

Live Webinar Series

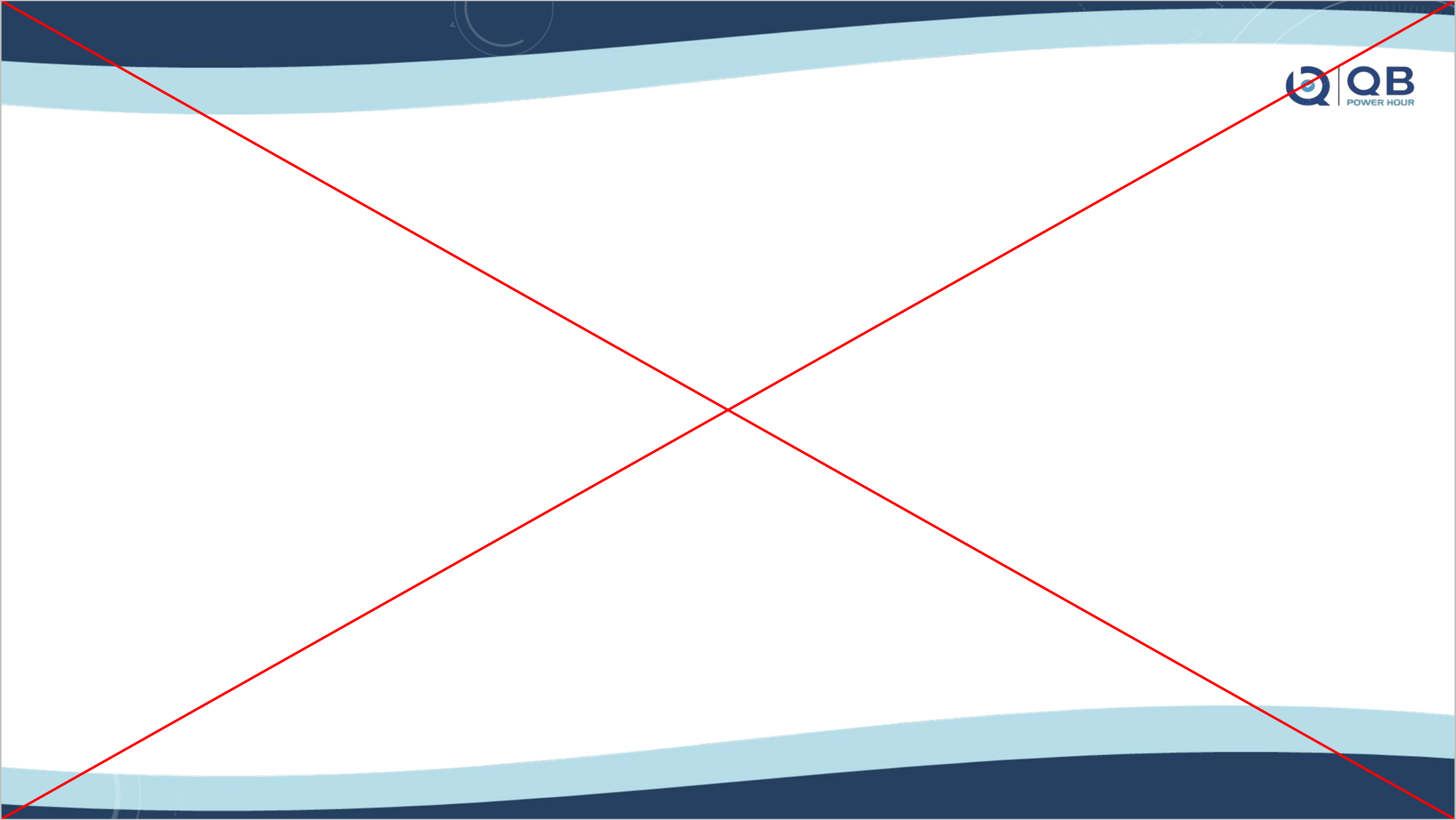
Discussing QuickBooks & Apps
that work with QuickBooks



Every Other Tuesday
9am PT | 12pm ET

Spot

Dan



Time-Saving Tech Solutions for Accountants



Sharrin



Tuesday 10/14
9am PT | 12pm ET



Dan

Dan DeLong

- **Owner** - Danwidth and schoolofbookkeeping.com™
- Worked at **Intuit** for nearly 18 Years
- **Co-Host** - QB Power Hour
- **Co-Host** Workshop Wednesdays
- **Feature Deep Dive Guest Host** - The Unofficial QuickBooks Accountant Podcast
- **Admin Facebook Group** ~17,700 members
<http://facebook.com/groups/qbpowerhour>
- **Tech Editor** of **QBO for Dummies** (since 5th edition - 2019-2025) and **QuickBooks All-In-One**
- **Top 10 ProAdvisor 2021** - Social Media



Matthew “Spot” Fulton



- Founder of **Parkway Business Solutions**
- **QB Community Live** Facebook group
- Big Data Manipulator
- Workflow Design Nerd with API Experience
- Top Educator/Trainer/Writer 2021
- Top 100 ProAdvisor



Sharrin Fuller



- **Founder of Glass Wallet Ventures** where accounting pros go to stop doing it all and start leading
- **Built, scaled, and sold multiple 7-figure firms** using the exact methods she now teaches
- **Creator of the Clone & Conquer Method™** a no-fluff system for building a team and backend that runs without you
- **Host of *Start 2 Scaling: The \$1 Million Journey*** podcast and creator of the Remote Team Roadmap™
- **Top 100 ProAdvisor for three consecutive years** and 2025's Top QuickBooks Educator
- **Runs 3 companies in just 3 days a week** and helps firm owners do the same with strategic advisory, courses, and her Community Hub

Insightful Accountant Nominations Open



<https://blog.insightfulaccountant.com/2026-top-advisor-awards-launch-tonight>

QB Power Hour Webinars Details

Every Other Tuesday at 12:00 ET

Upcoming Webinars:

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
([Channel on Earmark](#))

Show Topics:

- QuickBooks tips, what's new, troubleshooting, etc.
- Marketing, pricing, apps and more
- Topics to help accounting professionals succeed in their business

Where to Find our Resources:

- PDF of slides
- Past Recordings and Podcast
- and other Resources

www.qbpowerhour.com/resources

Want CPE for this Session?

- 1 Get the Earmark App
- 2 Take 5 Question Quiz
- 3 Receive CPE Certificate

This session will be recorded and available on demand, we'll email you when the CPE quiz is ready.

 EARMARK

earmark.app

Intuit News:

- Intuit Enterprise Suite in Desktop Enterprise

Time Saving Tech Tips

- AI Helpers - Sintra AI
- Email Responders - Fyxr
- Task Management/Booking - Motion
- Client/Team Training - Scribe
- Proposal Platforms - Anchor



Polling Question 1

What version of QuickBooks do you serve your clients with?

- ☐ QuickBooks Online Only
- ☐ QuickBooks Desktop Only
- ☐ Both
- ☐ N/A

Spotlight Sponsor - [Free 14 Day Trial](#)

