

Mobile App

About this Guide and Webinar

This guide is designed to accompany our webinar entitled *Mobile App*, in which you will learn how to use the QuickBooks Online mobile app in a construction setting, as you will likely wish to produce estimates and invoices “on the go” on your smartphone or tablet.

Note: this supplemental guide and the video it accompanies were prepared using QuickBooks Online (“QBO”) Plus Canada and a Construction Demo company set up specifically by the author for this purpose. This company is not available to students taking this webinar, but you can set up your own company with this Demo company as a model. While you can also access the QuickBooks Online Canada Sample Company, *Long for Success – Event Planning* to test out what you’ve learned (The *Long for Success – Event Planning* is accessible here: <http://tinyurl.com/canadasampledta>), there is no sample company for use with the mobile app, covered in this webinar.

What is the QuickBooks Mobile App?

The QuickBooks Mobile App, AKA *QuickBooks Online Mobile*, is a free app for your phone or tablet, available for Android and iOS operating systems. It can be found on Google Play and the iTunes App Store. Although the app is free to download, it opens existing QBO company files, which do require a subscription. Using the mobile app will allow you to handle many functions on the spot from your job site or in the presence of your construction customers, instead of waiting until you get back to your office to follow up. This is a time-saver and can ensure that tasks won’t “fall between the cracks.”

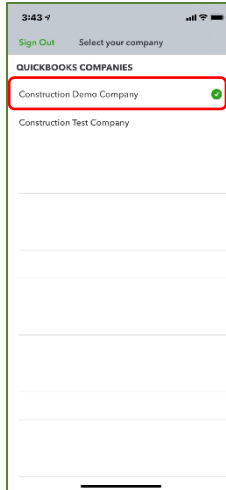
Although it is not as robust as the full browser-based QBO program, this mobile app allows you to access your QuickBooks Online company files, many of the transaction types (such as invoices, expenses, and bills), and some very basic reporting.

With the mobile app, you can snap photos of receipts, categorize expenses, and attach the photos to those expenses in the browser-based program. You can also send professional-looking estimates and invoices on the spot, and capture customer signatures on those estimates and invoices if you so choose. This is something that cannot be done in the full browser-based QBO program. We will cover this signature functionality in this webinar.

Be aware the *Progress Invoicing* and the *Projects* features do not work in the mobile app.

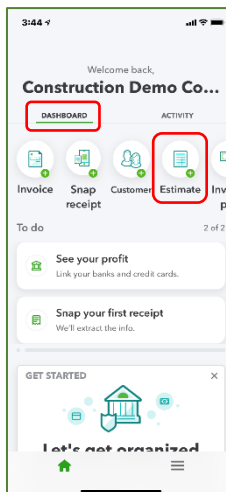
Working in the QuickBooks Mobile App

After you download the mobile app, login using your Intuit credentials that you use to login to QBO in a browser. If you have more than one company in QBO, choose the company you wish to open.



Entering Estimates and Converting to Invoices in the Mobile App

1. To create an estimate, click on the **+ Estimate** icon in the *Dashboard* tab:



2. Start to populate the estimate using the header fields (customer or sub-customer, date, and expiry date) you would use in the browser-based QBO. You can assign a custom estimate number, or you can leave that field blank and QuickBooks will assign it automatically for you. By default, the status of this estimate is *Pending*. Select Add product or service to start populating the detail lines of the estimate. You will see the service items that you already set up.

9:51

Cancel New estimate Save

Customer or Project >

Estimate no. Enter or let us assign

Date February 24, 2021

Expires

Status Pending

+ Add product or service

Subtotal \$0.00

Tax Tax is exclusive

Total \$0.00

Message to customer

Message on statement

- Now scroll to find the service item you want for each line. Populate the detail lines with those service items, quantities (if other than 1), rates, and sales tax code. Overwrite or append text to the boilerplate description for each service item if you need it. Select **Done** when you're finished with each line's details. When you're finished with each line item, select **Add** in the top right to complete the addition of that line item. You can now add more service items, line by line.

