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appreciate the anytime/anywhere access the product provides. Like QuickBooks Desktop, QuickBooks Online is well suited to both small businesses and nonprofit organizations.

Mary Girsch-Bock • Mar. 22, 2017



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QuickBooks Online utilizes an interface that is very different than its desktop counterpart, where users are able to access system functions from the vertical menu on the left and quickly create common transactions from the “+” shortcut on the upper right. QuickBooks Online offers fairly basic accounts receivable functionality, with users able to add a decent amount of information about each customer or donor, including tax information, payment and billing options as well as any attachments related to that particular customer. There is also a notes field, which allows users to add any notes or other information about each customer.

All sales activity is completed under the transactions option, where users can enter estimates, invoice detail, sales receipts, payments, credit memos and billable time activities and charges. Payments received can be quickly processed, with users able to accept online payments including credit card payments and ACH.

To post a received payment, users simply click on the Receive Payment option and choose the customer that they wish to apply the payment to, or else click the Receive Payment option for an open invoice. Users will have to choose where the payment needs to be deposited to. The transaction list allows users to view transaction details for each customer, with filtering options available to sort by a variety of criteria including all invoices, open invoices, credit memos, recently paid, and money received.

Users can also use QuickBooks Payments to quickly process credit card payments from customers from any location. The payments account can be linked directly to QuickBooks Online, eliminating the need to enter payment detail twice.

For payments received at the time of service or purchase, users can create a sales receipt that documents both the item(s) purchased as well as the total monies received. Full audit trail functionality is available through the Gear button on the

upper right, which lets you filter the activity in QuickBooks Online to a specific

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Though users can choose the type of currency they wish to utilize, only one currency can be assigned for each customer, vendor, or bank account that is set up.

QuickBooks Online is a complete financial application with all functions integrated. The product also integrates with over 400 third party apps that extend product functionality.

QuickBooks Online is well suited for the small business owner that requires anytime/anywhere system access, and an easy way to process payments quickly. Available in three versions, starting at \$10.00 for the Simple Start edition, the Plus version currently runs \$28.00 a month, and includes the ability to pay bills, schedule recurring invoices, track inventory, create purchase orders and prepare 1099s. A mobile app is included in all versions of the product at no additional charge.

2017 Overall Rating – 4.25 Stars

Accounting • Auditing

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