method



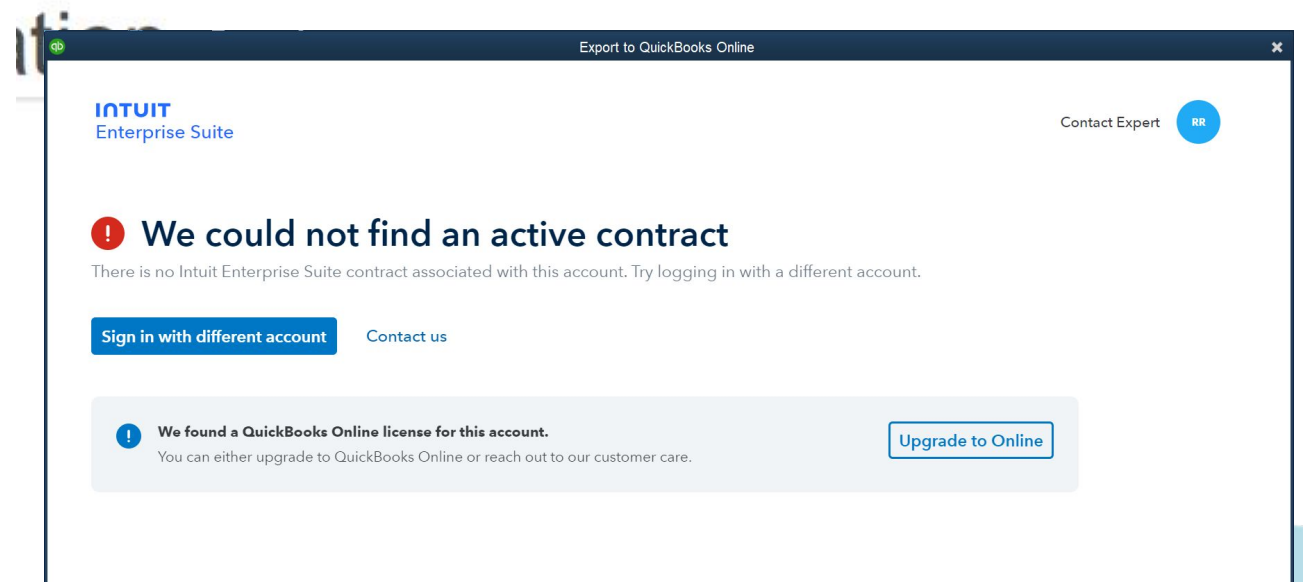
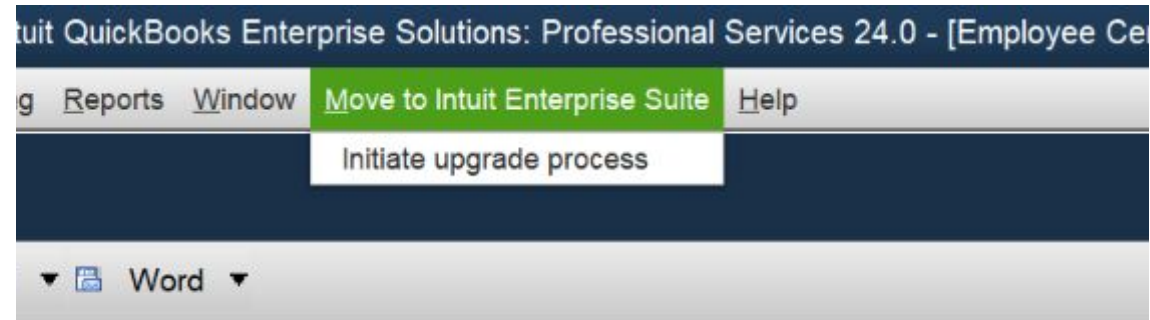
Intuit News: Intuit Enterprise Suite Marketing in Desktop Enterprise



Intuit Enterprise Suite in Desktop Enterprise

What's Happening

- Service Updates in Enterprise Desktop
- New Menu
- “Initiate Upgrade Process”
- Pre-Purchase required to do anything



Not all “Enterprises” Are the Same

IES is Not QBES

- Concept is the same
- Same Conversion issues DT to QBO
- Platform of IES is QBO feature set



[S of B Blog: IES First Look](#)

Time Saving Tech

Tools that create time

Is this you?



Talent Shortage

You need to do more in your Practice but don't have the time or capacity to do it.



Frustration with Workload

Realizing the services you provide are not fulfilling



Additional Offerings

By working on the Have to do's, there's no time to have meaningful discussions that elevate the business

Current Workloads Bogging You Down?



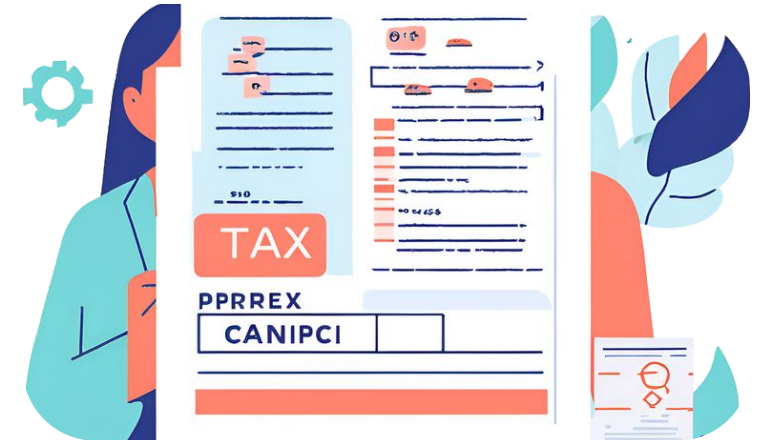
Chasing

When you don't have what you need that will cause undue delays and interruptions



Categorizing

Time spent sorting and categorizing the the transactional data is not a value add to the business



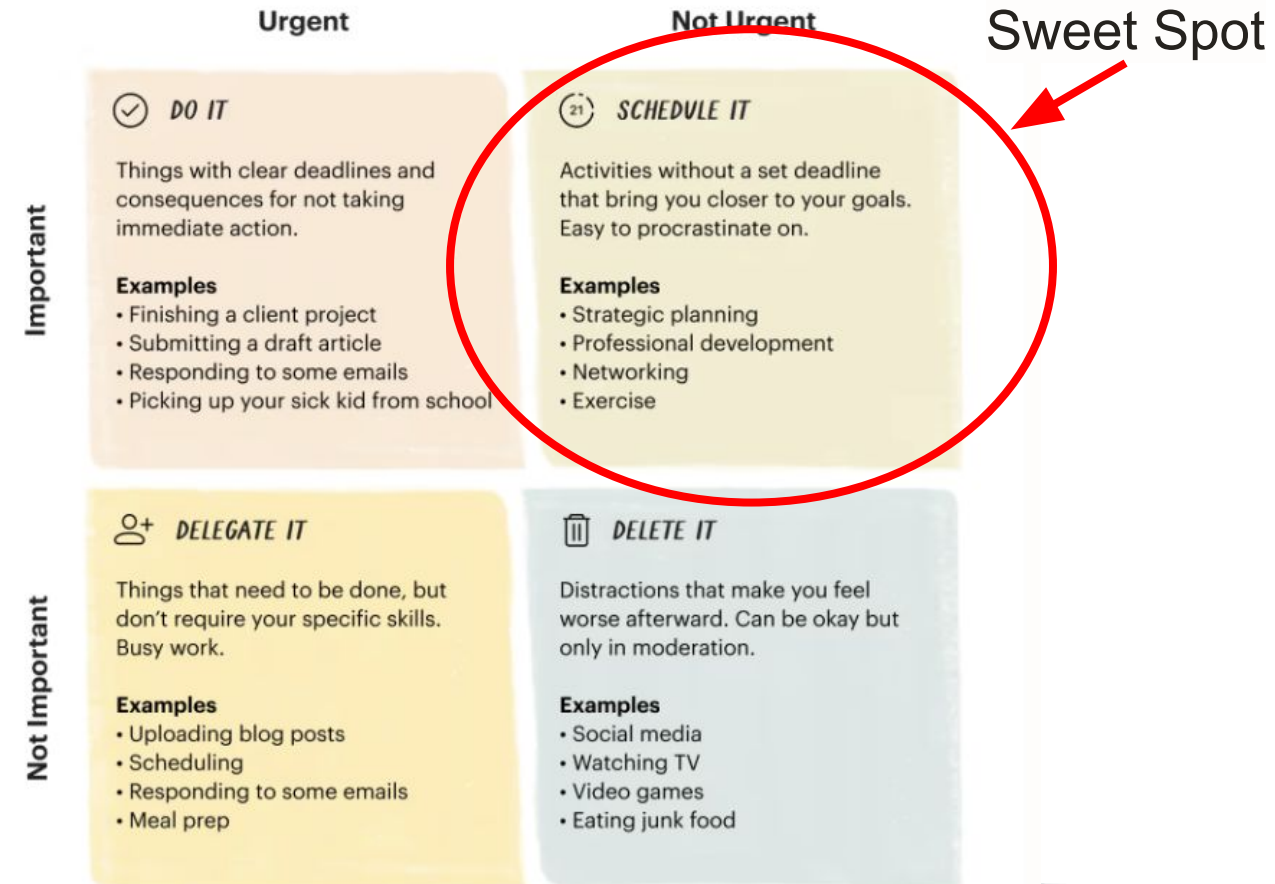
Compliance

By working on the Have to do's, there's no time to have meaningful discussions that elevate your client

