and the client time and effort in keeping bookkeeping records up to date. I could not do without the bank feeds!

Vicky,
Accountant at Edwards and Hancock

Leaders in Innovation

At QuickBooks, we plan to leverage our highly rated mobile accounting app to introduce new and exciting features to our audiences. Market-leading innovations that take advantage of emerging technology are only the beginning of a product roadmap dedicated to empowering customers.

Making Tax Digital (MTD)

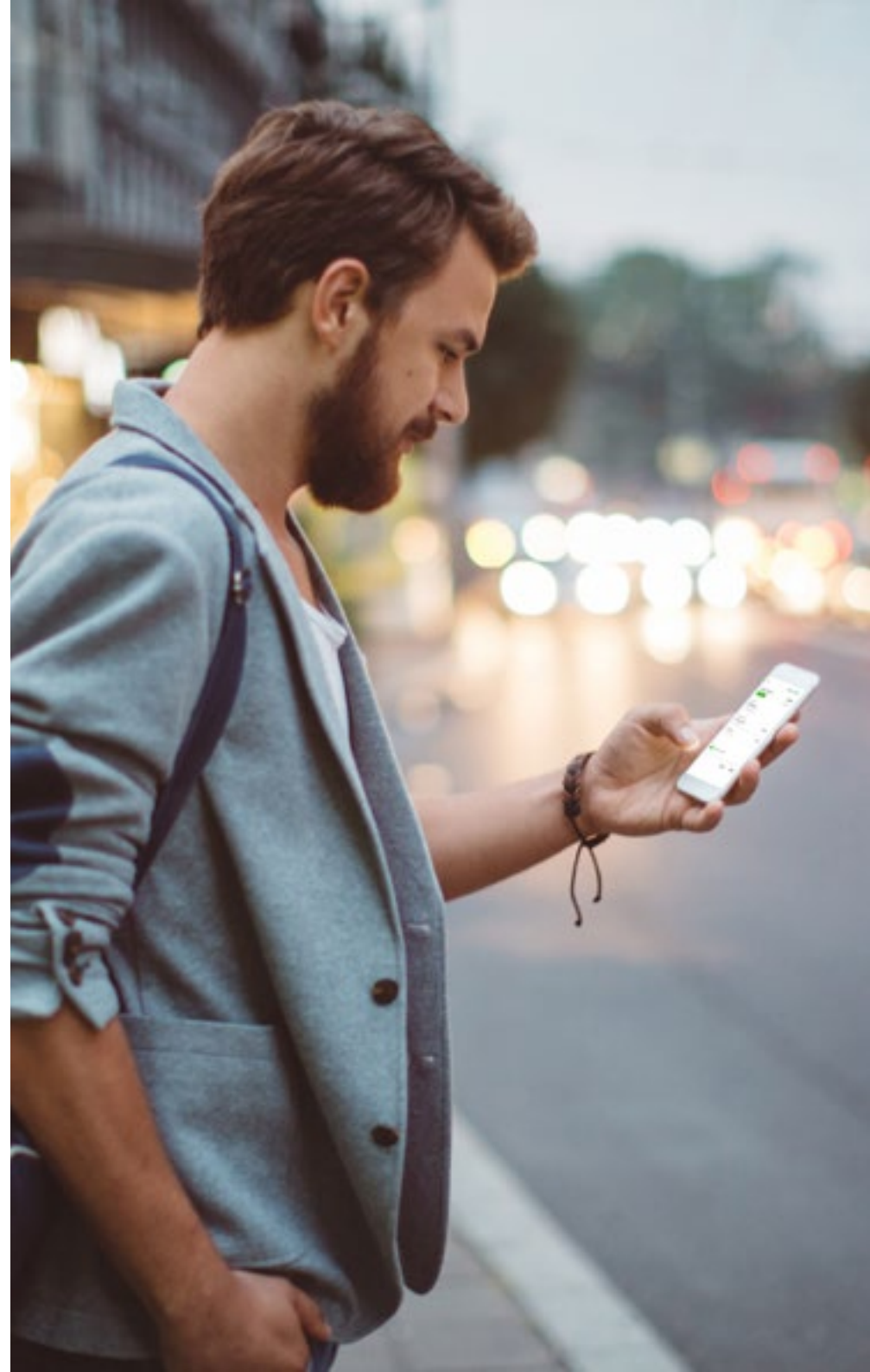
Following HMRC's plan to bring UK tax into the digital age, we introduced solutions to revolutionise your approach to tax administration. With VAT Error Checker and our HMRC-compliant bridging software, filing taxes through QuickBooks have become simpler and more efficient.