3:46

Cancel Select item

Add comment >

PRODUCTS & SERVICES

Deposit \$0.00 >

Customer Deposits

Direct Costs

Bricklaying Labour \$0.00 >

Bricklaying Labour

Bricklaying Materials \$0.00 >

Bricklaying Materials

Cabinetry & Countertops \$0.00 >

Cabinetry & Countertops Materials

Cabinetry & Countertop... \$0.00 >

Cabinetry & Countertops Labour

Clean Up Labour \$0.00 >

Clean Up Labour

Clean Up Materials \$0.00 +

Clean Up Materials

Line Item

Direct Labour

Service Date March 31, 2021

Quantity 150.00

Rate \$75.00

Amount \$11,250.00

TAX IS EXCLUSIVE

Tax Code HST ON>

Direct Labour for addition

Done

- When you're finished populating the estimate completely, put in a customer message if desired, then select **Done** and **Save**.

3:47

Cancel New estimate **Save**

Service date: 2021-03-31

Direct Labour for addition

+ Add product or service

Subtotal \$11,750.00

Tax Tax is exclusive

HST (ON) 1,527.50

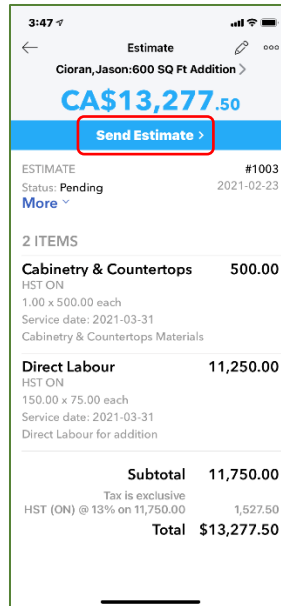
@ 13% on 11,750.00

Total \$13,277.50

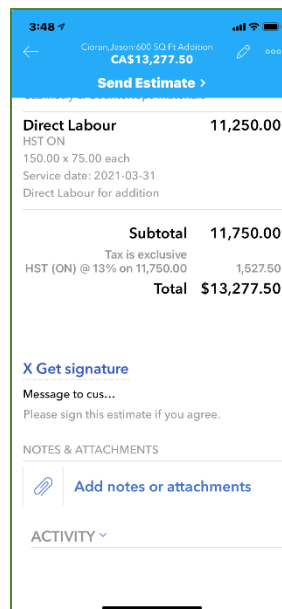
Please sign this estimate if you agree.

Done

- The estimate is now completed and saved. You can send it now if you want by selecting **Send Estimate**.



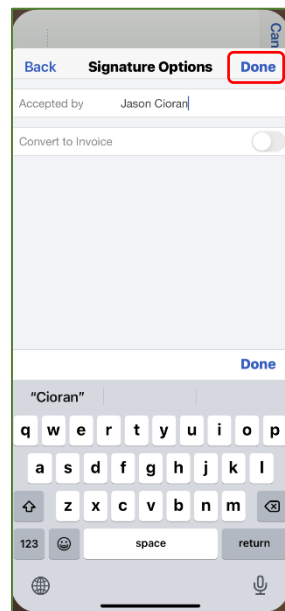
- But...if you want, you can add a customer signature (you would have to be in the customer's presence with your mobile device) and/or any attachments. (You can also scroll down to the bottom to see the audit log of activity for this estimate.)



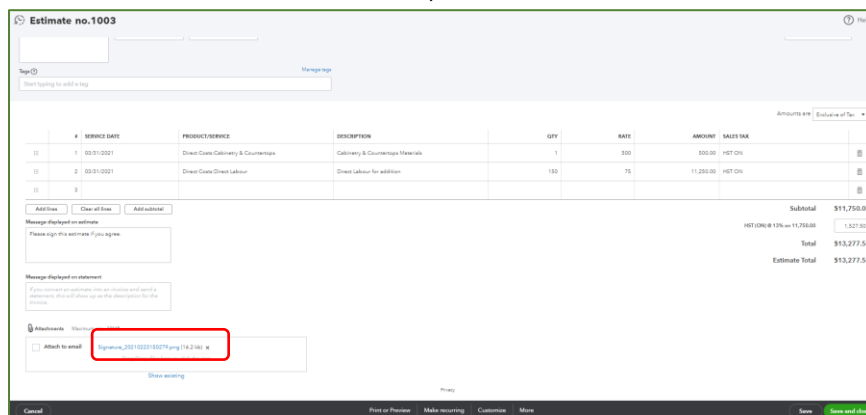
- After selecting **Get signature**, your customer can sign with their finger or a stylus and then select **Done**:



