

Accounting Process - QuickBooks Online and Integrated Services

Summary and Scope of Training

The scope of this engagement will be focused on training your in-house accounting team on how to effectively map their current and future accounting processes, master the technical skills required to maximize the potential of QuickBooks Online (QBO) Advanced and explore potential value-added software applications that will integrate with QBO to create a seamless ecosystem to manage the business. These processes will entail administrative procedures, accounting required procedures, technical procedures and customer service and relationship management procedures.

The deliverables will include:

- Facilitated classroom based training or one-on-one hands-on training
- Trainees must complete a live case study project for each module before completion
- Current Instructor: Sarah Tiet, QBO Advanced Certified
- Trainee per class: 1 – 10
- Certificate of completion

Training Cost - Training cost is \$3,000 per trainee

Training Schedule and Course Outline

| | | Hours |
|-----------------------------|---|-----------------|
| Day 1 | <ul style="list-style-type: none"> • Accounting for business management • Introduction to QuickBooks Online • Process documentation methodology and tools | 3 |
| Day 2 | <ul style="list-style-type: none"> • QuickBooks Online setup • QuickBooks Online bookkeeping – basic • Examples, scenarios and hands-on training • Process documentation updating | 3 |
| Day 3 | <ul style="list-style-type: none"> • QuickBooks Online payroll module • GST preparation and filing • Examples, scenarios and hands-on training • Process documentation updating | 3 |
| Day 4 | <ul style="list-style-type: none"> • QuickBooks Online training – advanced • Examples, scenarios and hands-on training • Process documentation updating | 3 |
| Day 5 | <ul style="list-style-type: none"> • QuickBooks Online audit and control management • QuickBooks Online year-end module • Full cycle case study and examples | 3 |
| Day 6 | <ul style="list-style-type: none"> • Financial reporting for business management • QuickBooks Online custom reporting module • Cash – flow management and forecasting | 3 |
| Day 7 | <ul style="list-style-type: none"> • Customer relationship management and pricing levels • Operational efficiency and procedures • Intuit Marketplace App research and testing • Software selection criteria's and considerations | 3 |
| Total Training Hours | | 21 Hours |