Job Costing and Construction Accounting in QuickBooks Online (Plus/Advanced)





About Presenter

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Upcoming Episodes

- 04/18/2019 Job Costing and Construction Accounting in QuickBooks Online (Plus/Advanced)
- 05/16/2019 Inventory Management in QuickBooks Online (Plus/Advanced)
- 06/20/2019 Real Estate Accounting in QuickBooks Online (Plus/Advanced)
- 07/18/2019 QuickBooks Online Payroll Deep Dive (Essentials/Plus/Advanced)
- 08/15/2019 QuickBooks Online for Legal Professionals / Law Firms (Plus/Advanced)
- 09/19/2019 QuickBooks Online Advanced User Permissions (Advanced)
- 10/17/2019 Class, Locations, and Customer:Project Reporting Deep Dive in QuickBooks Online (Plus/Advanced)
- 11/21/2019 Importing Transactions into QuickBooks Online (Plus/Advanced + Apps)
- 12/19/2019 QuickBooks Online Bank Feeds all Editions (Advanced Tips/Tricks)
- 01/16/2020 QuickBooks Online Advanced/Custom Reporting (Plus/Advanced)
- 02/20/2020 QuickBooks Online for E-Commerce Business (Essentials/Plus/Advanced)
- 03/19/2020 QuickBooks Online for Retail/Restaurant Businesses (Plus/Advanced)





- ADVANCEDWEBINARS is a brand by Hector Garcia, CPA as a platform to deliver multiple educational webinar and webinar series
- The first webinar series is on "QuickBooks Online Advanced Training" which will be 2-hours long 1pm to 3pm, every 3rd Thursday, starting 4/18/2019, episodes scheduled through 03/19/2020





- This webinar will be FREE to attend live (limited to 500 attendees so login early!) via Zoom
- There will <u>not</u> be a recording link or a YouTube version of this
- Optional Subscription for \$500 per year to access recording, presentation slides, and/or other materials via the portal. Subscribers will also be able to request a CPE certificate
- More info, go to http://advancedwebinars.com





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Use Coupon: *ADV053119* for \$200 off, coupon expires 05/31/2019

Or use direct link:

<u>https://quickbooks.teachable.com/p/quickbooks-online-advanced-webinars-premium-archive</u>





Benefits of becoming a paid member:

- You are supporting Hector Garcia to continue to create ADVANCED/PREMIUM content
- Unlimited access to recordings (will not be posted to YouTube or available to non-members)
- Access slides and/or other resources mentioned in the webinar (if applicable)
- Access to ALL of Hector's premium/paid content available on the Teachable portal
- 2-hour CPE Certificates per episode available on-demand for paid members only





• Other series on QuickBooks Desktop/Enterprise, 3rd Party Apps, Excel, Practice Management, etc... will be developed over time. Actively looking for sponsors and/or monetization options...

Stay Tuned, Join our Facebook Group called "QuickBooks Power User community" (Formerly "QB Power Hour"):

https://www.facebook.com/groups/QBPowerHour/





Table of Contents

Some notable Intuit/QuickBooks News and Updates (10 mins)

FEATURE:

- Creating Customer and Sub-customers in QuickBooks Online (10 mins)
- Creating Projects in QBO (5 mins)
- Projects vs. Sub-customers (10 mins)
- Creating Estimates and Progress Invoices (15 mins)
- Creating Purchase Orders from Estimates (10 mins)
- Creating Bills, Check, and Expenses with Job Costing (15 mins)
- Using Timesheets for Job/Project Costing when using outside Payroll (20 mins)
- Using Built-in payroll for Job/Project costing (20 mins)
- Project/Job Related Reports (15 mins)