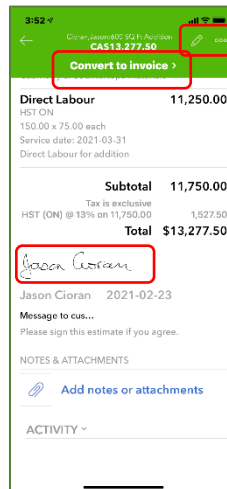
8. Once you or the customer have selected **Done**, the Signature options screen appears, in which you can enter the name of the person who signed the estimate. The status of the estimate will now be *Pending*. If you wish, you can also invoice immediately from the screen, but you don't have to invoice from here. You can invoice from this estimate later as well. Select **Done** again.



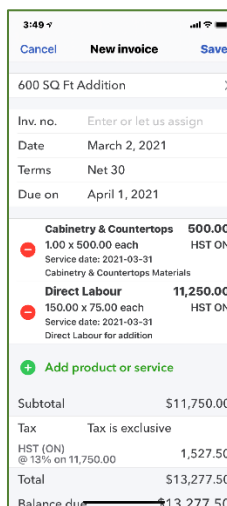
9. Back in the estimate, you can see that the customer's signature has been saved as part of the estimate. In the full browser-based QuickBooks, this is seen as an attachment to the estimate.

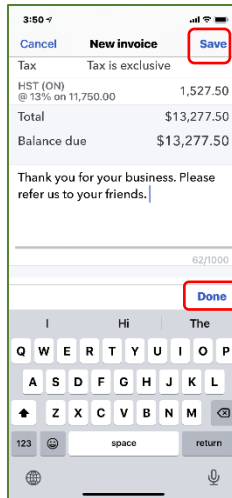


10. You can add notes and/or other attachments here as well. You can always convert the estimate to an invoice here. You can always come back to this estimate and select the **pencil** icon in the top right to make edits. In addition, you can select the **3 horizontal dots** in the top right for a menu of other actions you can take. One of these actions is to **email** the estimate.

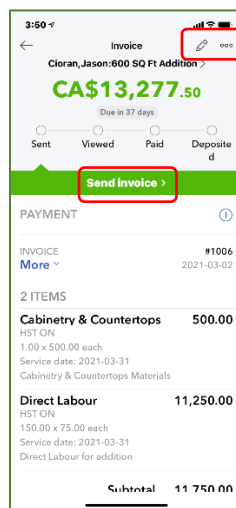


11. What you see next is the converted invoice. Make any changes as necessary and then scroll down to the bottom of the invoice. You can add a message; select **Done** when finished entering the message. Select **Save**.





12. You can send the invoice if you want from here. You can also come back to this invoice at any time and select the **pencil icon** to make edits. The **three horizontal dots** can be selected for a selection of other actions to take.



13. Or, if you want, scroll down to the bottom of the invoice and select **Add notes or attachments**. You can also select **Get signature** and, if you are in the presence of your customer, have them sign the mobile screen as was done for an estimate. Select **Done**.

Cancel

Get Signature

Done



Feb 23, 2021

Invoice no.1006

Type

Start typing to add a tag

Manage tags

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
01	03/31/2021	Direct Cases Cabinetry & Countertops	Cabinetry & Countertops Materials	1	\$30	\$30.00	HST ON
02	03/31/2021	Direct Cases Direct Labour	Direct Labour for addition	130	75	11,250.00	HST ON
03	3						

Add Taxes

Clear all taxes

Add additional

Message on invoice

Thank you for your business. Please refer us to your friends.

