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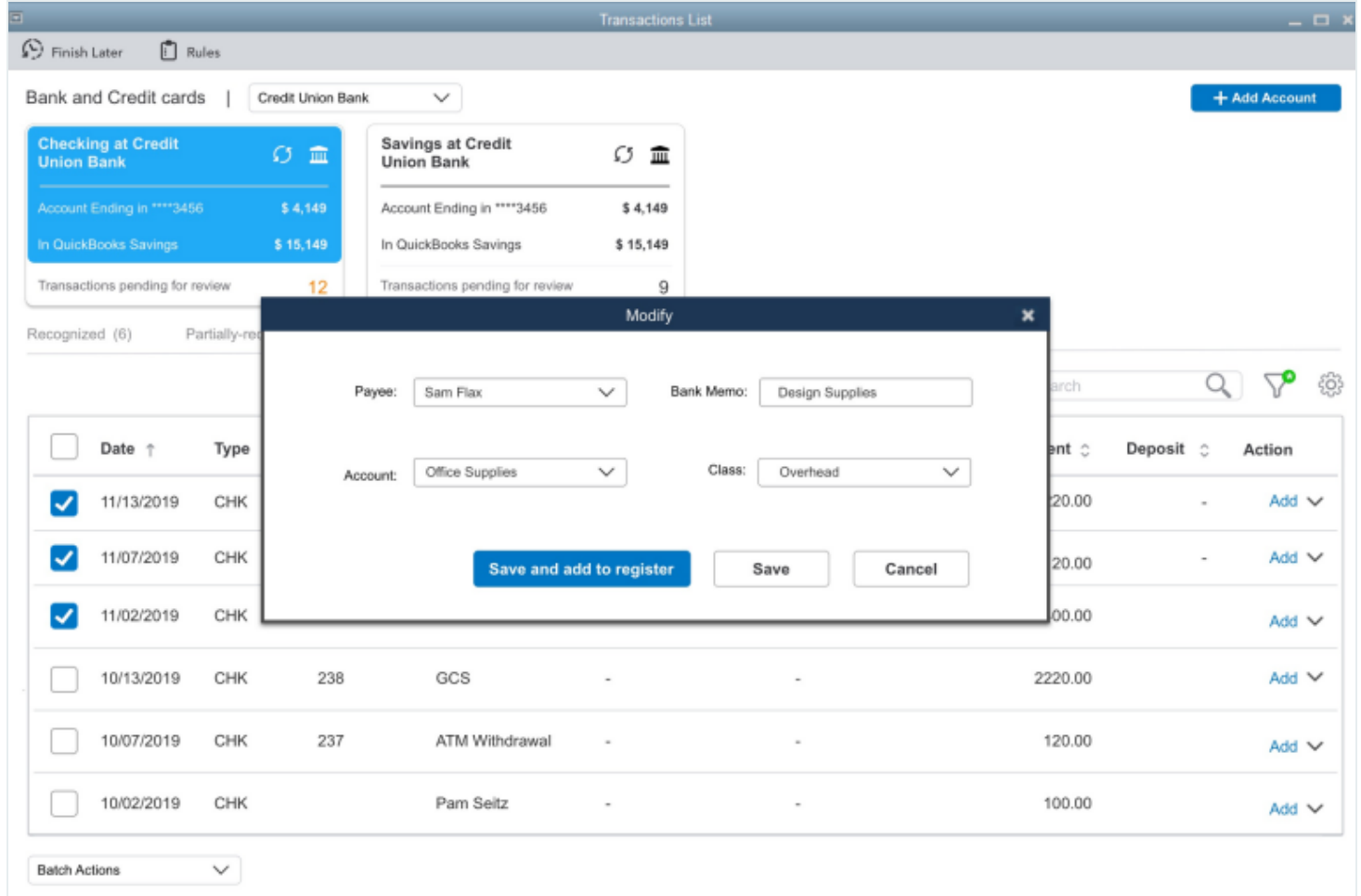
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## AUDITING

# QuickBooks Desktop 2021 Offers More Automation to Save Time and Boost Productivity

QuickBooks Desktop (QBDT) 2021 delivers enhancements to become even more of the 'go-to solution' for accounting firms who want to help their clients succeed and grow their businesses.

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Information management and the flow of financial information means more to clients than ever. QuickBooks Desktop (QBDT) 2021 delivers enhancements to become even more of the 'go-to solution' for accounting firms who want to help their clients succeed and grow their businesses.

