



## QuickBooks Product Comparison Module/Features



QB Module/Feature	Pro	Premier	ES	Premier/ES Accountant	MAC	QBO Essentials	QBO Plus	QBOA	Comments
Accept Credit Card payments from customers	x	x	x	x	x	x	x	n/a	Additional fees apply, free for ProAdvisors
Accountant Center				x				x	Customize and access accountant tools from one view
Accountant's Copy (Send to Accountant)	x	x	x	x		n/a	n/a	n/a	Ability to create a file (QBX) to send to accountant
Accountant's Copy Conversion				x		n/a	n/a	n/a	Convert QBX to QBA, or QBA to QBY and send changes back to client's QBW
Adjusting Journal Entries			x	x					Mark a JE as an adjusting entry
Adjusted Trial Balance Report			x	x					7 column report detailing unadjusted/adjusted TB
Anywhere, Anytime Access						x	x	x	QBO is built for this. QB desktop would require terminal server, citrix, linux, etc
Audit trail tracks changes to transactions	x	x	x	x		x	x	x	Audit Trail in QB desktop, Activity Log in QBO
Audit trail tracks lists changes				x		x	x	x	Need CDR to track changes to lists in QB desktop
Audit trail tracks when users log in and out						x	x	x	No way in QB desktop
Auto Deliver Reports						x	x	x	Set reports or report groups to auto-send
Auto Sales Price Markup			x	ESAE					Markup items automatically when costs change
Automatic offsite backups	x	x	Free with FSP	x		x	x	x	Requires IDP subscription for QB desktop, ES free with FSP
Automatic upgrades						x	x	x	QBO requires no installations or maintenance
Average cost inventory valuation method	x	x	x	x	x				
Balance Sheet by Class		x	x	x					
Bank Reconciliation	x	x	x	x	x	x	x	x	QBO not a robust reconcile like desktop, does not allow Undo reconcile
Bank Reconciliation -- List of Previous Monthly Reconciles		x	x	x				x	
Bank Reconciliation--Undo previous	x	x	x	x				x	Ability to undo the last reconciliation, Premier and higher can choose which month to undo
Batch Invoicing	x	x	x	x					Create the same invoice for multiple customers at once
Batch invoicing for Time and Expense		x	x	x					Create different invoices for multiple customers at once
Batched Timesheet Entry	x	x	x	x					Create timesheet for multiple employees/vendors
Billing Rate Level		Contractor Professional	Contractor Professional	x					Allows user to create and assign different billable rates to their employees/subcontractors for service performed
Budgets	x	x	x	x	x		x	x	
Business Planner, Forecasting, Balance Sheet by Class (Premier and ES)		x	x	x					
Calendar View	x	x	x	x					Track appts, current and overdue transactions, To Do's
Change Orders on Estimates		Contractor	Contractor	x					Track changes to your job estimates/contracts
Class Tracking	x	x	x	x	x		x	x	Track most business activity by department, etc
Client Data Review	x	x	x	Full Version				x	QB 2009-2012, Accessible in non-accountant QB when signed in as External Accountant user. QBA/ESA/QBOA offer Batch Reclassify and Write-Off Invoices
