

August 17, 18, 19: QuickBooks Online Certification Boot Camp

August 17: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION Who: Seeking QBO 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: Value of Accountants Keynote 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 Certification Exam Prep Module 1 - QuickBooks Solutions for Clients Who: Seeking QBO Certification for first time, or lapsed (80 min - 1.5 CPE) Speaker: Erin Walsh Dyer
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 Certification Exam Prep Module 2 - Client Onboarding Who: Seeking QBO 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
12:45 - 1:35pm	1:45 - 2:35pm	2:45 - 3:35pm	3:45 - 4:35pm	QuickBooks Online Live - A Day In The Life Bonus Training: Learn what its like to be part of QB Live (50 min - No CPE) Speaker: Michelle Long
1:35 - 1:50pm	2:35 - 2:50pm	3:35 - 3:50pm	4:35 - 4:50pm	Networking Lounge and Exhibit Hall Open 15 min

August 17: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION Who: Seeking QBO Advanced 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: Value of Accountants Keynote 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 - 10:50am	10:35 - 11:50am	11:35 - 12:50pm	12:35 - 1:50pm	QBO Advanced Certification Exam Prep Module 1 - Advanced Categorization Who: Seeking QBO Advanced Certification for first time, or lapsed (75 min) 1.5 CPE Speaker: MB Raimondi
10:50 - 11:05am	11:50 - 12:05pm	12:50 - 1:05pm	1:50 - 2:05pm	Networking Lounge and Exhibit Hall Open 15 min
11:05 - 12:20pm	12:05 - 1:20pm	1:05 - 2:20pm	2:05 - 3:20pm	QBO Advanced Certification Exam Prep Module 2 - Advanced Features Who: Seeking QBO Advanced Certification for first time, or lapsed (75 min) 1.5 CPE Speaker: MB Raimondi
12:20 - 12:45pm	1:20 - 1:45pm	2:20 - 2:45pm	3:20 - 3:45pm	Networking Lounge and Exhibit Hall Open 35 min
12:45 - 1:35pm	1:45 - 2:35pm	2:45 - 3:35pm	3:45 - 4:35pm	QuickBooks Online Live - A Day In The Life Bonus Training: Learn what its like to be part of QB Live (50 min - No CPE) Speaker: Michelle Long
1:35 - 1:50pm	2:35 - 2:50pm	3:35 - 3:50pm	4:35 - 4:50pm	Networking Lounge and Exhibit Hall Open 15 min

August 18: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QBO 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	QuickBooks Online Certification Exam Prep Module 3 & 4: Special Onboarding Tasks, Managing Client Work Who: Seeking QBO Certification for first time, or lapsed (115 min - 2 CPE) Speaker: Heather Satterley
10:55 - 11:10am	11:55 - 12:10pm	12:55 - 1:10pm	1:55 - 2:10pm	Networking Lounge and Exhibit Hall Open 15 minutes
11:10 - 1:10pm	12:10 - 2:10pm	1:10 - 3:10pm	2:10 - 4:10pm	QuickBooks Online Certification Exam Prep Module 5 & 6 - Supporting Your Small Business Clients and Banking & Tools Who: Seeking QBO Certification for first time, or lapsed (120 min - 2 CPE) Speaker: Alicia Katz-Pollock
1:10 - 1:25pm	2:10 - 2:25pm	3:10 - 3:25pm	4:10 - 4:25pm	Networking Lounge and Exhibit Hall Open 15 minutes

August 18: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QBO Advanced 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
9:00-11:10am	10:00-12:10pm	11:00-1:10pm	12:00-2:10pm	QBO Advanced Certification Exam Prep Module 3 & 4 - Advanced Banking & Advanced Reports Who: Seeking QBO Advanced Certification for first time, or lapsed (130 min) 2.5 CPE Speaker: Michelle Long
11:10-11:25am	12:10-12:25pm	1:10 - 1:25pm	2:10 - 2:25pm	Networking Lounge and Exhibit Hall Open 15 minutes
11:25-12:55pm	12:25 - 1:55pm	1:25 - 2:55pm	2:25 - 3:55pm	QBO Advanced Certification Exam Prep Module 5 & 6 - Inventory & Sales Tax Who: Seeking QBO Advanced Certification for first time, or lapsed (90 min) 1.5 CPE Speaker: Erin Walsh-Dyer
12:55 - 1:25pm	1:55 - 2:25pm	2:55 - 3:25pm	3:55 - 4:25pm	Networking Lounge and Exhibit Hall Open 15 minutes

