

# Live Webinar Series

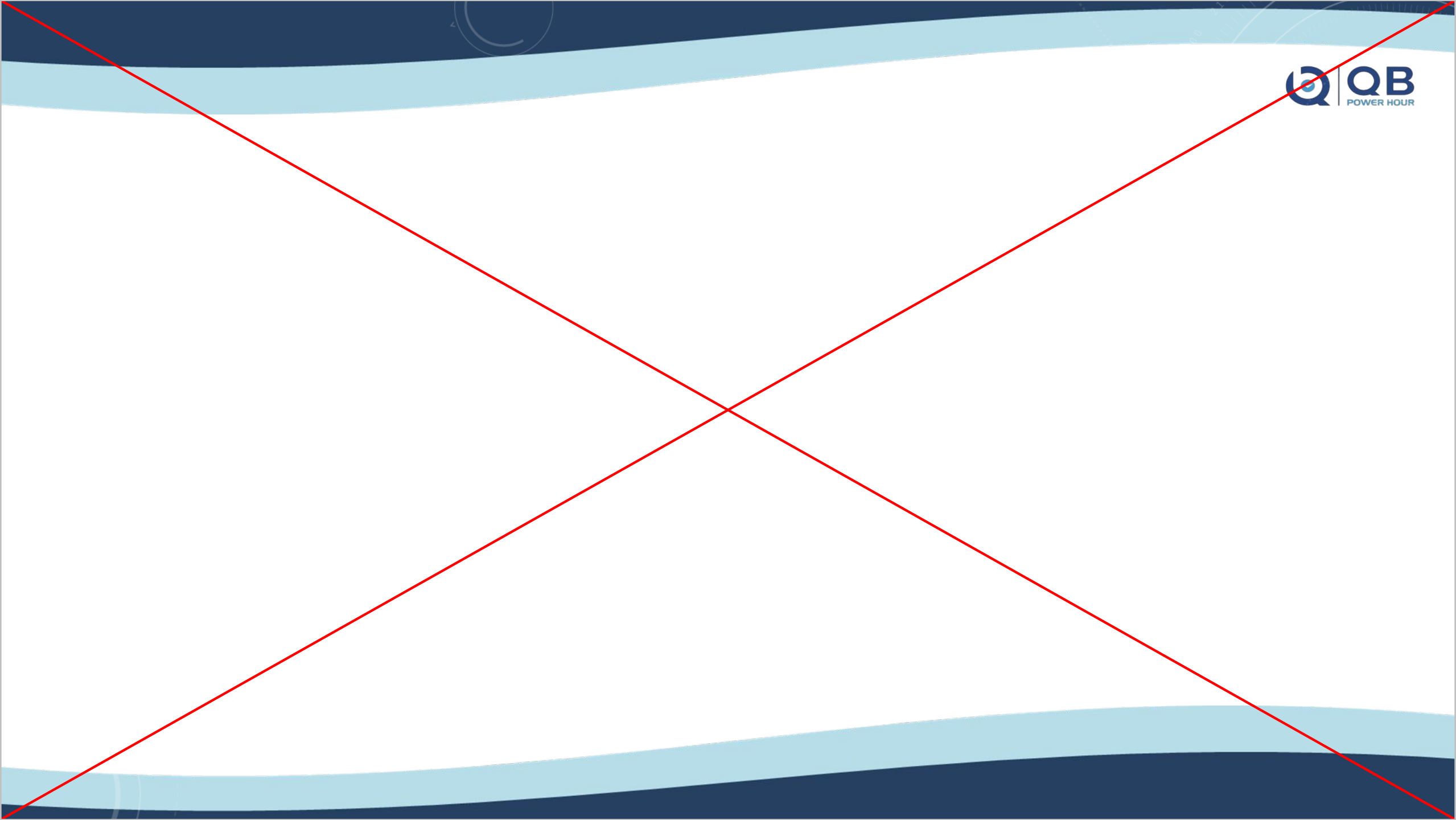
Discussing QuickBooks & Apps  
that work with QuickBooks



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



# 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](http://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:

- QBO Payroll Tax Payments and Filings - Cannot Opt Out after 11/15

## The State of Desktop

- State of QuickBooks Desktop
- Furlane CX Demonstration & Pricing
- Case Study | Do it Yourself | FAQs





# Polling Question 1

Where are you in your QuickBooks Desktop journey?

