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Dec. 22, 2008

*From the [Jan. 2009 Review](#)  
of Not-for-Profit Accounting Programs*

QuickBooks prides itself in being user friendly. From the menus to sharp graphical workflows of the customizable Home Page, QuickBooks is easy to navigate and performs the functions needed.

#### **EASE OF USE/FLEXIBILITY – 5 Stars**

The QuickBooks Centers offer great flexibility. They allow quick access to customer, vendor and employee databases with their history and the ability to launch new transactions from the same screen. Users have great flexibility to customize how they use the system with icons at the top of the main screen and individual entry tools in the Preference screens. Popular options include using Tab vs. Enter key, auto decimal placement, spell checking and startup options.

For organizations with business operations, the basic functions are built into QuickBooks without additional modules necessary. Additions available for Quick-Books include Point of Sale, Intuit Merchant Services (credit card and billing services), online Time Tracker and Enhanced Payroll. QuickBooks relies on third-party applications to expand the offerings to integrate with management software with hundreds of options available.

#### **MODULES/SCALABILITY – 4 Stars**

QuickBooks for Nonprofits offers small business accounting software adapted to the nonprofit sector. There is no direct support of grant management, fund accounting or cost allocations per se, but, as accounting software, all the tools are there if you know how to use them. As QuickBooks is designed for those

without accounting knowledge, the vendor has made an effort to provide guidance.

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Tight integration with Microsoft Office allows mail merge capabilities with Word, exporting reports and data to Excel and contact information with Outlook. QuickBooks also allows e-mailing of reports and forms as well as a Shipping Manager to integrate with UPS and FedEx. For those that need more, Intuit offers QuickBooks Enterprise Solutions. It's the same user-friendly interface over a much larger database, and it expands up to 30 users with customizable account/report-level security. Additional operational functionality makes QuickBooks Enterprise Nonprofit Edition a solid competitor for the mid-sized organization.

### **FEATURES/FUNCTIONALITY – 4 Stars**

With the Nonprofit Edition, if an organization uses the Easy Step Interview to create its agency, it can choose from general nonprofit, member association or faith-based organization structure with options to use the unified chart of accounts. QuickBooks provides for fund or restriction management on the income statement with the class function. Program or fund-ing source tracking can be accomplished by using the Job Costing features built into the product. The Help system points users to these adaptations to nonprofit needs.

Budget and forecast setups are easy in spreadsheet-like tools. QuickBooks Nonprofit offers one budget per fiscal year for the entire chart of accounts (profit & loss and balance sheet separately), each class, or individual program (job). Budget setups are limited to the organization's fiscal year, but reporting can span unlimited date ranges, effectively allowing multiple-period program and grant budgets.

QuickBooks encourages users to work with a professional for accounting guidance with tools like the Accountant's Copy. This special archived file allows

users to continue work while the accountant makes corrections to their file

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compliance as well as hundreds of business analysis reports. However, financial statements are not in traditional GAAP format but can be exported to Excel for quick formatting changes. For integrated reporting capabilities, nonprofit organizations

may want to consider the Accountant Edition of QuickBooks. New in the 2009 Accountant

Edition, QuickBooks introduced an add-on Intuit Statement Writer with GAAP templates

and functionality in-cluded. QuickBooks Accountant Edition also includes the Fixed Asset Manager at no additional charge. Coupled with additional industry reports and functionality, the Accountant Edition may be the right fit for some nonprofit agencies.

QuickBooks reports and forms can be customized, memorized and grouped for efficient production. Reports can also be ex-ported, e-mailed and saved in PDF format. Users can be set up to access reports only for board and management purposes. All reports offer drill-down capabilities to analyze back to original transactions.

### **SUPPORT/HELP – 5 Stars**

In-product Help offers nonprofit-specific assistance in many areas. Revamped in 2009, the Help system dynamically adapts to current activities and offers live access to the New Live Community online forum. This lively online user forum is available to all QuickBooks users and has many active nonprofit threads. The QuickBooks support website is also very useful with a large knowledgebase available of FAQs, error message resolution and product guidance.

QuickBooks offers technical support packages with 24/7 tele-phone assistance for technical and product questions. First-year plans are \$349 and \$299 subsequently.

Annual support plans include downloadable guides, installation and setup support,

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10 users (Enterprise pricing includes Intuit's Full Service Plan). For small and growing organizations, QuickBooks is easy to customize to your specific needs if you are willing to do a little research. For a nonprofit organization that knows the ropes and is operating on a tight budget, QuickBooks Nonprofit Edition is an excellent option.

## **2009 OVERALL RATING:**

Technology

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