// *QuickBooks provides real-time information that can be accessed anytime anywhere, allowing my clients to make better business decisions.*

Kathryn,
Accountant at Guidon Group

// *The link to HMRC from QuickBooks is great and invoicing to clients is effortless*

Julie Milroy,
Small Business owner



Take your practice to the next level with the ProAdvisor Programme

When you sign up to QuickBooks Online for Accountants you automatically join our valuable ProAdvisor Programme. Get access to valuable tools and resources to help build success on your terms.

Promote your practice

Get more of the clients you want with our Find-a-ProAdvisor directory, used by thousands of small businesses and once you're QuickBooks certified, you'll get a free listing.

Grow your practice

Use our free My Marketing Hub asset library to promote your services to new and existing clients. Create dual-branded emails, social media content and more, as you grow. Use our Client Analysis Tool to gain key insights about your clients and get valuable discounts on software and services.

Get expert customer support

An award-winning team of people who care about your success, our customer support experts are available to help on phone, chat messaging and email.

ProAdvisor Programme - How it works

It's simple, earn points for doing what comes natural, like adding clients and achieving certification. The more points you earn, the more benefits you unlock.

+5 points

Add a QuickBooks Online Standard Payroll client

+10 points

Add a QuickBooks Online client
Add a QuickBooks Online Advanced Payroll client

+50 points

Get QuickBooks core certified

+100 points

Get QuickBooks advanced certified

ProAdvisor benefits at a glance

Benefits	● Silver 0 points	● Gold 200 points	● Platinum 800 points	● Elite 3000 points
Marketing Tools				
Listing in the Find-a-ProAdvisor directory (Certification required)	●	●	●	●
My Marketing Hub asset library	Standard	Standard+	Advanced	Advanced+
Software and Services				
Client analysis tool	●	●	●	●
QuickBooks Online for your practice	●	●	●	●
Discounts on QuickBooks subscriptions for your clients	●	●	●	●
Free QuickBooks time tracking NEW	●	●	●	●
Product Support				
Dedicated Account Manager		●	●	●
Expert customer support available on phone and messaging	●	●		
Priority phone customer support			●	●
Expert message customer support				●
Onboarding specialist to help you get up and running faster			60 days	90 days
Training				
QuickBooks Online training and certification	●	●	●	●
Advanced Certification training	●	●	●	●
Onsite QuickBooks Online certification training for your employees			●	●
Onsite classroom training for clients				●

Product comparison chart

Simple Start
Start managing your small business accounts & become MTD compliant.

Essentials
Manage accounts, VAT, MTD, payroll & employee time.

Plus
Full account management inc. budgets, purchase orders & stock control.

£6/month

£10/month

£12/month

	Simple Start £6/month	Essentials £10/month	Plus £12/month
Track income & expenses	•	•	•
Making Tax Digital for VAT	•	•	•
VAT Error Checker	•	•	•
Mileage tracking	•	•	•
Unlimited invoicing	•	•	•
Snap, sort & store receipts	•	•	•
Connect your bank	•	•	•
Run reports	•	•	•
Manage CIS transactions	•	•	•
Create estimates	•	•	•
Supports multi-currencies		•	•
Manage bills & payments		•	•
Add users		3	5
Track employee time			•
Track project profitability			•
Set budgets			•

Special terms

1. Earning Points through Qualifying Activities.

Points are accumulated by Members through the completion of "Qualifying Activities". The points balance shown in the Program is based on all Qualifying Activities completed by all Members who belong under the same QBA firm.

Completion of a Qualifying Activity occurs when, if applicable, Intuit collects the funds associated with the Qualifying Activity or when completed tracking for non-transactional actions, such as completing certification or surveys. See below for a current list of Qualifying Activities, which is subject to change.

The conduct that constitutes a Qualifying Activity and the number of Points earned for such Qualifying Activity may be changed by Intuit from time-to-time in its sole discretion. In addition to the Qualifying Activities generally available as part of the Program, Intuit may from time-to-time offer individual or specific Members one (1) or more bonus rewards or the ability to earn Points through the completion of other activities or may offer Members a one-time opportunity to earn Points in a new way ("Additional Qualifying Activities"). Some Additional Qualifying Activities may not be open to all Members. The details of an Additional Qualifying Activity, including a description of the conduct required and the number of Points available, will be communicated to the eligible Member(s) by email or in another communication from Intuit.

Points will appear in your QBA firm's ProAdvisor Program account within approximately twenty-four (24) hours of your completion of a Qualifying Activity and upon next subsequent QBOA account login. If Intuit makes changes to the Program terms, point eligibility or transfer under the updated terms shall be in Intuit's sole discretion. Neither Points nor benefits/rewards in the Program have any monetary or cash value and they may not be redeemed for cash or any QBO cash equivalent. Points and benefits/rewards are not transferable and cannot be combined with other offers or with another person's Points or benefits/rewards. Points and benefits/rewards are not your personal property, and may not be inherited, bartered, purchased or sold to any third party. Other exclusions and restrictions may apply.