- ☐ Moving all to QBO
- ☐ Using both Desktop and QBO
- ☐ Staying in Desktop
- ☐ Haven't decided

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

**method**



# Intuit News: QBO Payroll Tax Payments and Filings



# QBO Payroll Tax Payments and Filings

## What's Happening

- New QBO Payroll Subscribers
- November 15th, 2025
- Can no longer Opt Out of Automatic Taxes and Form Filings







# THE STATE OF QUICKBOOKS DESKTOP

Marjorie Adams, CEO



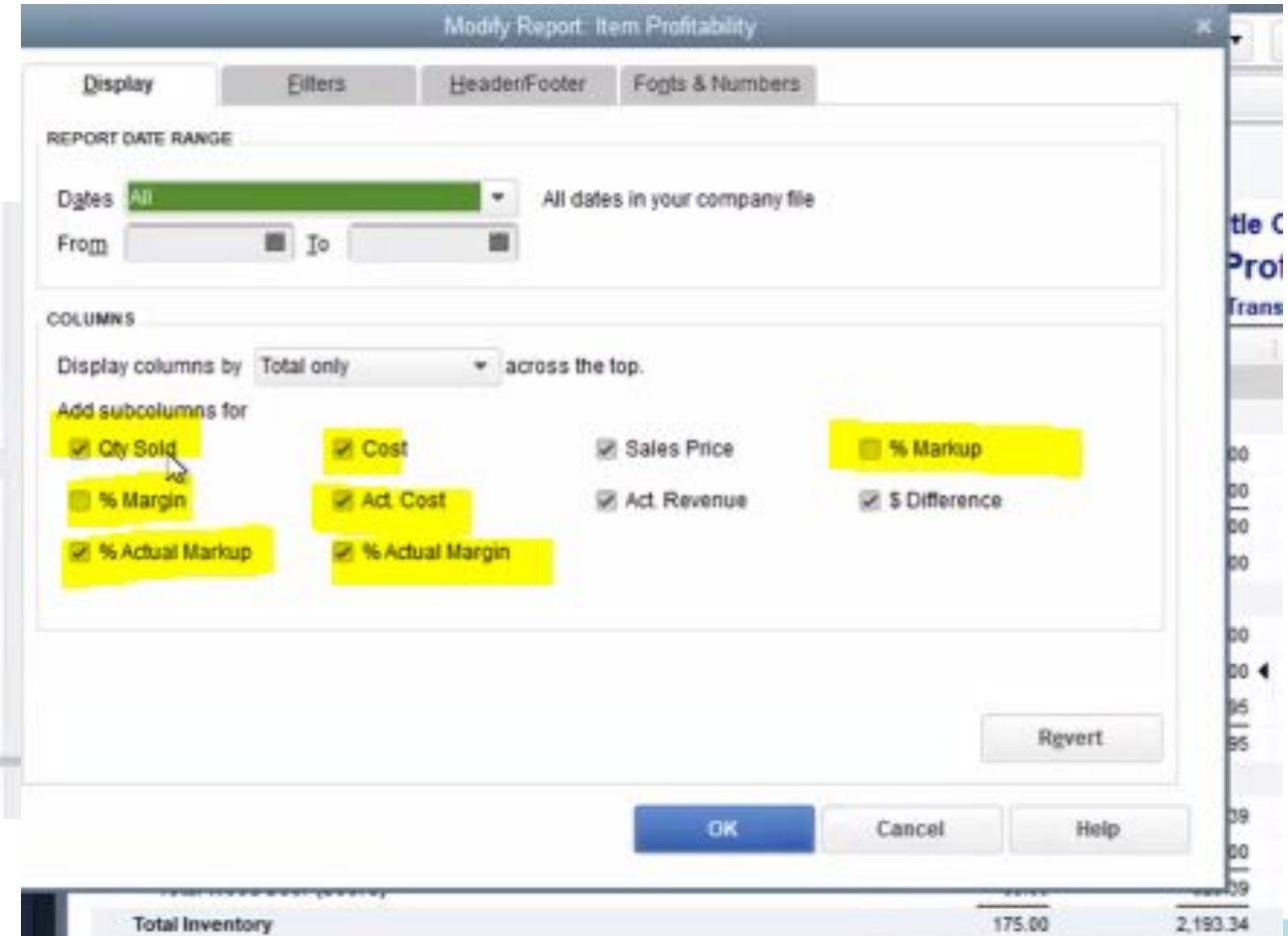
Fourlane®

## 01

## State of QuickBooks Desktop

- QuickBooks Desktop is NOT going away
  - New licenses – No Lifetime Discount
  - Re-install not needed annually
  - Product updates pushed quarterly