Polling Question #1



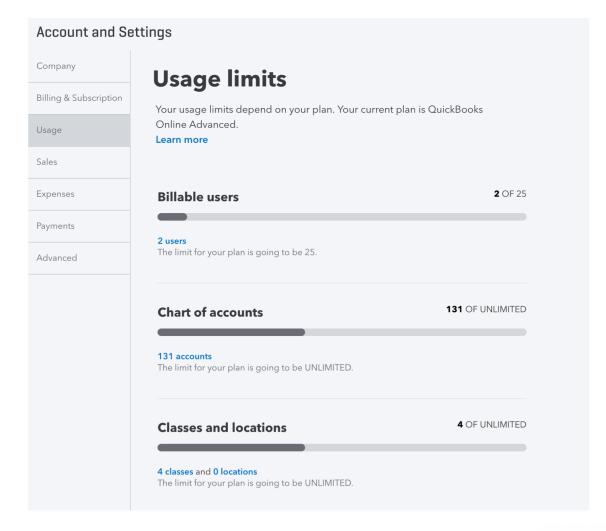


- QBO SS/Essentials/Plus Usage limits: 250+ Accounts, 40+ Class/Locations, and/or 6+ Users will Require QuickBooks Online Advanced (to be implemented through 2019)
- QBO Plus/Advanced: Late Fee Charges for overdue invoices (BETA)
- QBO Plus/Advanced Customer, Sub-customer, and Project Profitability with Payroll
- QBO Plus/Advanced Project Profitability with Timesheets (when using outside Payroll)
- QBO Advanced Custom Fields with in header and transaction lines (with dropdown menu options)
- QBO Advanced Custom User Permissions (limiting some access to specific users)
- QBO Advanced Importing Invoices from CSV
- QBO Advanced Batch Invoicing "Multiple Invoicing"





• Usage Limits

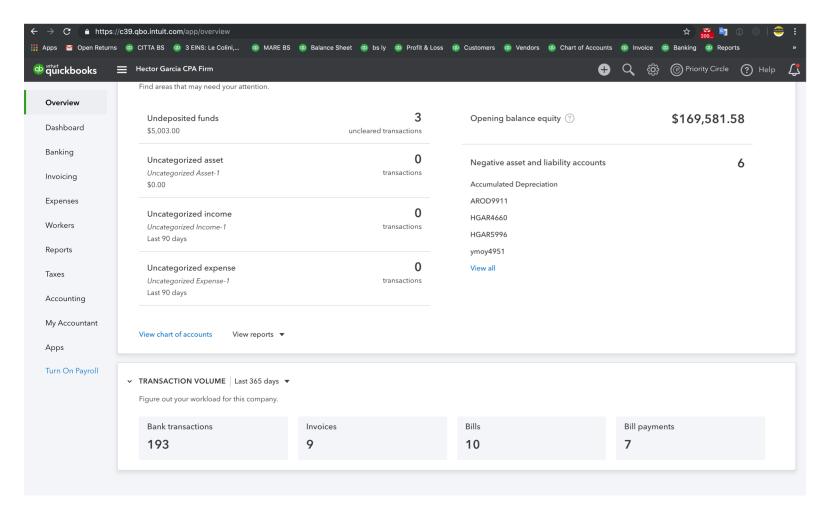






For Accountants Only

Usage Overview







For ProAdvisors:

- Get Re-certified by July 31th, 2019, to avoid being de-listed or lose the Advanced Certification
- Moving to annual recertification





New QuickBooks Online Test Drive (Demo Company):

https://qbo.intuit.com/redir/testdrive us advanced





Webinar Date / Features Disclaimer

• This webinar was recorded LIVE on 04/18/2019. All comments about features available and/or not available in QuickBooks Online is within the context of the webinar date.

Intuit adds new features almost monthly, so stay tuned for monthly announcements!





Creating Customers and Sub-Customers

- When converting from QB Desktop, Jobs come in as "Sub-customers" NOT projects
- Projects must be created one by one, there is no importing feature for projects
- Sub-customers can be used for different billing address, but avoid using Sub-customers as Projects/Jobs, once Projects feature is turned on
- A Sub-customer can have the same name as Project, so it could lend itself to confusion!







In-Product Demo





Questions/Comments?

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