



Made for accountants & bookkeepers

Your guide to QuickBooks



It's time for your practice

We know the challenges modern accountants and bookkeepers face—maintaining good client relationships, finding and retaining the best talent and staying up to speed with the changing regulatory landscape.

It's a lot to navigate. And knowing where to focus your time and energy has never been more important.

That's why we've developed an ecosystem of intuitive, cost effective accounting solutions designed to give you more time for what matters. We're powering prosperity by giving accountants and bookkeepers the tools to run their practice effectively and help their clients thrive.

Our support for your firm doesn't stop there—when you work with us, you'll benefit from unrivaled integrations with Intuit tools like

Mailchimp. Imagine the new client and growth opportunities when your accounting and marketing tools work together to power your practice.

When you choose Intuit QuickBooks for your practice and clients—you'll be in good company. We're trusted by **over 6.5 million subscribers worldwide.**

We look forward to partnering with you.



Nick Williams,
Head of Product, Intuit QuickBooks UK

About Intuit

Founded in the US, but today with a truly global reach, Intuit's mission is to power prosperity around the world. As a global software company, our suite of products includes **TurboTax**, **Credit Karma**, **QuickBooks**, and **Mailchimp**.

Powering prosperity

Serving approximately **100 million customers worldwide** across our product suite, Intuit helps put more money in consumers' and small businesses' pockets, saving them time by eliminating work, and ensuring they have confidence in every financial decision they make.

INTUIT



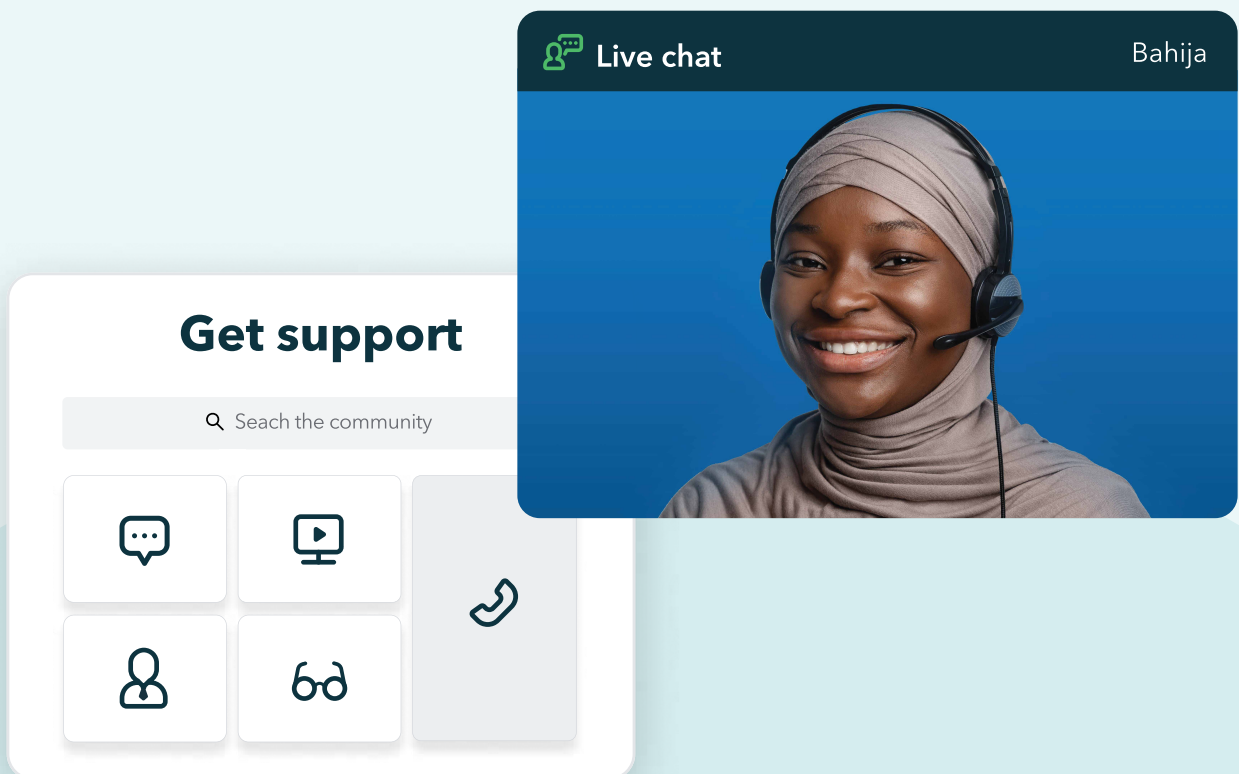
Why QuickBooks?