# QBDT Feb Update - Item Profitability Reporting





# QBDT Feb Update - Search on Reports

Microsoft Remote Desktop Edit Connections Window Help

Sample Rock Castle Construction - Intuit QuickBooks Enterprise Solutions 24.0

Company or Help

Inventory Stock Status by Item

Customize Report Comment on Report Share Template Memorize Print E-mail Excel Hide Header Collapse Rows Refresh Create Auto PO's

Dates This Month-to-date From 01/12/2026 To 15/12/2026 Use avail qty to reorder Hide zero QOH Full Assemblies Zoom 100% Hide Category

Show Filters

7:57 PM  
12/15/26

Rock Castle Construction  
Inventory Stock Status by Item  
December 1 - 15, 2026

	Category	Pref Vendor	Reorder Pt (Min)	Max	On Hand	On Sales Order	For Assemblies	Available	U/M	Order	On PO	Reorder Qty	Next Deliv	Sales/Week
Uncategorized														
Inventory														
Cabinets (Cabinets)														
Cabinet Pulls (Cabinet Pulls)	Uncategorized	Patton Hard...	15		423	0	0	423	ea		0	0		12.1
Light Pine (Light pine kitchen cabinet wall unit #CLD-123...	Uncategorized	Patton Hard...	0		6	2	0	4			0	0		0
Cabinets (Cabinets) - Other	Uncategorized	Thomas Kit...	15		0	0	0	0			0	16		0
Total Cabinets (Cabinets)					429	2	0.00	427.00	ea		0			12.1
Door Frame (standard exterior door frame)	Uncategorized	Patton Hard...			21	0	-15	6			0	0		0
Hardware														
Brass hinges (standard interior brass hinge)	Uncategorized	Perry Wind...			246	0	-45	201	ea		0	0		0
Doorknobs Std (Doorknobs Part # DK 3764)	Uncategorized	Perry Wind...	50		124	0	-15	109			0	0		5.1
Lk Doorknobs (Locking interior doorknobs Part # DK415)	Uncategorized	Perry Wind...	50		122	0	0	122			0	0		1.9
Hardware - Other	Uncategorized	Patton Hard...			0	0	0	0			0	0		0
Total Hardware					492	0	-60.00	432.00	ea		0			7
Wood Door														
Exterior (Exterior door - #P-10561)	Uncategorized	Perry Wind...	5		16	0	0	16			0	0		1.9
Interior (Interior door - P-1870551)	Uncategorized	Perry Wind...	5		47	0	-15	32			0	0		6.1
Wood Door - Other	Uncategorized	Patton Hard...			1	0	0	1			0	0		0
Total Wood Door					64	0	-15.00	49.00			0			8
Total Inventory					1,026	2	-90.00	914.00	ea		0			27.1
Assembly														
Interior Door kit (complete interior door)	Uncategorized		5		20	0	15	35			0	0		0
Total Assembly					20	0	15.00	35.00			0			0
Total Uncategorized					1,026	2	-75.00	949.00	ea		0			27.1
TOTAL					1,026	2	-75.00	949.00	ea		0			27.1

Act. Sales...	Amount	Balance
1,799	1,799.00	1,799.00
	-1,500.00	299.00
1,799	1,799.00	2,098.00
	-1,500.00	598.00
400.00	800.00	1,398.00
	-3,000.00	-1,602.00
1,800	1,800.00	198.00
	-1,500.00	-1,302.00
3,500	3,500.00	2,198.00
	-1,500.00	698.00
	-3,000.00	-2,302.00
	-2,302.00	-2,302.00
	-2,302.00	-2,302.00
	-2,302.00	-2,302.00
	-2,302.00	-2,302.00

Flooring (Flooring)	0.00	0.0%	0.0%
Fluorescent Ceiling Lighting (Fluorescent Lights)	0.00	-100.0%	100.0%
Lighting (Lighting)	0.00	-100.0%	100.0%
Patio Door	200.00	60.3%	37.6%
Plumb Fixtrs (Plumbing fixtures)	0.00	-100.0%	100.0%
Window (Window)	0.00	0.0%	0.0%
Total Parts	2,099.98	-68.7%	-219.9%

# QBDT Feb Update – Custom Fields

Modify Report: Inventory Stock Status by Item

Display Filters HeaderFooter Foots & Numbers

CHOOSE FILTER

size Size

FILTER

Size
All
All
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SIZE FILTER

Select one or more item from the dropdown.

