December 5th-7th: QuickBooks Certification Boot Camp

December 5th: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QuickBooks Online product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5
8:30 - 9:00 AM	9:30 - 10:00 AM	10:30 - 11:00 AM	11:30 - 12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00-9:20 AM	10:00-10:20 AM	11:00-11:20 AM	12:00-12:20 PM	**Kick Off: Welcome and Event Overview** (20 minutes) - NO CPE
9:20-9:35 AM	10:20-10:35 AM	11:20-11:35 AM	12:20-12:35 PM	Networking Lounge and Exhibit Hall Open 15 minutes
9:35-10:50 AM	10:35 - 11:50 AM	11:35 - 12:50 PM	12:35 - 1:50 PM	**QuickBooks Online Session 1: Solutions for Clients** **Who:** Seeking product training, QuickBooks Online Certification for first time, or lapsed (75 minutes - 1.5 CPE) Trainer: Mariette Martinez
10:50-11:00 AM	11:50-12:00 PM	12:50-1:00 PM	1:50-2:00 PM	Networking Lounge and Exhibit Hall Open 10 minutes
11:00-1:00 PM	12:00-2:00 PM	1:00-3:00 PM	2:00-4:00 PM	**QuickBooks Online Session 2: Getting Started** **Who:** Seeking product training, QuickBooks Online Certification for first time, or lapsed (120 minutes - 2 CPE) Trainer: Mariette Martinez
1:00-1:15 PM	2:00-2:15 PM	3:00-3:15 PM	4:00-4:15 PM	Networking Lounge and Exhibit Hall Open 15 minutes
1:15-2:50 PM	2:15-3:50 PM	3:15-4:50 PM	4:15-5:50 PM	**QuickBooks Online Session 3: Sales & Customers** **Who:** Seeking product training, QuickBooks Online Certification for first time, or lapsed (95 minutes - 1.5 CPE) Trainer: Stacy Kildal
2:50-3:00 PM	3:50-4:00 PM	4:50-5:00 PM	5:50-6:00 PM	Networking Lounge and Exhibit Hall Open 10 minutes

December 5th: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QuickBooks Online advanced level product training & Advanced Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5.5
8:30 - 9:00 AM	9:30 - 10:00 AM	10:30 - 11:00 AM	11:30 - 12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00 - 9:20 AM	10:00 - 10:20 AM	11:00 - 11:20 AM	12:00 - 12:20 PM	**Kick Off: Welcome and Event Overview** (20 minutes) - NO CPE
9:20-9:35 AM	10:20-10:35 AM	11:20-11:35 AM	12:20-12:35 PM	Networking Lounge and Exhibit Hall Open 15 minutes
9:35-11:35 AM	10:35 - 12:35 PM	11:35 - 1:35 PM	12:35 - 2:35 PM	**Advanced QuickBooks Online Session 1: Sales, Customers and Vendors: Part 1** **Who:** Seeking advanced product training, QuickBooks Online Advanced Certification for first time, or lapsed (120 minutes) 2 CPE Trainer: MB Raimondi
11:35-11:50 AM	12:35-12:50 PM	1:35-1:50 PM	2:35-2:50 PM	Networking Lounge and Exhibit Hall Open 15 minutes
11:50-1:15 PM	12:50-2:15 PM	1:50 - 3:15 PM	2:50- 4:15 PM	**Advanced QuickBooks Online Session 2: Sales, Customers and Vendors: Part 2** **Who:** Seeking advanced product training, QuickBooks Online Advanced Certification for first time, or lapsed (85 minutes) 1.5 CPE Trainer: MB Raimondi
1:15-1:30 PM	2:15-2:30 PM	3:15-3:30 PM	4:15-4:30 PM	Networking Lounge and Exhibit Hall Open 20 minutes
1:30-3:20 PM	2:30-4:20 PM	3:30-5:20 PM	4:30-6:20 PM	**Advanced QuickBooks Online Session 3: Advanced Banking and Reports: Part 1** **Who:** Seeking advanced product training, Advanced Certification for first time, or lapsed (110 minutes) 2 CPE Trainer: Michelle Long
3:20-3:30 PM	4:20-4:30 PM	5:20-5:30 PM	6:20-6:30 PM	Networking Lounge and Exhibit Hall Open 15 minutes