Smart accounting software with real-human support

Our range of intuitive accounting solutions is designed for both accounting and bookkeeping professionals, and your clients. We know every practice is unique, so our smart solutions scale as you do.

Plus you and your clients will benefit from expert product help from real people 7 days a week*, and FREE 1 on 1 onboarding.

*Phone support available 8.00am - 7.00pm Monday - Friday or live message 8.00am - 10.00pm Monday to Friday, 8.00am - 6.00pm Saturday & Sunday



QuickBooks Online Accountant

FREE for accountants and bookkeepers, manage your practice, clients and payroll directly from QuickBooks Online Accountant. It supports you with everything from day-to-day accounting, payroll, VAT preparation and filing.

As a QuickBooks accountant or bookkeeper, you'll enjoy:

- An end to end product solution for you, and your clients
- Award-winning customer support—speak to a real person over the phone
- Get free QuickBooks certification and training for you, and your team
- Preferential pricing, with discounted licences and,
- Great benefits to enjoy at your practice, including marketing support, and discounts on Mailchimp

The screenshot displays the QuickBooks Online Accountant interface. The main header shows 'Intuit' and 'Duncan's clients' with an 'Add client' button. The left sidebar contains navigation options like 'Clients', 'Team', 'ProAdvisor', 'Work', 'Pro Tax', 'Apps', 'BOOKMARKS', and 'YOUR BOOKS'. The main content area is divided into 'Reports' and 'ACCOUNTS RECEIVABLE BY AGING PERIODS'. The 'Reports' section includes 'Revenue streams', 'Expenses', 'Net profit', 'Accounts receivable', 'Cash flow', and 'Cost of goods sold'. The 'ACCOUNTS RECEIVABLE' section shows a total amount of £24,844 and a donut chart with data points: £4,800 (Current), £5,100 (1-7 days), £5,000 (8-14 days), and £5,044 (15-21 days). A 'Reclassify' button is visible on the right, along with a list of clients: Digital LTD, Kactus CO, and ABC Ltd, each with an 'Edit client' link. A 'Save' button is at the bottom right.

For accountants

Whether handling tax submissions or streamlining bookkeeping processes, our platform empowers you to effortlessly navigate your clients' finances.

- Save time with books and taxes in one place
- Simplify compliance work
- Have a more informed practice with access to clients' real-time information



For bookkeepers

Our smart and secure platform allows you to efficiently manage finances in real time, ensuring accurate and up-to-date records for your clients' businesses.

- Collaboration made easy—get work done anytime, anywhere
- Time-saving tech with automation features
- Simplify your workflows



Access your clients' books, send reminders, run reports, complete month-end reviews and manage your own books, too. All in one place.



I'd encourage [accountants/bookkeepers] to try QuickBooks. What it's given us as a business has been absolutely fantastic. It really is the heart of our business.

Chris Reeve,
Gascoynes Accountants

QuickBook Online

Our range of QuickBooks Online plans are designed to serve the unique and diverse needs of your clients—whatever industry or size of business they're in. From QuickBooks Ledger to Advanced, our easy to use, reliable accounting solutions are **trusted by over 6.5 million subscribers worldwide**.

