

# Customized QuickBooks – Advanced for Midsized Business

*Grow your business.*



## 1. Income and expenses.

- Securely import transactions from your bank and credit cards.
- Automatically sort transactions into tax categories
- Snap photos of your receipts and we will automatically match them to existing expenses.

## 2. Invoice and payments.

- Create professional custom invoices with your logo that you can send from any device.
- Accept payments instantly online, right through the invoice.
- Track invoice status, send payment reminders, set up recurring invoices, and match payments to invoices automatically.

## 3. Tax deductions.

- Easily organize income and expenses into tax categories.
- Automatically sort business expenses into the right tax categories to keep more of what you earn.

## 4. Run powerful reports.

- Monitor critical financial metrics like revenue and cash flow instantly.
- Build custom reports and dashboards that measure performance against time period, budget, and more.
- Quickly create professional-looking charts to spot business trends earlier.

## 5. Receipt capture.

- Snap photos to add receipts on the go.
- We will match your receipts to existing expenses or create new expenses for you.
- QuickBooks sorts your receipts into tax categories.

## 6. Mileage tracking.

- Reliably and automatically track miles with your smartphone's GPS.
- Categorize business and personal trips with a swipe and add trips manually.

## 7. Cash flow.

- Forecast money-in and money-out up to plan ahead.
- See all your business balances on one dashboard, no messy spreadsheets.

## 8. Sales and sales tax

- Accept credit cards anywhere with our mobile card reader or sync with popular apps.
- Connect to the e-commerce tools you love, including Amazon, eBay, and Shopify.
- Automatically calculate taxes on your invoices.

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## 9. Estimates.

- Customize estimates to fit your brand and business needs.
- Accept mobile signatures and instantly see estimate status.
- Convert estimates into invoices with ease.

## 10. Payroll and Contractors.

- Full-service payroll. Run Auto Payroll for salaried employees on direct deposit.
- E-file and e-payment payroll taxes federal and states.
- Review and approve payroll before paychecks are sent.
- Make changes and add additional compensation easily, like commission and bonuses.
- Assign vendor payments to 1099 categories.
- See who you have paid, what you have paid, and when you did it.
- Prepare and file 1099s right from QuickBooks.

## 11. Connect all sales channels.

- Connect QuickBooks Online to any number of accounts across Amazon, Shopify, and eBay—and to other platforms added in the future. One account is one store within a platform.
- Match payouts with bank deposits with automatically separated revenue, taxes, and fees.
- See cash flow, expense, and profitability trends instantly.

## 12. Includes 25 users.

- Create custom access to share the work safely without sharing the sign-in.
- Invite up to 25 unique users and unlimited reports-only users to work together remotely.
- Reduce errors and rework with employees working in real time inside Advanced.

## 13. Bill management

- Organize bills in one place, plus schedule and make payments online right in QuickBooks.
- Pay online via bank transfer or pay via debit or with credit card.
- Choose how you want vendors to get paid, by contact-free direct deposit or check.

## 14. Enter time.

- Enter your team's hours or give them access to add their own.
- Add employee/contractor time to invoices.
- See how much each employee or contractor costs your business and run profitability reports.

## 15. Inventory.

- Track products, cost of goods, and receive notifications when inventory is low.
- See what is popular, create purchase orders, and manage vendors.

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## 16. Project profitability.

- Get a bird's eye view of all your projects, all in one place.

## 17. Data sync with Excel

- Avoid manual errors and have confidence in your data by seamlessly connecting Advanced and Excel.
- Use pre-made templates, build consolidated reports for multiple companies, and refresh your data in a single step.
- Work with your data how you want and create flexible workflows with familiar tools.

## 18. Employee expenses

- Employees submit expenses directly to QuickBooks Advance, saving time and reducing errors.
- Review and track all employee expenses right in QuickBooks Advance.
- Expense records are stored in one place, so it is easy to find information on which you can rely.

## 19. Batch invoices and expenses

- Import and send hundreds of invoices and expenses at once.
- Enter and edit multiple bills and checks in a few quick steps.

## 20. Custom access controls

- Give your team the level of access to QuickBooks Advance with custom roles and permissions.
- Assign work by transactions such as deposits, sales, expenses, inventory, or reports.
- Delegate work to users or sales reps by their assigned locations to boost productivity.

## 21. Exclusive premium apps

- Work your way by Integrating best-in-class apps like LeanLaw, HubSpot, Docusign, Bill.com, Salesforce, Centage, and more for tailored end-to-end-premium solutions. \*
- Access functions and connections exclusive to QuickBooks Online Advanced.
- Scale and customize on your time and budget.
- Track data unique to your industry.

\*Premium Apps: Apps may require a third-party subscription.

## 22. Workflow automation

- Set reminders for transactions like invoices, payments, or deposits with a due date.
- Notify customers when their payment has been received.
- Route invoices through on pre-set approval flows quickly.

## 23. Data restoration

- Have peace of mind knowing your data is saved automatically and regularly.
- Restore to a previous time period, so if data is entered incorrectly for any reason, you can quickly make the fix.
- No need to pay for extra software or services to keep and restore your data.

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 **Mario Lomazzi, CPA**  
Accounting & Tax Services  
Business Advisory Services

## 24. Revenue recognition

- Automatically track and enter deferred revenue to your books—avoid manual work in spreadsheets and third-party tools.
- Get the most clear and accurate picture of your business health with better analysis and reporting.
- Give financial institutions correct and credible revenue info; stay compliant with standards that state how and when businesses should recognize their revenue.