

# What's New In QuickBooks Desktop Enterprise 2018



Presented by **Scott Gregory**

Certified QuickBooks Enterprise Advisor, Intuit Premier Reseller, CPA





## Remember These Key Points As You Consider An Upgrade

- QuickBooks Desktop Enterprise 2018 is only offered on a subscription/per year basis. Please review the details about your options and what's included with each subscription level on [Scott's web site](#).
- The data in your current QuickBooks file will upgrade to QuickBooks 2018 seamlessly. You should not have any worries about that as you evaluate the purchase of QuickBooks Desktop Enterprise 2018.
- Support for QuickBooks 2015 products ends May 31, 2018. Upgrade must be on or before May 31, 2018.
- QuickBooks Enterprise 2018 will NOT run on Windows XP, but it will run on Windows 7, 8 and 10. For full tech specs on QuickBooks, consult the [QuickBooks web site](#).

## New Features Inside The 2018 Version Of QuickBooks Desktop Enterprise

**Multi-monitor support** - Users can use up to three connected monitors to view multiple pages.

**Payroll liability payment reminder** - For those who have an Enhanced Payroll subscription. When liability payments are within 7 days of their scheduled payment date, the home page will display a red marker on the Pay Liabilities icon.

**Past due stamp on invoices** - Users have the option to print "past due" on invoices, but can also turn this feature off. Users can also choose to print the past due notice on either emailed or printed invoice, or can customize it invoice to invoice.

**Merge vendor records** - This feature provides a consolidated window to identify and merge duplicate vendor records

**Copy and paste keyboard shortcuts** - Users can now copy and paste entire transaction rows with the shortcuts Ctrl+Alt+Y and Ctrl+Alt+V

**Cash/accrual toggle on reports** - Users can toggle displayed reports between cash or accrual basis.

**Search chart of accounts** - There is a new search box on the chart of accounts window that can be used to find and select a chart of account

**Email security** - Users can edit email preferences now to use “enhanced security,” which will enable security for emails sent from Gmail, Outlook, Hotmail, MSN and Windows Live accounts through QuickBooks.

**Mobile inventory scanning** - Business users can pick quantities at a warehouse using a barcode device or Android phone to record inventory.

**Sales order fulfillment workflow** - Users now have access access to picklist details on a mobile device that's connected wirelessly to a QuickBooks Enterprise (QBE) file with Advanced Inventory, and real-time access to the status of sales order fulfillment in QBE.

**Inventory report customization** - This feature now provides customizable display options added to select inventory reports

## What You May Have Missed in Earlier Versions of QuickBooks Enterprise

- **Smart Search** – Save time with faster searching. Begin typing a name and QuickBooks automatically fills in the rest.
- **Reports filters** – Now one click is all it takes to see which filters have been applied to a report. Visible filters make it easy to reproduce memorized reports.
- **Improved Multi-User experience** – QuickBooks makes it easier than ever to work with multiple users. There are now fewer instances that require users to switch between Multi-User and Single-User mode. It also has a built-in communication tool to make switching modes easier. When you do need to switch modes, switching takes much less time.
- **Remind users of undeposited funds** – Clearly see what deposits require action with a new badge that displays the number of pending deposits to be recorded.
- **Deleted user names continue to appear in audit reports** – Track transactions by deleted users with better accuracy.
- **Vendor and Customer Type filter** – Find the information you need faster with the ability to filter by vendor type and customer type.
- **Cleared Flag on credit card charges** – Easily see if a credit card charge is reconciled.
- **Copy and paste in time sheets** – Save time when entering time sheet information by copying and pasting data from one line to the next.
- **New “Bill Tracker”** – Allows you to see important details about the “money out” side of your business.
- **Improved verify and rebuild process** – Better information in an easier-to-read format.
- **Bulk clear of Send Forms window** – Clear out any and all e-mail forms that are still sitting to be sent.
- **New default date range of “This Fiscal Year to Last Month”**
- **Auto copy of ship-to address on purchase orders** – No need to manually type in your customer address when creating a PO.
- **Filter for custom fields in item-based reports** – These filters now work properly.
- **Continuous label feed printer support** – Allows for printing from Zebra compatible printers.
- **E-invoicing** – Get paid electronically via a link in your invoices (separate fees apply).
- **Batch void/delete transactions** – Bulk delete or void of select transactions in QB. Admin account only.

