

Live Webinar Series

Discussing QuickBooks & Apps
that work with QuickBooks



Every Other Tuesday
9am PT | 12pm ET

Spot

Dan

QuickBooks Gratitude 2025

Features We Love



Sharrin



Tuesday 11/25
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** ~17,800 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

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 and Open AI Partnership

Features We are Grateful For

- Payroll Corrections in a Prior Quarter
- Intuit App Integration Improvements
- Customizing My Menu
- Reclassifying Transactions from the Vendor Page
- Desktop Migration Improvements



Polling Question 1

Which version of QuickBooks do you use to support your clients?

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

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method



Intuit News: Intuit and Open AI Partnership



Intuit and Open AI Partnership

What's Happening

- Intuit Investing \$100M into OpenAI
- Intuit offerings inside ChatGPT
- Leveraging Open AI's Advanced AI models



[Blog Article](#)

Intuit and Open AI Partnership



What?!? What about Intuit Assist

- Frontier models are expensive and fast-moving
- More Exposure from ChatGPT
- People are already using it that way
 - Next Level Google
 - Analyzing Reports - Custom GPTs
- Context (Intuit) and Brains (OpenAI)

[Blog Article](#)

Features We Love

Payroll Corrections in a Prior Quarter

- All versions allow for Prior Payroll to be entered
- Amended Payroll Forms and W-2s
 - QBO Premium & Elite Only
 - 6-8 Weeks Turnaround



[Intuit Article](#)







Integrations

Integration Transactions

- Amazon Business
- Online Sales Channels
- PayPal
- Square

Sync your sales channel data with QuickBooks

Skip the manual entry. Connect your sales channels to automate tasks and bring in even more transaction data.

 Amazon Business Purchases Automatically import your expense transactions from Amazon Business purchases Learn more Connect free integration	 Shopify Connector Automatically import Shopify transactions to reduce manual data entry Learn more Connect free integration	 PayPal Connector Automatically import PayPal transactions to reduce manual data entry Learn more Connect free integration
 Squarespace Connector Automatically import Squarespace transactions to reduce manual data entry Learn more Connect free integration	 Square Connector Automatically import Square transactions to reduce manual data entry Learn more Connect free integration	 Wix Connector Automatically import Wix transactions to reduce manual data entry Learn more Connect free integration

Amazon Business

- Order Details on Amazon
- Split Purchases

IT kbooks *Travis & Sharrin

Navigate or search for transactions, contacts, reports, and more

My experts

DATE	SOURCE/PAYEE	DESCRIPTION	CATEGORY OR MATCH	SPENT	RECEIVED	ACTION
08/23/2025	Amazon Business (American Express ...1003)	Items (2)	Beauty Products	\$14.98		Add

Order details

KRISTOFER BUCKLE Cashmere Slip® Longwear Lipstick Duo, 0.11 oz. (each) | Creamy, Richly Pigmented Lipstick That Delivers Bold Color for Up To 8 Hours | Tender/Kissed Qty: 1 **\$ 7.49**

Category: 620110 Personal:Health/Beauty:Be

Order# 111-1866010-3149843

KRISTOFER BUCKLE Cashmere Slip® Longwear Lipstick Duo, 0.11 oz. (each) | Creamy, Richly Pigmented Lipstick That Delivers Bold Color for Up To 8 Hours | Dare/Obsessed Qty: 1 **\$ 7.49**

