


McWilliams & Associates Inc.
QuickBooks® Accounting Software Training

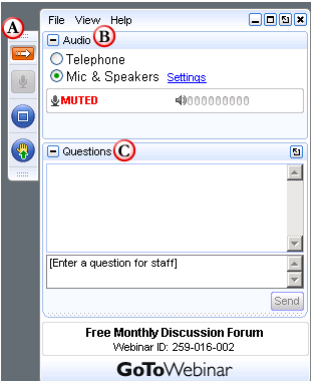
QuickBooks ProAdvisor Membership Tips & Tricks



Presented by:
Bonnie Nagayama, CPA
 925-247-0100 x 106
 Bonnie@AccountingSoftwareSecrets.com

McWilliams & Associates Inc.
 Accounting Software Secrets for your Business

Using GoToWebinar (Basics)

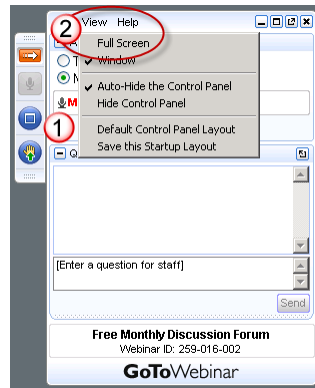


- A** To minimize (or expand) the control panel, click on the orange box with the white arrow.
- B** Choose Telephone (then the call in information will appear) or listen via your computer speakers
- C** Please submit questions via the Q&A box.

Note all attendees are muted.

McWilliams & Associates Inc.
 Accounting Software Secrets for your Business

Using GoToWebinar (Full Screen)



1 Click on the circle with the full screen icon (it switches to two windows if you want to switch it back)

2 To switch to via the presentation via Full Screen:

- Expand the control panel, if necessary
- Click on View on the top menu
- Click on Full Screen



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Housekeeping

- CPE credit is available for this course. The requirements are
 - 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.accountingsoftwaresecrets.com/quickbooks-proadvisor-program>



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Speaker Bio – 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**
- **Weekly Tips & Tricks Newsletter**
- **Monthly FREE Discussion Forum**
- **Premier Intuit Reseller**
- **Advanced Certified ProAdvisor**
- **Intuit’s Trainer/Writer Network Member**
- **Intuit IPP Advisory Council Member**
- **Sleeter Group Consultant Network Member**
- **Sleeter Developer Advisory Panel Member**



<http://www.accountingsoftwaresecrets.com/referral-program-small-business-professionals>



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Let Us Help You As One Point of Contact!

- <http://www.accountingsoftwaresecrets.com/referral-program-small-business-professionals>
 - **\$50 Intuit Payment Solutions**
 - **\$75 QuickBooks Enterprise Solutions**
 - **\$25 QuickBooks Pro or Premier**
 - **\$50 on other Intuit offerings**
 - **QuickBooks ProAdvisor Membership (new only)**
 - **Field Service Management**
 - **QuickBooks Payroll**
 - **DemandForce**
 - **Salesforce.com**

**We have dedicated Intuit
Contact in Each Department!**



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Speaker Bio – Andi Ancheta

- Andi Ancheta has been with Intuit(R) for over 10 years in the Accounting Professionals Division.
- As a Senior Marketing Manager on the QuickBooks ProAdvisor(R) Program team, she is dedicated to delivering a top notch end-to-end customer experience.
- When not at work, you can bet that she has Food, Friends and Family in her plans.



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

The QuickBooks ProAdvisor Program



The best All-in-One accounting package to help you deliver great client service!

- **Designed for accounting professionals like you who want to:**
 - Support any QuickBooks client
 - Increase your knowledge and expertise of QuickBooks
 - Distinguish your practice and be more competitive
 - Reach new clients and grow your practice
- **ProAdvisor Program includes all you need and more:**
 - Over \$5,000 worth of QuickBooks Software included: QB Accountant/ QB Online Accountant/ QB Enterprise Accountant/ QB for Mac / QB Enterprise Advanced Inventory/ QB Point of Sale
 - QuickBooks Certification with CPE at no additional cost
 - Increased product discounts for you and your clients
 - **For you:** Up to 50% off products for your firm
 - **For your clients:** 25 - 40% off products based on certification level
 - Free listing on Find-A-ProAdvisor website where 400,000 businesses search for QB help
 - Annual or monthly payment options

~~\$59.99~~ \$49.99/monthly OR ~~\$599~~ \$549/year

With 60-Day Money Back Guarantee

(some limitations apply)