December 5th: TRACK 3 - QUICKBOOKS PAYROLL CERTIFICATION
Who: Seeking QuickBooks Payroll product training and Payroll Certification

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 4
8:30 - 9:00 AM	9:30 - 10:00 AM	10:30 - 11:00 AM	11:30 - 12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00 - 9:20 AM	10:00 - 10:20 AM	11:00 - 11:20 AM	12:00 - 12:20 PM	**Kick Off: Welcome and Event Overview** (20 minutes) - NO CPE
9:20-9:35 AM	10:20-10:35 AM	11:20-11:35 AM	12:20-12:35 PM	Networking Lounge and Exhibit Hall Open 15 minutes
9:35-10:35 AM	10:35-11:35 AM	11:35-12:35 PM	12:35-1:35 PM	**QuickBooks Payroll Session 1: Getting Started with Payroll** **Who:** Seeking QuickBooks Payroll product training and QuickBooks Payroll Certification (60 minutes) 1 CPE Trainer: Liz Scott
10:35-10:50 AM	11:35-11:50 AM	12:35-12:50 PM	1:35-1:50 PM	Networking Lounge and Exhibit Hall Open 15 minutes
10:50-11:50 AM	11:50-12:50 PM	12:50-1:50 PM	1:50-2:50 PM	**QuickBooks Payroll Session 2: Managing Employees** **Who:** Seeking QuickBooks Payroll product training and QuickBooks Payroll Certification (60 minutes) 1 CPE Trainer: Liz Scott
11:50-12:00 PM	12:50-1:00 PM	1:50-2:00 PM	2:50-3:00 PM	Networking Lounge and Exhibit Hall Open 10 minutes
12:00-2:00 PM	1:00-3:00 PM	2:00-4:00 PM	3:00-5:00 PM	**QuickBooks Payroll Session 3: Wages and Taxes** **Who:** Seeking QuickBooks Payroll product training and QuickBooks Payroll Certification (120 minutes) 2 CPE Trainer: Liz Scott
2:00-2:15 PM	3:00-3:15 PM	4:00-4:15 PM	5:00-5:15 PM	Networking Lounge and Exhibit Hall Open 15 minutes

December 6th: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QuickBooks Online product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5.5
8:30 - 9:00 AM	9:30 - 10:00 AM	10:30 - 11:00 AM	11:30 - 12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00-10:00 AM	10:00-11:00 AM	11:00-12:00 PM	12:00-1:00 PM	**QuickBooks Online Session 4:** **Expenses and Vendors** **Who**: Seeking product training, QuickBooks Online Certification for first time, or lapsed (60 minutes - 1 CPE) Trainer: Stacy Kildal
10:00-10:15 AM	11:00-11:15 AM	12:00-12:15 PM	1:00-1:15 PM	Networking Lounge and Exhibit Hall Open 15 minutes
10:15-12:40 PM	11:15-1:40 PM	12:15-2:40 PM	1:15-3:40 PM	**QuickBooks Online Session 5:** **Banking and Tools** **Who**: Seeking product training, QuickBooks Online Certification for first time, or lapsed (145 minutes w/10 min break- 2.5 CPE) Trainer: Stacy Kildal
12:40-1:00 PM	1:40-2:00 PM	2:40-3:00 PM	3:40-4:00 PM	Networking Lounge and Exhibit Hall Open 20 minutes
1:00-2:50 PM	2:00-3:50 PM	3:00-4:50 PM	4:00-5:50 PM	**QuickBooks Online Session 6:** **Reports** **Who**: Seeking product training, QuickBooks Online Certification for the first time, or lapsed (110 minutes - 2 CPE) Trainer: Michelle Long