Category: 620110 Personal:Health/Beauty:Be

Order# 111-1866010-3149843

Payee: Amazon.com PO Number: Enter a PO Number

Memo: https://www.amazon.cc

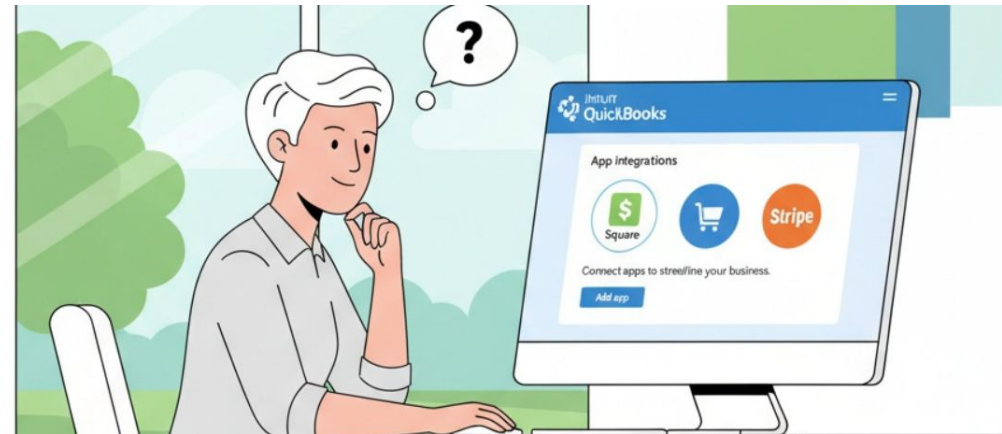
Order subtotal: \$14.98
Grand total: \$14.98

Add

Square Connector

The App with many Names

- Sync with Square (retired)
- Connect with Square (legacy)
- Square Connector (Current)
 - Supports multiple Square locations
 - Item Mapping Square products to QuickBooks products/services
 - Imports customer info, payment methods, and item-level transaction details.




[Blog Article](#)

Integrations Overview


- Status
- Link to Connect
- Tasks

My integrations ☺


×




Google Sheets In...




nettTracker




Spreadsheet Sync




Autymate




Melio




Method CRM



Online Invoice P...



PayTraQer - Shop...




Ramp

Integrations overview

Client integrations

Recommended

From Intuit




Mailchimp

+

 Find integrations


▼ Apps connected by others (9)



