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QuickBooks Online

Intuit

www.quickbooksonline.com

From the July 2019 reviews of small business accounting systems.

QuickBooks Online Accounting is a good fit for small businesses looking for an easily accessed accounting application. QuickBooks Online has made numerous improvements and enhancements to its initial online product that have made it easier to use and more in tune with QuickBooks Desktop products. QuickBooks currently supports up to five system users.

QuickBooks Online Accounting is available in three versions, suitable for sole entrepreneurs to small businesses of any type, with users able to start small and scale up to a more robust version of the application if needed. The global version of QuickBooks Online supports multiple currencies, and can be translated into 45 languages.

Once QuickBooks Online is accessed, users will be guided through the entire product setup process. QuickBooks Desktop users can also easily export their entire company

directly into the application. The user homepage serves as a dashboard, providing

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QuickBooks automatically installs a chart of accounts based on the information entered during the initial setup process, but users have the option to customize it as needed. Both AP and AR functionality are available in QuickBooks Online, with users able to import customers and vendors directly into the application or add them to the system individually. Users can access the vendor list to perform a variety of tasks, including creating a new bill, creating an expense, or making a payment, with a similar process used for customers, including creating an invoice or estimate from the customer list. Bills can be scheduled for payment on a particular date or paid when received. In addition, QuickBooks Online easily tracks sales tax for product sales and services. An optional Payroll application is available that can be purchased separately from the core financial application, with users able to choose self-service or full-service payroll. The Sales module can double as a point of sale module, though it's not suitable for high-volume processing, with users able to accept tenders such as cash, checks, credit cards, and Apple Pay from customers. The product also offers integration with a variety of sales, point of sale, online shopping carts and other e-commerce applications as well.

Relationship Management

QuickBooks Online offers basic tracking and management for vendors and customers, though users can opt to utilize a third-party app for more robust CRM capability. In addition to basic information, users can record information such as current account balances, billing rates, notes on each particular vendor or customer, and attach any documents, invoices, purchase orders, or other correspondence directly to their account.

Cloud Capability

QuickBooks Online includes a free mobile app that supports both iOS and Android smart phones and tablets. Online banking is also available in the application, with

users able to set up any financial institution they wish to connect to during the setup

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view key performance indicators such as total invoices and expenses, a profit and loss graph, total sales, and bank account balances. The homepage dashboard is completely customizable, with users able to display only the information they desire. The application also offers integration with financial analysis tools to create more robust management reports and dashboards. QuickBooks Online also includes a Company Overview report which provides a quick summary of vital statistics, while the Company Snapshot provides an overview of company performance over a select period of time. All QuickBooks Online reports are categorized by group, with complete financial reporting capability offered, including Balance Sheet, Trial Balance, and Profit and Loss. Users can create a Favorites list for frequently run reports for quick future access. All reports are fully customizable, with users able to save customized reports as well. All QuickBooks Online reports can be exported to Microsoft Excel for further customization, or saved as a PDF.

Tech Issues: 4.5 Stars

QuickBooks Online offers a variety of tools designed to make data import and export easy, with users able to choose a variety of data to import, including bank data, customers, vendors, a chart of accounts, and products and services. Users can also export numerous system reports and lists as well as financial statements. Payroll is not included in the core application, but QuickBooks Online Payroll is available at an additional cost. In addition, QuickBooks Online is designed to integrate with numerous third-party applications that extend product functionality considerably, and QuickBooks Online for Accountants makes it easy for accountants to access client data.

Users can click on the Help button in QuickBooks Online to quickly ask a question or search for answers. A Contact Us tab is also available at the bottom of the screen that allows users to briefly describe their issue, which will be routed to support personnel. There are also brief training videos online that can be accessed when

convenient, as well as numerous user guides that can be downloaded or printed.

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Plus is \$70.00 per month, though Intuit runs frequent sales throughout the year.

Payroll is priced separately, with both Self-Service and Full-Service payroll options available, with prices varying.

2019 Product Rating: 4.75 Stars

Accounting • Small Business

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