2. Qualifying Activities.

As of 27 August 2019, Members can earn Points in the Program by completing Qualifying Activities. Qualifying Activities and the associated Points earned for those activities currently include:

a. United Kingdom

- i. Add a QuickBooks Online subscription for a client
 1. 10 Points per client under the QBA firm
- ii. Complete certification for QuickBooks Online
 1. 50 Points for each Member under the same QBA firm
- iii. Complete advanced certification for QuickBooks Online
 1. 100 Points for each Member under the same QBA firm

3. Points Expiration.

Points expire from the Program account balance when the Qualifying Activity is no longer active.

- a. Add a QuickBooks Online subscription for a client
 - i. Points will remain in the Program account balance as long as QBO client account remains active (monthly subscription paid) under the QBA firm
- b. Add a QuickBooks Self-Employed subscription for a client
 - i. Points will remain in the Program account balance as long as QBSE client account remains active (monthly subscription paid) under the QBA firm
- c. Add a QuickBooks Online Payroll subscription for a client
 - i. Points will remain in the Program account balance as long as payroll account remains active (monthly subscription paid) under the QBA firm
- d. Complete Certification for QuickBooks Online
 - i. Points will remain in the Program account balance as long as certification is active (Member must have completed certification or, in applicable regions, recertification exam prior to annual deadline July 31 of every year in order to retain certification points)
 - ii. If the member with certification is no longer under the QBA firm, the points for completing certification for QuickBooks Online will be removed from the QBA firm's ProAdvisor points balance
 - iii. If the member with certification joins a new QBA firm, the points for completing certification for QuickBooks Online will be added to the new QBA firm's ProAdvisor points balance
- e. Complete Advanced certification for QuickBooks Online
 - i. Points will remain in the Program account balance as long as certification is active (Member has completed certification or, in applicable regions, recertification exam prior to annual deadline July 31 of every year in order to retain certification points)
 - ii. If the member with certification is no longer under the QBA firm, the points for completing advanced certification for QuickBooks Online will be removed from the QBA firm's ProAdvisor points balance
 - iii. If the member with certification joins a new QBA firm, the points for completing advanced certification for QuickBooks Online will be added to the new QBA firm's ProAdvisor points balance
- f. Purchase ProAdvisor Deluxe or Premium for desktop
 - i. Points will remain in the Program account balance as long as annual account remains active (annual subscription paid) under the QBA firm
- g. Complete certification for QuickBooks Desktop
 - i. Points will remain in the Program account balance as long as certification is active (Member has completed certification or, in applicable regions,

recertification exam prior to annual deadline July 31 of every year)

- ii. If the member with certification is no longer under the QBA firm, the points for completing certification for QuickBooks Desktop will be removed from the QBA firm's ProAdvisor points balance
 - iii. If the member with certification joins a new QBA firm, the points for completing certification or QuickBooks Desktop will be added to the new QBA firm's ProAdvisor points balance
- h. Complete certification for QuickBooks Desktop Enterprise**
- i. Points will remain in the Program account balance as long as certification is active
 - ii. If the member with certification is no longer under the QBA firm, the points for completing certification for QuickBooks Desktop will be removed from the QBA firm's ProAdvisor points balance
 - iii. If the member with certification joins a new QBA firm, the points for completing certification or QuickBooks Desktop will be added to the new QBA firm's ProAdvisor points balance

4. Program Levels.

The Program allows Members to achieve levels of status in the Program based on the total points balance under the QBA firm's ProAdvisor Program account. The Program offers four levels of status: Silver, Gold, Platinum, and Elite. Levels are earned based on the following points thresholds:

In the United States, Canada, and Australia:

- Silver - part of the Program and remain in good standing, <200 points balance
- Gold - 200 points balance
- Platinum - 800 points balance
- Elite - 1,600 points balance

In the United Kingdom:

- Silver - part of the Program and remain in good standing, <200 points balance
- Gold - 200 points balance
- Platinum - 800 points balance
- Elite - 3,000 points balance

Once a QBA firm earn a status based on its total point balance from all Members in the QBA firm, all Members will get access to the benefits of the level achieved for as long as the points balance do not fall below the points threshold.

5. Program Level Grace Periods.

90 day standard grace period when points balance drops below tier point threshold

A 90-day grace period will be activated once the QBA firm's points balance falls below a tier points threshold. All members in the QBA firm will continue to be able to access the tier benefits before the 90-day grace period ends. If the QBA firm's points balance does not accumulate enough points to maintain the tier status prior to the end of the grace period, the QBA firm will drop to a lower tier and all associated members of the QBA firm will only be able to access this tier's benefits.

See extended grace periods below. The 90-day standard grace period will only apply after the extended grace periods for certification has ended.