AutoEntry

Reconnect


⋮



Cyfe-2

How to reconnect


⋮



Expensify

How to reconnect


⋮



Firm.ai

How to reconnect


⋮



RUN Powered by ADP

How to reconnect

⋮



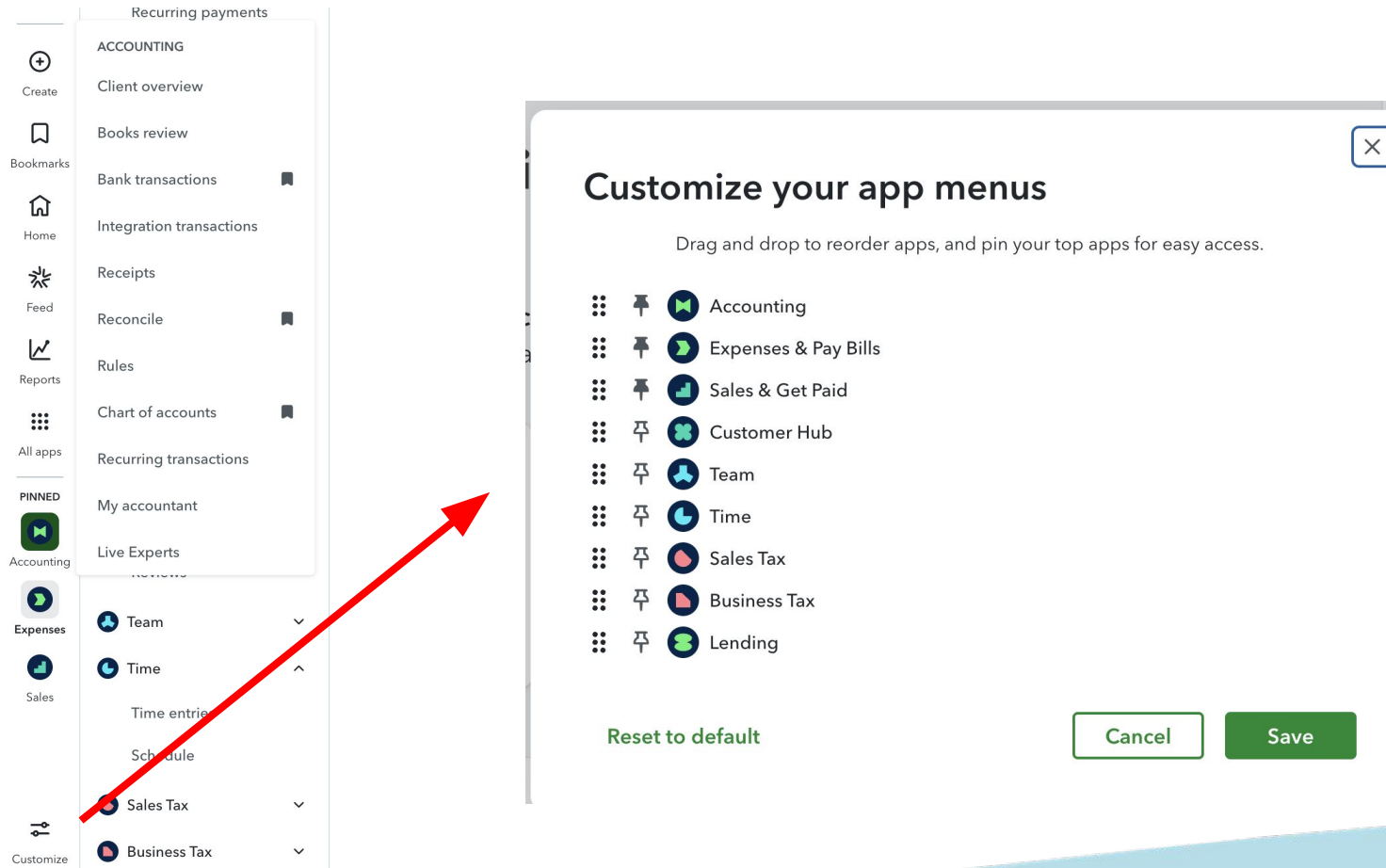
Xenett

How to reconnect

⋮

Customizing Navigation

Customizing Left Side Navigation



The image shows the QB app interface with a left side navigation menu and a customization dialog. The navigation menu is divided into sections: "Recurring payments", "ACCOUNTING", "Client overview", "Books review", "Bank transactions", "Integration transactions", "Receipts", "Reconcile", "Rules", "Chart of accounts", "Recurring transactions", "PINNED", "My accountant", "Live Experts", "Team", "Time", "Time entries", "Schedule", "Sales Tax", and "Business Tax". A red arrow points from the "Customize" option at the bottom of the navigation menu to the customization dialog. The dialog is titled "Customize your app menus" and contains a list of apps with drag handles. The apps listed are: Accounting, Expenses & Pay Bills, Sales & Get Paid, Customer Hub, Team, Time, Sales Tax, Business Tax, and Lending. At the bottom of the dialog are buttons for "Reset to default", "Cancel", and "Save".

Recurring payments

ACCOUNTING

Client overview

Books review

Bank transactions

Integration transactions

Receipts

Reconcile

Rules

Chart of accounts

Recurring transactions

PINNED

My accountant

Live Experts

Team

Time

Time entries

Schedule

Sales Tax

Business Tax

Customize

Customize your app menus

Drag and drop to reorder apps, and pin your top apps for easy access.

- Accounting
- Expenses & Pay Bills
- Sales & Get Paid
- Customer Hub
- Team
- Time
- Sales Tax
- Business Tax
- Lending