With automated bank feeds, invoicing, reporting, integrated payments and award winning support all included as standard, our QuickBooks Online plans come with no hidden fees or charges.

Your clients can benefit from:

- Easy collaboration with their accountant or bookkeeper. With a fully cloud based solution, so you can collaborate from anywhere, at any time
- Simple, smart accounting software—to help keep their books accurate and up to date
- A wide range of tools and features, so you can focus on the advisory work your clients value
- Competitive pricing for a comprehensive financial management solution



QuickBooks is my preferred choice
because my clients find it easier to use.

Jason Fudge,
Merranti Accounting LTD

There's a QuickBooks plan for every client

Our range of plans help your clients submit VAT & Corporation Tax, prepare Self Assessment, and get Income Tax estimates.

Ledger

For basic small business clients, who don't require invoice, estimate or receipt capture tools.



1 user



Simple Start

For small business clients who require invoicing, estimate and receipt capture tools.



1 user



Essentials

For small business clients who need all the functionality of Simple Start and who work with suppliers.



Up to 3 users



Plus

For small business clients who need all the functionality of Essentials and manage projects and stock.



Up to 5 users

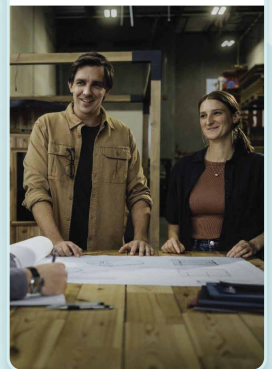


Advanced

For small and medium business clients needing automatic data backup, custom permissions, bespoke reporting and insights.