Collections Center	x	x	x	x					Track overdue and almost due invoices
Company Scorecard						x	x	x	QBO has a Trend Tracker as well
Company Snapshot	x	x	x	x					
Comparative Balance Sheet and P&L	x	x	x	x	x				
Condense Data File	x	x	x	x					
Condense Data--Period Copy									Create a file for a specific period of data
Condense Data--Summary Journal Entry									Condense now allows for one summary entry
Create Estimates	x	x	x	x	x		x	x	
Current Availability		x	x	x					Tracking what is available to promise to a customer, not just QOH
Current Availability Window		Retail, M&W	x	x					Window details what is on SO, PO or Assembly per item, QOH and what is currently available to sell
Custom Fields	x	x	x	x	x	x	x	x	Desktop QB custom fields for items and names, QBO allows 3 fields on forms. Pro/Premier is 5 for items, 15 for names, ES is 15 for item, 30 for names
Customer Snapshot	x	x	x	x					
Delayed Charges/Billing						x	x	x	QBO feature--Enter charges to be billed later
Document Center	x	x	x	x					Doc Center for local storage in QB desktop free. Attached Docs still requires subscription to store online, not included for PAP anymore
Easy Saver--buy supplies for business online/shop and compare	x	x	x	x					Web-based purchasing center
Enhanced Item Receiving			x	ESAE					Bill and Item receipt are separate/unlinked transactions
Express Setup of QB Company file	x	x	x	x		x	x	n/a	
FIFO Inventory Valuation			Advanced Inventory	ESAE with AI			x	x	ES 12 AI. Inventory Cost First In, First Out method
File Manager/Client File Dashboard				x				x	
Find and Select Items			x	ESAE					Quickly find and select items on transaction, add multiple at once
Go from Estimate to a PO or SO		x	x	x					Very important to contractors
Improved Excel Reporting	x	x	x	x					Export report to existing excel spreadsheet
Industry specific reporting		x	x	x					QBA and ESA have all edition reports
Integrated Help	x	x	x	x					QB 2011 Plus too: Help, KB and Community articles
Inventory Assembly/Bill of Materials		x	x	x					Manufacture finished good from component parts
Inventory Assembly--Edit Build/Variable Builds			x	ESAE					To edit build in Premier, must edit the actual assembly item. Time consuming, not ideal like ES
Inventory Center		x	x	x					ES supports item picture
Invoice Automation						x	x	x	Automatically create invoice from unbilled activity
Job Costing Module and Reports	x	x	x	x	x		x	x	QBO Plus does not offer a lot of "job" reports
Lead Center	x	x	x	x					
Location Tracking							x	x	A secondary level of class tracking
Manage Fixed Assets									Track your fixed assets and post depreciation to QB
Mileage Tracking	x	x	x	x					Enter vehicle mileage and assign to customer/job
Multi-currency	x	x	x	x					
Multi-Location Access						x	x	x	Desktop QB requires Citrix, Terminal Server or Hosting
Multi-Instance			x	x					2 company files open in same program year