- **Sort on various columns in receive payment screen** – Simplify the payment posting process.
- **Improvements in Advanced Reporting user interface** – Drag and drop capabilities in certain areas.
- **Don't allow items to ship negative to create negative on-hand balances** – This is probably one of the most desired enhancements to QuickBooks in over a decade.
- **Disallow selling to clients that have overdue balances** – You may or may not like the implementation of this new feature.
- **Full access to new Advanced Reporting module** – Build your own reports with this new feature in Enterprise.
- **See costs on sales forms** – Compare your selling prices to item cost field (not the average cost field) when creating estimates, sales orders or invoices.
- **Negative item list and assembly shortage reports** – Quickly and easily see which items have negative on hand values or where shortages exist for assemblies.
- **Add totals to most columns on forms** – Need a total quantity of items shipped? Need a total of some custom field on an invoice? Now you can with the additional checkboxes for subtotal items.
- **Sort by various columns on forms** – Click on the column header and have the data in that column sort automatically for you. This is a great new feature.
- **Search within transactions** – Easily find information within a transaction screen when desired.
- **Footer on last page only** – Set QuickBooks to print a footer only on the last page instead of each page.
- **Get shaded lines on reports** – This new option allows for easier to read forms and reports.
- **Hide opening balance field** – Allows for much greater control when setting up new customers, vendors or items.
- **Hide zero reorder quantity** – Make your inventory reorder report more meaningful by hiding these items.
- **Maximum stocking levels** – You now have a maximum quantity to go with a minimum quantity (reorder point) per item.
- **“Where Used” in assemblies** – Query by part number to see anywhere and everywhere that part is used in assemblies.
- **Automatically build nested subassemblies** – Have QuickBooks build any and all subassemblies (nested assemblies) needed when building the main assembly.
- **Assembly cost and price rollups** – The total bill of material cost changes will now update the cost field for each assembly item in addition to the update of sales prices and markups that started in QuickBooks Enterprise 2012.
- **Markups AND Margins** – See both figures when making changes to item costs.
- **The new “Advanced Pricing” module** – A new way to apply price rules and promotions at the item level (requires Platinum Enterprise subscription).
- **Payroll security holes have been closed** – Users can't see paycheck information unless they have explicit access.
- **Limit user access to specific bank accounts**
- **Maintenance alerts and other notifications** – Now these are displayed right on the home screen for easy reference.

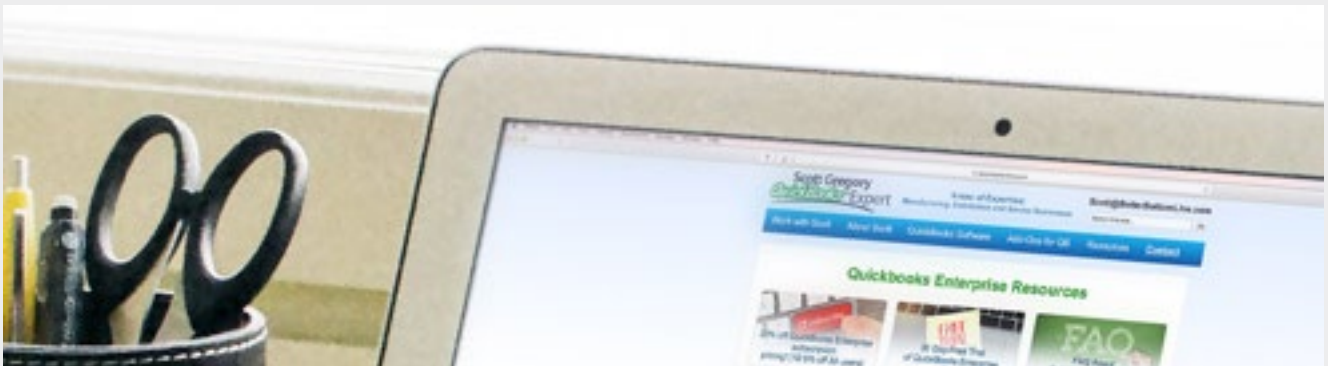
- **Customize the “view balances” area of the home screen** – Add or remove accounts to this area as you prefer.
- **E-mail tracking** – The Customer Center now tracks all sent e-mails so you have a record of them.
- **Send a customer payment receipt via e-mail** – Many businesses have been asking for this.
- **Tag sales reps to jobs, not just customers**
- **Filter many reports by job status** – See reports by open, in process, closed and other status levels.
- **Copy and paste entire lines, not just fields within a line**
- **Online Banking is now called Bank Feeds** – See the improvements to streamline the flow of bank and credit card information into your QuickBooks.
- **New “income tracker” replaces the collections center** – See unbilled and unpaid balances at a glance.
- **Create multiple e-mail templates for each form you send** (invoices, quotes, etc.)
- **Attach additional documents to web mail based e-mails** – Include drawings, pictures and any other type of digital document you like.
- **Auto Create Purchase Orders** – Stock status reports show you which items you need to reorder. Simply add your quantities, then click to auto-create all your purchase orders in one step.
- **Default Classes** – Save time and help improve accuracy by assigning default classes to items, accounts or names.
- **Print Vendor Bills** – Now it is easy to print the bill screen just as you enter it.
- **Bin Location and Barcode Scanning (requires Platinum Level Subscription to QuickBooks Enterprise)** – Track specific inventory items down to the bin location level within one or more warehouses. When filling out forms, automatically see quantities and serial or lot numbers for each bin. Sort pick lists and item receipts by location for efficient picking and stocking.
- **Bill Credits Print on Check Stubs and Bill Payment Stubs** – Finally!
- **Inventory Reorder Reports Now Include Available Quantity**
- **Centers Customization** – Expanded contact information fields in the Employee, Customer and Vendor Centers are now more customizable, allowing up to 8 contact fields and multiple notes per contact. New tab functionality enables you to view transactions, contacts, to-dos and notes on the same page.
- **Ribbon and Layout Updates** – Invoices, Estimates, Sales Orders and other forms now have a simplified layout, providing easier access to actions that were previously hidden or required several clicks to execute.
- **Inventory Center** – Easily find and locate inventory tasks by accessing your inventory items and reports all in one place with the Inventory Center. Now add a notes field or image to each item for quick identification.
- **Serial/Lot tracking** – Conveniently track serial numbers and lot numbers right inside QuickBooks. (requires Platinum level subscription to QuickBooks Enterprise)
- **Enter serial numbers and lots at the time of purchase, transfer, or sale** – This means no extra data entry is required for reliable tracking.
- **You can track defective lots** – Through assemblies and subassemblies, in stock on shelves, and customer purchases with new reports.

