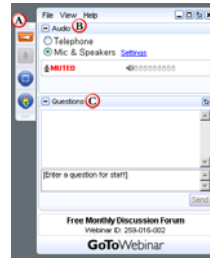


QuickBooks for Mac Overview for ProAdvisors

Bonnie Nagayama & Kimberly Gehant
June 7, 2013



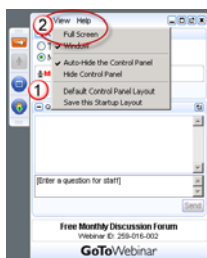
Using GoToWebinar (Basics)



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Agenda

- Introduction and Housekeeping
- Overview and demo of QuickBooks for Mac
- Determining if QuickBooks for Mac is a good fit for your clients
- Additional resources
- Wrap Up and Q&A

Speaker Bios



Bonnie Nagayama,
CPA

- Founded McWilliams & Associates in 1992, exclusive Intuit focus since 1997
- “Clients” are QB Professionals which we work with directly and via their clients
- Advanced Certified ProAdvisor
- Sleeter Group Consultant Network Member & Developer Advisory Panel Member



Kimberly Gehant

- QuickBooks for Mac Product Leader
- Joined Intuit in 2009
- Previously worked on several other products for small businesses
- Currently working with both small businesses and accounting professionals to improve QB Mac and better support its users

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Housekeeping

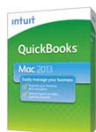
- If you would like CPE credit for this course, you will need to
 - Be on the call at least 50 minutes AND
 - Answer ALL three of the polling questions
 - Your CPE certification will be emailed as a PDF in 2-3 weeks
- This session will be recorded and available via <http://www.growyourpracticeapps.com/>
- The handouts are available via the link in the reminder email, or via <http://www.accountingsoftwaresecrets.com/intuit-app-center-webinars>

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Why QB Mac important for ProAdvisors to understand and support

- Rounding out client service
- Mac clients are happier with Mac products
- Practitioners need to know enough to efficient work with it
- Know where to get help when deeper dive is needed



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QuickBooks for Mac is built off the same concepts and features as QB Win



- Same workflows and main features
- Same core set of reports and insights
- Data converts back-and-forth to QB Windows format (can import a file into QBAE)

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QB Mac is a great fit for simple small businesses who want a Mac experience

- Small businesses, typically with fewer than 10 employees
- Simple businesses, especially service based businesses that don't have advanced inventory needs
- Business owners who appreciate the Mac user experience: design of the program, integration with Apple software (Calendar and Contacts), etc.

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QB Win better for larger businesses or those used to specific QB Win functionality

- **Online v. desktop payroll.** QuickBooks for Mac exchanges data with the online QuickBooks Payroll for Mac service. Payroll is not integrated as it is on Windows.
- **3rd party app integration.** Any applications that rely on the QuickBooks SDK, WebConnector, or App Center to access QuickBooks data will not integrate with QuickBooks for Mac. The workaround for some developers is IIF.
- **No Multicurrency.** QuickBooks for Mac does not support multicurrency.
- **No Online Bill Pay.** You can connect to most Financial Institutions to download your banking transactions into QB Mac, but will need to initiate Payments from your FI website.
- **Premier and Industry Specific users should exercise caution:** There's only one version of QuickBooks for Mac with a mix of Pro & Premier functionality.
 - **Limited Inventory features:** No assembly items, current availability, Inventory Center
 - **No Price Levels, Sales Orders, or Billing Rate Levels**
- **There is no QB Enterprise product for the Mac platform**
- **No Accountant's Copy.** QB Mac users have several other options for how to work with their accountant, including converting their file to QB Win format.

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Resources for you and your clients on QuickBooks for Mac



QB Mac Little Square website:
www.qblittlesquare.com



Real World Training for QB Mac:
quickbookstraining.com/cd-dvd-training/learning-quickbooks-macintosh.html



Intuit Community Forum:
community.intuit.com/category/quickbooks-for-mac



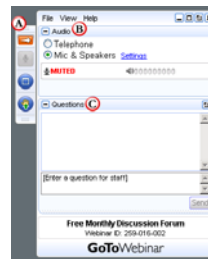
LinkedIn QB Mac Professionals Group:
www.linkedin.com/groups/QuickBooks-Mac-Professionals-3693142/about

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Q & A



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- Following the webinar, there will be a brief survey. We appreciate your feedback!
- On the survey you can also indicate your interest for more info.

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Wrap Up

Thanks so much for attending!

Sign up for our free weekly QuickBooks Tips and Tricks email update filled with time saving suggestions for using QuickBooks more effectively.

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