August 19: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QBO Advanced 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 Certification Exam Prep Module 7 & 8 - Reporting and Analytics & Closing the Accounting Cycle Who: Seeking QBO Certification for first time, or lapsed (90 min - 1.5 CPE) Trainer: Stacy Kildal
10:30 - 10:45am	11:30-11:45pm	12:30-12:45pm	1:30-1:45pm	Networking Lounge and Exhibit Hall Open 15 minutes
10:45 - 11:45am	11:45 - 12:45pm	12:45-1:45pm	1:45-2:45pm	Now that I am Certified, What's Next? Who: Seeking QBO Certification for the first time, or lapsed (60 Min - 1 CPE) Trainer: Erin Walsh-Dyer
11:45 - 12:00pm	12:45 - 1:00pm	1:45-2:00pm	2:45 - 3:00pm	Networking Lounge and Exhibit Hall Open 15 minutes

August 19: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QBO Advanced 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
9:00-10:30am	10:00-11:30am	11:00-12:30pm	12:00-1:30pm	QBO Advanced Certification Exam Prep Module 7 & 8 - Special Transactions & Multicurrency Who: Seeking QBO Advanced Certification for first time, or lapsed. (90 min) 1.5 CPE Trainer: Michelle Long
10:30-10:45am	11:30-11:45am	12:30-12:45pm	1:30-1:45pm	Networking Lounge and Exhibit Hall Open 15 minutes
10:45-12:05pm	11:45-1:05pm	12:45-2:05pm	1:45-3:05pm	QBO Advanced Certification Exam Prep Module 9 - End of Period Who: Seeking QBO Advanced Certification for first time, or lapsed. (80 min) 1.5 CPE Trainer: Michelle Long
12:05-12:20pm	1:05-1:20pm	2:05-2:20pm	3:05-3:20pm	Networking Lounge and Exhibit Hall Open 15 minutes
12:20-1:40pm	1:20-2:40pm	2:20-3:40pm	3:20-4:40pm	QBO Advanced Certification Exam Prep Module 10 - Complex Conversions Who: Seeking QBO Advanced Certification for first time, or lapsed. (80 min) 1.5 CPE Trainer: MB Raimondi
1:40-1:55pm	2:40-2:55pm	3:40-3:55pm	4:40-4:55pm	Networking Lounge and Exhibit Hall Open 15 minutes



TRACK 1: QuickBooks Online Certification

This course will provide you with the skills and knowledge required to provide a professional level of support to small business clients and help them succeed using QuickBooks Online.

As you progress through the course you will develop a working understanding of the complete end to end accounting life cycle and be able to support clients with the key required tasks within QuickBooks Online Accountant. This training course also prepares you to take the QuickBooks Online Certification exam with confidence.

Learning objectives

On completion of this course, you will be able to:

- Analyze your clients' needs and advise them on the best QuickBooks Online subscription to meet their needs.
- Effectively onboard new client's setup on QuickBooks Online in a way that's right for them and their business.
- Follow best practice with QuickBooks Online, to manage small business clients; managing, balancing and maintaining their books throughout the accountancy workflow.
- Generate business reports that add value to your clients
- Use QuickBooks Online Accountant to manage clients and work so you never miss a deadline

Module 1: QuickBooks Solutions For Clients

This module opens the door to understanding your clients needs in order to best advise them on which QuickBooks Online subscription will suit their requirements. The module will prepare you to effectively set up a QuickBooks Online account and discuss billing options and additional features, like apps, with your clients.

Module 2: Client Onboarding

This module looks at the key stages for onboarding clients to QuickBooks Online. Refresh your knowledge of the Chart of Accounts and the Products and Services list. Learn how to update the Chart of Accounts, add a preferred vendor, set up customer and vendor lists and create bank feeds.

Module 3: Special Client Onboarding Tasks

This module explores additional onboarding tasks you can undertake in order to optimize your client's QuickBooks Online. Learn how to manage apps on behalf of your client, perform a basicsales tax set up, customize payment settings, sales forms and assign different access levels for their team.

Module 4: Managing Your Clients And Work

This module looks at the key management tasks you can undertake for your clients in QuickBooks Online and how to get the best from the client dashboard. Learn how to manageclient subscriptions, assign levels of access to your team and use the Work functionality to increase organization and efficiency for your team and your clients.

Module 5: Supporting Your Small Business Clients

This module explores the ways in which you can support your small business clients and will refresh your knowledge of best practice workflows. Learn how to utilize the features of Undeposited Funds, Estimates, Purchase Orders, Vendor Credits, Credit Memos and CustomerStatements. As well as diving deeper into best practice workflows, you will also discover how tomake the best of Deposit Transactions, Online Payments, Journal Entries and Transfers.

Module 6: Banking And Tools

This module looks at using Bank Feeds, matching transactions and reconciling the bank. Learnhow to register for receipt forwarding, add and match receipts, exclude a bank transaction andcreate a simple bank rule. You will also learn how to utilize the reconciliation tools and how to use recurring transactions.