Up to 25 users

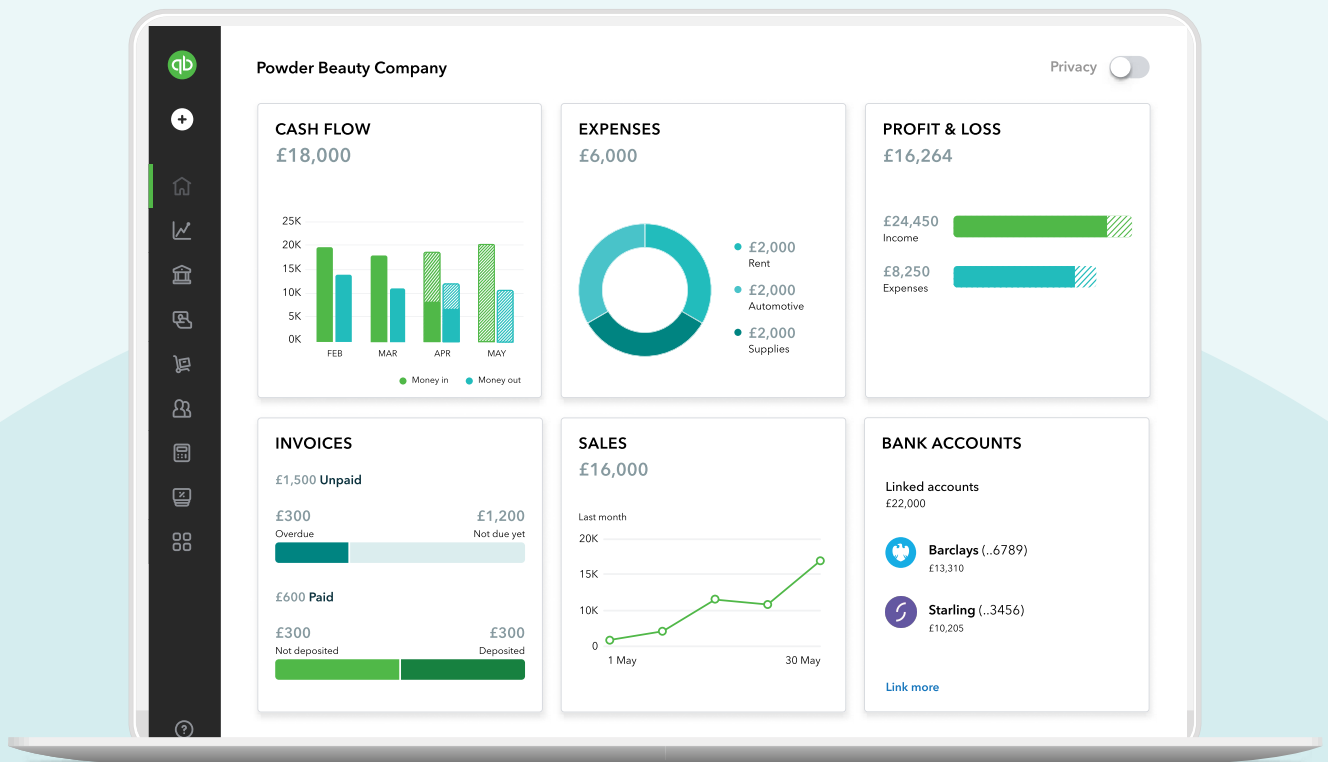


Need help choosing? **Talk to us on 0808 258 3854.**

Our client support means a great deal

Get up to 60% off our QuickBooks Online plans when you manage the subscription billing for your clients.















Talk to us about licence package options and payroll discounts on 0808 258 4342.



Accountant products that scale with your practice

With QuickBooks Online Accountant, your end-to-end accounting and bookkeeping needs are catered for—from managing your practice, to bookkeeping, payroll, and VAT preparation and filing—you can manage everything in one place, all within the QuickBooks ecosystem.

Enjoy a range of features, or add-ons, built for accountants and bookkeepers, that can support your practice, and help scale as you do.

 Client management	 Team management	 Work management	 Chart of accounts & templates
 Journal entries	 Reconciliation	 Transaction categorisation	 Standard and customised reports
 Transaction reclassification	 Workpapers	 Pro Tax	 Books review
	 Practice management Add on	 Bureau payroll Add on	

Feature spotlights

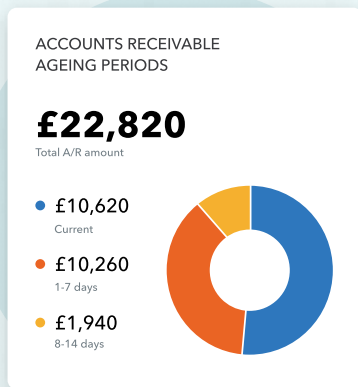
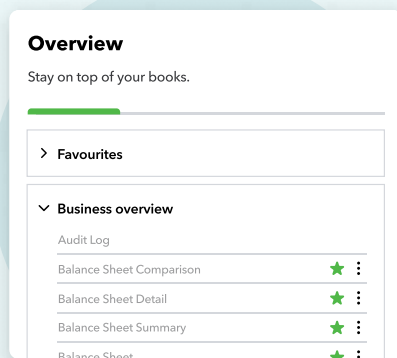


Chart of account templates

Streamline client set-up with chart of account templates.

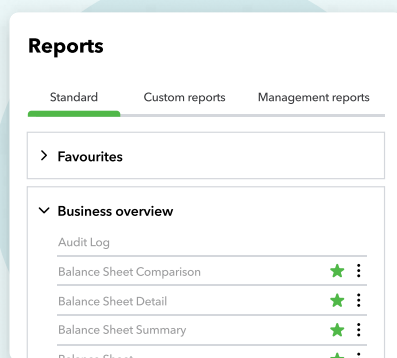
- Choose from customisable predefined templates, or create your own from scratch, to quickly set up a chart of accounts for new and existing clients.



Books review

Review your clients' books and stay up to speed on tasks with books review.

- See key tasks to quickly tie up any loose ends, prioritise work, and customise your own tasks for review.
- Collaborate on transactions with your client directly in QuickBooks, send and receive messages, and upload documents.