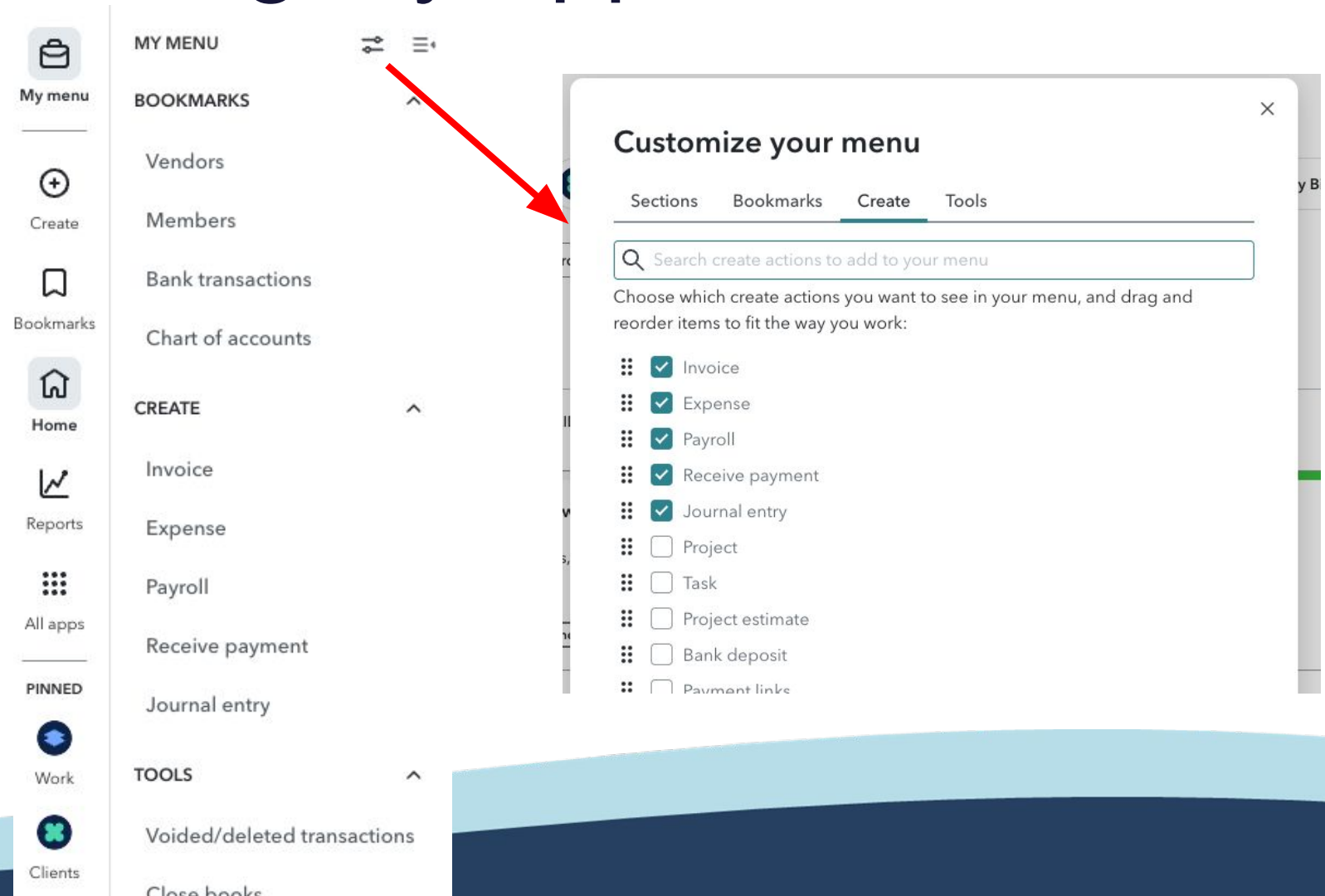
Reset to default

Cancel

Save

Customizing My Apps Menu

- Accountant Customization
- Sections
 - Bookmarks
 - Create
 - Tools



Polling Question 2

How do you feel about customization

- ☐ Users should be able to customize their experience
- ☐ Makes it challenging to support clients when they can have a personalized workflow
- ☐ One way to do things
- ☐ None of the above

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Bulk Editing


Reclassify


Reclassify Transactions


- Accountant and QBO Advanced
- Accounts
- Class
- Location


 MY MENU


 Create


 Bookmarks


 Home


 Feed


 Reports

 All apps

 PINNED

 Accounting

 Expenses

 Sales

BOOKMARKS

Vendors

Bank transactions

Reconcile

Chart of accounts

CREATE

Expense

Bank deposit

Receive payment

Check

Journal entry

TOOLS

Voided/deleted transactions

Close books

Client requests

Notes

Reclassify transactions

Reports options

Write off invoices

Account types

Profit and loss

Basis

☒ Accrual
 ☐ Cash

Find an account

ACCOUNT	AMOUNT
410000 Personal Income Income	
410300 Consulting Services Income	\$30,000.00
610000 Household Expenses	
610100 Utilities/Phone Expenses	
610110 Alarm Expenses	\$8.33
610130 Garbage/Recycling Expenses	\$23.29
610140 Gas and Electric Expenses	\$230.06
610150 Water/Sewer Expenses	\$6.99
610160 Internet Expenses	\$282.52
610170 TV/Movie Subscriptions Expenses	\$58.79
610180 HOA Expenses	\$72.00
610200 Automobile	