Eisenhower Matrix

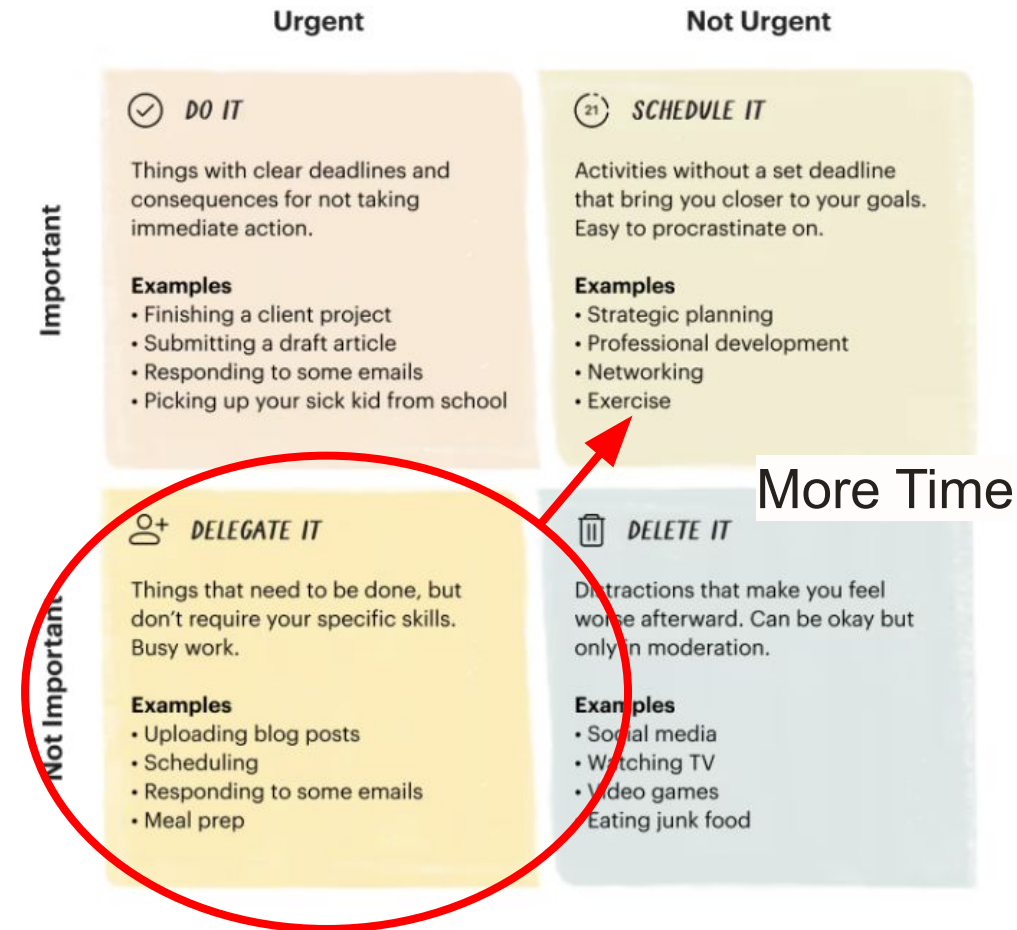
“I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent.”

Dwight D. Eisenhower

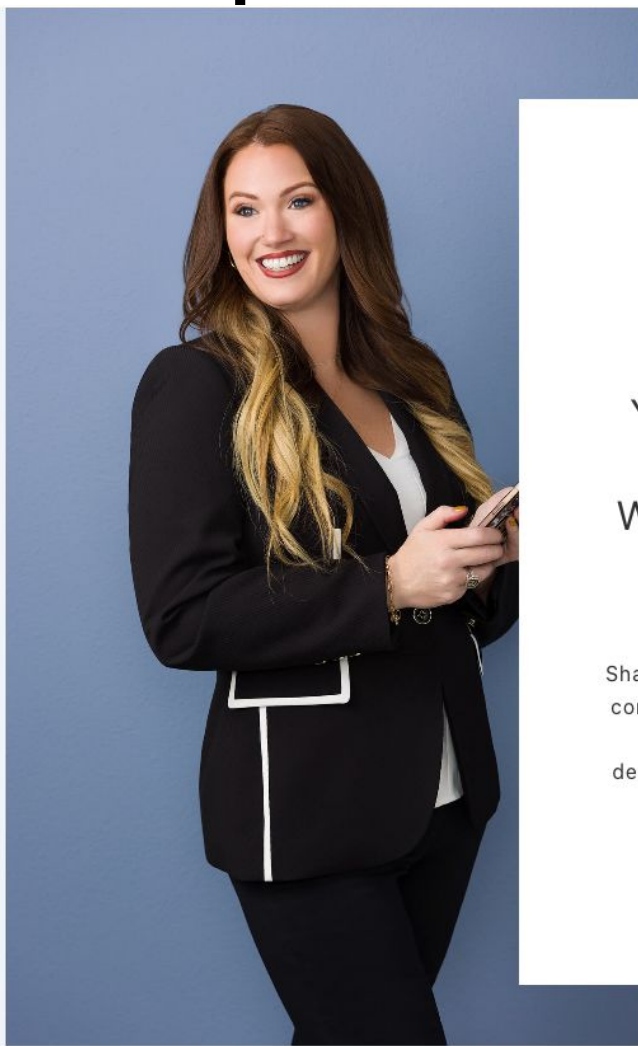


Removing the Urgent/Not Important

If “busy work” was removed/reduced, more time to invest in Tasks that Matter (Significance)



Clone and Conquer



**the
clone
&
conquer
method**

BECAUSE CLONING IS EASIER THAN
BURNOUT

You Built Your Business.
Now It's Time To Run It
Without Running Yourself
Into The Ground.

Sharrin Fuller is the CEO of three successful companies—and she does it all in just three days a week. Her secret? A method designed to systemize your brilliance, train your double, and reclaim your time.

JOIN HERE →

[Learn More](#)

Polling Question 2

Where are you spending most of your time?

- ☐ Urgent/Important
- ☐ Not Urgent/Important
- ☐ Urgent/Not Important
- ☐ Not Urgent/Not Important

Spotlight Sponsor - [Learn More](#)

 Qbox

Sintra

AI Helpers/Employees

Sintra AI

- 1-12 AI Helpers
- Each is customizable
- Trainable
(Snippets/Webpages/Files)
- Generative/Creative/Ideas
- Automate/Schedule
- Mobile App



[Learn About Sintra](#)

Sintra AI - Weekly Questions - Ideas

- Asks you questions weekly
- Based on your answers each Helper comes up with ideas

[Learn About Sintra](#)

× 26 left



Vizzy is seeking information on...

What percentage of your revenue comes from annual memberships versus monthly subscriptions?

Answer here

Save

[Skip Question](#)

Ideas



Buddy has an idea
I'll design referral partnerships with accounting firms
Expiring soon