Month-end review

Integrate month-end review seamlessly into your firm's way of working and benefit from greater consistency and time savings.

- Access easy to use workflows to manage month-end tasks and your clients' books with the month-end review feature.

Feature spotlights

Review & adjust		Debits	Credits
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VAT Control	-- 6,781.65
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1200 Current	1,000.00 --
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Monzo Bank	-- 44,653.40
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Debtors	-- 260.00

Year-end workpapers

Save time and manage year-end all in one place with QuickBooks Workpapers.

- Work directly in your clients books and compare your prior and current tax year data side by side
- Review final accounts and post necessary adjustments
- Collaborate with your team by leaving notes and comments for others and always keep track of any changes
- Prepare FRS 105 annual accounts for micro entity clients. Add or amend disclosure notes as mandated by Companies House/HMRC, and auto apply iXBRL tags mandated for online submission by HMRC
- The addition of FRS 102 1A is coming soon

quickbooks.intuit.com/uk/accountants/workpapers/




The main feature we absolutely love is the reporting feature which allows us to generate a report in seconds.

Eriona Bajrakurtaj,
Majors Accountants

Feature spotlights

Pro Tax

 HM Revenue & Customs

Company Tax Return
CT600

CT600

1	Company name	Valentines coffee and cakes
2	Company registration number	99-1111110
3	Tax reference number	123124567

Pro Tax

File Corporation Tax for your clients faster with Pro Tax in QuickBooks

- Speed up Corporation Tax preparation by mapping accounts to tax categories
- Prepare and complete Corporation Tax with tax computation in Pro Tax
- Track issues with Live Auditor. The Live Auditor in ProTax consolidates warnings, sign-offs and issues as you work, for ease of reviewing
- File Corporation Tax for micro entity clients directly to HMRC
- File annual accounts directly to Companies House

quickbooks.intuit.com/uk/accountants/protax/



Apps and integrations

Simplify tasks, streamline data entry, and sync it all to QuickBooks. With over 350+ app partner integrations, you can enjoy a seamless workflow with QuickBooks, and partner apps.

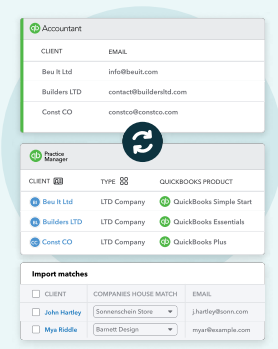
Visit the App Center in QuickBooks Online Accountant to discover more.

Visit the App Center



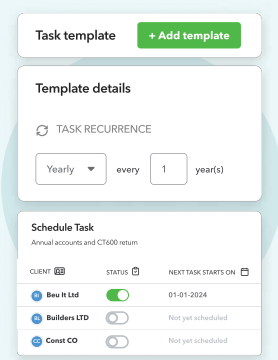
Enjoy a more efficient practice with QuickBooks Practice Manager

Streamline workflows, reduce admin by automating tasks, centralise client records and get help managing your workload. No matter what financial management software your clients use, you can serve them all through QuickBooks Practice Manager.



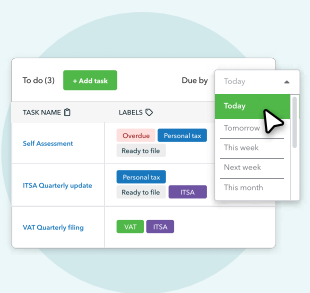
Manage your practice in one place

- Client management simplified
- Collect and store client data
- Easily manage your team and workload
- Easily view clients key bookkeeping and financial data



Be more productive

- Automate tasks and recurring jobs
- Speed up data uploads
- Save time with QuickBooks workflow integrations