This year's release addresses many of customers' most requested changes, including bank feeds, receipt management, data level permissions, customized payment receipts and batch delete for sales orders.

**Bank feeds.** Many business owners spend hours every month manually categorizing and entering banking transactions into books and accounts. Now, businesses can save time with enhanced bank feeds in QBDT 2021.

With enhanced rules, improved matching, and batch editing, your clients will be able to automatically categorize or batch edit bank transactions by payees, accounts and classes; improve data integrity with better matching and less manual entry; quickly search for and define categorization criteria; and quickly review or resolve transaction discrepancies. Benefiting from these improvements will also be a breeze for accounting firms since QuickBooks Desktop leveraged a similar experience to that which is found in QuickBooks Online.

**Receipt management.** Manually entering receipt data into QuickBooks can be a long, complex process, and prone to typos. Now, with this highly requested feature for QBDT, business owners who enter receipt expenses in QuickBooks can efficiently and quickly import and add transactions to the register via the QuickBooks Desktop mobile app, which uses algorithms to extract and categorize the data. Just photograph, import and review. The ability to photograph, import and review receipts through the QuickBooks Desktop mobile app is only available in the QuickBooks Desktop Plus subscription product.

For customers who do not want to use the app, they don't have to. They can still scan and upload their electronic and physical receipts, and still take advantage of the optional automated categorization and improved matching.

Customers will appreciate the filing and audit time savings too. Capturing receipts and attaching them to transactions for audit trails will reduce the need to organize physical receipts, help prevent the loss of those receipts and facilitate audits.

**Data level permissions.** Data permissions is what every business should have in place – especially when it involves their accounting records. This often-requested feature grants firms the ability to give users more granular access to view, edit, or delete only the specific customers, vendors, and data they are responsible for. This can be particularly effective for larger, more complex, or multi-geographical businesses. For example, now East Coast sales reps won't have to have access to West Coast customers, and vice-versa.

**Customized payment receipts.** Faced with limits on including information on these key documents, business owners can now have a consistent, professional look across all customer communications, including invoices, estimates, and statements. Customization of payment receipts can include graphics such as logos, and additional fields and details for each customer and client.

Firms can also tailor payment receipt formatting to different customers by saving multiple customized format settings. Best of all, this leverages the existing layout designer, so there's no need to learn a new tool.

**Batch delete for sales orders (QuickBooks Enterprise Accountant only):** Now accountants can manage their clients' files more efficiently with batch delete for sales orders. No more having to delete them one at a time.

**Additional features for QBDT 2021:**

- **Customer Groups:** The ability to create rule-based customer groups based on such fields as customer type, status, location, and balance, so firms can easily manage and communicate with specific collections of customers.
- **Advanced Inventory Improvements (QuickBooks Enterprise Platinum & Diamond only):**
  - Greater visibility with Barcode Label Prices
  - Greater control and flexibility with improved landed cost calculations. Now users can setup landed cost accounts such as “COGS” or “Other current assets.”
  - Gain more insight into alternate vendors by including them as a column in key reports like Inventory Stock Status by Item and Inventory valuation summary.
- **QuickBooks Desktop Tool Hub:** The Hub contains easy-to-use troubleshooting tools to help users address common problems and errors on their own. Users can access all of their current/prior subscriptions, as well as information that can be used to resolve common issues related to installation, networks and passwords.
- **QuickBooks Capital:** Allows firms to access transparent and easy flexible business funding with no origination fees, prepayment penalties, or hidden charges.

## What to expect with the QuickBooks Desktop 2021 release

There will be several changes related to the QBDT 2021 release, including the following:

**Greater emphasis on subscription options:** Intuit will be encouraging customers to select one of its best value QuickBooks Desktop Plus subscription offerings, which includes many additional benefits like the receipt management capability via the QuickBooks Desktop mobile app.

**Changes in retail availability:** Starting this month, you’ll only find QuickBooks Desktop Plus subscription products on store shelves. Intuit will continue to offer one-time purchase products on their website, through online retailers, or by calling their sales team.

**New discounts for you and your clients:** Call the accountant sales team at 888-250-7279 for more information.

Finding solutions to meet your clients’ needs helps take your firm to the next level. The new features and options of QuickBooks Desktop 2021 helps you do just that – quickly, easily, and at a great value.

For more information, go to <https://quickbooks.intuit.com/desktop/pro/>.

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