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# QuickBooks Solution Provider cobranding guide

2023



# Table of contents

<b>Cobranding guidelines overview</b>	<b>3</b>
<b>Writing about QuickBooks</b>	<b>9</b>
<b>Digital ads</b>	<b>11</b>
<b>Social posts</b>	<b>15</b>
<b>Emails</b>	<b>18</b>
<b>Print ads</b>	<b>22</b>
<b>Websites</b>	<b>27</b>
<b>Policies and resources</b>	<b>32</b>

# Your brand and QuickBooks

At Intuit, we're here to provide you—a trusted QuickBooks Solution Provider—with the tools, assets, and resources you need.

Cobranding success happens when your brand and ours leverage our joint value in marketing assets.

QuickBooks is a trusted household name that can help to promote your relationship with Intuit. However, we want your brand, your message, and your value proposition to be in the spotlight.

As a QSP, you have access to all the pre-approved, cobrandable templates in the QSP Resource Center.

Use this guide to best represent the QuickBooks brand—**because we're better together.**



# Approved terminology

## Excerpts from the Program Guide

### You cannot use the terms:

“Intuit Partner”, “QuickBooks Partner” or any other description other than what is set forth in the [QSP Program Guide](#).

1. It is not permissible to represent your company as a “Partner” of QuickBooks.
2. You must display the current QuickBooks Solution Provider badge on your website home page. The badge should not appear at the top of your website. The badge should not appear larger than your company logo.

You may **only use the following approved phrases** to promote, advertise, market, or communicate your participant status:

- “Member: QuickBooks Solution Provider Program”
- “Member of the QuickBooks Solution Provider Program”
- “QuickBooks Solution Provider”

For all policies, please refer to the most current version of the [QSP Program Guide on the QSP Resource Center](#).

# Using the QuickBooks logo

In the [QSP Resource Center](#), you can download two QuickBooks logos: a color logo and a reversed logo (for dark backgrounds).



Color logo



Reversed logo  
(white on transparent background)

Our logo requires a clear space all around its border to stand out.



## Tips:

- If you use a reversed logo, make sure you clearly distinguish it from the background.
- The background and logo must have a high contrast between them, and the logo should always be perfectly legible.
- You can only use the logo in connection with the QSP program, including to communicate that you can help small business owners to acquire, set up, and use QuickBooks. See [QSP Program Guide](#) for details.

# Using the QuickBooks logo: what not to do



Don't put the QuickBooks logo in a containing shape.



Don't place our logo on a background pattern, busy image, or illustration.



Don't add a product name with the logo.



Don't place the logo on a green background because it's not accessible.



Don't place the logo on a solid background color that isn't approved.

# QuickBooks logo usage guide

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In your marketing materials, put your logo to the far left and the QuickBooks logo to the far right or below your own logo with appropriate white space between the two.

**You cannot lock up QuickBooks logo with your company logo.**



To left side



To right side



(Optional: below after white space)



Do not lock up logos.

# QuickBooks color palette and typography



If your company does not have a standard typeface for your brand, we recommend using Arial for readability and accessibility.

**Arial**

**Aa**

ABCDEFGHIJKLMNOPQRSTUVWXYZ

abcdefghijklmnopqrstuvwxyz

0123456789!?.’”;- —’@\$%&()\*\#



# Writing about QuickBooks

These guidelines can be used for emails, websites, ads, social posts—any space where you describe your company’s QuickBooks offerings.

## Voice and tone\*

### Key voice principles:

- It’s about them, not us
- Speak their language
- Focus on the payoff
- Keep it simple
- Delight when it’s right

### The QuickBooks brand is:

- Optimistic in outlook
- Passionate in nature
- Proactive in action
- Empathetic to all

## Tips and tricks

- Always spell QuickBooks with an uppercase “B” (never “Quickbooks”).
- Always spell out QuickBooks product names fully; do not use acronyms or abbreviations (QBO, etc.).
- Use first person plural (we, us, our).
- Use exclamations sparingly.
- Be sure to always annotate sources for data.

# Writing examples using Intuit voice and tone

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## **It's About Them Not Us:**

Do: Stay ready for tax time

Don't: Organize your tax records

## **Speak Their Language:**

Do: Your free account expires soon

Don't: Free trial expiring

## **Focus on the payoff**

Do: Stay ready for tax time

Don't: Connect your accounts

## **Keep It Simple**

Do: Get paid on the spot

Don't: Use your free card reader to take payments

## **Delight When It's Right**

Do: Share the love

Don't: Refer a friend, get a gift card

## **Optimistic in Outlook**

Do: E-filing made easy. For real.