Seomi has an idea
I'll optimize blog posts for QuickBooks updates
Expiring soon

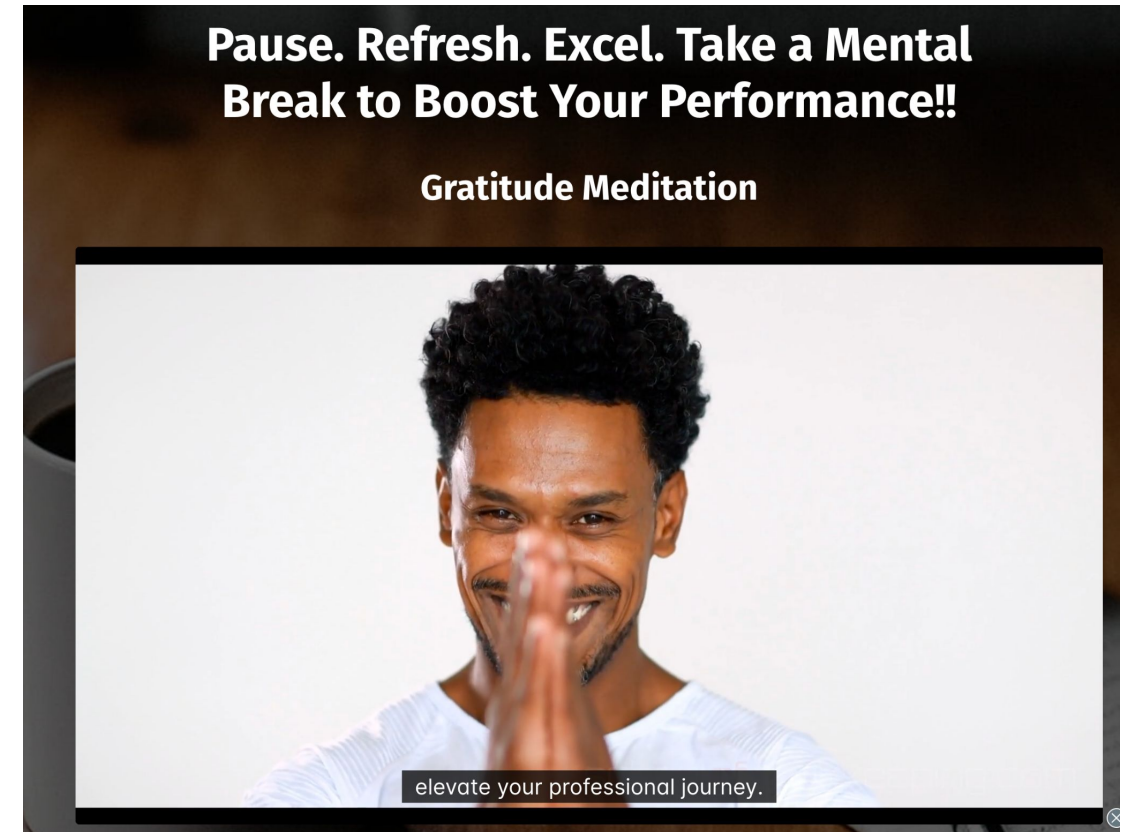


Cassie has an idea
I'll create QuickAnswers response templates
Expiring soon

Sintra AI - Idea Example

- I want people to avoid burnout
- Questions led to idea for a guided meditation
- Gratitude & Balance
- Sintra wrote
 - Meditation Script
 - Crafted Email

Would not have ever thought about it without the spark of the idea



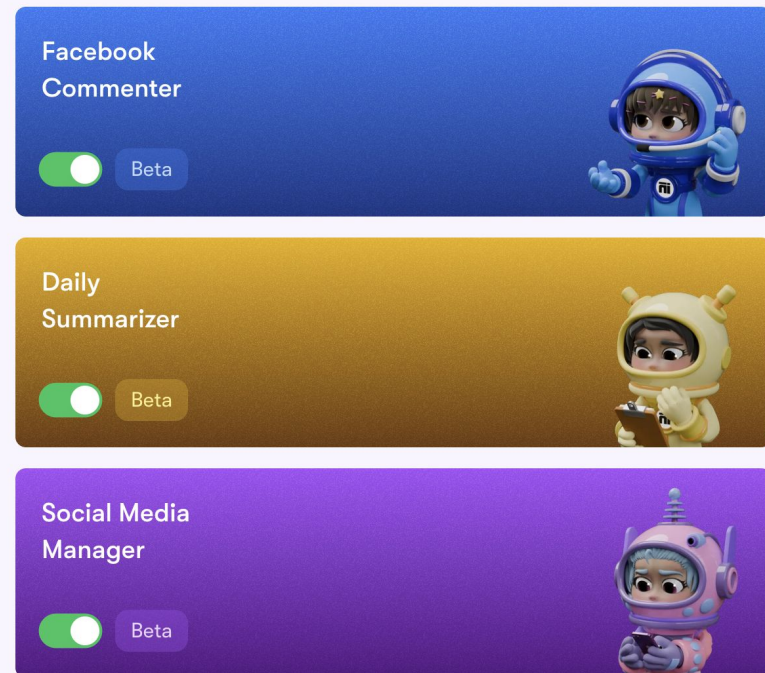
[Take a 5 Min Break](#)

Sintra AI Automations

- Responds to FB Comments
- Social Media Creator/Scheduler
 - LinkedIn
 - Facebook/Instagram
 - X (Creator but no scheduler)
- Summarize your day/calendar

[Learn About Sintra](#)

Automations ⓘ



Pricing

- \$37/ mo Individual
- \$97/ mo for all 12
- Annual Discounts
- Team Members can be added



[Learn About Sintra](#)

Fyxxer

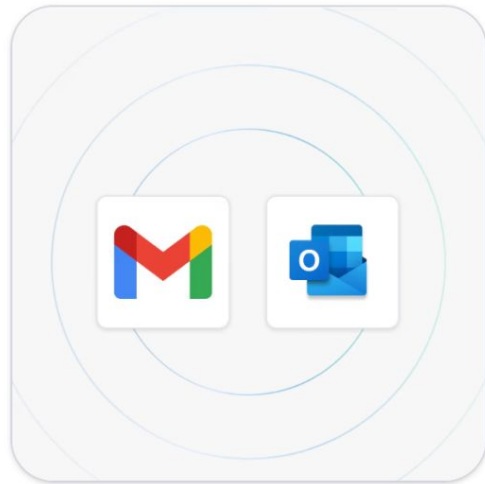
AI Email Responder

Time Suck with Email

- Repeating Responses
- Emails fall through the cracks
- Thoughtful responses take time
- Sorting through noise
- Mo' Inboxes - Mo' Problems

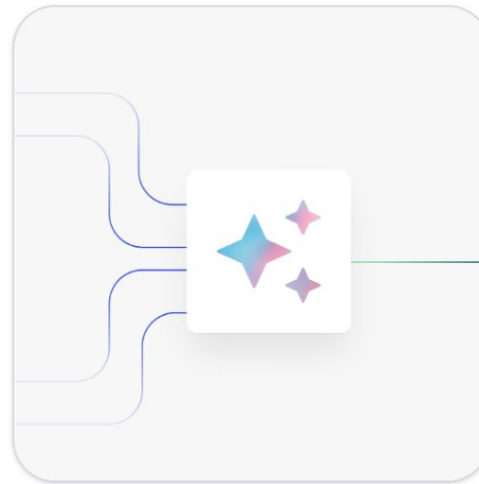


Fxyer to the Rescue!!



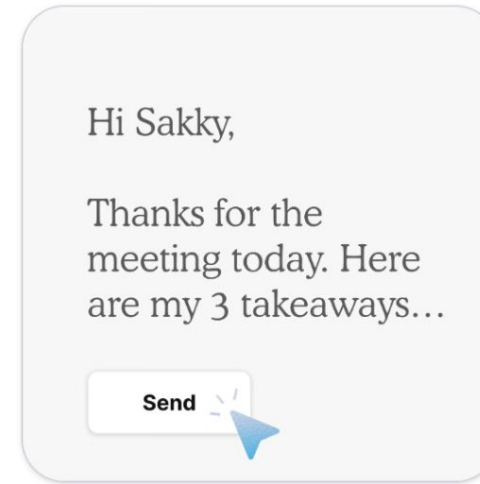
Connect to your Inbox

Link your Gmail or Outlook account
in a few quick clicks.



Fyxr Learns Your Voice

Fyxr automatically reads and
learns the way you sound in email.

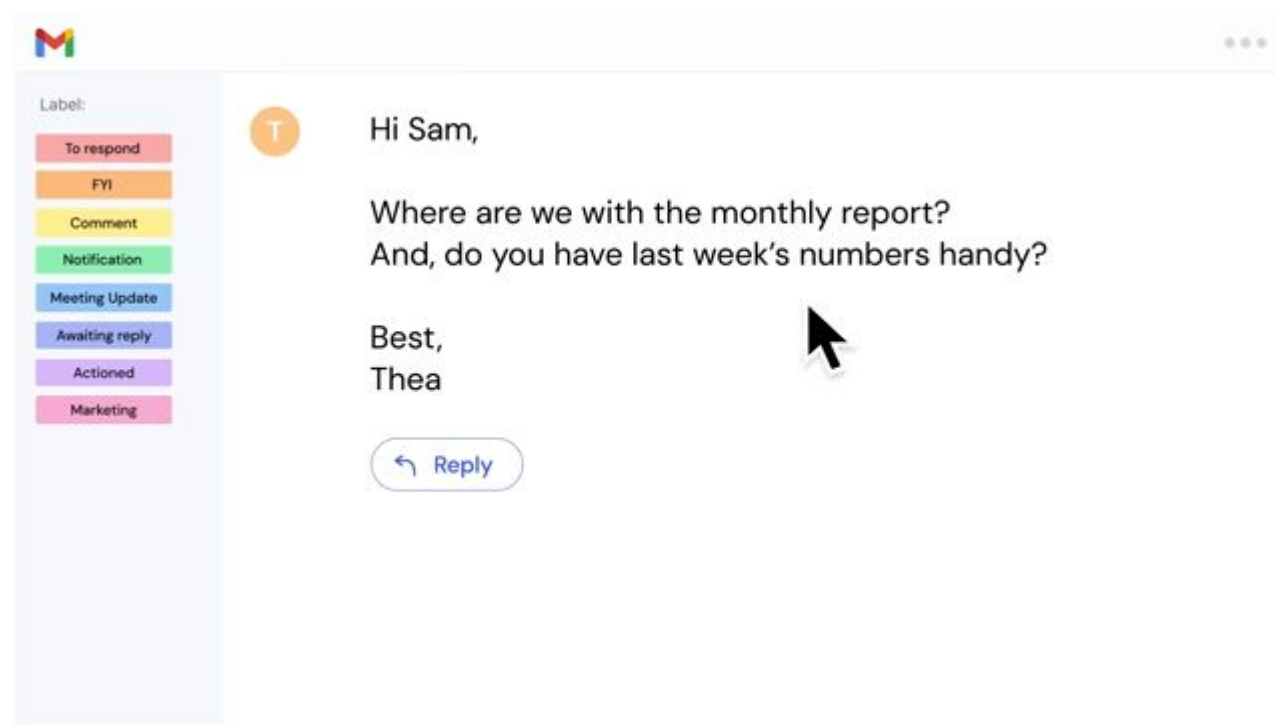


Pre-written Drafts

Fyxr writes draft replies to all your
relevant inbox items

What Does it Do?

