Quickbooks Online

Gone are the days when QuickBooks Online was just to write checks and record payments no matter where you are. QuickBooks Online now offers almost everything that the desktop has offered for years, depending on which level of QuickBooks Online you choose to use.

PDR CPAs + ADVISORS

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BENEFITS TO USING QUICKBOOKS ONLINE

1

Easy access
You can log in anywhere you have an internet connection.

2

Multi-user function
Easy to set up users and restrict access depending on job duties

3

An accountant can be set up and they can access without needing an accountant's copy and/or backup.

4

Download bank/credit card transactions for easy account reconciliation

5

Allows for customer invoices to be paid online from the invoice itself. A small fee does apply.

1

Dashboard Feature

Shows a snapshot of workflow: "Get things done"

If you have invoices not sent or customer payments needing to be processed, this screen will show you

2

Business Overview

Gives you a quick glance at how your business is doing income vs. expenses

You can look at the last 30 days or even year to date with a click of the drop-down arrow

Graph to show how your business is comparing to last year

BILL PAYING AND BANK FEED CHANGES

- **Upload and manage bills**
  - You can schedule future bill payments automatically within the bill screen-Melio Payments
    - Paying by bank transfer/debit card is free
    - Paying by credit card there will be a fee of 2.9%
  - You can now upload bills from your computer to QuickBooks online
    - Review and categorize it to the appropriate account
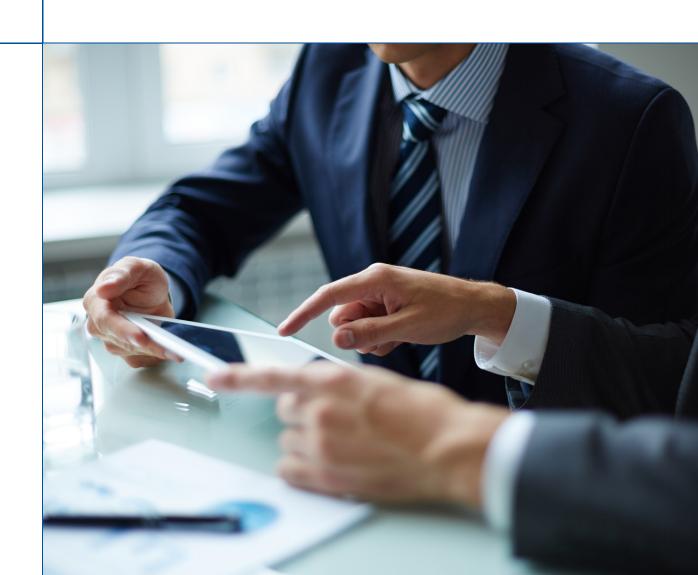
- **Import bank statements**
  - Select banks will now allow you to import your bank statements directly into QuickBooks Online to help with the reconciliation process

WHAT IS NEW IN REPORTS

- You can now edit the section titles on certain reports instead of having to export to excel and make changes there.

- You can now view your reports in chart/graph format

- Enhanced search in reports
  - You can use the find feature to search for transactions in the current tab

ON THE GO PAYMENT APP: GOPAYMENT

- GoPayment can allow you to get paid while on the go using the free mobile credit card reader.
  - You can invoice and get paid on the spot
  - Transactions automatically reconcile with QuickBooks Online

- Even without the reader, you can receive payment on the go by including cash, check, or card.

- Fees are 2.4% + $0.25 per card transaction