Reclassify Transactions

From:

10/01/2025

To:

10/31/2025

Fewer filters

Type

All

Customer/Vendor

Select

Modify

All

Account: All

Find transactions

Search by memo or description



Do a quick cleanup
Reclassify the account, class on a bunch of transactions at once. Set date range to find the transactions you want to change.

Batch Actions Vendor Transaction List

- Accountant and QBO Advanced
- Accounts
- Class
- Location

Filter by name or details

Sort by name ▲

- 1 Postal \$0.00
- 1-800-FLOWERS \$0.00**
- 18 Bin \$0.00
- 1800PetMeds \$0.00
- 1Password \$0.00
- 1Stop Bedrooms \$0.00
- 24 Hour Fitness \$0.00
- 360 Painting LV \$0.00
- 595 Craft Kitchen \$0.00

1-800-FLOWERS

Company - Billing address - Bill Pay ACH info -

Notes [Add notes](#)

SUMMARY

\$0.00
Open balance

\$0.00
Overdue payment

Transaction List Vendor Details Notes

All transactions ▼ Filter Dates: Last 12 months

2 transactions: \$172.88 [Categorize](#) [Delete](#)

✓	DATE	TYPE	NO.	PAYEE	CATEGORY	TOTAL	ACTION
✓	08/28/2017	Expense		1-800-FLOWERS	690230 MISC:Gifts:All Oth	\$93.22	View/Edit ✓
✓	08/25/2017	Expense		1-800-FLOWERS	SOS Business Expenses (d	\$79.66	View/Edit ✓
Selected total						\$172.88	

First Previous 1 - 2 of 2 Next Last

Batch Actions Bank Feed

Relay 2.0 Checking ▾ [Give feedback](#) | [Up](#)

Relay 2.0 Cl
Bank: \$
Posted: \$6,57

Pending

Search

<input type="checkbox"/>	Date
<input checked="" type="checkbox"/>	11/24
<input checked="" type="checkbox"/>	11/24

Edit selected transactions

Transaction type

Vendor/Customer name

Account

Class

Location

Member/project

☐ Billable

[Cancel](#) [Apply](#) [Apply and post](#)

Bulk Edit - Spreadsheet Sync

- Advanced Only
- Many Lists & Transactions
- Done in Excel
 - Pull into Excel
 - Edit
 - Push back to QuickBooks



