



# QuickBooks Online: what's right for me?

QuickBooks Online gives your growing business access to cloud-based accounting software that tracks and organizes your financial information for you. Automate tasks like bookkeeping, invoicing, time tracking, budgeting, and more. QuickBooks Online allows multiple users to work simultaneously and seamlessly, tracking changes via an activity log. And with industry-recognized security, all of your financial data remains protected. Organize your finances in a single online platform with one of four plans:

## Simple Start

With QuickBooks Online Simple Start, track income and expenses, send invoices and accept payments, organize receipts, and more:

Maximize tax deductions

Run general reports, like P&L

Record mileage

Manage cash flow

Track sales and sales tax

Create and send estimates

Manage 1099 contractors

## Essentials

Do you have more than one employee who needs to access your books? QuickBooks Online Essentials plan includes up to three users. In addition to the Simple Start features, the Essentials plan lets you organize and pay bills, run enhanced reports, and track hours by client or employee.

## Plus

If you need up to five users, want to track inventory, or want to keep tabs on project profitability, QuickBooks Online Plus might be right for you. Receive all the functionality mentioned above, plus these additional features.

## Advanced

With QuickBooks Online most robust plan, you get a slew of additional analytics and automation capabilities and can define user access (for up to 25 users) on a secure business productivity platform. Benefit from the scalability and flexibility of a customizable solution that grows with your business and integrates with third-party applications.

## Is QuickBooks Online Advanced right for me?

### Do you have...?

- 10-100 employees
- More than 5 employees who need access to QuickBooks
- Complex operations and lots of data

### Do you need...?

- On-demand online training
- A dedicated account team
- Batch processing capabilities
- Advanced analytics features
- Premium apps

# Explore your options with QuickBooks Online

No matter the size of your business, QuickBooks Online has the right plan for you. Use this chart to compare the key features that will help you achieve your goals.

Feature	Essentials	Plus	Advanced
Share access with multiple users	Up to 3	Up to 5	Up to 25
Built-in business reports	40+	65+	65+
Share access with accountants	Up to 2	Up to 2	Up to 3
Track income and expenses	✓	✓	✓
Send and track invoices	✓	✓	✓
Access data from any device	✓	✓	✓
Automatic data backup and protection	✓	✓	✓
Integrate with 3rd-party apps	✓	✓	✓
Automated sales tax calculations	✓	✓	✓
Automatically sort bank and credit card transactions	✓	✓	✓
Capture and organize receipts	✓	✓	✓
Print checks and record transactions	✓	✓	✓
Prepare and print 1099s for contractors	✓	✓	✓
Track mileage using your smartphone	✓	✓	✓
Import data from Excel or QuickBooks Desktop	✓	✓	✓
Set up automated, recurring transactions	✓	✓	✓
Manage and pay bills from vendors	✓	✓	✓
Basic user permissions	✓	✓	✓
Track billable hours by customer	✓	✓	✓

Feature	Essentials	Plus	Advanced
Handle multiple currencies	✓	✓	✓
Enter bills and schedule payments for later	✓	✓	✓
Track time using TSheets	✓	✓	✓
Track project profitability		✓	✓
Track inventory		✓	✓
Create and send purchase orders		✓	✓
Create budgets for income and expenses		✓	✓
Categorize income and expenses using class tracking		✓	✓
Track sales and profitability by location		✓	✓
Batch transactions: invoices, checks, expenses, and bills			✓
Customize access by roles			✓
Online back-up and restore			✓
Enhanced custom fields			✓
Automate with reminders and rules			✓
Budget import from Excel			✓
Custom chart builder			✓
Cash flow dashboard			✓
Revenue streams dashboard			✓
Google Sheets integration			✓
Priority Circle membership which includes: <ul style="list-style-type: none"> <li>• Designated Customer Success Manager</li> <li>• Care calls routed to the front of the line</li> <li>• Access to self-paced, online QuickBooks training</li> </ul>			✓