Tell me more...

CURRENT FILTER CHOICES

FILTER	SET TO
Date	This Month-to-date
Item	All inventory and a...
Posting Status	Either

Remove Selected Filter

Revert

# QBDT May Update

- Changing Shipping Manager – ShipEngine
- Changes to Paste from Excel
  - Vendor Items – Name Drop down and populated
  - Added Alternate Vendor Pop Out
- Enhanced Inventory Changes
  - Must type “ACCEPT” to turn on
  - Fixed that if you do PO to Item receipt, then item receipt to Bill it would not link back to PO
- Customer Contacts
  - Can select additional contacts on send

Select a list    Customize columns to display    Paste from Excel or type to add to or modify your list.

Find  Search within results

Currently Editing: Hook

ITEM NAME	ITEM DESCRIPTION	ITEM COST	VENDOR PART NUMBER	PURCHASE UNIT	LEAD TIME	NOTES	VENDOR TYPE
Hook	Retainer Hook, Manual Strap	0.00		Each			None
Base - BL	Anchor Base, Black	0.00		Each			None
Hex Tool	T Style Hex Tool	0.00		Each			None
Spring	Spring	0.00		Each			None
Edge - CL	Leading Edge, Clear	0.00		Each			None
Pump Pump BP	Rule Pump, Bass Plate	0.00		Each			None
Pool Covers Cover -AQ	Pool Cover, Aqua	0.00		Each			None
Pool Covers Cover -LB	Pool Cover, Light Blue	0.00		Each			None
Anchor Adhesive	Adhesive, Anchor	0.00		Each			None
RD-14in	Rope w/ Core 1/4" - Per Foot	0.00		Foot			None
Rope	Rope	0.00		Foot			None
Anchor 12x1	Anchor, 12x1 RedCap	0.00		Each			None
Dell	0034-121 Cardless Cell	0.00		Each			None
Roller -4	0034-270 Rolly Roller #4	0.00		Each			None
Pedestal - DR	PowerTrak, Drive Pedestal	0.00		Each			None
Screws-SC-12	Screw, #12 Drill Flx HWH #3 Tex	0.00		Box of 100			None
Drum - AL	Drum, 4" Aluminum	0.00		Each			None
Hook - SR	Strap Hook, Manual Strap	0.00		Each			None
Connectors - UR	UR- Connectors	0.00		Each			None
Screws-SC-10x5-SS	Screw, 10x10 phl pan SS	0.00		Box of 100			None
J Box	Box, 10"x1 Single J Box	0.00		Each			None
Grommet 4	Grommet, #4 Sticks	0.00		Each			None
Alt Spring	Anchor Spring	0.00		Each			None
Pool Covers Cover -FG	Pool Cover, Forest Green	0.00		Each			None
Pin - BL	Anchor Pin, Black	0.00		Each			None
Washer - RU	Washer, Rubber	0.00		Each			None
Pool Covers Cover -DB	Pool Cover - Dark Blue	0.00		Each			None

Send Invoice

FROM: parthgmd5@gmail.com

TO: Operations Manager - Josh[josh1@gmail.com]

ATTACH: Operations Manager - Josh[josh1@gmail.com]  
Accounts Payable Manager - Rob[rob1@gmail.com]  
Accounts Payable Manager - Rob[rob1@gmail.com]

TEMPLATE: Invoice 3 from R1

SUBJECT: Dear Customer:  
Please see attached invoice number-3 which is due for payment.  
Thank you for your business.  
Sincerely,  
R1

Check Spelling

Send Cancel

Invoice

Invoice 3 from R1

Quantity	Description	Unit	Amount



# QBES Support Fixes

- 01** QBO to QBDT conversion tool fixed
- 02** Fixed latency with opening a file with attachments
- 03** Fixed unable to log into Intuit account

# Intuit Enterprise Suite: Identifying the Right Fit

Flags and Triggers	Pain Points
Growing business	<ul style="list-style-type: none"><li>• Operations not scaling</li><li>• Multi-entity accounting needs</li><li>• AR/AP unmanageable</li><li>• Reliant on manual processes</li></ul>
Ineffective tech stack	<ul style="list-style-type: none"><li>• Scalability concerns</li><li>• Third-party app dependent</li><li>• Integration issues</li><li>• Manual processes</li></ul>
Lack of visibility across the business	<ul style="list-style-type: none"><li>• Unclear growth and profitability drivers</li><li>• Insufficient reporting and insights</li><li>• FP&amp;A non-existent and/or spreadsheet-based</li><li>• Limited access to capital</li></ul>