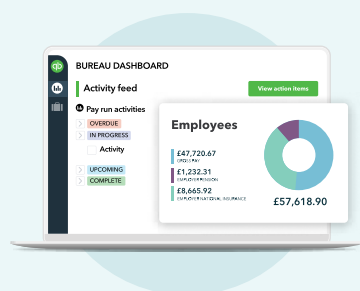
Stay up to speed

- Never miss a deadline
- Track your team's progress
- Get task notifications
- Flexible reporting for your practice and clients

For more information and pricing visit quickbooks.intuit.com/uk/accountants/practice-manager/

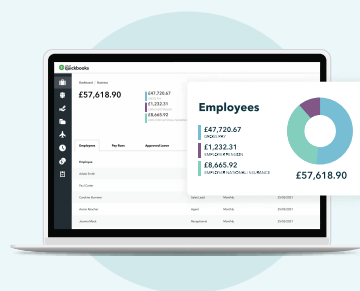
Payday their way with our payroll solutions

Add the perfect payroll solution to your clients' QuickBooks subscription and power through payroll with super-charged software. Our intuitive payroll software for accountants makes it easy for you to be your clients' payroll manager.



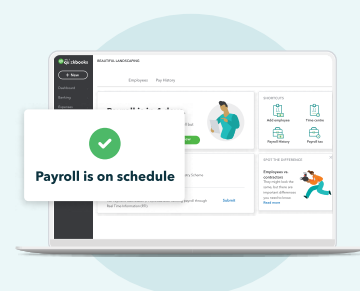
QuickBooks Bureau Payroll

A standalone solution for accountants running payroll for diverse customers across multiple accounting software (including QuickBooks, Xero, Sage, Freshbooks, FreeAgent and more).



QuickBooks Advanced Payroll

For accountants running payroll for customers with more complex payroll, reporting or HR needs.



QuickBooks Core Payroll

For accountants running payroll for director-only businesses or small employers who need speed and simplicity.

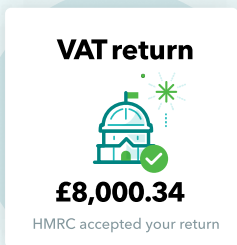
Find out more about QuickBooks Payroll solutions



Be ready for Making Tax Digital

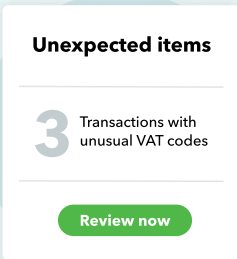
Whether your clients are small businesses or large corporations, our powerful all-in-one accounting software can help you save time managing their finances in line with HMRC standards.

VAT



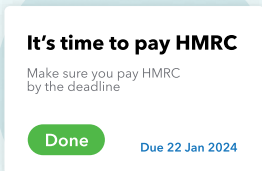
Submit VAT to HMRC

Prepare VAT for your clients using an Making Tax Digital filing solution and submit directly to HMRC—even if they're still using spreadsheets



VAT error checker

Our VAT error checker spots common mistakes so that you can save time and submit your clients return to HMRC with confidence



VAT deadline reminders

Get notified about VAT return deadlines throughout the year, with customisable alerts

Income Tax and Self Assessment

Self Assessment	
2022-23 tax estimate	
Business income	£13,000.15
Other business income	£2,000.10
Total allowable expenses	£1,200.31
Net profit	£13,800.47
Total estimated tax	£1,550

Prepare for Self Assessment

Get a break-down of your clients earnings and tax-deductible expenses, then use the figures to prepare the SA103 form for submission to HMRC

Taxes	
SA 103F Form	
SELF ASSESSMENT SUMMARY	
Business income	£13,000.15
Other business income	£2,000.10
Total allowable expenses	£1,200.31
Net profit	£13,800.47
Total estimated tax	£1,550

Get Income Tax estimates

See Income Tax and National Insurance estimates throughout the year based on figures entered into your clients QuickBooks