Don't: E-file taxes with our latest tax filing capabilities

## **Passionate in Nature**

Do: We are determined to help you change your customers vision of tax time

Don't: We have been working hard on our new feature, Receipt Capture

## **Proactive in Action**

Do: We make tax time easy with our latest QuickBooks features

Don't: We have the latest QuickBooks software available

## **Empathetic to All**

Do: We are here to help. All businesses. All sizes. Everywhere.

Don't: We specialize in small to medium organizations and their tax needs

# Digital media guide

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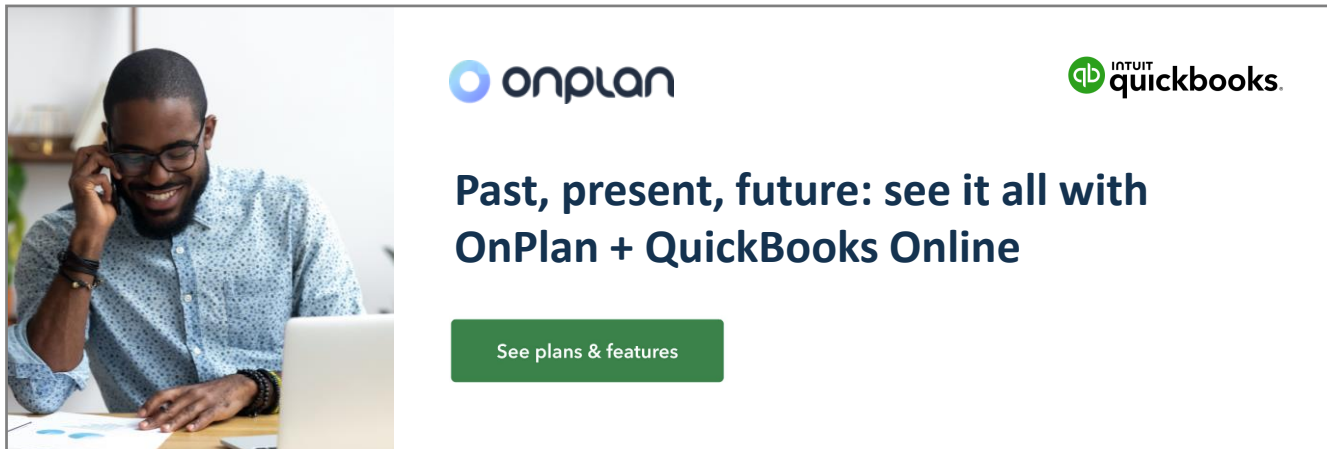
Digital ads and social media can augment your business exponentially. Here are a few suggestions on how to build effective messages around your QuickBooks offerings. An authentic social media presence is key to discovering and connecting with potential customers—we're here to help.

The following pages give guidelines\* to help you create impactful campaigns with tips on value propositions, tag lines, logos, and strong CTAs, as well as social media and content advice from our QSP Resource Center.

Don't forget you can have digital campaigns created through approved agencies in the [Marketing Service Catalog](#).

# Digital ads guide

When creating digital ads, follow these guidelines to represent your QuickBooks bundle or services successfully. And be sure to know our online advertising policy, found in the [QSP Program Guide](#).\*



## Know your digital ad elements

- **Tagline:** Short, simple, and compelling—it’s the biggest thing the viewer will see and should pull them in.
- **Value proposition:** The statement that you make about your product’s value; perhaps it is a brand promise or a differentiator.
- **Call to action (CTA):** What you want the ad viewer to do. Examples are “Email us,” “Go to our website,” “Get started,” or “Learn more.”
- **Button:** If your CTA is a link, make it a button for a more polished look.
- **Logo:** Don’t forget your logo! See our cobranding logo guidelines.

# Digital ads guide

## Best practices for simple and effective digital ads

- Your logo or company name should be prominent, as it's an offer from you (see logos page), but make logos visible while not dominating the value proposition or call to action.
- The value proposition should be prominent so that it is the first thing the viewer notices.
- Examples of calls to action include:
  - Learn more
  - Get started
  - Click to start your free trial
- Make it easy to see and read—don't use cursive or script fonts, extremely thin font weight, all uppercase copy, or font sizes smaller than 10 point (unless it's a disclaimer or copyright notice).

## Digging Deeper

- Use standard web banner sizes according to the channel on which you are.