# Intuit Enterprise Suite: When not a good fit

Flags	
Needs advanced inventory	Manufacturing, wholesale, and retail businesses are most affected, especially those who need multiple inventory locations, lot/bin tracking, bill of materials, and kit creation.
Needs global entity/multi-currency	Intuit Enterprise Suite supports USD currency and the English language.
Needs granular user permissions and custom roles	ERP-level role customizations and user management are not yet available in Intuit Enterprise Suite.



# 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](#)

## Polling Question 2

# How are you approaching the move to the cloud?

(multiple choice answer)

- ☐ Moving to QBO
- ☐ Utilizing VPN/RDP (IT Services)
- ☐ Adding Cloud Hosting
- ☐ None of the above

Spotlight Sponsor - [Learn More](#)

 Qbox

Fourlane CX (Cloud Experience) is a cloud-based interface for QuickBooks Desktop.



### What is Fourlane CX?

Fourlane CX (Cloud Experience) is a cloud-based user interface for QuickBooks Desktop – a great solution for users who prefer to use QuickBooks Desktop vs Online but want a true cloud-based application.



### A familiar look and experience

Fourlane CX has the same look and feel as QuickBooks Desktop with features easily accessible such as creating estimates, accessing the chart of accounts, creating sales orders, reporting, inventory, invoicing, and many other tasks typically done in QuickBooks Desktop.