Annual Accounts and Corporation Tax

Annual accounts	
Account details	
<input checked="" type="checkbox"/>	Cover sheet
<input checked="" type="checkbox"/>	Officers
<input checked="" type="checkbox"/>	Director(s)
<input type="checkbox"/>	Secretary
<input checked="" type="checkbox"/>	Profit and loss

Prepare and submit annual accounts

- Prepare and file annual accounts directly to Companies House using QuickBooks Workpapers & Pro Tax
- Get notified once submitted

Pro Tax	
HM Revenue & Customs	Company Tax Return CT600
CT600	
Company name	XXXXXXXXXX and others
Company registration number	XXXXXXXXXX
Tax reference number	XXXXXXXXXX

Prepare and submit Corporation Tax

- Prepare and file Corporation Tax directly to HMRC using QuickBooks Workpapers & Pro Tax
- ProTax lets you e-file CT600, and attach iXBRL tax computations and annual accounts

Construction Industry Scheme (CIS)

HMRC updated VAT rates for CIS
<input checked="" type="checkbox"/> Your new domestic reverse charge VAT rates are ready

Calculate and submit CIS

- Manage, track, calculate and file Construction Industry Scheme taxes.
- Add unlimited sub-contractors
- Free and available on QuickBooks Online licenses (excluding Ledger)

Take your practice pro with these ProAdvisor benefits

When you sign up for QuickBooks Online Accountant, you'll automatically be enrolled in our ProAdvisor Programme. It's here to help you find new clients and grow.

Start enjoying these exclusive ProAdvisor benefits when you sign up:



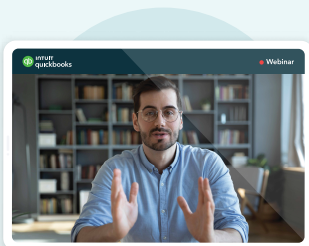
Be found by new clients

Our Find-a-ProAdvisor directory generates nearly a quarter of a million client leads annually worldwide. Once you're QuickBooks certified, you'll get a free listing.



Grow your practice

Use our free marketing asset library to promote your services to new and existing clients.



Advance your expertise

Sign up for free live webinar or online self-study training and become a certified or advanced-certified QuickBooks expert. Continue your learning with tips and tricks from our free webinars.



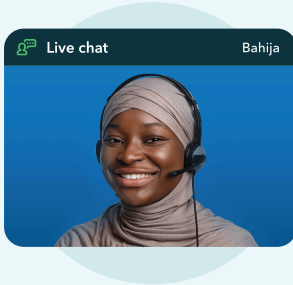
Expert set-up services and get started tools

Get your practice and your clients set up for success with our ProAdvisor specialist services offered by our UK Service Delivery Team, and our Professional Services team.



75% off the Mailchimp Standard plan

Bring your accounting and marketing tools together and accelerate your growth. ProAdvisors get an exclusive discount on DocuSign too.



Award winning customer support

Get access to real people who care about your success—our award-winning, UK-based support experts.

[Learn more](#)



Free training & certification

Boost your skills to help grow your business. Our certification courses and webinars help you tap in to the power of QuickBooks. We offer core and advanced certification for you, and all of your team members. Choose from self paced or live online courses.

- Hosted by QuickBooks experts
- Free for you, and all of your team members
- Stay up to date with QuickBooks, with free annual re-certification



Core certification

Become a core certified ProAdvisor and learn the key features of QuickBooks. This training provides you with the tips and tricks to get the most out of QuickBooks for your practice and clients.



Advanced certification

After completing our core training you can move on to our advanced certification. Advance your skills, learn more ways to save time and how to use QuickBooks for complex accounting solutions.

quickbooks.intuit.com/uk/accountants/training/



We learned some ideas on how to make things more efficient and streamline how we use the software for our clients. We'd thoroughly recommend a training session with Katie. Another great thing is that as a fellow accountant herself, Katie is able to understand how we want to use QuickBooks in our practice.