December 6th: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QuickBooks Online advanced level product training & Advanced Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5
8:30 - 9:00 AM	9:30 - 10:00 AM	10:30 - 11:00 AM	11:30 - 12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00-10:35 AM	10:00-11:35 AM	11:00-12:35 PM	12:00-1:35 PM	**Advanced QuickBooks Online Session 4:** **Advanced Banking and Reports: Part 2** **Who**: Seeking advanced product training, QuickBooks Online Advanced Certification for first time, or lapsed (95 minutes) 1.5 CPE Trainer: Michelle Long
10:35-10:45 AM	11:35-11:45 AM	12:35-12:45 PM	1:35-1:45 PM	Networking Lounge and Exhibit Hall Open 10 minutes
10:45-12:20 PM	11:45-1:20 PM	12:45-2:20 PM	1:45-3:20 PM	**Advanced QuickBooks Online Session 5:** **Period and Year End** **Who**: Seeking advanced product training, QuickBooks Online Advanced Certification for first time, or lapsed (95 minutes) 1.5 CPE Trainer: Michelle Long
12:20-12:30 PM	1:20-1:30 PM	2:20-2:30 PM	3:20-3:30 PM	Networking Lounge and Exhibit Hall Open 10 minutes
12:30-2:30 PM	1:30-3:30 PM	2:30-4:30 PM	3:30-5:30 PM	**Advanced QuickBooks Online Session 6:** **Enhanced Features of QuickBooks Online Advanced** **Who**: Seeking advanced product training, QuickBooks Online Advanced Certification for first time, or lapsed (120 minutes) 2 CPE Trainer: Michelle Long
2:30-2:45 PM	3:30-3:45 PM	4:30-4:45 PM	5:30-5:45 PM	Networking Lounge and Exhibit Hall Open 15 minutes

December 6th: TRACK 3 - QUICKBOOKS PAYROLL CERTIFICATION
Who: Seeking QuickBooks Payroll product training and Payroll Certification

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 3
8:30 - 9:00 AM	9:30 - 10:00 AM	10:30 - 11:00 AM	11:30 - 12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00-10:00 AM	10:00-11:00 AM	11:00-12:00 PM	12:00-1:00 PM	**QuickBooks Payroll Session 4: Deductions and Contributions** **Who**: Seeking QuickBooks Payroll product training and QuickBooks Payroll Certification (60 minutes) 1 CPE Trainer: Liz Scott
10:00-10:15 AM	11:00-11:15 AM	12:00-12:15 PM	1:00-1:15 PM	Networking Lounge and Exhibit Hall Open 15 minutes
10:15-11:15 AM	11:15-12:15 PM	12:15-1:15 PM	1:15-2:15 PM	**QuickBooks Payroll Session 5: Managing Tax Liabilities and End-of-Period Activities** **Who**: Seeking QuickBooks Payroll product training and QuickBooks Payroll Certification (60 minutes) 1 CPE Trainer: Liz Scott
11:15-11:30 AM	12:15-12:30 PM	1:15-1:30 PM	2:15-2:30 PM	Networking Lounge and Exhibit Hall Open 15 minutes
11:30-12:30 PM	12:30-1:30 PM	1:30-2:30 PM	2:30-3:30 PM	**QuickBooks Payroll: QuickBooks Payroll Certification Exam Prep** **Who**: Seeking QuickBooks Payroll Certification for first time (60 minutes) 1 CPE Trainer: Liz Scott
12:30-12:45 PM	1:30-1:45 PM	2:30-2:45 PM	3:30-3:45 PM	Networking Lounge and Exhibit Hall Open 15 minutes
12:45-1:30 PM	1:45-2:30 PM	2:45-3:30 PM	3:45-4:30 PM	**Bonus Session: Reimagined ProAdvisor Program Changes and Benefits** **Who**: Those who want to learn about the changes to the ProAdvisor Program and how they will impact you and your firm. (45 minutes - NO CPE) Trainer: Jim Dzundza