<http://www.youtube.com/watch?v=dBFrgXLq86w&feature=youtu.be>

8

Intuit Proprietary & Confidential

intuit

Included Software

- **QuickBooks Accountant Plus with Accountants Copy File Transfer and QuickBooks Statement Writer**
- **QuickBooks Online Accountant with QuickBooks Online Company File**
- **QuickBooks Enterprise Solutions for Accountants with Advanced Inventory**
- **QuickBooks for Mac**
- **QuickBooks Point of Sale**
- **Optional: Intuit Payment Solutions Bundle**
- **Add-On: Payroll Enhanced for Accountants (\$200/yr)**

\$5,000 worth of QuickBooks Software



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

ProAdvisor Dashboard

Dashboard



BONNIE NAGAYAMA

Customer Account Numbers
Member Profile
My Account Details

[Account Details](#)

Notifications

Live QuickBooks Certification Prep for QuickBooks ProAdvisors

Our partners at Scaling New Heights are offering QuickBooks Certification preparation courses at this year's conference with CPE credits, June 23-26. For more information, or to register, click here.

My Intuit Accountants Products



QuickBooks ProAdvisor Program

Level Member
Diamond

Certifications
Certified

[View](#)
[Course Locker](#)

License #: [REDACTED] (renewal: 09/13/2013)

[Go to My ProAdvisor](#)

Status
Current

Set to auto renew on
September 13, 2013

Enrolled using credit card
ending in 1804
expiring on 11/2014
[Update Card](#)

[Download Software](#)

[Membership Goals](#)

[Software & Discounts](#)

[Find-a-ProAdvisor-Listing](#)

[Training](#)

[Support](#)



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

ProAdvisor Site Navigation

Dashboard
My ProAdvisor
Account Management
Welcome, Bonnie Nagayama ▾

Certification

- Available Certifications
- Completed Certifications
- Find-a-ProAdvisor Listing

Training

- Training For You
- Training For Your Clients

Practice Resources

- Overview
- Client Services
- Marketing & Growth
- Products & Technology
- Business Administration
- Member Goals

Software & Discounts

- Included Software
- Discounts For You
- Discounts For Your Clients
- Special Offers on Apps

Support & Community

- Support
- Community
- Program Information**
- Program Benefits
- FAQs
- Program Agreement

McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Training for You

- Certification Training - QuickBooks 2013
- Certification Training - QuickBooks 2012
- Certification Training - QuickBooks Online 2013
- QuickBooks Desktop
- QuickBooks Online
- Intuit Statement Writer
- QuickBooks Payroll
- QuickBooks Point of Sale
- QuickBooks ProAdvisor
- QuickBooks Enterprise
- Intuit Payment Solutions

Choose the free training that is right for you

Build your QuickBooks knowledge with over 60 hours of optional training

- ✓ Prepare for the QuickBooks certification exam with 9 FREE training courses
- ✓ Learn by doing through simulations instead of simply reading through material
- ✓ Use our easy-to-read and on-the-go course materials
- ✓ All courses, study resources, exams and quizzes are online

	Time to complete	CPE Credits
QuickBooks for Mac: Overview for Accounting Professionals	30 mins	0
QuickBooks at Year-end: Reviewing and Correcting Common Errors	70 mins	1
Choosing the Right QuickBooks Edition for My Client	35 mins	0
Internal Controls for Small Businesses to Help Reduce the Risk of Fraud	75 mins	1.5
Top Ten QuickBooks Tips and Tricks	120 mins	2
Common QuickBooks Mistakes Clients Make and How to Fix Them	100 mins	2

Training for Your Clients

- There are resources to help improve your presentation skills
- Checklists for hosting a seminar
- A webinar to help you grow your practice with training and consulting
- And more

QuickBooks Online Student Handouts

Course 1: Product Overview — How to Choose and Recommend (DOC, 1.1MB)

Course 2: Navigating QuickBooks Online (DOC, 1.8MB)

Course 3: Setting up QuickBooks Online (DOC, 1.4MB)

Course 4: Recording Transactions in QuickBooks Online (DOC, 2MB)

Course 5: Reporting in QuickBooks Online (DOC, 873K)