Message on statement

If you send statements to customers, this will show up as the description for this invoice.

Attachments

Maximum size: 20MB

☐ attach to email

Signature_20210223102045.png (15.6 kb)

Show receipt

Subtotal

\$11,750.00

HST ON @ 12% on 11,750.00

\$ 1,327.50

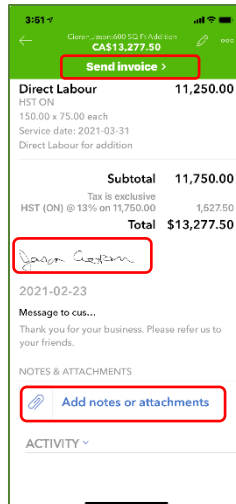
Total

\$13,277.50

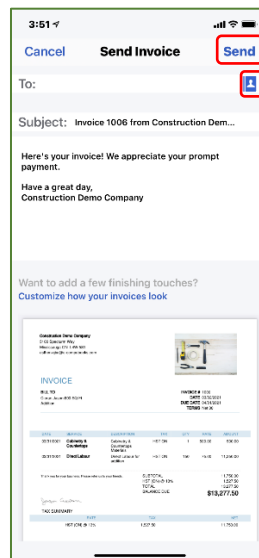
Balance due

\$13,277.50

15. You can add a note and/or other attachments here, and you can send the invoice from here as well:



16. Once you've selected **Send invoice**, this is the screen you see. Any "send" screen will be automatically populated with the email address(es) you've added to the customer or sub-customer. If you have not added an email address, you can enter the email address manually. Or, you can click on the **address book icon** and allow QBO to access your mobile device's contacts. Choose **Send** and the invoice is emailed!



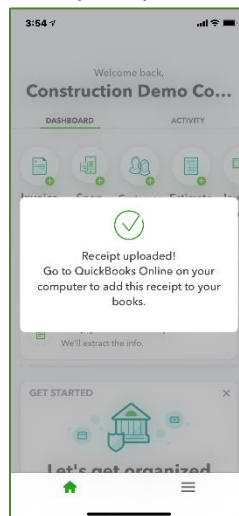
Taking Pictures of Receipts

You can use the QBO mobile app to take pictures of your receipts. Here's what you do:

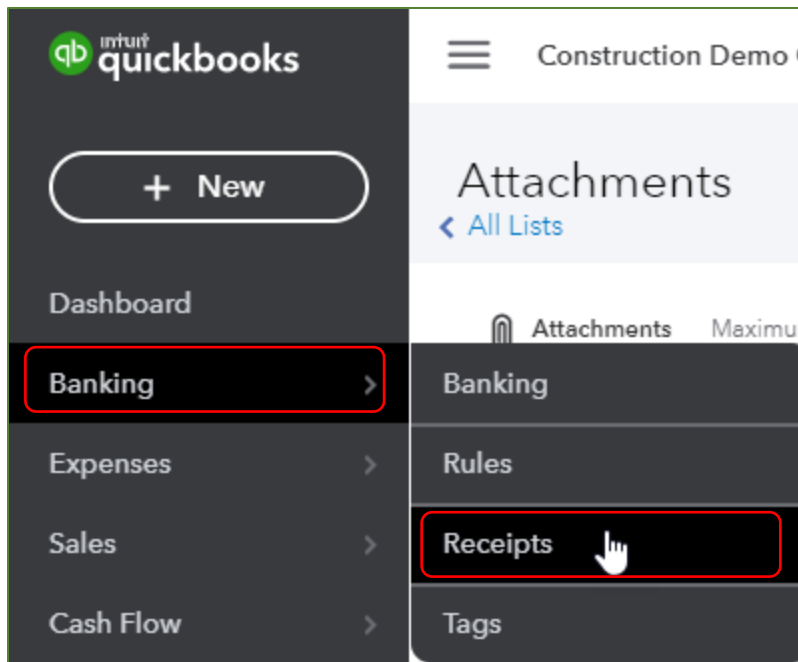
1. Select Snap receipt from the QBO screen.