- Drafts Responses
- Categorizes (and Moves) non-essential email
- Multiple Inboxes/Calendar
- Google or Outlook
- Meeting Transcriber & Recap
- Setup in 5-10 Minutes

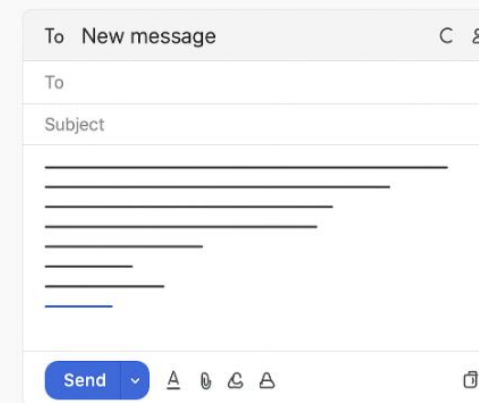


[7 day Free Trial - \\$25 credit: Fyxr](#)

Weekly Recap

- Number of Emails Organized
- Drafts Written

You've saved 8.6 hours last week



606 Emails Organized

That's **2.3 hours** back in your week you'd spend sorting email.

69 Drafts Written

Saved **6.3 hours** of writing time with Fyxr.

[7 day Free Trial - \\$25 credit: Fyxr](#)

How Good are the Drafts?

- Learns your voice
- Documents can be uploaded to train
- Drafts are not automatically sent, but could be sent if you reply too quickly.



[7 day Free Trial - \\$25 credit: Fyxr](#)

Draft Example

- Payment with a fee to Lower deposit (net)
- Screen shows Undeposited Funds (not expense)
- Drafts correctly stated pointed out the correction.

☐	Kozy Electric	10/09/2025	Payment	Check		230	\$2,819.82
☒	CONTRACTOR SALE	10/10/2025	Payment	AMEX			\$99.68

1-5 of 5 1 Total 3058.12 Selected Payments Total 99.68

Select all Clear all

▼ Add funds to this deposit

#	RECEIVED FROM	ACCOUNT	DESCRIPTION	AMOUNT	CLASS
1	CONTRACTOR SAL	12000 Undeposited Funds		-\$94.92	
2					

Add lines Clear all lines Other funds total -\$94.92

☐ Track returns for customers

Memo

Cash back goes to 10200 Cash - Level One Cash back memo Cash back amount

Total \$4.76

Draft Example



Dan DeLong

RE: Virtual Terminal Fees

To:

October 10, 2025 at 12:32 PM

Hi

Yes, on the line where you enter the negative value for the fee, "Received From" should stay as the customer and "Account" should be the same account you use for the fee expense (e.g., Merchant Fees or Bank Charges), not undeposited funds. The positive line is the full payment from the customer to undeposited funds; the negative line is the fee, posted to the expense account. That way the net deposit matches what actually hit your bank.

Let me know if you want a step-by-step or to review the attachment.

Thanks,

Dan

[7 day Free Trial - \\$25 credit: Fyxr](#)

Pricing for Fyxr

- Two Levels
 - Standard - One Inbox/Calendar - \$30/mo
 - Pro - Multiple Inboxes/Calendars - \$50/mo
- Team Options



[7 day Free Trial - \\$25 credit: Fyxr](#)

Scribe

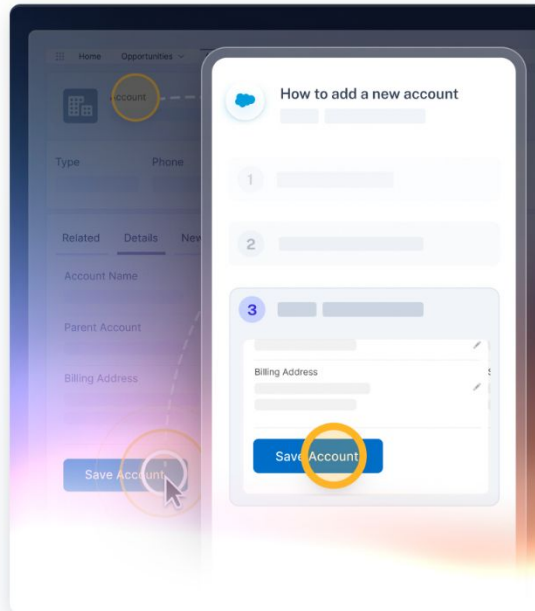
Walkthroughs and SOP

Ever Feel Like You're Repeating Yourself?

- Team Members
- Clients
- Steps getting missed
- Phone Tag
- Infrequent processes forgotten



Document and scale how work gets done



1. Capture any workflow

Instead of taking screenshots and writing instructions, automatically create step-by-step guides with AI.



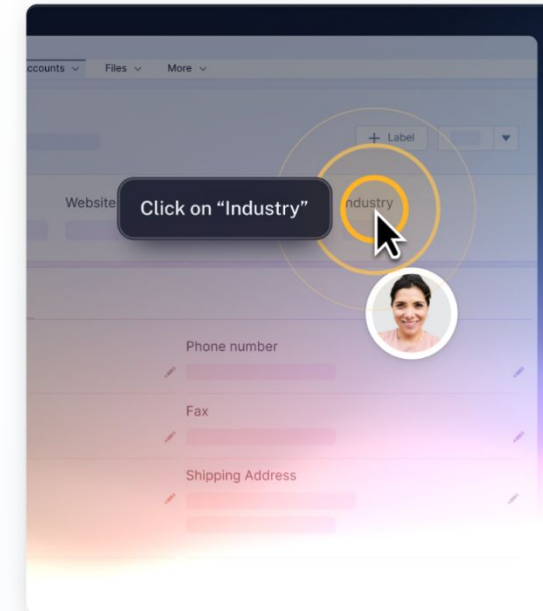
2. Share with colleagues and clients

Share or embed guides in multiple formats, right where your team works — chat, wikis, and more.