Some standard size examples include:

- 300 x 250px (medium rectangle)
- 160 x 600px (wide skyscraper)
- 120 x 240px (vertical banner)

How long will a viewer spend looking at your ad?  
**Probably only a few seconds.** Keep it simple.

# Digital ads guide: Use cases

You can cobrand your web banners by adding our logo (as instructed on logos page and QSP Program Guide).



**Connect QuickBooks Online and your stores  
to simplify your accounting, inventory, and  
shipping workflows.**

**TRY WEBGILITY FOR FREE**

Start your 15-day free trial, no credit card required.



# Social posts guide

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Intuit uses many social channels, but you don't have to use them all. Share content where your audience is spending time. QuickBooks has a prescribed way of creating content for social media, whether it's copy, graphics, videos, or third-party links.

## Know your post elements

- **Caption:** Research shows that an average of 150 characters, or about 15 words, gets the most clicks.
- **Call to action:** Ask a question to encourage comments or share a link to invite your audience to learn more, make contact, buy, or sign up.
- **Mentions:** Tag other accounts for greater visibility and reach.
- **Hashtags:** Add #keywords for easy searchability. Find and use hashtags that are current and popular in your industry (try an online hashtag generator).
- **Images or videos:** Aim to always include a high-quality photo, GIF, or video clip that is tailored to your brand and your audience.

# Social posts guide

## Best practices for compelling social post content

- Always be you!
- Keep it short, simple, and positive.
- Use high-quality images and videos.
- Add a call to action.
- If posting a link, use a free service like [bitly.com](https://bitly.com) to shorten URLs and track click-through analytics.
- Vary your content; it can be educational, entertaining, inspiring, or promotional.
- We love it when you share content that is hosted by QuickBooks, but you can also share third-party content and mention how it relates to your QuickBooks offering or solutions (think: thought leadership).
- Always ensure your posts clearly come from you, and not from QuickBooks.

## Digging Deeper\*

- Plan your posting schedule using the best days and times of the week for each platform:
  - LinkedIn: Tuesday and Wednesday, 9 am–11 am PST
  - Twitter: Monday and Thursday, 6 am–9 am PST
  - Facebook: Tuesday and Thursday, 8 am–12 pm PST

\*These are general guidelines, but audiences may differ



# Social posts guide: Use cases

Discover the social post library in the QSP Resource Center and link your social feeds.

These posts come ready-made with graphics, copy, and hashtags, and you can opt into autopost with or without your review at varying times during business hours.

You have 17 posts per week available to you in the QRC.

## Social post library

Leverage and customize QuickBooks variety of pre-built social posts for LinkedIn, Twitter, Facebook, and other popular social platforms.

[Look now](#)

**10:00 AM**

One way #smallbusinesses can benefit from #IoT devices: they can help your business adopt more sustainable habits, which in turn reduces your carbon footprint. [oal.lu/123s1](https://oal.lu/123s1) #CSR #CloudAccountingSoftware #QuickBooksSolutionProvider

Hosting Advanced Inventory Advanced Pricing General

**04:00 PM**

Cape Cod-based adventure business, Rideaway Adventures, shared their experience migrating from #QuickBooks Desktop to QuickBooks Online and what they appreciate most about the switch: [oal.lu/123s1](https://oal.lu/123s1) #CloudAccountingSoftware #QuickBooksSolutionProvider

QuickBooks Hosting Point of Sale Desktop General Retail Manufacturing Contractor NonProfit

# Email guide

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Your email design should always align with your own brand identity. Subject lines should be short, catchy, and difficult to ignore. **Recipients should know instantly who the email is from and why it was sent.** You should never make an email appear as if it is from Intuit.

Your customers should know exactly how to take the next step. Make sure there's a **clear call to action**, and that **click-throughs are an intuitive experience.**

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Read on to discover guidelines and best practices to ensure a strong and consistent customer experience when opening an email from you that includes messaging about QuickBooks.

## Call to action

**Watch more here:**

[Webinar: A crash course in B2B email creative](#)

(See what we did there?)

# Email guide

## From name

The “from name” is one of the first elements that factor into whether the recipient will open your email. To ensure a consistent and trusting customer experience, standardize your from name.

In addition to customer experience, a standardized from name increases the strength of your brand and increases deliverability. Don't include Intuit or QuickBooks brand elements in your email addresses.

## Subject lines

All email service providers have different maximum character lengths for displaying subject lines. Our research shows that subject lines around 50 characters (including spaces) have the highest non-deletion rates.