## QuickBooks Product Comparison Module/Features



QB Module/Feature	Pro	Premier	ES	Premier/ES Accountant	MAC	QBO Essentials	QBO Plus	QBOA	Comments
Multi-User Access	up to 3	up to 5	up to 30	x	up to 5	up to 3	up to 5	x	QB is a User License, regardless of concurrent use
Multiple Vendor ship to addresses	x	x	x	x					
Multiple windows	x	x	x	x	x	limited	limited	x	View and flip thru multiple windows in your view
One-click Transactions	x	x	x	x					Pay bill right from bill, Receive Pmt or Create Credit Memo from invoice. QB 2011 Plus too
Online Banking	x	x	x	x	x	x	x	x	
Payroll	x	x	x	x	x	x	x	x	Subscription/Fees required. Desktop Payroll: Basic, Enhanced, Assisted, Enhanced Payroll for Accountants. Online Payroll: Intuit Online Payroll Basic/Plus/IOP4A/Full Service Payroll. IOP platform is used for QBO and QB Mac payroll
Prepare and Print 1096	x	x	x	x	x				
Prepare and E-File 1099s	x	x	x	x					Additional fees apply. Supported from Jan-April 15
Prepare and Print 1099s	x	x	x	x	x		x	x	QB 2012 improves setup, December
Price Levels	x	x	x	x					Pro only has fixed %, Premier and ES per item too, Pro/Premier support 100, ES 12 increased to 750
Progress Invoicing/Billing	x	x	x	x	2012				Create multiple invoices from a Sales Order or Estimate
Purchase Orders	x	x	x	x			x	x	
Purchase Orders--Receive against partially	x	x	x	x					
QB Search feature	x	x	x	x					Search company file or online
QuickBooks Statement Writer			x	x					Though ISW's inception was 2009, it is best used in 2011, 2012. Name changed 2012 from ISW to QSW
Recurring Billing/Memorized Transactions	x	x	x	x	x	x	x	x	
Remote Access	x	x	x	x		n/a	n/a	n/a	Powered by WebEx
Set and Maintain Reorder Points	x	x	x	x	x				
Reversing Journal Entry		x	x	x					Click Reverse tab on JE to reverse it
Set Accounting Period								x	Set period all tools/reports in Accountant Center look at
Shipping Manager	x	x	x	x					Ups/FedEx, QB 2012 supports USPS
Sales Orders		x	x	x					Non-posting transaction to capture customer/work order
Sales Order Fulfillment Worksheet		Retail, M&W	x	x					Manage your sales orders and print Pick List or Packing Slip
Scan checks with Intuit Check Solution for QB	x	x	x	x	x				QB Mac supported 2010 and up
Serial Number or Lot Tracking			Advanced Inventory	ESAE with AI					Can choose one or the other, not both at once
Shared Report Templates with Intuit community	x	x	x	x					Share a custom report with online community
Sort No Company Open Window				x					Sort, edit and hide company files on No Company Open window
Starter Copy				x					Create company file from another file
Time Tracking and billing by customer	x	x	x	x	x		x	x	Pass thru Time or Expense
Toggle to another edition/version				x					
Transaction History Panel	x	x	x	x					Customer and Vendor transactions has panel detailing history/notes and transaction history
Unit of Measure		x	x	x					Multiple U/M in Premier Contractor, M&W, AE. Retail has no U/M in Premier or ES
Unlimited Report Readers and Time tracking users							x		Set up users that have only Report or Time Entry access
Up to 5 users simultaneous use		x	x	x	x		x		
Voided/Deleted Transaction report				x				x	
Working Trial Balance				x					Spreadsheet-like UI, shows accounts, beginning balance, transactions, adjustments, ending balance and work paper references
Zoom Into Detail from reports	x	x	x	x	x	x	x	x	Dig down to the detail behind the numbers

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# QuickBooks Product Comparion Premier vs Pro vs QBA



Features in Premier or Higher	QB Accountant Features (Not in Pro)
Ability to Access Previous Reconciliations	Accountant Center
Ability to Create Forecasts	Accountant's Copy Conversion
Balance Sheet by Class	Adjusted Trial Balance
Batch Invoice for Time and Expense	Adjusting Journal Entries
Billing Rate Level	All Premier level modules
Business Planner	Better File Condense, Starter Copy and Period Copy
Change Orders on Estimates	Complete Client Data Review
Enhanced Job Costing Complexity(Estimate to PO to SO to Invoice)	Debit and credit totals on JE
Estimate to PO and Sales Order	File Manager v2
Free Year of Remote Access(Unattended)	Free 1 Year Remote Access--Unlimited Meetings
Industry Specific Reporting	Industry Specific Reporting
Inventory Assemblies	List of Previous Journal Entries
Inventory Center	Multi-Instance
Price Level by Item	QB Pro/Premier Flavor Compatibility (Toggle)
Reversing Journal Entries	QuickBooks Statement Writer and Fixed Asset Manager Included
Sales Orders	
Track Inventory Current Availability	
Unit of Measure	
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## QuickBooks Product Comparion Premier Editions