December 7th: TRACK 1 - QUICKBOOKS ONLINE CERTIFICATION
Who: Seeking QuickBooks Online product training & Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 5.5 credits
8:30 - 9:00 AM	9:30-10:00 AM	10:30-11:00 AM	11:30-12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00-10:50 AM	10:00-11:50 AM	11:00-12:50 PM	12:00-1:50 PM	**QuickBooks Online Session 7:** **Managing Your Work Team and Clients** **Who:** Seeking QuickBooks Online Certification for the first time, or lapsed (110 minutes - 2 CPE) Trainer: Stacy Kildal
10:50-11:00 AM	11:50-12:00 PM	12:50-1:00 PM	1:50-2:00 PM	Networking Lounge and Exhibit Hall Open 10 minutes
11:00-12:25 PM	12:00-1:25 PM	1:00-2:25 PM	2:00-3:25 PM	**QuickBooks Online Session 8:** **Period and Year End** **Who:** Seeking QuickBooks Online Certification for the first time, or lapsed (85 minutes - 1.5 CPE) Trainer: Mariette Martinez
12:25-12:40 PM	1:25-1:40 PM	2:25-2:40 PM	3:25-3:40 PM	Networking Lounge and Exhibit Hall Open 15 minutes
12:40-2:25 PM	1:40-3:25 PM	2:40-4:25 PM	3:40-5:25 PM	**QuickBooks Online Certification Exam Prep** **Who:** Seeking QuickBooks Online Certification for the first time, or lapsed (105 minutes - 2 CPE) Trainer: Stacy Kildal
2:25-2:40 PM	3:25-3:40 PM	4:25-4:40 PM	5:25-5:40 PM	Networking Lounge and Exhibit Hall Open 15 minutes
2:40-3:25 PM	3:40-4:25 PM	4:40-5:25 PM	5:40-6:25 PM	**Bonus Session: Reimagined ProAdvisor Program Changes and Benefits** **Who:** Those who want to learn about the changes to the ProAdvisor Program and how they will impact you and your firm. (45 minutes - NO CPE) Trainer: Jim Dzundza

December 7th: TRACK 2 - QUICKBOOKS ONLINE ADVANCED CERTIFICATION
Who: Seeking QuickBooks Online advanced level product training & Advanced Certification for first time, or lapsed

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 1.5 credits
8:30-9:00 AM	9:30-10:00 AM	10:30-11:00 AM	11:30-12:00 PM	Networking Lounge and Exhibit Hall Open 30 minutes
9:00-10:30 AM	10:00-11:30 AM	11:00-12:30 PM	12:00-1:30 PM	**QuickBooks Online Advanced Certification Exam Prep** **Who:** Seeking QuickBooks Online Advanced Certification for first time, or lapsed (90 minutes) 1.5 CPE Trainer: MB Raimondi
10:30-10:45 AM	11:30-11:45 AM	12:30-12:45 PM	1:30-1:45 PM	Networking Lounge and Exhibit Hall Open 15 minutes
10:45-11:30 AM	11:45-12:30 PM	12:45-1:30 PM	1:45-2:30 PM	**Bonus Session: Reimagined ProAdvisor Program Changes and Benefits** **Who:** Those who want to learn about the changes to the ProAdvisor Program and how they will impact you and your firm. (45 minutes - NO CPE) Trainer: Jim Dzundza

QuickBooks Online Session 1: Solutions for Clients

This session helps you determine the different workflows needed to onboard a new client and the tools available to help with the onboarding process. It also introduces the different QuickBooks Online subscription and billing options including QuickBooks Time and QuickBooks Online Payroll.

- Key tools and workflows needed when setting up clients in QuickBooks Online
- Onboarding a client new to QuickBooks Online
- The different QuickBooks Online subscriptions, and recommending the right solution to clients
- Benefits and subscription levels of QuickBooks Time and QuickBooks Online Payroll

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: Familiarity with QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 75 Minutes
Recommended CPE: 1.5

QuickBooks Online Session 2: Getting Started

This session looks at adding the basics lists, users and apps. Find out how to customize the chart of accounts and set up Product and Services and additional lists. Discover the steps involved in adding customers, vendors and users as well as adding apps.

- The benefits of customizing the chart of accounts in QuickBooks Online
- Customizing account names and numbers, and merging and inactivating accounts in the chart of accounts in QuickBooks Online
- The restrictions on editing accounts in the chart of accounts in QuickBooks Online
- Importing chart of accounts, products and services, customer and vendors into QuickBooks Online
- Setting up and managing the products and services list
- Managing customers and vendors
- Adding and managing users
- Adding apps

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: Familiarity with QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 120 Minutes
Recommended CPE: 2.0

QuickBooks Online Session 3: Sales & Customers

This session covers a range of tasks related to sales and customers. Discover how to customize sales forms. Learn how to use estimates, purchase orders, credit memos and customer refunds. Find out about different forms of customer statements. Discover how to set up QuickBooks Online Payments and basic sales tax.