Subject lines should refer directly to the content of the email (alerts, reminders, marketing) and avoid obvious spam-type language such as all caps, exclamation points, and gimmicky words like “free” or “special offer.”

## Preheaders

The preheader is text that comes after or below the email subject line. This content should help explain the benefit of the messaging inside the email. Preheaders should work in conjunction with the subject line to provide click-worthy insight.

Like subject lines, email providers have variable standards for the number of characters displayed for preheaders. The most popular email clients recommend a preheader of 50-100 characters.

## Links and footers

Anchor link text should be short and clearly indicate the URL destination. The footer should include all relevant company details and the unsubscribe link should be easy to find.

# Email: Best practices

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## Design guidelines

- Put your brand at the forefront. Don't make the QuickBooks logo larger than your own—and always ensure it's clear that the email is from you.
- Ensure the colors align with your brand.
- In your marketing emails, put your logo to the far left and the QuickBooks logo to the far right or below it with appropriate white space between the two.
- You should not lock up with QuickBooks logo or mark with your company logo.
- See next page for information on QuickBooks links.
- The Intuit logo should not be used in your company's marketing emails.

## Email: Use cases

To help in building a cobranded email, be sure to review the [QSP Program Guide](#)\* and know what can and cannot be said about your participation in the QuickBooks Solution Provider program.

\* See page 18 of the QSP Program Guide

### Badges and logos

- Program badges or authorized QuickBooks logos displayed on emails and marketing materials should be smaller than your business name and logo—but must still be legible. Email must clearly be from you, not QuickBooks.
- The QSP badge should only be used on your website or in promotional material where you want to emphasize your membership in the QSP program.



- Use your tier logo on your email signature, following all QuickBooks logo usage guidelines.
- Don't edit, crop, or recolor tier logos in any way.
- Don't use the tier logo as a replacement for your profile photo or company logo.

### Links

- Link to any official QuickBooks product webpage that helps bring opportunities to new potential clients.
- Don't link to websites that are unaffiliated with Intuit or use an Intuit brand in the company name or website domain.

# Print media guide

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Print ads and mailers are tangible ways to market your company and leave a lasting impression with customers. The permanence of handouts and mailings make precision and design key elements.

Read on to learn more about design/artwork, copy suggestions, CTAs, and logo cobranding with QuickBooks,\* as well as our [QSP Resource Center](#) which offers a ready-made toolkit and cobrandable PDFs to help you succeed.

# Print ads guide

Whether you're creating mailings or printing handouts for an event, use the following guidelines to cobrand properly with QuickBooks.

## Know your print ad elements

- **Headline:** Make it short and catchy with large font.
- **Design/artwork:** You can use our templates and image library for approved designs and graphics.
- **Ad copy:** Refer to the [Writing about QuickBooks page of the QSP Program Guide](#).
- **CTA:** Write a clear, simple call to action, like “Email us” or “Visit our website.”
- **Company signature:** Our logos together: see the [QuickBooks logo guidelines page](#) of the QSP Program Guide.

# Print ads guide

Whether you're creating mailings or printing handouts for an event, use the following guidelines to cobrand properly with QuickBooks.

## Best practices for creating print ads

- Don't overlay a logo or text on top of an image.
- Don't use more than 3-4 text sizes.
- Adhere to our logo cobranding rules.
- Keep it clean and don't be afraid of white space.
- Consider images carefully. Make sure the image conveys the same message as the copy.
- Viewers recall print ads more readily than digital ads.\*

\*<https://www.newsworks.org.uk/research/rametrics/print-vs-digital-advertising/>



# Print ads guide: Use cases

Ask your PDM about our ready-made toolkit, [Events in a Box](#), or find it in the [QSP Resource Center](#).

Choose from a selection of premade cobrandable PDFs where you can put your knowledge of cobranding guidelines to good use.



These assets are already branded for **QuickBooks**—just add your logo and describe your offerings, then print and distribute.

# Print ads guide: Examples

Check out these examples of cobranded materials available in the [QSP Resource Center](#).

## One-page print assets

Cobrandable PDF forms—just fill out the form fields using the directions and tooltips.

**One secure solution**  
QuickBooks Online  
A smart, stress-free way to run your business anytime, from almost anywhere.<sup>1</sup>

**Simplify your business**  
QuickBooks Online Advanced  
Work smarter and grow faster with more tools.

**Plans that fit any business**

**Power productivity**

## One-page print asset PowerPoint templates

More customizable pages—use your expanded value proposition, and your own images, then print as a PDF.