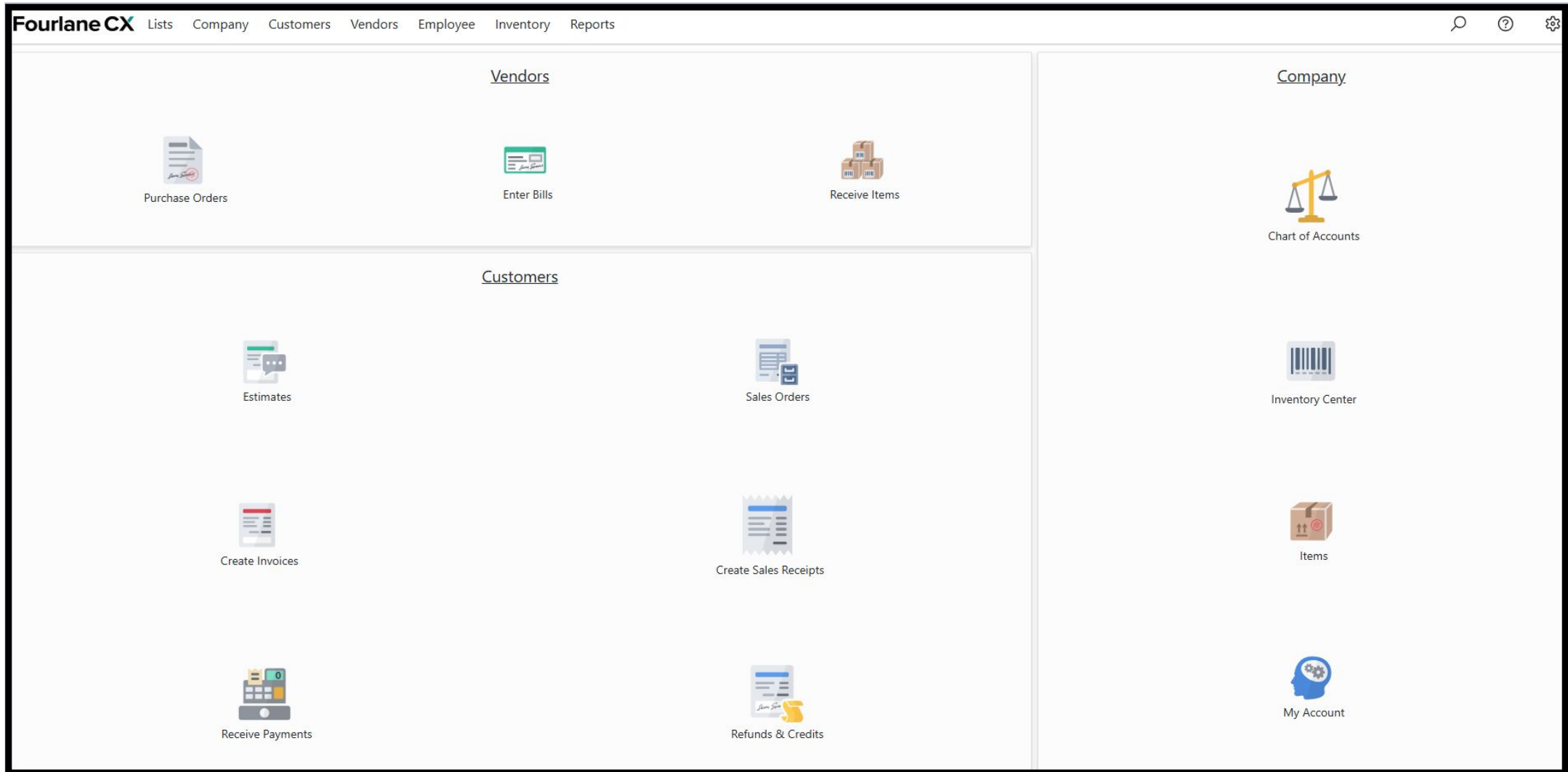


### Lightning-fast and scalable

Is your QuickBooks Desktop file struggling to keep up? Fourlane CX is built from the ground up to be fast. Fourlane CX also supports multiple company files and over 40 users.



# Fourlane CX: Similar Look & Feel





**Let's take a look a live look....**

## Polling Question 3

How do you manage the price of QuickBooks licenses?

- ☐ Work directly with an Intuit Rep
- ☐ Work through a VAR/QSP
- ☐ I don't manage licenses and/or pricing



# Pricing

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Add-ins

Analyze Data

Create PDF and Share link

Create PDF and Share via Outlook

Spreadsheet Sync

	A	B	C	D	E	F	G	H
1								
2	Gold 10	\$ 71.04	License Fee per User					
3	Users	10						
4	Hosting Per User	\$ 45.16						
5	Fourlane CX Premium	\$ 499.00						
6	Shift to FourlaneCX	7						
7								
8	QBES + Hosting							
9	QBES Licensing Fee	\$ 8,525.00						
10	QBES Support Fee							
11	Hosting Fee	\$ 5,419.00						
12		\$ 13,944.00						
13								
14	QBES + Hosting + FourlaneCX							
15	Gold 3	\$ 3.902.00						



Paste

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Add-ins

Analyze Data

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	A	B	C	D	E	F	G	H
7								
8	QBES + Hosting							
9	QBES Licensing Fee	\$ 8,525.00						
10	QBES Support Fee							
11	Hosting Fee	\$ 5,419.00						
12		\$ 13,944.00						
13								
14	QBES + Hosting + FourlaneCX							
15	Gold 3	\$ 3,902.00						
16	QBES Support Fee							
17	Hosting Fee	\$ 1,546.00						
18	Fourlane CX Fee	\$ 5,988.00						
19		\$ 11,436.00						
20								
21								

FileHomeInsertPage LayoutFormulasDataReviewViewAutomateHelpAcrobatQuickBooks

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Adobe Acrobat

Create PDF and Share via Outlook

Spreadsheet Sync  
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	A	B	C	D	E	F	G	H
13								
14	QBES + Hosting + FourlaneCX							
15	Gold 3	\$ 3,902.00						
16	QBES Support Fee							
17	Hosting Fee	\$ 1,546.00						
18	Fourlane CX Fee	\$ 5,988.00						
19		\$ 11,436.00						
20								
21								
22	Savings (Difference)	\$ 2,508.00						
23								
24	<b>Fourlane</b>							
25								
26								
27								

# Service Opportunity

# Case In Point:

## Streamlining a 2.8 GB QuickBooks Desktop File with Furlane CX



### Challenge

- QuickBooks file had **swollen to 2.8 GB**
- **Slow performance** and occasional data integrity warnings due to concurrent logins (30 licenses with direct access)
- **Negative inventory errors** that interfered with normal workflows

### Solution

- **Phase 1:** Deep-dive file audit → identify bloating transactions → remove audit trails & obsolete entries → compress the file
- **Phase 2:** Introduce **Furlane CX** web interface + sync client → reduce direct load on the QuickBooks file + allow users to work via browser