Desktop Migration Improvements

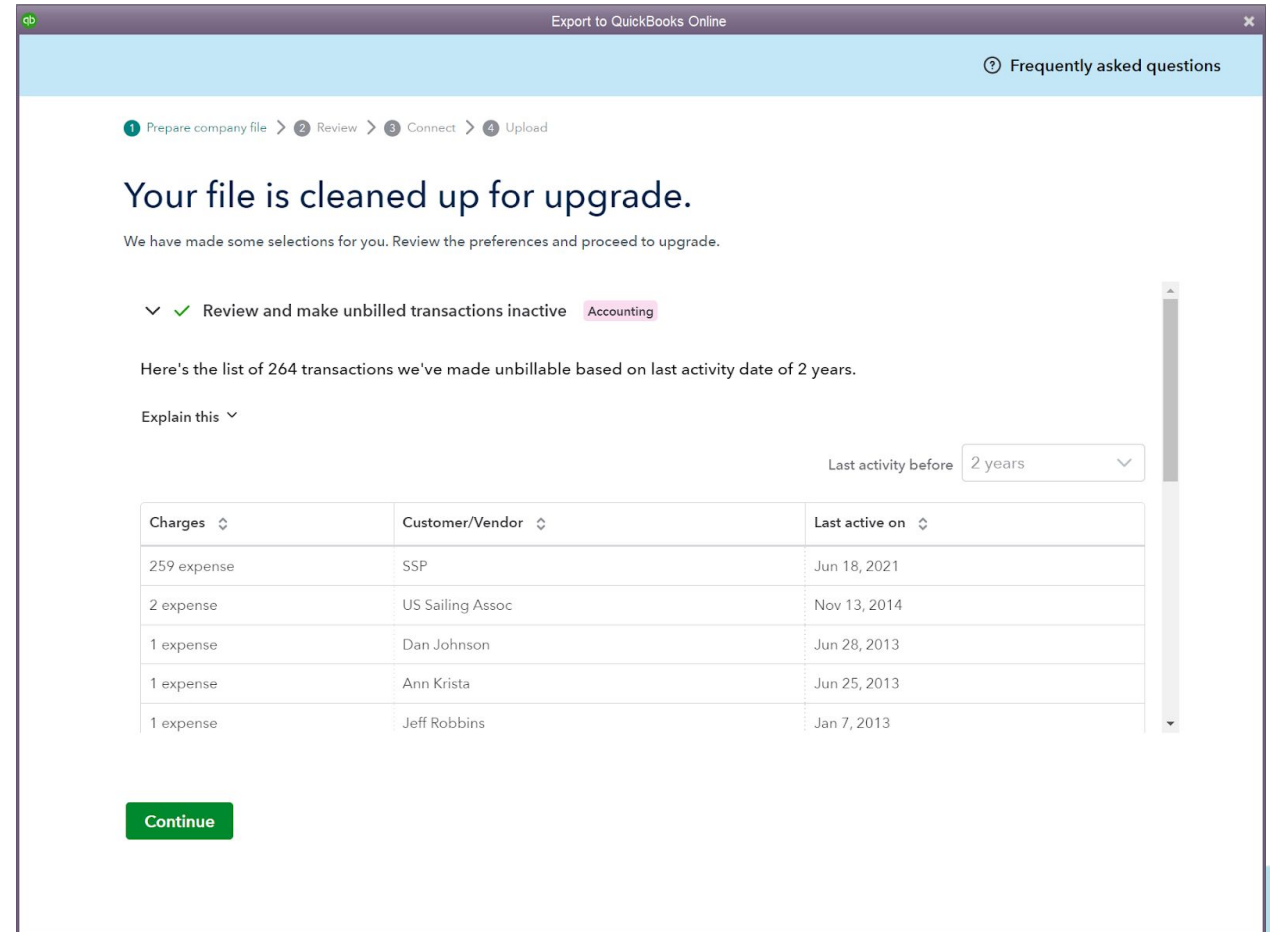
Desktop Migration Improvements

- Payroll & Payments Setup and service migration
- Attachments
- NEW Unbilled Charges



Unbilled Charges - Corrected in Desktop

- Reimbursable Expenses & Unbilled time become Billed
- Really difficult to correct post conversion
 - Certain transactions altered during conversion
 - Inactive Lists
 - QBO Utility rarely worked
- New migration wizard corrects during migration (Backup included)



Export to QuickBooks Online

1 Prepare company file > 2 Review > 3 Connect > 4 Upload

Your file is cleaned up for upgrade.

We have made some selections for you. Review the preferences and proceed to upgrade.

✓ Review and make unbilled transactions inactive Accounting

Here's the list of 264 transactions we've made unbillable based on last activity date of 2 years.

Explain this ▾

Last activity before 2 years ▾

Charges ▾	Customer/Vendor ▾	Last active on ▾
259 expense	SSP	Jun 18, 2021
2 expense	US Sailing Assoc	Nov 13, 2014
1 expense	Dan Johnson	Jun 28, 2013
1 expense	Ann Krista	Jun 25, 2013
1 expense	Jeff Robbins	Jan 7, 2013

[Continue](#)

Polling Question 3

Was this information useful?