**One secure solution**  
QuickBooks Online  
A smart, stress-free way to run your business anytime, from almost anywhere.<sup>1</sup>

**3-line heading at 48pts**  
Subheading 24pts  
3-line subheading blurb at 18pts. AvenirNext for INTUIT, not Avenir Next for Intuit.

**We're <vertical> business solution experts**  
Partner value proposition.

**Feature or benefit call out. 18pt font. Lines variable.**

Partner logo

Insert JPG or PNG logo file then delete border

# Website guide

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Your website is your company's digital store and its public-facing image. When customers visit your website, they receive an instant impression about your business.

The next few pages offer cobranding tips and guidelines such as design, grammar, layout, logo placement, and general usability, as well as use cases with suggested QuickBooks product webpage links.

Need an agency to help you build? Try one of our recommended agencies in the [Marketing Service Catalog](#).

# Website guide

If social media, print or digital ads, and emails are your organization's calling cards, then your website is your home base. Your website is where customers come to learn more about you, buy into your own brand, and invest in your business.

**Your landing page evokes your company's brand and personality—and by extension, the brand of QuickBooks.**

We make website cobranding easy, with a website plugin library [available here](#).

# Website guidelines\*

## Here are some simple tips for maximum cobranding power:

- Invest in design—the look of your website is like a home or event: it conveys a feeling about your brand.
- Make sure your content reflects your brand and is well-written, grammatically correct, and easy to digest.
- Usability is key. Create your site to be user-friendly and navigable with clear drop downs and clear messaging.
- Design your pages to have the most important information and cobranding at the top left of the page, and above the fold.
- Add your QuickBooks-related services to your top navigation (see next page for details).
- Always spell QuickBooks with an uppercase “B” (never “Quickbooks”).
- Always spell out QuickBooks product names fully; do not use acronyms or abbreviations (QBO, etc.).
- Utilize QuickBooks [website widgets on the QSP Resource Center](#).
- Always use your own name in your domain and URLs. You cannot use “quick” or “qb” or “quickbooks”.

# Website guide: Use cases

## Badges and logos

- Program badges or authorized QuickBooks logos displayed on website and marketing materials should be smaller than your business name and logo—but must still be legible.
- The QSP badge should only be used on your website or in promotional material where you want to emphasize your membership in the QSP program. You should predominantly use the QuickBooks logo as in most instances you'll be promoting the product or your bundle.
- Don't edit, crop, or recolor the tier logos in any way.
- Don't use the tier logo as a replacement of your profile photo or company logo.

## Links

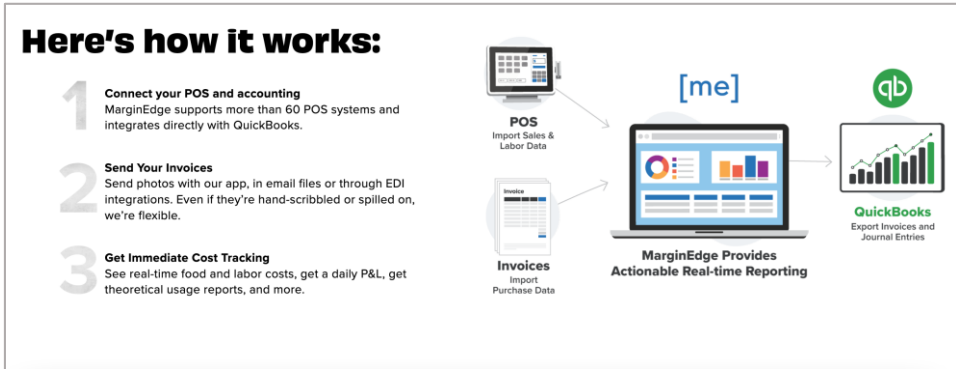
- Link to any official QuickBooks product webpage that helps bring opportunities to new potential clients such as your microsite.
- Don't link to websites that are unaffiliated with Intuit or use an Intuit brand in the company name or website domain.



# Website guide: Use cases

Cobranded website design is about more than logo placement—it's about highlighting QuickBooks solutions within your offerings.

Click on the links to actual QuickBooks Solution Provider's websites to view how they present their cobranded bundle.