- Customizing sales forms
- Adding custom fields
- Create estimates and convert to purchase orders and invoices
- Create customer statements
- Create and use credit memos and Refund receipts
- Setting up and using QuickBooks Payments
- Performing basic sales tax setup in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: Familiarity with QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 95 Minutes
Recommended CPE: 1.5

QuickBooks Online Session 4: Expenses & Vendors

This session covers a range of tasks related to expenses and vendors. Explore managing bills and receipts. Find out how to set up QuickBooks Bill Pay. Discover how to record various transactions such as vendor credits and paying down a credit card.

- Signing up to QuickBooks Bill Pay
- Using QuickBooks Bill Pay
- Adding and managing bills and receipts
- Using Vendor Credits
- Using the Pay down credit card feature

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online

Prerequisites: Familiarity with QuickBooks Online

Delivery Method: Group-live Internet

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

Course Level: Intermediate

Course Length: 60 Minutes

Recommended CPE: 1.0

QuickBooks Online Session 5: Banking & Tools

This session covers many aspects of using the banking center as well as setting up and using recurring transactions. Discover other transaction types such as using undeposited funds, creating deposits, journal entries and transfers. Learn how to reconcile balance sheet accounts and correct beginning balances for reconciliations.

- Excluding bank transactions and reinstating excluded transactions in QuickBooks Online
- Managing bank feed connections
- Creating and using simple bank rules
- The benefits of recurring transactions, and creating them in QuickBooks Online
- Recording undeposited fund transactions
- Recording deposit transactions
- Using journal entries and adjusting journal entries
- Using the Transfer functionality
- Reconciling balance sheet accounts
- Correcting beginning balances for reconciliations

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online

Prerequisites: Familiarity with QuickBooks Online

Delivery Method: Group-live Internet

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

Course Level: Intermediate

Course Length: 145 Minutes

Recommended CPE: 2.5

QuickBooks Online Session 6: Reports

This session is all about the different reports in QuickBooks Online. Discover which reports to use to answer common business questions or customize reports for clients. Find out how to run and analyze the Profit and Loss and Balance Sheet reports or prepare management reports. Learn about setting up and using tags.

- Running basic report types
- Running the Profit and Loss report and the Balance Sheet
- Selecting the best report in QuickBooks Online to answer clients' common business questions
- Customizing reports in QuickBooks Online to meet the needs of clients
- Ways of customizing and working with managements reports in QuickBooks Online
- Setting up and using tags

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online

Prerequisites: Familiarity with QuickBooks Online

Delivery Method: Group-live Internet

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

Course Level: Intermediate

Course Length: 110 Minutes

Recommended CPE: 2.0

QuickBooks Online Session 7: Managing Your Work Team and Clients

This session covers learning about tools in QuickBooks Online to help troubleshoot issues. Explore the Client menu and manage client subscriptions. Discover the Team menu and learn how to add, edit and delete team members and set permissions levels. Use the Work menu to create projects, share documents and create client requests.

- Troubleshooting issues with common workflows
- Managing the Clients menu
- Managing client subscriptions
- Managing your team
- Setting up custom roles for team members
- Managing your work
- Creating a client request
- Managing shared documents

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online

Prerequisites: Familiarity with QuickBooks Online

Delivery Method: Group-live Internet

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

Course Level: Intermediate

Course Length: 110 Minutes

Recommended CPE: 2.0

QuickBooks Online Session 8: Period and Year End

This session will cover the processes involved at period end. Find out how to use the Books review center and cover the key tasks in preparing the books for year end. Discover the Reclassify transactions and Write off invoices tools and understand how to close the books.