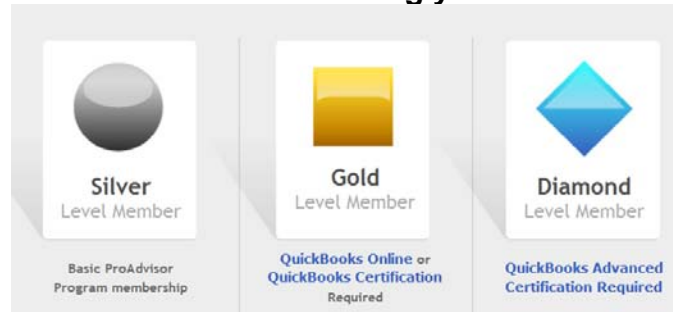
Course 6: Expanding QuickBooks Online — Payments, Payroll, and Apps (DOC, 3.7MB)



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

More ProAdvisor Benefits

- The ProAdvisor Program rewards your experience and dedication with increasingly exclusive benefits.



Note: Must be certified in the most recent three versions of QuickBooks Certification to be eligible for Advanced Certification.



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Silver, Gold, & Diamond Benefits

Benefit	Silver	Gold	Diamond
Discount on software	25% off (1)	30% off plus added client offers (1)	35% off plus added client offers (1)
Dedicated Support via chat	Yes	Yes	Yes
Live, US based phone support	No	Unlimited free	Yes, VIP Support
Find-a-ProAdvisor listing & Logos	No	Yes	Yes

¹ Exceptions to discounts: QuickBooks Point of Sale hardware discount 10-15% off, QuickBooks Enterprise Solutions discount 20% off. Other exceptions may apply.



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

ProAdvisor Listing Example

- <http://proadvisor.intuit.com/quickbooks-help/bonnie-nagayama>

Bonnie Nagayama
McWilliams & Associates, Inc.
1480 Moraga Road, Suite I
PMB 385
Moraga CA 945562005
(925) 247-0100
bonnie@4uvalbiz.com

Professional Designations:

- CPA (Certified Public Accountant)
- Accountant
- Computer Consultant
- Educator/Trainer
- Value-Added Reseller

Other Designation/Credentials:

- Intuit Solutions Provider
- Intuit Trainer & Writer Network

Years in Business: 17

Certifications:

- Adv Since 2007
- QBO 2013
- QB 2013, 2012, 2011, 2010, 2009, 2008, 2007, 2006, 2005, 2004, 2003, 2002, 2001, 2000, 1999
- ES v11, v9

Other Info:

- Industries Supported
- Services Provided
- Products Supported

About Me and My Practice

As an Accounting Coach and QuickBooks Consultant I can assist you with a free assessment call to have QuickBooks work for you! As the owner of my business, I have had the opportunity to work with numerous industries from the small one person office to the multi-million dollar company. Assisting the client in using QuickBooks most effectively for them is a challenge I thoroughly enjoy. We offer remote

My Clients

With a focus on only QuickBooks and 90% of our business coming as referrals from other accountants I have had the opportunity to work with numerous industries from the small one person office to the multi-million dollar company. Assisting the client in using QuickBooks most effectively for them is a challenge I thoroughly enjoy. We offer remote

Optional: Free One-Hour Consultation



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Listing Tips & Tricks

- **Complete advanced certification. Requires ACE (Advanced Continuing Education) to renew.**
- **Get certified and stay current on QuickBooks Desktop certs.**
- **Get QBO certified to further boost your rankings points.**
- **Add a profile photo.**
- **Opt-in to 'Ratings and Reviews' & encourage client reviews.**
- **Complete QuickBooks POS and QuickBooks ES certifications.**
- **Fill up your profile as completely as possible.**
- **Finally, make sure you answer your phone and respond as soon as possible.**
- **Consider providing a free initial consultation and indicate on your profile.**



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Practice Resources

All

Client Services

Marketing & Growth

Products & Technology

Business Administration

Tax Center

Expanding Your Practice

Marketing 101: Learn the Basics

Online Marketing

Trade Shows and Local Events

Social Media

Marketing 101 - Learn the Basics

Get results with membership goals. [GO](#)

Download ProAdvisor certification logos to use on your marketing material. [Learn more.](#)

Recommended Reading

- 9+ Creative Ways to Recruit and Retain Clients
- The Top 7 Ways This ProAdvisor Gets New Leads
- Sales Letters to CPA Firms
- How to Prospect for New Business Clients

Membership Goals

<http://accountants.intuit.com/secure/proadvisor/goals/>

Maximize your membership

Get started in the ProAdvisor Program. New tasks (1)

Learn more about your program benefits

Get prepped for certification.

Get started in the ProAdvisor Program.