- ☐ Yes
- ☐ No
- ☐ N/A



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
 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

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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- Hats

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Upcoming Events

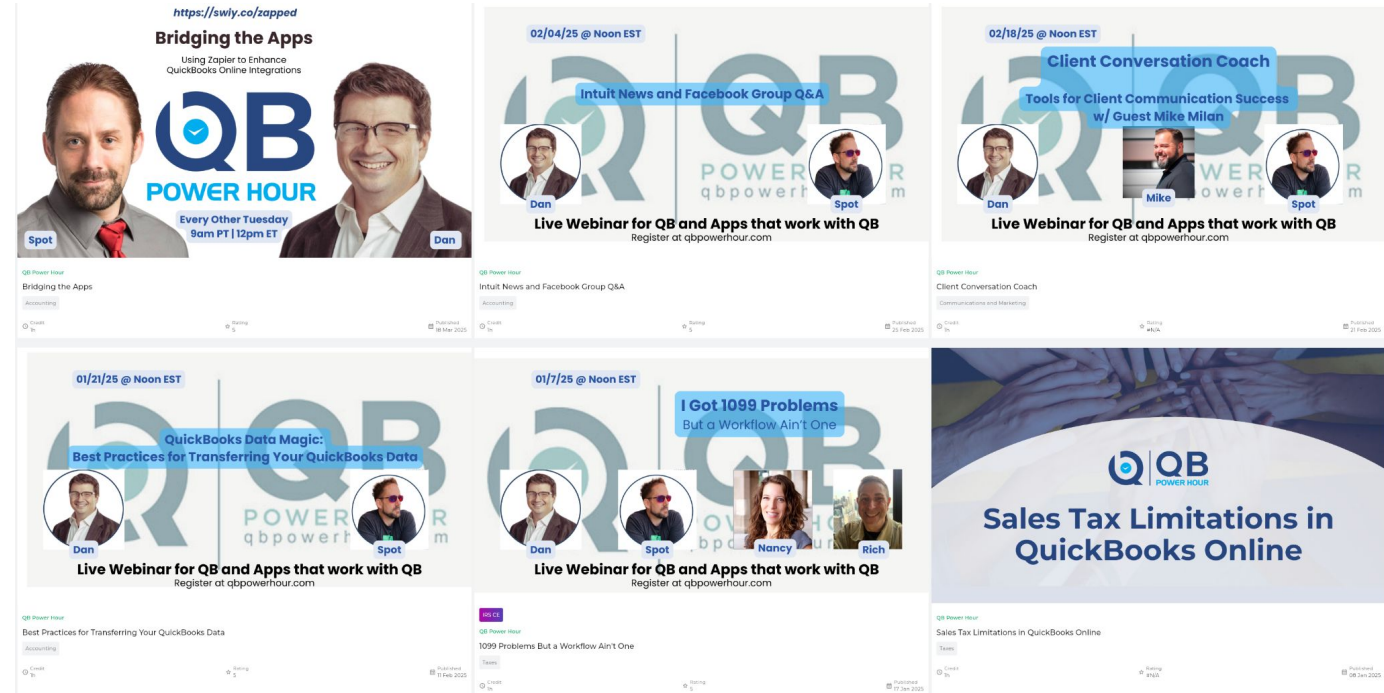
- QB Power Hour Webinar Series – every other Tuesday 12:00 pm Eastern
<http://qbpowerhour.com>
- Check the [website](#) for more upcoming events
- QuickBooks vCon and webinars:
<http://qbtrainingevents.com>



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



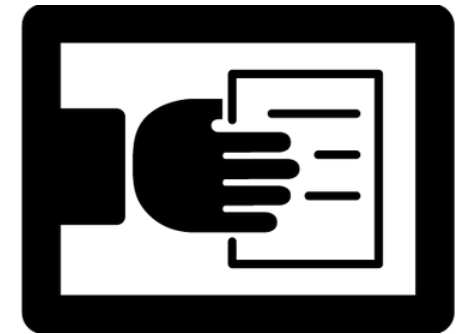
PLEASE USE THE Q&A
ICON FOR QUESTIONS
ON TODAY'S TOPIC

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

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