

QuickBooks Connect Web & Mobile Access



What is QuickBooks Connect?

QuickBooks Connect allows users to access essential QuickBooks customer and transaction data online or on a mobile phone. QuickBooks Connect automatically syncs with QuickBooks through our easy to use Intuit Sync Manager.

Web Access: Users can view and create invoices and sales receipts from the web. They can also view and create estimates, generate, e-mail, or print PDF's, record payments, perform basic searches and access key business metrics (internet access required).

Mobile Access: *Blackberry* and *iPhone* customers can view customer information, view and create invoices & sales receipts, e-mail PDF's and record payments (data plan with carrier required).

What are the benefits?

Save Time

- Easily create invoices, view and update critical information, and record payments on the road
- Access essential customer and transaction QuickBooks data when out of the office
- Eliminates the need to enter information in a non-live copy of QuickBooks data only to re-enter it in the live books back at the office

Stay Connected

- Get the latest on how the business is doing with snapshots, key metrics and pulse alerts

Be More Productive

- Answer questions and perform key tasks on the go
- No longer have to wait to issue invoices or record payments – get it done right then and there, on the road or at a client site
- Check customer balances, manage payments, create invoices and more without having to call back to the office
- Synchronizes with QuickBooks desktop data in the office so information is always up-to-date

What are some good probing questions?

- When you're away from the office, how do you keep track of business transactions?
- How often do you wish you could access QuickBooks when you're away from the office?
- What would it mean to you if you could receive payments from customers while away from the office?
- How would your productivity increase if you could perform certain QuickBooks tasks while away from the office?
- How much time do you spend re-entering transaction data into QuickBooks when you return to the office?
- How often do you conduct business on the go?



What can QuickBooks Connect Do?

Tasks you can do with QuickBooks Connect	Mobile Access	Web Access
Track your Business:		
View key business metrics, snapshots		✓
See latest business activity with Pulse alerts		✓
Perform basic searches		✓
Manage Customers:		
Look up customer contact information	✓	✓
View customer balances	✓	✓
View job information, items, lists		✓
Create new customers	✓	✓
Edit customer information		✓
Manage Money Coming In:		
Create and view invoices	✓	✓
Create and view sales receipts	✓ *	✓
Create and view estimates		✓
Create and view payments		✓
Use your custom QuickBooks templates		✓
Make a PDF of your transactions that you can save, e-mail or print	✓ *	✓
Record payments	✓ *	✓
Manage Money Going Out:		
View vendor information (bills, purchase orders)		✓

* iPhone only

Coming soon: Accept payments and Add permissions (as long as customer is an active subscriber)

Terms and Conditions

QuickBooks connect only works with QuickBooks 2011 (for Windows) or QuickBooks Pro (Premier) Plus. Not available to QuickBooks for Mac or QuickBooks Online users. Requires internet access, product registration and an Intuit account. Terms, conditions, features, availability, pricing, fees, service and support options subject to change without notice. Data plan required. Apps currently only compatible with iPhone and Blackberry and require registration and corresponding online services. Mobile application works with iPhone and Blackberry (Curve 8900, Curve 8500: 8520, 8530, Bold 9000, Bold 9700, Tour 9630). Customer is permitted one 30 day free trial per subscription. Cancel anytime by calling 800-450-8475. When purchased as a stand alone service and is canceled, customers will continue to have access through the end of the current subscription period. No refund will be available for the current subscription period.

Frequently Asked Questions

How do customers activate the services?

- Customers will receive a confirmation e-mail with a link. Clicking on the link will take them to the setup process for QBC.

- **For iPhone:** the application can be found in the App Store under QuickBooks Connect.

- **For Blackberry:** customers must have a supported Blackberry model. Customers will open their Blackberry browser and download the QuickBooks Connect application from <http://sbm.intuit.com/qbm.html> (can only be accessed from a Blackberry browser). They will follow the on-screen prompts to complete the installation. The application can be launched using the same login and password used to sign in to QuickBooks Connect on the web.

What if a customer wants to cancel?

Customers receive a 30 day free trial but can cancel at anytime by calling 800-450-8475. QuickBooks Connect continuously updates with QuickBooks desktop so data will not be lost.

How does a customer receive support?

Customers can receive support by calling 800-450-8475 or e-mail us at QBConnect@intuit.com.

Are there any limitations?

QB Connect works on any internet enabled browser, must have internet access.

QB Connect only works on certain mobile devices (see previous page), must also have a data plan.

How do I enter the order?

Order entry in CRIS will be source code driven. Source codes can be found on Atlas, under "Offers" under "Connected Services." The service will show up in CRIS under *Contracts* not *Agreements*.

What if a customer wants multiple users?

Customers can add up to 5 users at \$9.95 per month per user.

Are there any other steps customers need to follow after the sale?

They just need to follow the link in their confirmation e-mail to get started.

Where do I find information on the latest features and functionality in QuickBooks Connect?

Agents can visit <http://teamrooms.reno.intuit.com/servicedelivery/SBG/default.aspx> or Atlas to stay updated on the newest features. Additional communication will be provided via e-mail as needed.

Since this is a new service, where can I direct customer feedback and questions?

All non-urgent customer questions and feedback can be e-mailed to QBConnect@intuit.com. Responses will be provided within 48 hours. This e-mail is also a good resource for staying updated on the mobile devices for which QuickBooks Connect is compatible.

What if the customer purchases a new phone?

The customer can simply download the application again.

What happens if a customer loses their phone and they are concerned about their data?

The customer can call us at 800-450-8475 and the service can be temporarily disabled and/or transferred to another phone.

Can you explain the 30 day free trial?

Agents will use a source code in CRIS to set up the free trial. When a customer signs up for the 30 day free trial, they will need to provide a credit card number. The card will not be charged until the end of the 30 day free trial. The customer will need to call if they wish to cancel the service.

What happens if a customer purchases QB Connect a la' carte and then wants to upgrade to the QB Connect bundle or QuickBooks Plus later?

Customers can do this and will not lose any data. You will simply cancel the customer's QB Connect service and sign them up for the QB Connect bundle or QuickBooks Plus.