3. Ensure work gets done right

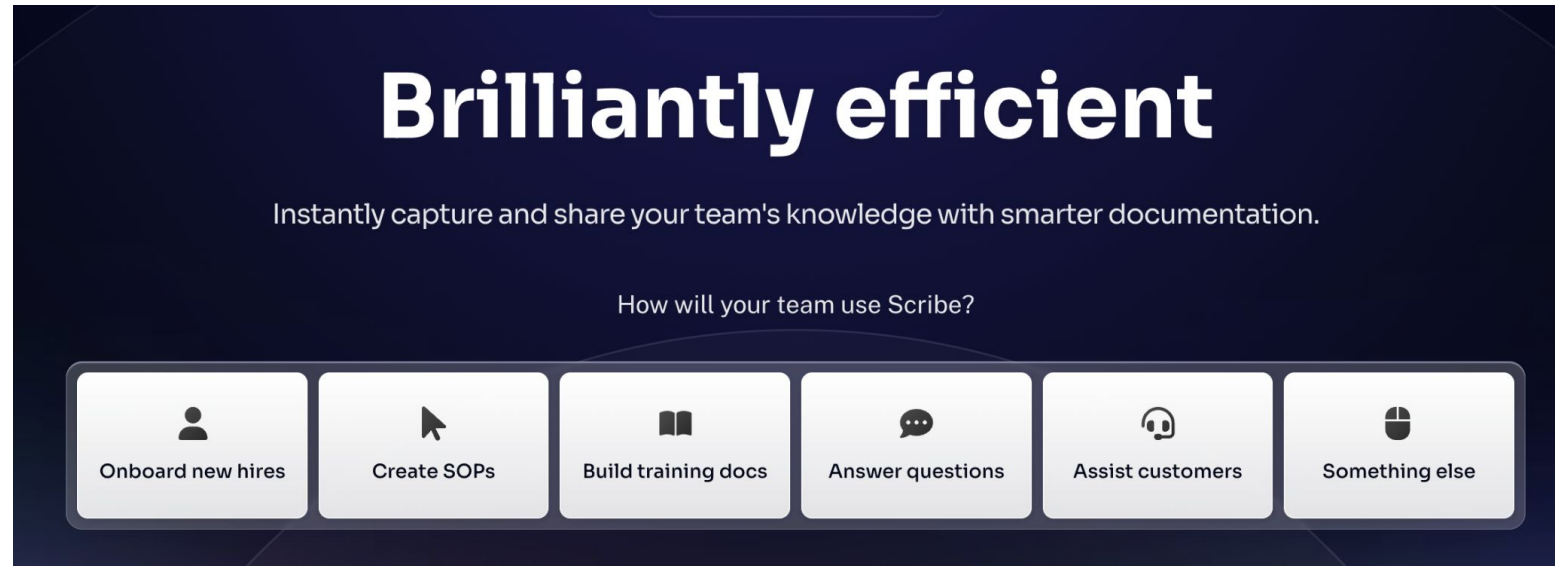
Complete any workflow with confidence with easy-to-follow guides and on-screen walkthroughs.



[Learn More About Scribe](#)

Features

- Fast to Create
- Easily Updated
- Flexible usage
 - Share Link
 - Export Options
 - Embed on Website
- Notifications when viewed
- Desktop App for multiple applications



[Learn More About Scribe](#)

Pricing for Scribe

- Two Main Levels
 - Basic - Free
 - Scribe Limitation
 - No Exporting
 - Pro - \$29/mo
 - Pro Teams - 5 or More
 - \$15 /mo/user

Basic

Experience the magic of Scribe in your browser and generate how-to guides.

Free

[Sign up](#)

Key Features

- ✓ Works with any web app
- ✓ Quick customization
- ✓ Shareable with link & embed

Pro Team

Create documentation in a flash for clients, new hires, or your whole organization.

 Starts at 5 seats
\$15 / USD
seat month

[Get Started](#)

Everything from Basic, plus...

- ✓ Works with web, mobile & desktop apps
- ✓ Customize with company branding
- ✓ Edit and redact screenshots
- ✓ Export to PDF, HTML and Markdown
- ✓ Collaborate with your team using comments
- ✓ Great value for teams of 3+

Pro Personal

Produce and share step-by-step guides for any process. Ideal for solo consultants.

 Starts at 1 seat
\$29 / USD
seat month

[Get Started](#)

Everything from Basic, plus...

- ✓ Works with web, mobile & desktop apps
- ✓ Customize with company branding
- ✓ Edit and redact screenshots
- ✓ Export to PDF, HTML and Markdown

[Learn About Scribe](#)

Motion

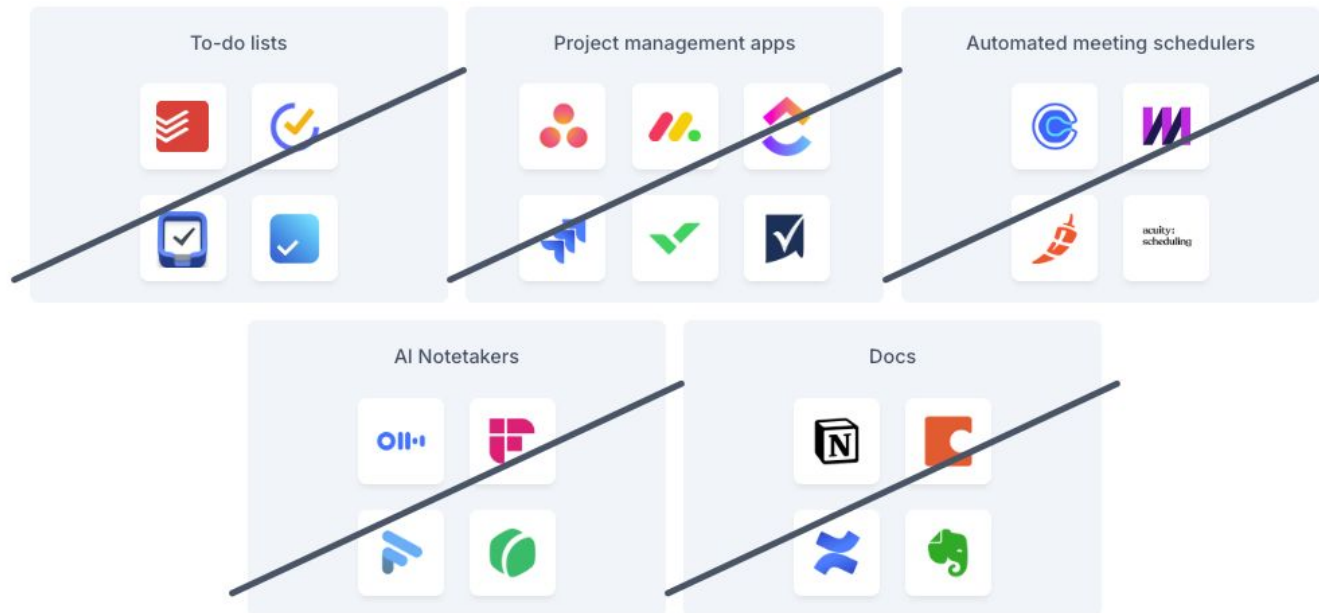
Task/Project Management/Booking

Consolidation of Tools

Motion includes all of the tools you use to be productive and organized — in one place

And it modernizes and supercharges those tools with the power of automation and AI

 motion replaces...



Features we like

- Tasks auto scheduled on calendar
- Multiple Calendar inputs
 - Google
 - iCloud
 - Outlook
- Booking Links (No Custom Branding)



AI and Human collaboration.

[Learn About Motion](#)

Pricing for Motion

- Adding “AI Employees”
- AI Credits
- Pricing Changed from when we started
- AI Workspace (No Employees) - \$29/mo



[Learn About Motion](#)

Anchor

Proposal to Payment



What is Anchor all about?

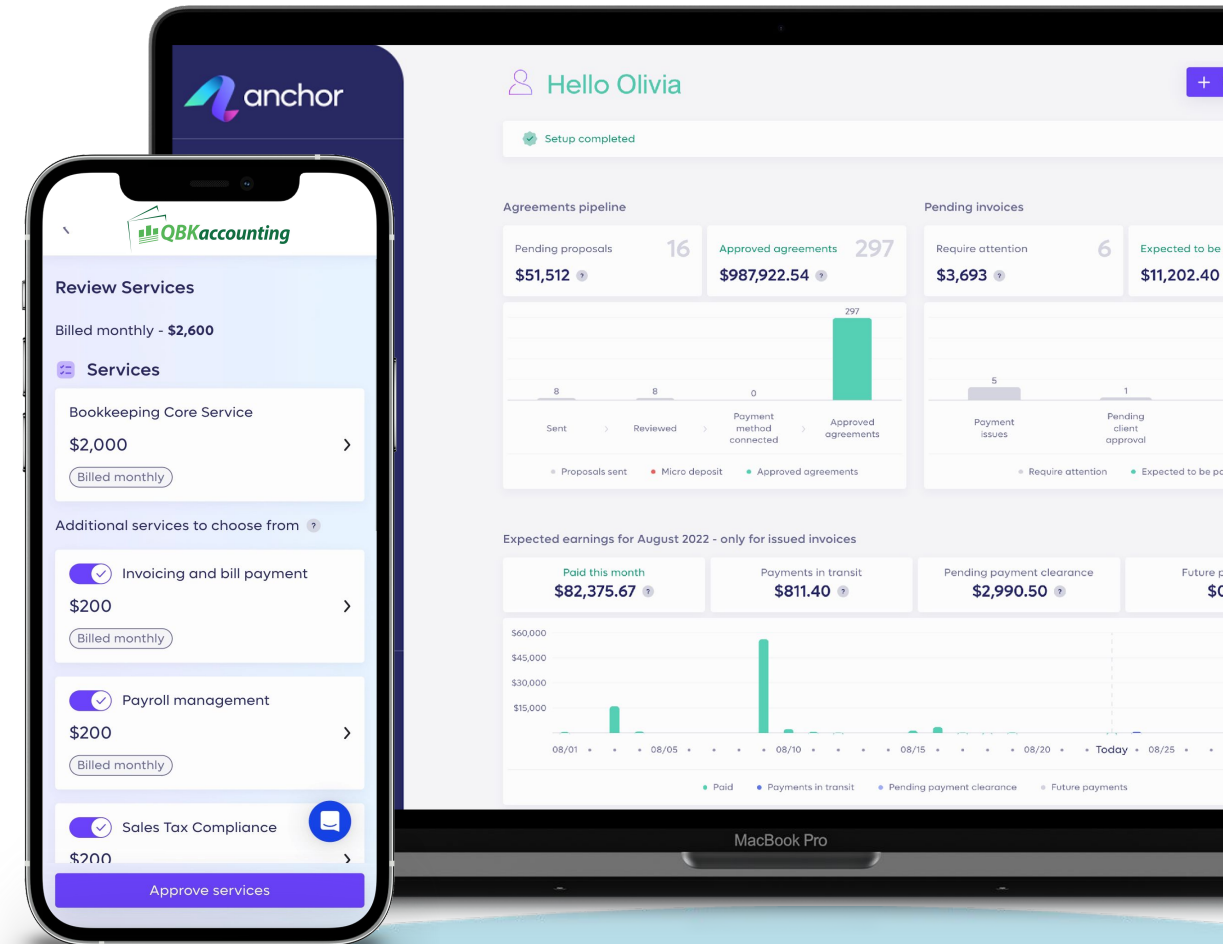
Anchor is a proposal-to-paid automation and profit optimization platform.