- **FIFO Costing** – Now you have the flexibility to work in FIFO costing in addition to average costing for tracking inventory. Switch between costing methods at any time. (requires Platinum level subscription to QuickBooks Enterprise)
- **Lead Center** – Track and follow up on sales leads in the new QuickBooks Lead Center. Easily import existing leads. When your lead becomes a customer, move the lead's contact information into the Customer Center with one click.
- **View** – See invoices, billing, past transactions and other important tasks coming due or past due in the Calendar view. The improved "to do" list captures more relevant information to help prioritize your tasks.
- **Excel Integration Refresh** – Save formatting and save time. Now when you export your QuickBooks reports to Excel, simply refresh your previously saved worksheet and your formats will be applied to the new report. QuickBooks remembers your Excel formats so you can work seamlessly.
- **Document Center** – Get organized by scanning and attaching receipts, estimates and other important business documents to your QuickBooks records with drag and drop ease. The new QuickBooks Document Center lets you store files locally on your hard drive. A major advantage at tax time.
- **Automatic Price Adjustments** – Set a default percentage or dollar amount markup for your items. When costs change, choose to increase sales prices by your markup amount, or have QuickBooks automatically make the changes for you.
- **More Price Levels** – Now you can add up to 750 different prices in the price level list.

## Ready to Purchase and Save 20%?

▶ YES I AM!

## QB Enterprise Resource Center



▶ TAKE ME THERE!

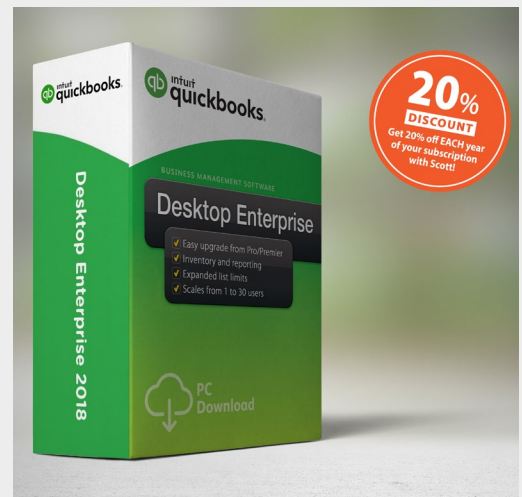
## Ready to Purchase or Need More Info on Desktop Enterprise?

We can help you determine whether QuickBooks Enterprise is right for you – we have a proven track record in helping our clients select the product that fits their needs. Contact Scott Gregory today!

☎ 1.888.581.2839

✉ Scott@BetterBottomLine.com

ℹ www.BetterBottomLine.com



*"Scott Gregory continues to amaze me. Every single client out of the dozens who have purchased Enterprise Solutions from Scott and worked with him have given him a 100% Net Promoter Score. This is very unusual in our industry. It is considered World Class." – MARIE ARCHULETA, Channel Sales Manager for Intuit*



## About Scott Gregory

### Certified QuickBooks Enterprise Advisor and Intuit Premier Reseller

Scott has been helping businesses "get it right" with their QuickBooks and business finances for over thirty years.


During that time, he has assisted well over 1,200 businesses with services such as: QuickBooks training, coaching sessions, demonstrating how to use QuickBooks for inventory tracking, and how to be more profitable and improve cash flow.


Prior to starting his own practice, Scott served as the CFO for a \$15 million manufacturing firm for more than ten years. During his tenure as CFO, Scott was responsible for: \$4 million in inventory, \$4 million in accounts receivable, inventory control, purchasing, information technology and banking relationships.

He is a member of the Certified QuickBooks ProAdvisor program, a CPA, and certified in integrated resource management (CIRM) by APICS. Scott has taught hundreds of business owners, bookkeepers, and CPAs how to use QuickBooks effectively and efficiently through local community colleges and via webinars.

Thousands of QuickBooks users rely on [Scott's QuickBooks Blog](#) for insight, tips and tricks each and every month.

## Contact Scott Today About QuickBooks Enterprise!

 1.888.581.2839

 [Scott@BetterBottomLine.com](mailto:Scott@BetterBottomLine.com)

 [www.BetterBottomLine.com](http://www.BetterBottomLine.com)