[MarginEdge restaurant software](#)

The screenshot shows the Clio website header with navigation links: Products, Practice Types, Pricing, Resources & Events, and a Try Clio for Free button. Below the header, there is a 'Back' link and a large section for 'QuickBooks Online' with the tagline 'Accounting software made easy.' Below this, there are three badges: 'Clio CERTIFIED APP', 'CLIO MANAGE', and 'AVAILABLE IN CANADA, EUROPE, THE UNITED STATES'. On the right side, there is a white box containing the 'intuit quickbooks' logo, the text 'Starting at \$35 per month USD', and two buttons: 'Get started' and 'View all plans →'.

[Clio legal software](#)

# Policies and resources

Your PDM and the QSP marketing team are here to help you along your cobranding journey to business growth.

Be sure to carefully read and familiarize yourself with both our [QSP Program Guide](#), specifically:

- Pages 16-17: Branding and identity
- Page 17: MAP policy
- Page 18: Online advertising
- Page 18: Online and third-party marketplaces
- Pages 18-19: Marketing standards
- Pages 20-21: Advertising standards including approved word use and terminology

And secondly, the [Minimum Advertised Pricing Policy \(MAP\)](#) for QuickBooks.

Remember, you have access to countless additional resources on our [QSP Resource Center](#) including services through the [Marketing Service Catalog](#), toolkits, templates, digital, and printable cobrandable materials.

Plus, we're here to help.



## Minimum Advertised Pricing Policy

aka "MAP Policy," "Safe to Advertise Policy," "Do Not Advertise Before Policy," together, the "Advertising Policies"  
Last Updated: 05/11/2022 Effective: 07/01/2022

Intuit's Advertising Policies are designed to help maintain the long-term strength of Intuit's brand equity by ensuring we and our partners engage in advertising that best conveys to end-users the value of Intuit's Product Lines. This document defines the MAP Program terms for Intuit's QuickBooks Online and Desktop software.

- 1. General Policy Information.**
  - 1.1. Product Lines.** These policies shall apply to the product lines ("Product(s)") listed in the [Product Line Attachments](#) section in this policy document, such Product Line Attachments shall be updated and provided to the authorized resellers and/or sales consultants by Intuit from time to time.
  - 1.2. Purpose.** The policies contained in this policy document are designed to provide all authorized resellers and/or sales consultants with an equal opportunity to sell the Product(s), to provide consistency among the Product advertisements, and to promote accuracy of Product availability information.
  - 1.3. Application.** These policies shall apply to Product advertisements published in any form, whether printed, broadcasted, or presented electronically through the Internet; including websites & associated landing pages.
- 2. Advertising Policies.**
  - 2.1. Timing.** A reseller may begin selling the Products when the Products are received on or after Intuit's QuickBooks official "Go Live Date".
  - 2.2. Advertised Prices.** "Advertised prices" are defined as prices that are visible in the authorized reseller and/or sales consultant's marketing materials (physical or digital) and including but not limited to prices discoverable through web search engines, crawlers, websites and all associated landing pages.
- 3. MAP Policy.**
  - 3.1. Minimum Advertised Price.** Intuit's MAP policy applies to authorized resellers and/or sales consultants' who refer Intuit's Product Lines to customers. Advertised prices do not restrict the reseller's right to sell products at whatever price they choose. Advertised prices include all advertising of Intuit products in all physical media, offline digital media, or onsite digital media. To be compliant with this MAP Policy, authorized resellers and/or sales consultants' advertisements of Product(s) must include MAP-compliant pricing.
  - 3.2. Physical Media** is defined as any physical advertising inside and outside your Physical Store including but not limited to printed coupons, mailers, newspapers, magazines, public signage, weekly ads and circulars, and television or radio advertising. It does not include shelf pricing or pricing physically affixed to Products and is also subject to the exceptions set forth in [section 3.2](#).
  - 3.3. Physical Store** is defined as a brick-and-mortar location where goods or services are sold.
  - 3.4. Onsite Digital Media** is defined as any digital advertising inside your Online Store (digital media on your website) including but not limited to any page visible on an authorized reseller and/or sales consultant's website including the homepage and all associated landing pages (other than the shopping cart or wherever checkout is presented and subject to the exceptions set forth in [section 3.2](#))
    - 3.4.1. Online Store** is defined as the website and all associated landing pages or applications by means of which goods or services are sold over the internet.



## QUICKBOOKS SOLUTION PROVIDER PROGRAM GUIDE

Updated August 1, 2022



# Additional resources

You can find a wealth of resources in the QSP Resource Center. You can search by audience, product, category, and more, or discover ready-made toolkits, templates, and cobrandable materials.

**See a list of webinars here:**

[Training webinars for marketing and branding](#)

Reach out to your PDM with further questions.