What does Anchor do?

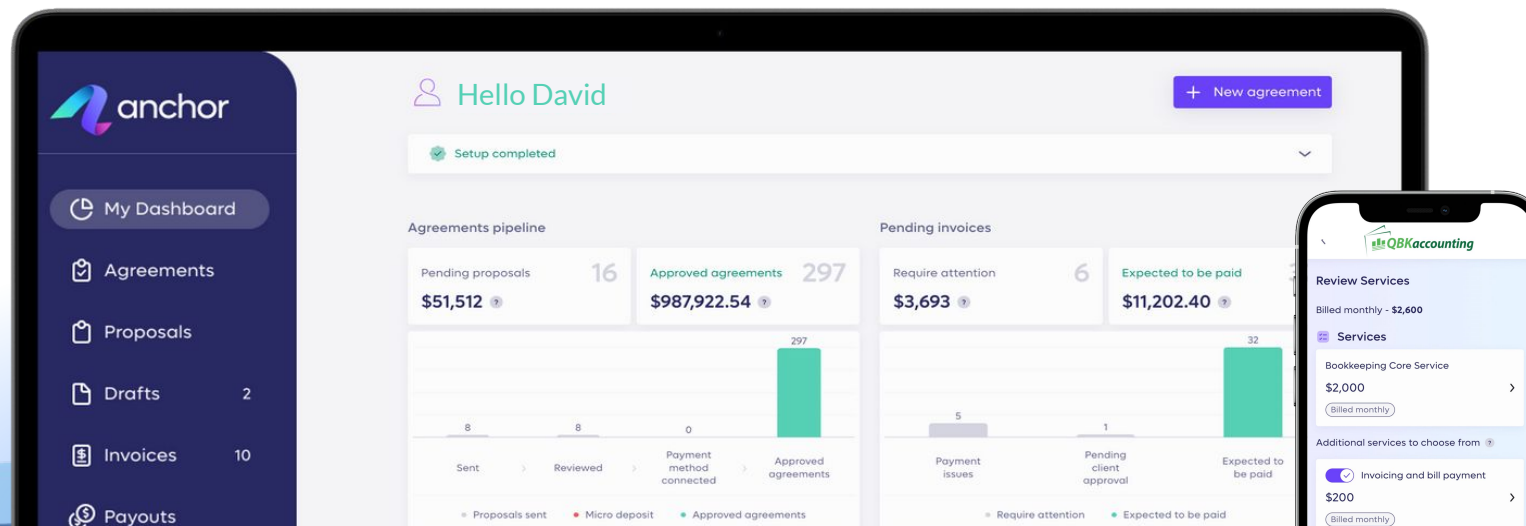
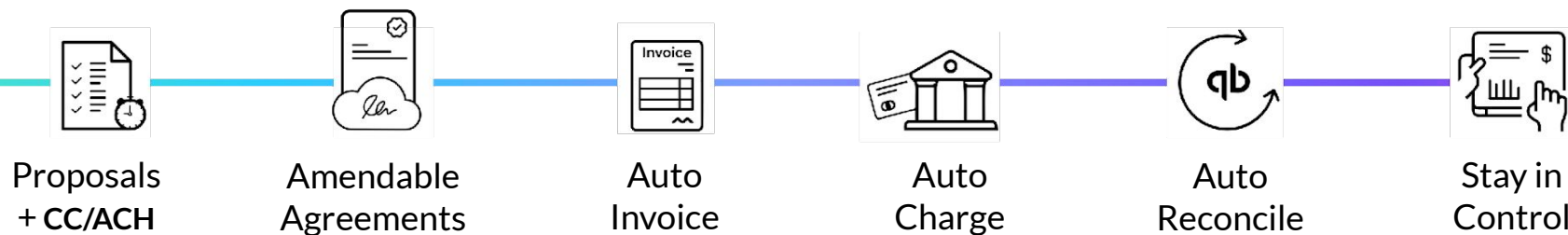
Anchor streamlines proposals, automatically bills, and charges your clients according to the eSigned proposal and then automatically reconciles it with QBO.

What will Anchor accomplish for the user?

- Close new clients faster with 90% less work.
- Bill and get paid automatically.
- Increase profitability and efficiency.
- Anchor certainty and control as a default.



Revenue Automation System, From Proposal to Paid.



The Devastating Costs of Having a Poor System



- 50% fail in the first five years.
- 90% of business failures are cash flow related.
- 45% of payments are late.
- 29% of SMB owners struggle to pay employees on time.
- 4.6% Revenue leakage – from the profit margin.



- 25% is the average close rate proposal to sale.
- 44% of businesses have been ghosted by clients post-proposal.
- 6.8 days is the avg time to create, send, & get a proposal signed.

INTUIT

Small Business & Self-Employed Problems

Need	Rank
Get Customers	1
Get Paid	2
Get Capital	3

We are only paid
when you are Paid.

\$5

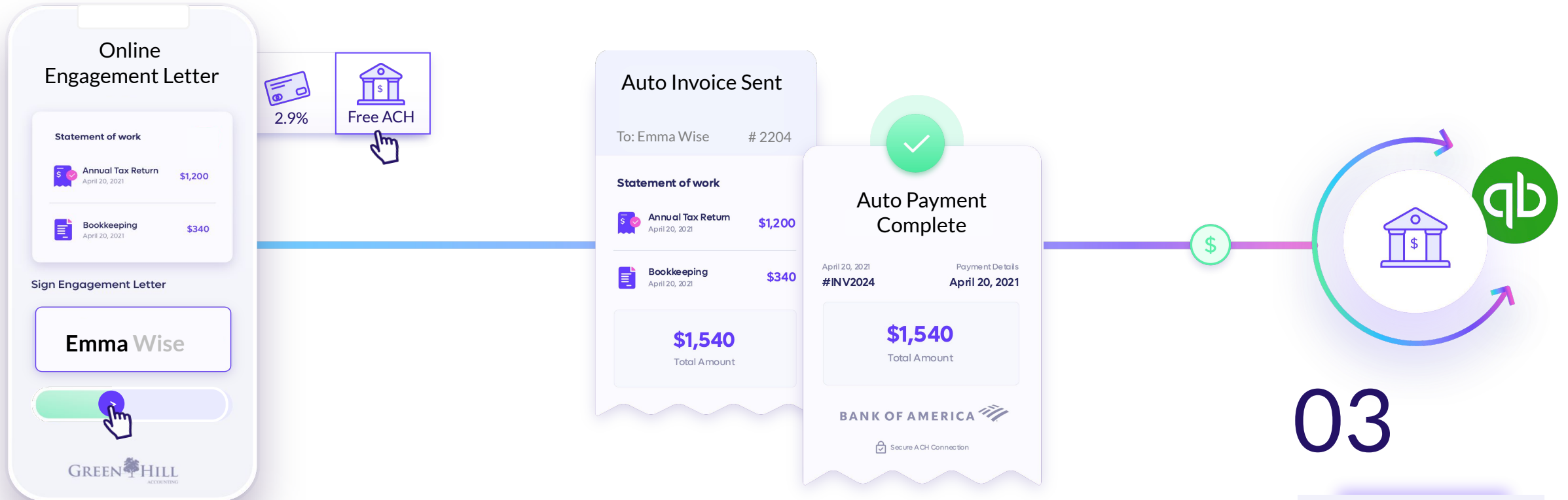
Per payment
received

- No subscription. You pay as you go.
- No minimums.
- No commitments.
- No merchant account needed.
- No ACH fees. (CC fees- charged to clients 2.9%)
- No setup fee.
- **No small print!**

- Quick, easy migration
with bulk client onboarding.
Done with you!