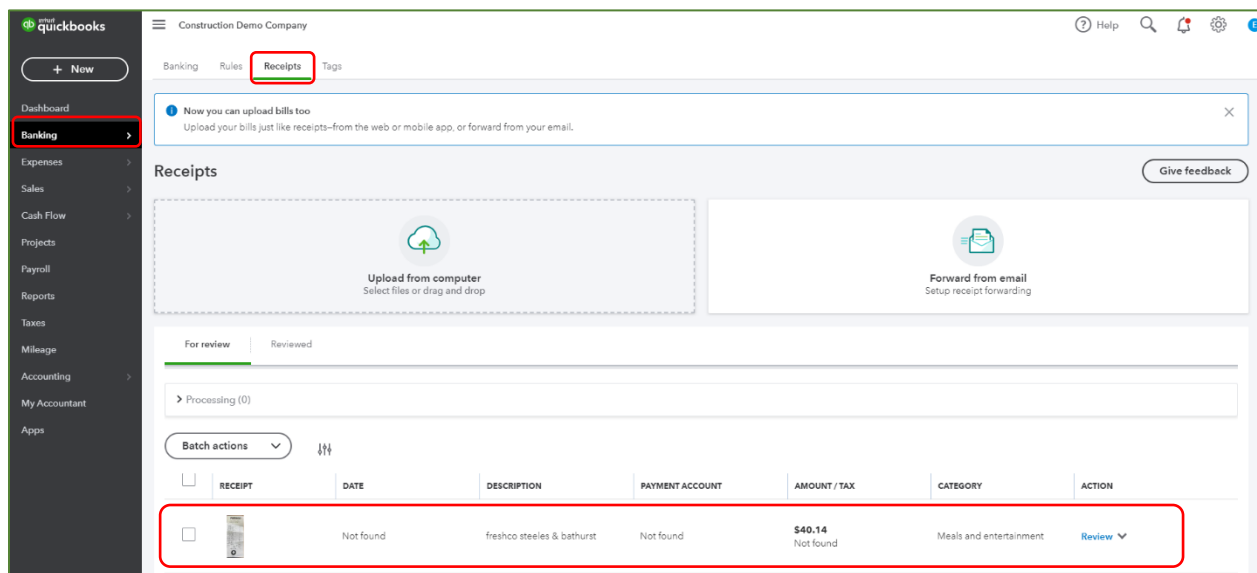
4. You see a message that the receipt has been uploaded, and that you must open QuickBooks Online on your computer to add this receipt to your books.



5. Back in the browser-based QuickBooks Online, open **Banking > Receipts**.



- The receipt you photographed using the QBO mobile app appears in the *Receipts* area for you to review. Open that receipt by selecting **Review** in the *Action* column or by clicking anywhere in the row for that receipt.



- Categorize that receipt by selecting the proper fields next to the picture. When you're done, save the receipt. The entry will then appear in QuickBooks with this receipt as an attachment.

Upload receipt

Added 3:53 PM 02/23/2021

Bank/Credit account

Select an account

Payment date *

Select a date

Account/Category

Meals and entertainment

Description

fresco steeles & bathurst

Total amount (Inclusive of tax)

40.14

Tax type

Select tax rate

Tax amount *

Enter tax amount

Memo

Add note (optional)

Additional Fields (optional)

Customer

Select customer(optional)

Ref no.

Enter a Ref no.

Cancel

Delete this receipt

Save and next

Note: you can only assign accounts from the Chart of Accounts to receipts in the Receipts area; you cannot choose service items. Therefore, you may wish to enter the expense or bill transaction related to that receipt manually in QuickBooks (using service items, which will allow you to get profitability reports), and then attach an image of that receipt as an attachment to that transaction.

In case you haven't viewed all the other webinars in this construction series, be sure to check out the following:

- *Settings up Products and Services*
- *Estimates, Change Orders, and Reporting*
- *Invoicing, Progress Invoicing, Job Costing and Reporting*
- *Projects*

Enjoy the freedom, flexibility and power that QuickBooks Online gives you. Best of luck in your business; you've already made the smartest decision in choosing QuickBooks Online to run it.