QBA firms with Members who have QuickBooks Online or QuickBooks Desktop certification as of December 3, 2018, will be honored under the Program until a specified date to a tier level regardless of initial point status. Grace periods cannot be stacked and will be based on the longest time frame granted to a QBA firm. Intuit may also grant extended grace period for specific tier levels for Program Members in Intuit's sole discretion.

QBA firms with a member who has QuickBooks Desktop Advanced Certification (for US Only)

If at least one member of a QBA firm has an active QuickBooks Desktop Advanced Certification on December 31, 2018, the QBA firm and all associated members of the QBA firm will be placed in the Platinum tier, regardless of initial point status for a grace period of three (3) years, starting January 1, 2019. Points balance toward Elite tier will continue to be based on the actual Qualifying Activities completed.

QBA firms with a member who has QuickBooks Online Advanced Certification (for US and Canada Only)

If at least one member of a QBA firm has an active QuickBooks Online Advanced Certification on December 3, 2018, the QBA firm and all associated members of the QBA firm will be placed in the Platinum tier, regardless of initial point status, for a grace period of three (3) years in the US and one (1) year in Canada, starting December 3, 2018. Points balance toward Elite status will continue to be based on the actual Qualifying Activities completed.

QBA firms with a member who has QuickBooks Online Certification (for US Only)

If at least one member of a QBA firm has an active QuickBooks Online Certification on December 3, 2018, the QBA firm and all associated members of the QBA firm will be placed in the Gold tier, regardless of initial point status, for a grace period of six (6) months, starting December 3, 2018. Points balance toward Platinum or Elite status will continue to be based on the actual Qualifying Activities completed.

QBA firms in the Platinum and Gold tiers (for UK Only)

If a QBA firm was in the Platinum tier on Aug 4, 2019, the QBA firm will be placed in the Elite tier, regardless of initial point status, for a grace period of one (1) year, starting Aug 5, 2019.

If a QBA firm was in the Gold tier on Aug 4, 2019, the QBA firm will be placed in the Platinum tier, regardless of initial point status, for a grace period of one (1) year, starting Aug 5, 2019.

6. Program Benefits and Rewards.

Program benefits and rewards are available to Members based on their QBA firm's tier status. Program benefits and rewards may vary across different regions. Please refer to the Benefits section of the ProAdvisor tab in your QBOA account for details on the available benefits.

Some Benefits or Rewards may have restrictions associated with them, may require a purchase, may have limited available quantities, may only be available while supplies last, and/or may be subject to other restrictions.

In order to access certain Benefits and Rewards associated with the Program, Members understand and agree that they may be asked to provide personal information, such as email address, or mailing address, and that the information provided will be disclosed to merchants and other third parties as necessary to complete the transaction. Intuit and its independent contractors have no control over, and no responsibility or liability for, the use by any merchants or other third parties of personal information or any other information that such parties independently acquire from Members or that is given to such parties to process Program transactions or fulfill Program Benefits. You may be subject to terms provided by third parties for their respective benefits.

7. Loss of Points and benefits/rewards; Termination of Your ProAdvisor Program Account.

In addition to termination of the Program as detailed elsewhere in these Program Terms, Intuit may also revoke your ability to participate in the Program for: (i) your abuse of the Program, including, without limitation, your use of any "bot," macro, or other automated means to participate in the Program or to earn Points; (ii) your failure to follow these Program Terms and any other terms and conditions applicable to the Program; (iii) the attempted or actual sale of any of your Points, rewards, or your ProAdvisor Program Account; (iv) any misrepresentation by you; (v) suspension or termination of your QBOA Account, or any other Intuit Account; or (vi) any other conduct deemed by Intuit, in its sole discretion, to be an abuse of the Program, to be detrimental to the interests of Intuit or its customers, or to be otherwise improper. If your ability to participate in the Program is revoked, any Points or unused benefits/rewards will automatically expire and your future participation in the Program may be prohibited. In addition, Intuit will have the right to take appropriate administrative or legal action, including criminal prosecution, as it deems necessary in its sole discretion.

Intuit is not responsible for Points that expire or benefits/rewards that expire, are lost or are redeemed due to fraudulent activity. Suspected illegal, fraudulent or other unauthorized use or misuse of Points or any other activity inconsistent with these Program Terms will result in termination of your participation in the Program, which may result in the loss of all accumulated Points earned and benefits/rewards issued but not yet redeemed.

You agree to abide by the final and binding decisions of Intuit regarding the Program and your participation in it. Intuit is the sole arbiter of all issues relating to the Program, including a decision to remove Points or benefits/rewards or to deny benefits/rewards or to terminate the Member from the Program, and all of Intuit's decisions relating to the Program are final.

Because having a QBOA account is a requirement in order to participate in the ProAdvisor Program termination of your QBOA account (either by you or by Intuit) will result in the automatic termination of your participation in the ProAdvisor Program and the forfeiture of any Points and rewards then associated with your accounts.

