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owner that desires the flexibility of anytime access that QuickBooks provides. QuickBooks Online is scalable, with three versions available, making it well suited ...

Mary Girsch-Bock • Mar. 20, 2017



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Though the interface in QuickBooks Online is very different than the traditional desktop version, and favors those accessing the system using a mobile device, the functionality is similar, with users accessing all system functions from a vertical menu on the left side of the main screen.

QuickBooks Online offers a surprising number of invoicing options for small business owners. Users can simply click on the plus (+) sign at the top of the screen, to access all invoicing functions. The product contains excellent customization capability, with users able to customize invoices, sales receipts, and estimates. Users can also add their business logo to invoices and receipts, and both the body and data entry fields can be customized as well. Users can view a PDF of the customized invoice prior to saving to ensure that all fields are correct.

Creating an invoice is easy, with users able to preview the completed document prior to processing. Users can easily create recurring invoices by simply locating the original invoice they wish to process on a recurring basis and clicking on the 'make recurring' option at the bottom of the page. Users can then choose the interval in which to process the invoice which includes weekly, every two weeks, twice a month, monthly, quarterly and semi-annually.

Invoices can also be edited or copied if desired, and can also be deleted, which should be used cautiously, although a record of the invoice and the deletion will be viewable in the audit log, which displays the most recent transactions (200) that are processed, though older transactions can be accessed as well, if necessary.

Users can setup email reminders to their customers about paying their invoice, and invoices can be easily printed and mailed or simply emailed to customers. Users can also choose the payment type that they will accept. For those that accept online payments through QuickBooks Payments, users can simply pay the invoice online using an acceptable payment method.

Time activity can be tracked in QuickBooks Online. Users have the option to enter

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statement of activities and statement of activities detail reports, which provide information on all monies received. A series of accounts receivable reports can also be useful when processing invoices. All QuickBooks Online reports can be printed, Reports are easily printed, shared with accountants or CPA's, exported to Excel, saved as a PDF, or emailed directly to recipients from the report screen.

QuickBooks Online invoicing options are robust, particularly for an application designed for mobile access. The product is available in three versions, which start at \$10.00 for the Simple Start edition; with the Plus version currently running \$28.00 a month. A mobile app is included at no cost in all versions of the product.

2017 Rating – 4.75 Stars

Accounting • Auditing • Technology

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