### Benefits Achieved

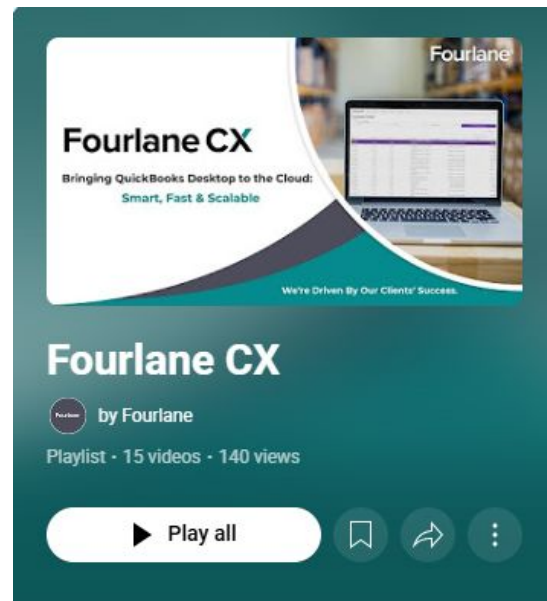
- **File size shrunk from ~3 GB to just 1 GB**, without losing any financial integrity
- **Faster** reports, **smoother** navigation, **less risk** of corruption
- The shift away from 30 desktop QuickBooks licenses toward a **leaner, browser-based setup**
- **Cleaner inventory data, fewer negative balances, better alignment between inventory and balance sheet**






# Do-It-Yourself Simplicity

## Easy Setup - No Extra Cost

Get started with Furlane CX without paying for expensive implementation. Our intuitive platform is designed for self-setup, and [our library of step-by-step YouTube tutorials](#) walks you through everything—from connecting to QuickBooks and creating custom fields to navigating reports with ease.



- **Furlane CX Troubleshooting Training Session**  
Furlane • 34 views • 2 months ago  
10:04
- **Furlane CX Print Templates**  
Furlane • 16 views • 2 months ago  
11:09
- **User and Role Creation in Furlane CX**  
Furlane • 18 views • 2 months ago  
5:46





## **Do I need a QuickBooks Desktop license in order to use Furlane CX?**

Yes, you will need an active QuickBooks Desktop license in order to use Furlane CX as an add-on app designed for QuickBooks Desktop. We recommend a QuickBooks Desktop license for your core accounting users (payroll, banking, sales tax, etc.) and all other users in Furlane CX – saving you money on QuickBooks licensing and hosting costs.



## **What type of security and backups do you provide for my data?**

Furlane CX is built on Amazon Web Services, the most secure global cloud infrastructure. All Furlane CX data is stored and routinely backed up in highly secure AWS data centers that are trusted by millions of business customers.



## **Is there a contract for signing up with Furlane CX?**

Furlane CX is a monthly subscription with no annual contract requirements – cancel anytime.



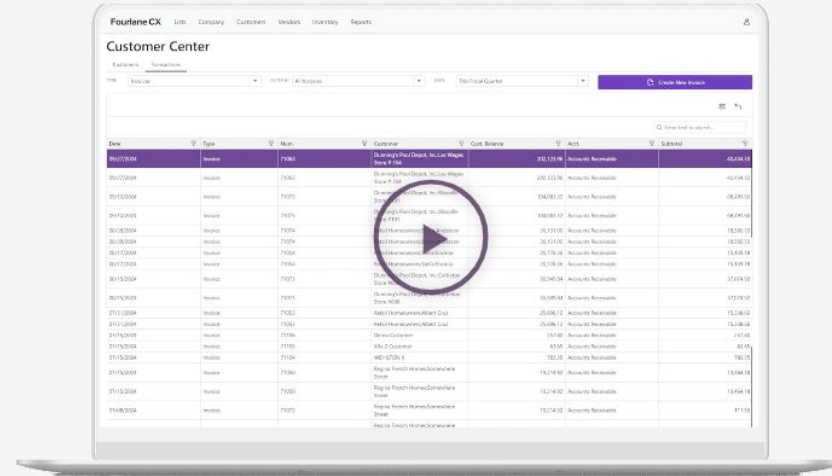
## **Do I have to run any maintenance?**

No, since it is a cloud-based software, we automatically update and maintain for you!



## **Which versions of QuickBooks is Furlane CX compatible with?**

Furlane CX is compatible with versions currently supported by Intuit. If you need assistance or have questions regarding your QuickBooks Desktop license, Furlane is also a QuickBooks Reseller and Solution Provider and can help.



