



7 TIPS TO MAKE THE MOST OF YOUR ACCOUNTING WITH QBO

Accounting is an extremely challenging task, as there are so many things you need to keep under control. That's why any solution that helps facilitate those different aspects of the process is welcomed on the market. You've definitely heard about or are using QuickBooks for your accounting. But are you sure you are making the most of it?

We have researched seven most helpful tips that you might not have thought about before, that can drastically change your practice!

1

LEVERAGE TESTING ENVIRONMENT

Since Accountant profiles are free to run on QuickBooks, why not create one that you can use anytime you need to test something? Most professionals will already be familiar with the accountant's habitat on QuickBooks, so all you need for having that safe space for testing new ideas is just a second email address away. Use it to safely experiment with Lists and Items, Inventory, COA , or invoice templates.

Pro-tip: One word – Sandbox. You might think of it as something that only developers use. You will not be wrong thinking of developers, but here is an idea: ANYONE can sign up for a Sandbox-anything! You do not have to be afraid of trying out new apps or features anymore. Test them in Sandbox. Besides QuickBooks Sandbox, sign up for PayPal and/or Stripe Sandboxes too to explore what they have to offer. All free



2

SAVE TIME WITH INTEGRATIONS THAT WORK WITH YOUR ACCOUNTING PLATFORM

Almost all types of payment platforms, e-commerce services, and CRM systems have integrations with other platforms. QuickBooks app store is famous for having a great diversity of options available. If you have a store on Magento, Shopify, or eBay, there are plenty of apps that can be extremely helpful for you. QuickBooks has many third-party apps that, for example, work with Amazon, Shopify, Bigcommerce, eBay, Etsy, Magento, WooCommerce Sync.

***Pro-tip:** Calculate the time that you can save up with the example of Synder - an app to sync PayPal, Stripe, and Square with QuickBooks. With the manual entry, it usually takes up to 3 minutes for every transaction you record, while the app performs the same action in just 1 second. Thus, with every transaction, you save up to 179 seconds. This means:*



Average Number of Online Transactions You Process in
1 month X 179 = Time You Can Save

For example, if you process around 1000 transactions a month, [Synder](#) is going to save you 49 hours a month. That's an entire workweek freed up!

3

IF YOU WANT TO AUTOMATE SOMETHING - SEARCH FOR A TOOL

Your brain is your most reliable computer. It comes up with great innovative ideas on an hourly basis, often without you noticing - listen to it. Try to acknowledge your thoughts when an idea of automating a routine task comes to mind. Catch it, write it down, search for it. Chances are that someone somewhere has already developed a great app for it!

Pro-tip: get paid and help your clients get paid on time and increase your cash flow. No need to check every client, the due date for their payments, and money transfers - just set up an automatic flow based on your QuickBooks data and send payment reminders before or after the due date. Learn how to [create this rule for your QuickBooks account](#) for FREE. You're welcome.



4

USE THE SEARCH TAB ON APPS.COM

QuickBooks apps are what makes QuickBooks unbeatable. Its [app store](#) is bursting with great solutions, but are you sure that the suggested ones are exactly what you need? Use the search tab to refine what you are looking for and what you get.

***Pro-tip:** read the reviews. A suggested app with bad reviews is likely to disappoint, while the one you search for with your specific keywords, that has many personal positive reviews is very likely to do exactly the job you need it to do!*

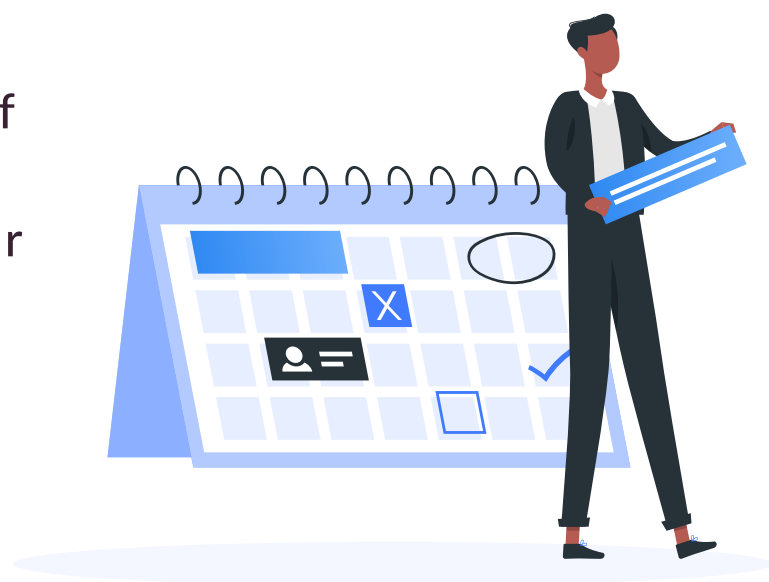


5

IMPORT YOUR DATA INTO QUICKBOOKS ONLINE USING GOOGLE SHEETS

You probably didn't know that there is a great option to import your data into QuickBooks Online through Google Sheets! It can be done with the help of [Excel Business Importer](#). You can not only import your data into QuickBooks Online in real-time but also are able to create schedules that will perform that process in the background without you launching the app.

Google Sheets is a great substitute for Microsoft Excel, and they are fully compatible. If you are using Microsoft Excel, you can copy & paste all of your data into Google Sheets and make your QuickBooks Online work even easier, saving time and money.



Pro-tip: let's assume you have your invoices data stored in a corporate program and you want to have it transferred into QuickBooks Online. Usually, there is a way to export such data into a CSV file (comma-separated values) or some other format native to your program. All of these formats can be easily copied into Google Sheets. Consult a guide on [how to open CSV in Google Sheets](#).

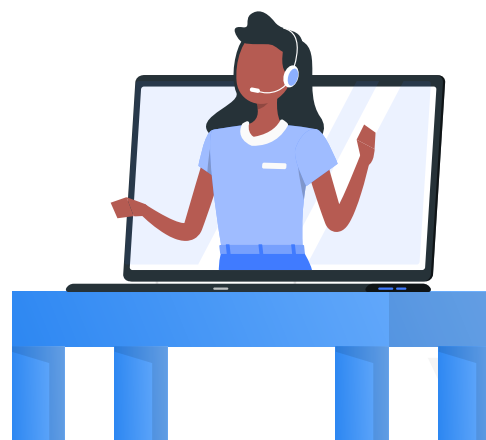
6

COME FOR AN INTUITIVE UI. STAY BECAUSE OF GREAT SUPPORT

Support represents what the company really is about. Are you considering purchasing an annual subscription for an app? Even if you're a pro, contact the support anyway. Look at the following:

- how quickly they get back to you;
- how many ways of contacting them are available (email form only is a no-no, at least email and chat are a must, better if there's also a live phone support);
- whether you're assisted by an actual human;
- whether general support is free;
- whether premium support is available;
- whether they look at your issue or just refer you to generic FAQs.

Purchasing an app subscription can be compared to entering a relationship. It can be so rewarding and pay for itself in the time you save by using it, but make sure to conduct the character assessment first - looking at the support is one of the best ways of doing that!



7

ASK TIMELY QUESTIONS

Quora is a household name but it is grossly undervalued in the business world. Did you know that asking a question there gives you an answer within 1 hour in 95 times out of 100? It's 30 seconds spent on asking a question and receiving an instant answer instead of having it bug you for days. Now that's the kind of math we like.

Pro-tip: *answering questions, on the other hand, can attract more clients to your accounting practice. Create a badge for you that highlights your expertise and start receiving leads without doing any extra work other than being helpful at what you do best.*

