Customized QuickBooks – Plus for Small Business

Grow your business.

Mario Lomazzi, CPA
Accounting & Tax Services
Business Advisory Services

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. Comprehensive reports.

- Stay on track with inventory reports, enhanced sales reports, and profitability reports.
- Run specific budgeting, expense, and class reports.
- Choose from various templates to build and customize reports based on your business needs.

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. <u>Sales and sales tax</u>

- 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.

9. Estimates.

• Customize estimates to fit your brand and business needs.

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Accept mobile signatures and instantly see estimate status.

Convert estimates into invoices with ease.

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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 5 users.

- Invite your accountant to access your books for seamless collaboration.
- Give employees specific access to features and reduce errors with auto-syncing.
- Protect sensitive data with user-access levels and share reports without sharing a sign-in.

13. <u>Bill management</u>

- 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. <u>Inventory.</u>

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

16. Project profitability.

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