- Discover the Books review center
- Using the Books review center year end
- Learning about other reports and tools to support year end workflow
- The key tasks involved in preparing a client's books for year- or period end in QuickBooks Online
- Using the Reclassify transactions tool in QuickBooks Online
- Closing the books in QuickBooks Online
- Accessing the Exceptions to Closing Date report in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: Familiarity with QuickBooks Online

Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical

Course Level: Intermediate
Course Length: 85 Minutes
Recommended CPE: 1.5

QuickBooks Online Certification Exam Prep

This session will help you decide if becoming a Certified ProAdvisor in QuickBooks Online is right for you. Attendees will learn what it means to be certified and how the benefits can increase year-on-year to help you grow your practice. We'll also explain what topics the exam will test you on, how the exam works, and deep dive into several topics that ProAdvisors may struggle with.

Learning Objectives:
- Understand the benefits of QuickBooks Online certification
- Understand how the certification exam works and what topics are covered

Details:
Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients with QuickBooks Online
Prerequisites: Completed QuickBooks Online product training or has at least 6 months experience using QuickBooks Online with clients
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Computer Software & Applications
Course Level: Intermediate
Course Length: 105 Minutes
 Recommended CPE: 2

Advanced QuickBooks Online Session 1: Sales, Customers & Vendors, Part 1

This session covers the more advanced features available in QuickBooks Online. Find out how to work with billable expenses and billable time, and delayed charges. Discover how to create progress invoices and price rules. Learn the different ways to record customer and vendor prepayments and working with sales summaries and budgets.

- Activating, using and recording billable expenses
- Setting up and using billable time
- Using delayed charges and credits
- Using progress invoicing
- Setting up and using price rules
- Handling customer retainers
- Handling vendor prepayments and deposits
- Setting up a daily sales summary
- Creating budgets

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified Delivery
Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 120 Minutes
Recommended CPE: 2

Advanced QuickBooks Online Session 2: Sales, Customers & Vendors, Part 2

This session introduces the features available in QuickBooks Online to set up, track, and manage inventory, including inventory adjustments. In addition, you will learn about various advanced sales tax activities. Explore how to set up tax agencies and custom sales tax, and file sales tax forms. Find out what to do to correct a payment error or make an adjustment on a sales tax return.

- The role of inventory management in QuickBooks Online
- Enabling inventory tracking in QuickBooks Online
- Setting up new inventory products and categories
- Buying, selling, and adjusting inventory
- Adjusting for donated inventory in QuickBooks Online
- Setting up sales tax in QuickBooks Online
- Filing sales tax successfully in QuickBooks Online
- Adjusting sales tax in QuickBooks Online

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 85 Minutes
Recommended CPE: 1.5

Advanced QuickBooks Online Session 3: Advanced Banking & Reports, Part 1

This session covers using advanced banking features and some advanced report features in QuickBooks Online. Discover more about bank rules, how to import or export them and how suggested rules work. Explore working with corporate credit cards, bounced checks and zero-dollar transactions.
Find out how cash-basis reports work, how to create scheduled reports and how to use the Performance Center.

- Banking productivity techniques
- How the Suggested rules feature in QuickBooks Online works
- Solving common client problems with suggested rules, category suggestions, and bank feeds
- Troubleshooting problems with bank feeds
- Importing and exporting bank rules
- Working with corporate credit cards
- Handling failed payments or insufficient funds
- Creating zero-dollar expenses
- Utilize cash-basis and expense reports
- Creating scheduled reports in QuickBooks Online
- Using the Performance Center to create meaningful commercial insight
- Maximizing the value of custom charts in the Performance Center

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified Delivery
Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 110 Minutes
Recommended CPE: 2.0

Advanced QuickBooks Online Session 4: Advanced Reports, Part 2

This session covers additional reporting tools such as the Cash flow tool and teaches advanced categorization options to optimize reports such as Tags, Class, Location, and Job tracking. Explore the benefits of each categorization method and how to enable or set up these options. Find out what you need to consider when tracking options are enabled.