Louise Hudson,
LM Hudson

Get set up for success with expert ProAdvisor services

As a QuickBooks ProAdvisor, get the most from your benefits and tap into powerful resources and services to set your practice and your clients up for success. Our Service Delivery team is here to support your practice, to get you and your clients up and running with QuickBooks in no time.

quickbooks.intuit.com/uk/accountants/success/



Professional services

Work with Intuit's Professional Services team to help your accountancy or bookkeeping practice thrive.

With a range of training topics, and dynamic personalised training available to suit your firm needs, you could benefit from Professional Services.



Training sessions include topics around:

- Get your practice started with cloud accounting
- Effective client onboarding to QuickBooks Online
- Optimise your day-to-day workflow as a bookkeeper
- Manager review excellence
- Troubleshooting clients books
- Year-end books preparation
- Customising QuickBooks Advanced for your clients

Speak to the Professional Services team today to find out more on how you could use this service to support your practice efficiencies.

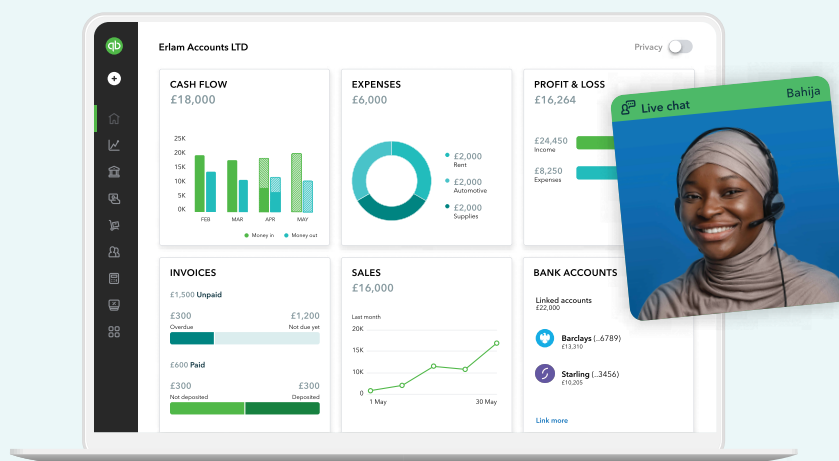
Switching your practice or clients to QuickBooks?

Speak to our team to learn more about support to easily and quickly migrate clients to QuickBooks. Whatever solution your clients are currently using—our team is here to support you every step of the way.

Got clients using Sage or Xero?

You can switch them to QuickBooks for FREE. **We'll cover the cost of 2 years historical data migration** through DataSwitcher or Movemybooks, saving them £180 + VAT and you the hassle.

<https://quickbooks.intuit.com/uk/accountants/switch/>



QuickBooks is giving me greater visibility and it's empowering me and my team to achieve for the clients and ensure they are being well looked after.

Dr Kamran Shaikh,
Morgan Reach Accountants

Enjoy preferential pricing

We know everyone's concerned about rising costs right now-and we don't want to add to the burden. Our range of intuitive, affordably priced accounting solutions come with **no hidden fees or changes**.

We want to work in partnership with your practice. That's why we offer free accounting and payroll software for you, **up to 60% off QuickBooks Online for your clients when you manage their subscription billing**, expert help from real people 7 days a week, and free 1 on 1 onboarding for you and every client.

Talk to our sales team about our range of licence package options and payroll discounts on 0808 258 4342.

Learn more





Join over 6.5 million subscribers worldwide

QuickBooks Online Accountant is free for accountants and bookkeepers—and you can save up to 60% on QuickBooks Online when you manage your subscription billing for your clients.

“ With its exceptional software quality, outstanding customer service and cost effective fees, QuickBooks is the ideal choice for your practice.

Abul Nurujjaman, TAJ Accountants



Activate QuickBooks
Online Accountant for **FREE**



Want to see QuickBooks in action? **Book a demo to learn more.**