QB Premier Feature	General Business	Contractor	M & W	Non-Profit	Retail	Professional	AE	Comments
Balance Sheet by Class	x	x	x	x	x	x	x	
Batch Invoice for Time and Expense	x	x	x	x	x	x	x	
Bill of Materials	x	x	x	x	x	x	x	Window view of all component parts of the assembly
Billing Rate Level		x				x	x	Quick Entry on forms, bill out service at different rates
Change Orders		x					x	Allows Contractors to see changes to estimate, contract or project
Current Availability Window			x		x		x	One window that displays an inventory item's complete availability vs what is on other sales orders or what is slotted for pending builds
Enhanced Job Costing (Estimate to PO to SO and Invoice)	x	x	x	x	x	x	x	
Forecasting/Business Planner	x	x	x	x	x	x	x	Enhanced future reporting on the business. BA goes out 5 years. Business Consulting for Accountant
Industry Specific Reporting		x	x	x	x	x	x	Enhanced reporting by Industry, saves time in having to filter canned reports
Inventory Assembly	x	x	x	x	x	x	x	Combine inventory items and assembly costs into new, separately trackable items that represent the finished goods you produce and sell
Inventory Center	x	x	x	x	x	x	x	
Multiple Units of Measure		x	x				x	Ability to convert multiple units of measure when purchasing and selling items in different units
Previous Reconciliation Reports	x	x	x	x	x	x	x	Ability to view monthly bank reconciliation reports
Price Levels Per Item	x	x	x	x	x	x	x	Quick Entry, campaigns, add to customer, keeps item list manageable
Remote Access to One PC free for year	x	x	x	x	x	x	x	
Reversing Journal Entry	x	x	x	x	x	x	x	
Sales Orders(Backorder Tracking)	x	x	x	x	x	x	x	Non-posting transaction so I don't have to book the income or AR till I sell it. Also can be used as a Work Order for services/labor
Single Unit of Measure	x	x	x	x		x	x	Ability to add a unit of measure to item and on forms
SO Fulfillment WS			x		x		x	Window view of sales orders I can fulfill and what I cant or am lacking
Track Current Availability	x	x	x	x	x	x	x	What is available for me to sell vs what is on other orders/builds?
Unbilled Time and Expense Window	x	x	x	x	x	x	x	One window to view unbilled time/expense and create invoice

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# QuickBooks Product Comparison Payroll



Payroll Function/Feature	IOP4A	EP4A	Enhanced	Assisted	Basic	IOP Retail-QBO-MAC	IOP Full Service	Comments
After the Fact Payroll		x						
Anytime, Anywhere Access	x					x	x	IOP is web-based
Auto-fill preparer ID	x	x					Intuit does it	Automatically fills in information on federal and state tax forms. IOP4A/EP4A support primary signature and 3rd party
Automatically calculate earnings, deductions, federal and state tax payments	x	x	x	x	x	x	x	Must be on current tax table in desktop payroll
Client Dashboard	x							
Client-Ready Reports		x						Allows creation of analytic payroll reporting
Direct Deposit	x	x	x	x	x	x	x	\$1.25/paycheck for desktop, Free for IOP
Easily share data with your accountant/client	x					x	x	Though all can share data with client, IOP is easy
Electronically pay taxes and file forms for no additional charge	x	x	x	x		x	Intuit does it	Assisted Payroll: Intuit does this for you. IOP must have Plus version
Email reminders	x					x	x	
Enter Net/Calculate Gross		x	x	x				
Handle up to 800 Employees		x	x	x	x			IOP supports up to 150
Job costing		x	x	x	x			Not yet for online payroll
Payroll Schedules	x	x	x	x	x	x	x	Schedule payroll to be run bi-weekly, etc.
Print completed federal forms	x	x	x	x		x	Intuit does it	
Print completed state forms	x	x	x	x		x	Intuit does it	Assisted Payroll: Intuit does this for you. IOP must have Plus version
Print paychecks from your PC in minutes	x	x	x	x	x	x	x	Mac payroll comes in as regular checks
Robust payroll reports	x	x	x	x	x	x	x	Desktop Payroll reports more robust by far
Setup Employee Defaults		x	x	x	x			Global employee preferences
Setup and Usage Support	x	x	x	x	x	x	Intuit does it	
Support up to 50 EINS		x						IOP4A has no EIN limit
Time Tracking/Capture Employees Time	x	x	x	x	x	x	x	Additional charge for IOP
To Do List	x					x	x	IOP4A has Dashboard of Client To Dos
Workers Comp	x	x	x	x		x	x	Add-on for IOP