Module 7: Reporting And Analytics

This module seeks to refresh your skills on basic reporting and introduce you to the value ofreports for your clients. You will also learn how to create reports that will answer your client'scommon business questions.

Module 8: Closing The Accounting Cycle

This module looks at preparing your client's books for year or period end. Learn how to spot when you may need- and how to reclassify transactions, discover how to prepare for taxes andwhen all is ready, close the books.

Details:

Who Should Attend? Accounting Professionals who plan to take the QuickBooks Online Certification exam and currently support or plan to support small business clients using QuickBooks Online.

Prerequisites:

- Basic understanding of general accounting principles
- Basic understanding of QuickBooks Online functionality
- Enrollment in the free QuickBooks ProAdvisor Program: www.quickbooks.com/qboa
- Attendance at the Introduction to QuickBooks Online for Accountants webinar: www.qbtrainingevents.com

Delivery Method: Group-live Internet

Field of Study: Non-Technical - Computer Software & Applications

Course Level: Intermediate

Course Length: 8.25 hours

Recommended CPE: 9.5

Track 2 - Next Page



TRACK 2: QuickBooks Online Advanced Certification

This course builds on the core concepts in the QuickBooks Online Certification course. It will teach you how to leverage more of the complex and advanced functionality like automated tax systems and troubleshooting with QuickBooks Online to meet the needs of different clients. It will also prepare you to take the QuickBooks Online Advanced Certification exam.

Objectives:

On completion of this course, you will be able to:

- Utilize advanced features (e.g. budgets, inventory, and job costing) available across all subscriptions
- Understand when and how to use special transaction and workflows based on client needs
- Reconcile and troubleshoot banking transactions and reconciliations
- Perform complex problem solving
- Understand logic of reporting and prepare customized reports
- Set up a new client (from scratch or converting from QuickBooks Desktop based on client needs)

Module 1: Advanced Categorization

Every business is different, but all can benefit from the powerful features of QuickBooks Online by using a method of recording and categorizing transactions that's right for them whether it's by location or project. As ProAdvisors, you can advise your clients on the best solution to suit their business now and as it grows. From sub-customers to the Projects Center, QuickBooks Online can be optimized to deliver the business-critical information every client needs.

Module 2: Advanced Features

This module covers some of the more advanced features used in QuickBooks Online to record and invoice for Advanced features. Included are how to work with various Advanced features including billable expenses and time, as well as creating delayed charges.

Module 3: Advanced Banking

This module examines how banking feeds work with QuickBooks Online and identifies best practices to troubleshoot common issues that compromise reconciliations. Also covered are advanced aspects of bank rules including how to optimize and export bank rules from one QuickBooks company into another.

Module 4: Advanced Reports

This module identifies how QuickBooks Online report features can be used to create customized reports that highlight key areas of company performance. The use of filters and adjustments to rows and columns are covered before progressing to a detailed look at creating management reports.

Module 5: Inventory Management

This module introduces the features available in QuickBooks Online to set up, track and manage inventory, including inventory and valuation adjustments. It also covers how to set up periodic Inventory systems.

Module 6: Advanced Sales Tax

This module looks at the inner workings of QuickBooks Online automated taxation system and how it uses data to calculate state and local tax liabilities. Learn to troubleshoot by working through how to create tax only transactions to adjust tax liabilities.

Module 7: Special Transactions

One of the greatest features of QuickBooks Online is that it can be utilized and customized to meet the needs of every business. This module explores some of the more advanced methods of recording transactions QuickBooks Online has to offer, such as recording bounced checks and customer and vendor prepayments.

Module 8: Multicurrency

QuickBooks Online can work with clients to record their international business transactions in different currencies. This module starts with the fundamentals of a multicurrency setup in QuickBooks Online and progresses to appropriate workflows, adjustments and troubleshooting.

Module 9: End of Period Activities

This module looks at the key activities that ProAdvisors are likely to perform when working with a client's QuickBooks Online company at end-of-period. From reviewing lists and balance sheet accounts to writing off invoices, the main activities are all here including troubleshooting issues with inventory balances and billable expenses.

Module 10: Complex Conversions

Many clients still need support moving their current QuickBooks Desktop companies into QuickBooks Online. This module outlines the most important consideration when planning a conversion and the steps that will be necessary once a conversion has been made.

Details:

Who Should Attend? Accounting Professionals who plan to take the QuickBooks Online Advanced Certification exam and currently support small business clients using QuickBooks Online.

Prerequisites: Current QuickBooks Online Certification

Delivery Method: Group-live Internet

Field of Study: Non-Technical - Computer Software & Applications

Course Level: Advanced

Course Length: 10.5 hours

Recommended CPE: 11.5