- Dedicated
Account Manager.

How does Anchor work?



01

Online-live agreement + Pre-approved payment methods

02

No touch invoicing + Auto payments

03

Auto reconciliation

 anchor

New Cohort - Passive Aggressive Income

- 4 week cohort
- Weekly Live Session
- Deep Dive into Affiliate and Partner Programs for Accounting Pros
- Evaluate Partner Programs
- More than QB (Method, Ramp, ADP)
- Nov. '25



[\\$300 Off Pre-Register!](#)

QB Power Hour Store



Dad Hat with Leather Patch (Rectangle)

\$19.35



Unisex Softstyle T-Shirt

\$18.75



QB Power Hour - Magnetic Induction C...

\$49.50



QB Power Hour Color Morphing Mug, 1...

\$12.99



[Buy Your Swag Here](#)

Get Swag & Support The Show

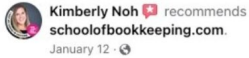
- Wireless Chargers
- Heat Activated Coffee Mugs
- T-Shirts
- Hats

[Want to Create Your Own Swag Store?](#)

Quick Answers at schoolofbookkeeping.com

- Chat/Email Support
- Day/Monthly/Annual Options
- Bundle with QBO subscriptions

[Learn More](#)

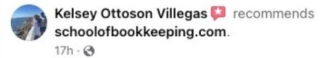


Kimberly Noh recommends schoolofbookkeeping.com. January 12 · 🌐

The School of bookkeeping is the place to go for all things bookkeeping.

Kimberly Noh - Noh Hassle Bookkeeping





Kelsey Ottoson Villegas recommends schoolofbookkeeping.com. 17h · 🌐

Dan has been absolutely amazing and so helpful! I am so grateful to have found SchoolofBookkeeping. Always prompt, correct and helpful answers! Thank you, Dan!

Kelsey Ottoson Villegas - OttoBooks LLC





Lidiya Louk recommends schoolofbookkeeping.com. about 3 years ago

I had a great experience with a QuickBooks Desktop to QuickBooks Online conversion. There were some challenges in the process, but the team performed very well and got me to a great outcome. Thank you again!!

Like 2 Share



Shanon Young recommends schoolofbookkeeping.com. about 3 years ago

Very knowledgeable and helpful. So quick to answer all my questions. Highly recommend! Thanks Dan!!

Like 2 Share

Polling Question 3

Was this information useful?

- ☐ Yes
- ☐ No
- ☐ N/A



Upcoming Events

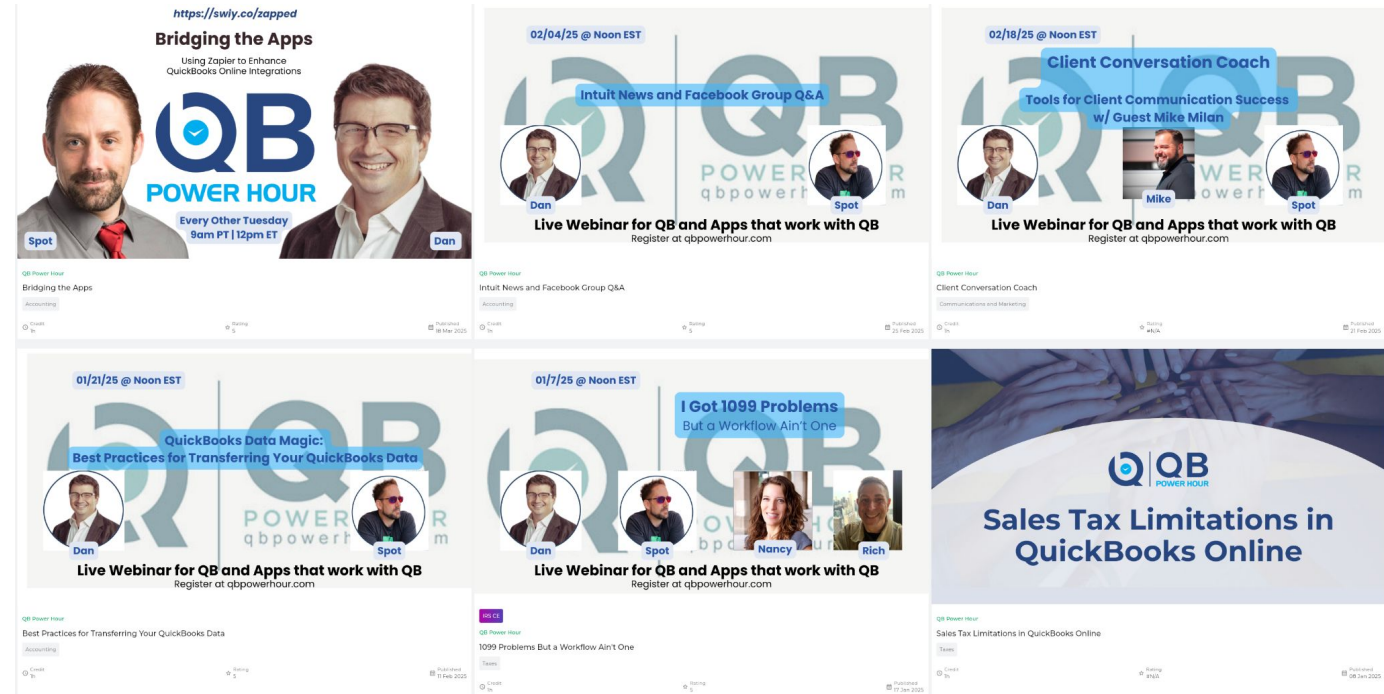
- QB Power Hour Webinar Series – every other Tuesday 12:00 pm Eastern
<http://qbpowerhour.com>
- Check the [website](#) for more upcoming events
- QuickBooks vCon and webinars:
<http://qbtrainingevents.com>



Appendix

QB Power Hour on Earmark

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
- [Channel on Earmark](#)



Housekeeping

QUESTIONS



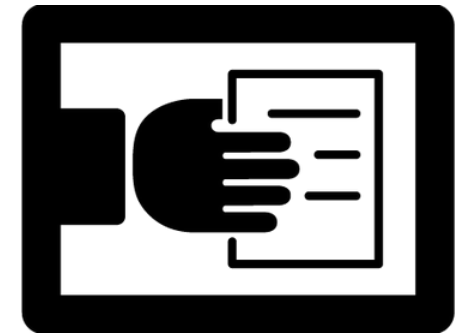
PLEASE USE THE Q&A
ICON FOR QUESTIONS
ON TODAY'S TOPIC

COMMENTS



IF YOU HAVE
COMMENTS, USE
CHAT

HANDOUTS



ALL HANDOUTS ARE
[HERE](#) OR ON OUR
[WEBINAR ARCHIVE](#)

Michelle L. Long, CPA, MBA

- **Owner** of Long for Success, LLC, Kansas City, Missouri
- **International speaker** – Intuit Trainer/Writer Network
- **Author** – 5 Books (Available on Amazon), numerous Intuit Academy courses, co-author QB and QBO Advanced Certifications
- **Co-Host** – <http://QBPowerHour.com>
- **Facebook Group** ~17,000 members
<http://facebook.com/groups/qbpowerhour>
- **Linkedin Group** ~160,000+ members – <http://tinyurl.com/qbgroup>
- **Honors & Recognition** – Most Powerful Women in Public Accounting, Top 100 Small Business Influencer, Top 10 ProAdvisor (Top Trainer/Writer & Top Social Media), SBA Financial Services Champion & more

Long
for Success LLC