- Using the Cash Flow tools
- Uses and limitations of tagging in QuickBooks Online
- Using advanced categorization to optimize reports in QuickBooks Online
- Setting up and optimizing Class tracking and related reports
- Setting up and optimizing Location tracking and related reports
- Tracking profitability by customers and sub-customers
- Using the Projects functionality

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 95 Minutes
Recommended CPE: 1.5

Advanced QuickBooks Online Session 5: Period and Year End

This session covers a range of end-of-period activities. Find out more about reviewing lists and account balances or troubleshooting issues with inventory balances and undeposited funds.
Discover more about tools such as Writing off invoices, preparing and filing 1099 forms and using the Prep for Taxes tool.

- Reviewing and troubleshooting QuickBooks Online lists
- Troubleshooting accounts on the balance sheet
- Troubleshooting Profit and Loss account balances
- Troubleshooting issues with undeposited funds
- Using the Write off invoices tool
- Troubleshooting inventory balance issues
- Preparing and filing Forms 1099-NEC and 1099-MISC
- Using the Prep for Taxes tool to prepare a client's tax forms for submission

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified Delivery
Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 95 Minutes
Recommended CPE: 1.5

Advanced QuickBooks Online Session 6: Enhanced Features of QuickBooks Online Advanced

This session will familiarize you with enhanced features of the QuickBooks Online Advanced subscription level. Learn how to utilize features such as the Custom report builder, Performance center, Spreadsheet Sync, batch transactions, expense claims, revenue recognition and Fixed Assets. Set up and manage custom roles. Utilize the workflows and tasks as well as discover the Estimates vs Actuals cost feature for Projects.

- •   Using the Custom report builder
- •   Advanced uses of the Performance center
- •   Working with Spreadsheet Sync
- •   Managing custom roles in QuickBooks Online Advanced
- •   Managing workflows and tasks
- •   Entering transactions in batches
- •   Managing expense claims
- •   Using the Fixed Assets feature
- •   How to set up and use the Revenue Recognition feature
- •   Using the projects Estimates vs Actuals feature

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online

Prerequisites: QuickBooks Online Certified

Delivery Method: Group-live Internet

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

Course Level: Advanced

Course Length: 120 Minutes

Recommended CPE: 2.0

This session will help you decide if becoming an Advanced Certified ProAdvisor in QuickBooks Online is right for you. Attendees will learn what it means to be advanced certified and how the benefits can increase year-on-year to help you grow your practice. We'll also explain what topics the exam will test you on, how the exam works, and deep dive into several topics that ProAdvisors may struggle with.

Learning Objectives:
• Understand the benefits of QuickBooks Online Advanced certification Understand how the certification exam works and what topics are covered

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online
Prerequisites: QuickBooks Online Certified
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Advanced
Course Length: 90 Minutes
Recommended CPE: 1.

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QuickBooks Online Payroll Session 1: Getting Started with Payroll

Explore the crucial responsibilities and functions of a payroll specialist and how to get started with QuickBooks Online Payroll! This session will guide you through the fundamental aspects of payroll management, equipping you with the knowledge and skills needed to navigate the payroll landscape with confidence. You will also gain insights into the various governmental and regulatory bodies that oversee payroll processes and get hands-on experience in setting up QuickBooks Online Payroll, from configuring employee information to defining payroll items and tax settings.

Whether you are a small business owner, an HR professional, or someone looking to enhance your career in payroll management, this webinar will equip you with the knowledge and tools to succeed in the world of payroll.

- Understand the Role of a Payroll Specialist
- Identify regulatory bodies that are required to stay compliant
- Define subscription offerings for QuickBooks Online Payroll
- Learn how to set up and configure QuickBooks Online Payroll

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online Payroll
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 60 minutes
Recommended CPE: 1

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QuickBooks Online Payroll Session 2: Managing Employees

This session will navigate the complexities of payroll management involving a myriad of responsibilities, from hiring to termination. Join us to unravel the intricacies of paying business owners and their families, classifying workers correctly, staying compliant when employing minors. Additionally, you'll be well-equipped to set up and manage employees and contractors effectively using QuickBooks Online Payroll. This comprehensive session will equip you with the knowledge and tools needed for successful payroll management.