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# QuickBooks Product Comparion

## QBO Plus vs Desktop



FEATURE	DESKTOP	QBO	Comments
Accept Credit Card payments from customers	x	x	
Anywhere, Anytime Access, Mobile, Multi-User/Multi-Location		x	No need to arrange login time, create transfer files or backups
Attached Documents/Document Center	x		Doc Center new in QB 2012
Audit trail tracks changes to transactions	x	x	
Audit trail tracks lists changes		x	Need CDR to see list changes
Audit trail tracks when users log in and out		x	No way to track login to desktop
Automatic offsite backups		x	QBO is stored online and backed up to Intuit's redundant servers
Automatic upgrades		x	Any time a new feature is added to subscription level, user has access
Average cost inventory valuation method - Set and maintain inventory re-order points	x		
Batch Invoicing	x		
Batch invoicing for time and expense	x		Premier and ES
Budgets	x	x	
Business Planner, Forecasting, Balance Sheet by Class (Premier and ES)	x		
Calendar View	x		
Change Orders on Estimates	x		
Class Tracking	x	x	Only QBO offers Class Tracking AND Location tracking; custom fields must be used in desktop
Collections Center	x		
Company Scorecard		x	Compares where company stands in regards to financials to others in industry. Not available in desktop
Company Snapshot	x	x	
Company Snapshot and Export reports to Excel		x	
Condense Data file	x		
Create Estimates	x	x	
Customer Snapshot	x		
Delayed Charges/Billing -		x	
Easy Saver--buy supplies for business online/shop and compare	x		
Enter Timesheets in a batch	x		
Go from Estimate to a PO or SO	x		QB Premier or higher
Improved Excel Reporting--Export report to existing excel spreadsheet	x		
Industry specific reporting (premier)	x		
Integrated Help	x	x	
Inventory Center	X		QB Premier 2012, ES 12 (ES allows for item pictures)
Invoice Automation: Can be set to automatically invoice any unbilled activity		x	Only QBO can automatically invoice clients for time and billing expenses
Job Costing Module and Reports	x		
Lead Manager	x		
Location Tracking		x	Only QBO offers Class Tracking AND Location tracking; custom fields must be used in desktop
Multi-currency	x		
Multiple Vendor shp to addresses	x		
Multiple windows open at once	x	x	Easier to move between browser tabs than QB windows
One-click Transactions (Pay bill right from bill, Receive pmt from invoice)	x		QB 2012 and QB Plus versions of 2011
Online Banking and Accounts Payable	x	x	QBO has automatic OLB functionality to download transactions every day. Must be initiated in desktop
Partial Purchase Orders	x		
Prepare and Print 1096	x		
Prepare and Print 1099s	x	x	
Progress Invoicing/Billing	x		
QB Search feature	x	x	
Recurring Billing and Invoice Automation	x	x	
Shipping Manager	x		
Sales Orders or Sales Order Fulfilment Worksheet	x		QB Premier or higher (SOFW only in QBA, MFG & Whsl or Retail Premier editions)
Scan checks with Intuit Check Solution for QB	x		
Shared Report Templates with Intuit community	x		QB 2012
Time Tracking and billing by customer (pass thru T&E)	x	x	
Tracks FIFO Inventory/Create Purchase Orders		x	Only QBO offers FIFO inventory tracking; with simple add on, it can track Avg Cost, FIFO or LIFO
Transaction History Panel	x		QB Plus 2011 and QB 2012
Unlimited Report Readers and Time tracking users		x	Desktop requires Time Tracker subscription
Up to 5 users simultaneous use		x	Pro only allows 3 simultaneously users, Premier 5

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