Feb 10, 11, 12: QuickBooks Online Certification Boot Camp

Feb 10: 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:** Importance of Certification and Event Overview (No CPE) **Speaker:** Michelle Long
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 1.5 CPE **Speaker:** Mariette Martinez
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 1.5 CPE **Speaker:** Stacy Kildal
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 - 1:45pm	1:45 - 2:45pm	2:45 - 3:45pm	3:45 - 4:45pm	**QuickBooks Online Live - A Day In The Life Bonus Training:** Learn what its like to be part of QB Live (No CPE) Speaker: Michelle Long
1:45 - 2:00pm	2:45 - 3:00pm	3:45 - 4:00pm	4:45 - 5:00pm	Networking Lounge and Exhibit Hall Open 15 min

Feb 10: 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:** Importance of Certification and Event Overview (No CPE) **Speaker:** Michelle Long
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 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 1.5 CPE **Speaker:** Stacy Kildal
12:20 - 12:45pm	1:20 - 1:45pm	2:20 - 2:45pm	3:20- 3:45pm	Networking Lounge and Exhibit Hall Open 20 min
12:45 - 1:45pm	1:45 - 2:45pm	2:45 - 3:45pm	3:45 - 4:45pm	**QuickBooks Online Live - A Day In The Life Bonus Training:** Learn what its like to be part of QB Live (No CPE) **Speaker:** Michelle Long
1:45 - 2:00pm	2:45 - 3:00pm	3:45 - 4:45pm	4:45 - 5:00pm	Networking Lounge and Exhibit Hall Open 15 min

Feb 11: 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: 4.5
8:30-9:00am	9:30-10:00am	10:30-11:00am	11:30-12:00pm	Networking Lounge and Exhibit Hall Open 30 min
9:00-11:05am	10:00-12:05pm	11:00-1:05pm	12:00-2:05pm	**QuickBooks Online Certification Exam Prep** **Module 3 & 4: Special Onboarding Tasks, Managing Client Work** **Who**: Seeking QBO Certification for first time, or lapsed 2.5 CPE Speaker: Carla Caldwell
11:05-11:20am	12:05-12:20pm	1:05-1:20pm	2:05-2:20pm	Networking Lounge and Exhibit Hall Open 15 minutes
11:20-1:20pm	12:20-2:20pm	1:20-3:20pm	2:20-4:20pm	**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 2 CPE Speaker: Stacy Kildal
1:20-1:35pm	2:20-2:35pm	3:20-3:35pm	4:20-4:35pm	Networking Lounge and Exhibit Hall Open 15 minutes

Feb 11: 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: 3.5
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 2 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 1.5 CPE Speaker: Erin Walsh-Dyer
12:55-1:10pm	1:55-2:10pm	2:55-3:10pm	3:55-4:10pm	Networking Lounge and Exhibit Hall Open 15 minutes

Feb 12: 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 1.5 CPE Trainer: Carla Caldwell
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:** New to Certification 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

Feb 12: 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. 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. 1.5 CPE Trainer: Bryce Forney
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. 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 "Core" 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 basic sales 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 manage client 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 Customer Statements. As well as diving deeper into best practice workflows, you will also discover how to make 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. Learn how to register for receipt forwarding, add and match receipts, exclude a bank transaction and create 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 of reports for your clients. You will also learn how to create reports that will answer your client's common 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 and when all is ready, close the books.

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 its' 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?s 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?s 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 and 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 actives 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.