- Understand how to classify workers as employees or independent contractors
- Gain insights into the rules and regulations governing the employment of minors.
- Identify how to enter information, configure payroll items, and manage tax settings for accurate and efficient payroll processing in QuickBooks Online Payroll

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online Payroll

Prerequisites: None

Delivery Method: Group-live Internet

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

Course Level: Intermediate

Course Length: 60 minutes

Recommended CPE: 1

QuickBooks Online Payroll Session 3: Wages and taxes

This session will equip you with the tools and expertise needed to efficiently manage payroll and ensure compliance with confidence. Payroll management involves a multitude of elements, from wage calculations and deductions to tax settings and direct deposits.

This session will provide a thorough understanding of the following key topics: Overview of wage types and compensation, mastering paycheck calculations, payroll operations, automation and customization, bank details and troubleshooting, voiding and deleting paychecks, and Projects and Classes integration.

- Develop a comprehensive understanding of wage types, payroll taxes, and workers' compensation, enabling you to make informed payroll decisions.
- Learn the intricacies of paycheck calculations, including deductions, taxes, and various wage types, to ensure accurate and timely payments.
- Explore the sensitive process of employee termination, including the legal considerations and best practices involved
- Acquire the skills to set up direct deposit, customize pay details, run payroll efficiently, and automate processes while adhering to tax and compliance regulations.

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with
QuickBooks Online Payroll
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 120 minutes
Recommended CPE: 2

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QuickBooks Online Payroll Session 4: Deductions and Contributions

Gain comprehensive insights into deductions and contributions. This session will help you understand the laws relating to various benefits such as health and disability, retirement plans, time off, and fringe benefits. Learn to manage deductions and contributions in QuickBooks Online Payroll.

This session will provide a thorough understanding of the following key topics: Overview of health and disability benefits, retirement plans, time off, fringe benefits, managing time off, and managing deductions and contributions.

- Develop a comprehensive understanding of Health and disability benefits and their tax implications
- Learn about Retirement plan options and their tax implications
- Understand Time off options and calculate wages for time off
- Define fringe benefits and their tax implications
- Be able to manage time off and manage deductions and contributions in QuickBooks Online Payroll

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with
QuickBooks Online Payroll
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 60 minutes
Recommended CPE: 1

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QuickBooks Online Payroll: Session 5: Managing tax liabilities and end-of-period activities

A deep dive into the effective management of tax liabilities and end-of-practice activities. This session aims to equip you with comprehensive insights on various aspects, including understanding payroll documents, depositing and filing taxes, running payroll reports, reconciling payroll, processing tax forms, and filing. Throughout the webinar, we'll cover essential topics such as an overview of payroll documents and forms, depositing and filing taxes, running payroll reports using QuickBooks Online Payroll, reconciling payroll within QuickBooks Online Payroll, processing payroll liability tax payments and forms through QuickBooks Online Payroll, handling W-2 forms, and addressing other crucial year-end activities within QuickBooks Online Payroll. This session will help you improve your knowledge and proficiency in managing tax filings and penalties through QuickBooks Online Payroll.

- •   Identify, maintain, and file the correct payroll records
- •   Understand payroll reporting requirements
- •   How to run and use various payroll reports in QuickBooks Online Payroll
- •   Reconcile payroll with the general ledger
- •   Process payroll tax payments and forms, and managing tax-related reports and filings in QuickBooks Online Payroll
- •   Process W-2 forms, and other year-end activities for payroll
- •   Manage tax filings and penalties in QuickBooks Online Payroll

Details:
Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online Payroll
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Computer Software & Applications – Non-Technical
Course Level: Intermediate
Course Length: 60 minutes
Recommended CPE: 1

QuickBooks Online Payroll Certification Prep

Gain comprehensive insights in getting ready for certification. This webinar will help you understand what it means to be certified in QBO Payroll, how to become certified, what some topics are in the QBO Payroll certification exam, and how the exam works.

- Identify what it means to have QuickBooks Online Payroll Certification
- Understand what the QuickBooks Online Payroll Certification exam covers

Details:

Who Should Attend? Accounting Professionals who currently support small business clients with QuickBooks Online Payroll

Prerequisites: None

Delivery Method: Group-live Internet

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

Course Level: Intermediate

Course Length: 60 minutes

Recommended CPE: 1