Estimated time to complete: 18 minutes

Better serve your clients

Become better prepared to answer your clients' questions


Help clients identify the right QuickBooks software

- ✓ **1. Download QuickBooks Accountant**
If you're a new member, we recommend you download your QuickBooks Accountant software now. If you've already downloaded your software, click here to mark this step complete.
15
minutes
- ✓ **2. Take A Site Tour**
Watch this short video and learn about key benefits available in the Program and where to find them within the site.
3:15
minutes


 McWilliams & Associates Inc.
 Accounting Software Secrets for your Business

Discounts for Your Clients

- **One client one free year of Intuit Full Service Payroll**
- **20% off checks, forms and supplies**
- **Intuit Customer Discount Program**
 - **AT&T and Sprint Mobile Plans (up to 15%)**
 - **Fedex Shipping and Printing (up to 25%)**
 - **Apple and Lenovo PCs (Up to 20%)**
 - **GTM and GoToMyPC (Up to 20%)**
- **Discount on software based on your level (*but check with us first, because we can often beat the pricing*)**


 McWilliams & Associates Inc.
 Accounting Software Secrets for your Business

Special Offers on Apps

All

QuickBooks Desktop (6)

QuickBooks Online (8)

All apps for QuickBooks

You can get free training and CPE credit by attending a [live webinar](#). Or, watch the pre-recorded webinars listed below.

Salesforce for QuickBooks

Close more sales, build strong customer relationships with the #1 sales app

Works with QuickBooks:

- ✓ Desktop
- ✓ Online

Get the #1 sales app with built-in integration to QuickBooks. Salesforce users experience on average: +40% leads, +30% lead conversion, and +33% sales productivity. Group Edition is ideal for smaller companies, includes basic sales and marketing features such as viewing QuickBooks customer details within Salesforce: open balance, credit limit, estimates, sales orders, invoices. Easily syncs with Outlook and Google Calendar. Professional Edition adds advanced features like inventory and item tracking info. Super-charge your sales!

[Learn more](#) [View recorded webinar](#)

Special Offer!

FREE 12-month Demo Subscription and Client Discount.*

Subscribe

[See details](#)

<http://www.accountingsoftwaresecrets.com/intuit-app-center-webinars>

McWilliams & Associates Inc.
Accounting Software Secrets for your Business

App Referral Program for ProAdvisors

http://appcenter.intuit.com/promos/proadvisor_app_referral_program

- Apps are a great way to provide additional value and services for your clients -- and a great way to grow your practice.
- As an additional incentive, Intuit will reward you \$300 for each 3 app referrals that convert to 3 months paid use (trial period excluded).
- Fill out the form prior to the end of the program on August 31, 2013 (but I am trying to get it extended until the end of the year 😊)

McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Let Us Help You As One Point of Contact!

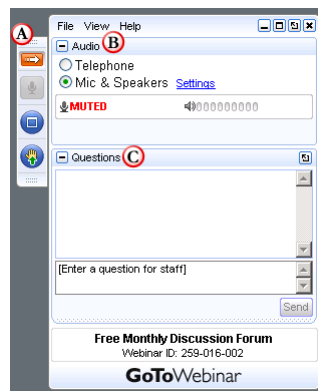
- <http://www.accountingsoftwaresecrets.com/referral-program-small-business-professionals>
 - \$50 Intuit Payment Solutions
 - \$75 QuickBooks Enterprise Solutions
 - \$25 QuickBooks Pro or Premier
 - \$50 on other Intuit offerings
 - QuickBooks ProAdvisor Membership (new only)
 - Field Service Management
 - QuickBooks Payroll
 - DemandForce
 - Salesforce.com

**We have dedicated Intuit
Contact in Each Department!**



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Q & A



- A** To minimize (or expand) the control panel, click on the orange box with the white arrow.
- B** Choose Telephone (then the call in information will appear) or listen via your computer speakers
- C** Please submit questions via the Q&A box.

Note all attendees are muted.



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Reminder

- CPE credit is available for this course. The requirements are
 - 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 at <http://www.accountingsoftwaresecrets.com/quickbooks-proadvisor-program>
- 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.



McWilliams & Associates Inc.
Accounting Software Secrets for your Business

Wrap Up

Thanks so much for attending!

Bonnie Nagayama, CPA

925-247-0100 x 106

Bonnie@AccountingSoftwareSecrets.com



McWilliams & Associates Inc.
Accounting Software Secrets for your Business