### Lightning-Fast Speed

Tired of QuickBooks Desktop slow performance? Fourlane CX is built from the ground up to be fast.

## Polling Question 3

Was this information useful?

Would you like to learn more about Fourlane CX?

☐ Yes

☐ No

☐ N/A





# Questions?

Marjorie Adams, CEO

[marjorie@fourlane.com](mailto:marjorie@fourlane.com)

800.931.2120

[www.Fourlane.com](http://www.Fourlane.com)



**Fourlane®**

# 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



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**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**  
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**  
about 3 years ago

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

1 2 Share



# 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>

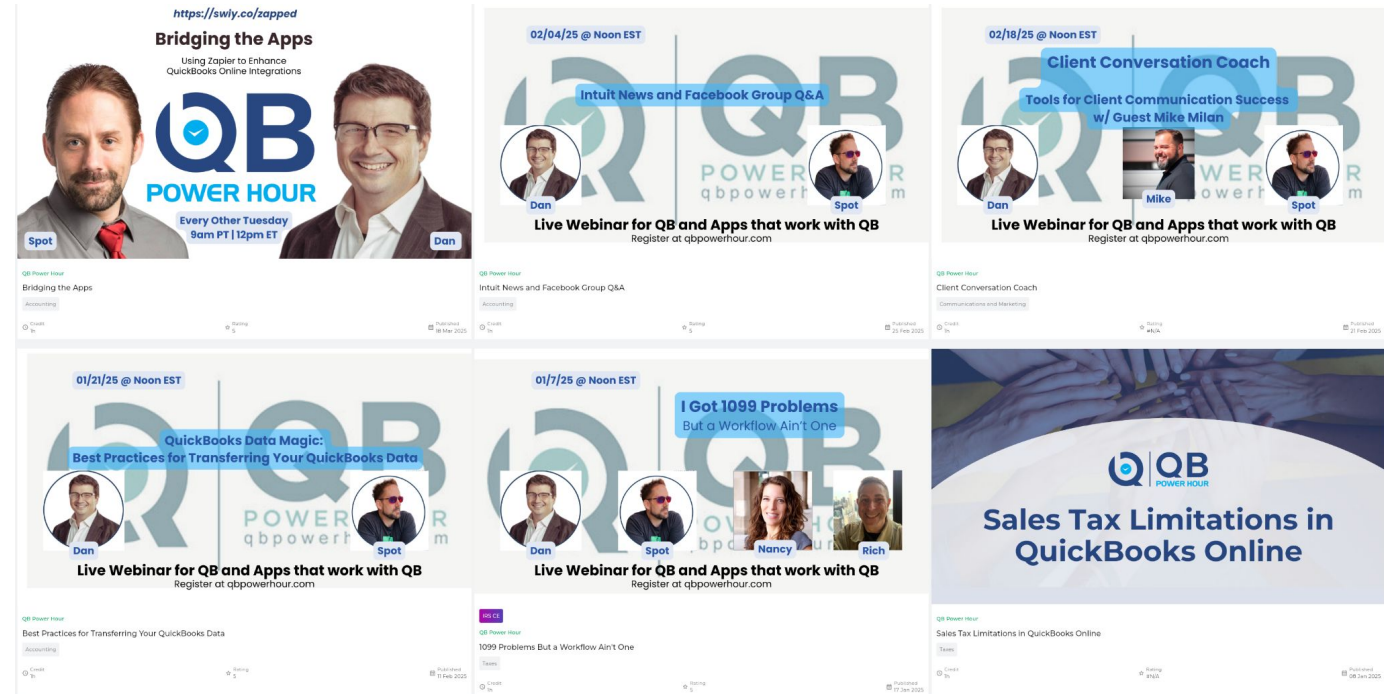




# Appendix

# 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



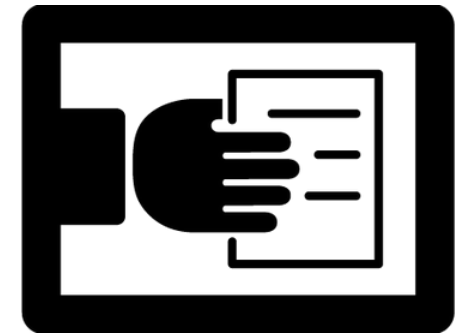
PLEASE USE THE Q&A  
ICON FOR QUESTIONS  
ON TODAY'S TOPIC

## 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

