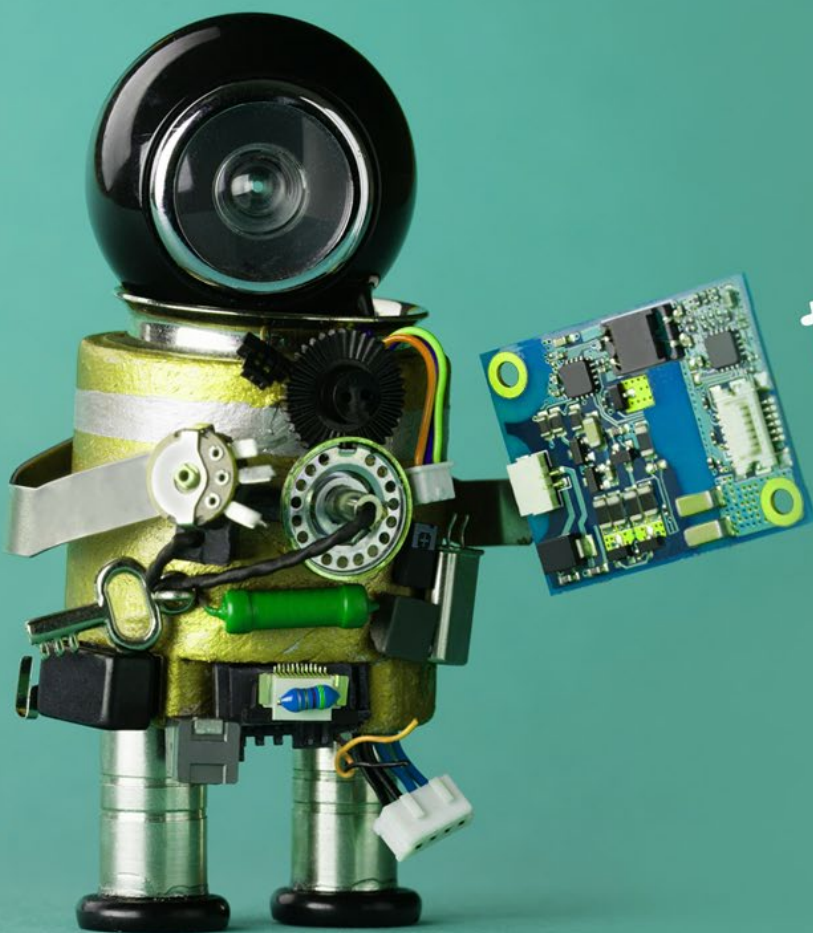


# What's New in QB Desktop 2018: And What You've Been Missing in Prior Versions



Presented by **Scott Gregory**

Certified QuickBooks Enterprise Advisor, Intuit Premier Reseller, CPA



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upgrade

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## QB Desktop 2018 is here and the big question is... should you upgrade?

I've prepared this chart to help provide a quick overview for you of the new features in the 2018 versions to help you answer that question. In addition, I've listed some important features that were added in prior versions of QuickBooks. While not every new feature from the last four years is listed, you will definitely see those that could have the most impact in the table.

### Remember these key points:

- **The data in your current QuickBooks file (2006 and later versions) will upgrade to QuickBooks Desktop 2018 seamlessly.** You should not have any worries as you evaluate the purchase of QuickBooks 2018.
- **Support for QuickBooks 2015 products ends 5/31/2018 (following the three year sunset cycle of Intuit).** If you use any services such as QuickBooks Payroll or QuickBooks Merchant Services, you will have to upgrade to QuickBooks 2018 to keep using them.
- **QuickBooks 2018 software will NOT run on Windows XP.** For full tech specs on QuickBooks, consult the [QuickBooks web site](#).

<p><b>Get a 20% Lifetime Discount on Enterprise</b></p>  <p><b>Desktop Enterprise</b></p> <ul style="list-style-type: none"> <li>✓ Easy upgrade from Pro/Premier</li> <li>✓ Inventory and reporting</li> <li>✓ Expanded list limits</li> <li>✓ Scales from 1 to 30 users</li> </ul> <p><a href="#">CLICK HERE</a></p>	<p><b>Buy QB Desktop Premier 2018 and Save Big!</b> (all industry specific editions)</p>  <p><b>Desktop Premier</b></p> <ul style="list-style-type: none"> <li>✓ Industry-specific tools and reports</li> <li>✓ Business planning tools</li> <li>✓ Includes all the features of Pro</li> </ul> <p><a href="#">CLICK HERE</a></p>	<p><b>Buy QB Desktop Pro 2018 and Save Big!</b></p>  <p><b>Desktop Pro</b></p> <ul style="list-style-type: none"> <li>✓ Organize your business finances all in one place</li> <li>✓ Instant reports on sales, expenses and profit</li> </ul> <p><a href="#">CLICK HERE</a></p>
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Key Features	2018	2017	2016	2015
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<p><b>Mobile inventory scanning.</b> Business users can pick quantities at a warehouse using a barcode device or Android phone to record inventory.</p>	Enterprise Only			
<p><b>Sales order fulfillment workflow.</b> 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.</p>	Enterprise Only			
<p><b>Inventory report customization.</b> This feature now provides customizable display options added to select inventory reports</p>	Enterprise Only			
<p><b>Batch void/delete transactions</b> – Bulk delete or void of select transactions in QB. Admin account only.</p>	Enterprise Only	Enterprise Only	Enterprise Only	
<p><b>Enterprise Only Sort on various columns in receive payment screen</b> – Simplify the payment posting process.</p>	Enterprise Only	Enterprise Only	Enterprise Only	
<p><b>Enterprise Only Improvements in Advanced Reporting user interface</b> – Drag and drop capabilities in certain areas.</p>	Enterprise Only	Enterprise Only	Enterprise Only	
<p><b>Don't allow items to ship negative to create negative on-hand balances</b> – This is probably one of the most desired enhancements to QuickBooks in over a decade.</p>	Enterprise Only	Enterprise Only	Enterprise Only	
<p><b>Disallow selling to clients that have overdue balances</b> – You may or may not like the implementation of this new feature.</p>	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<p><b>Full access to new Advanced Reporting module</b> – Build your own reports with this new feature in Enterprise.</p>	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only

Key Features	2018	2017	2016	2015
<b>See costs on sales forms</b> – Compare your selling prices to item cost field (not the average cost field) when creating estimates, sales orders or invoices.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Negative item list and assembly shortage reports</b> – Quickly and easily see which items have negative on hand values or where shortages exist for assemblies.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Add totals to most columns on forms</b> – 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.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Sort by various columns on forms</b> – Click on the column header and have the data in that column sort automatically for you. This is a great new feature.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Search within transactions</b> – Easily find information within a transaction screen when desired.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Footer on last page only</b> – Set QuickBooks to print a footer only on the last page instead of each page.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Get shaded lines on reports</b> – This new option allows for easier-to-read forms and reports.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Hide opening balance field</b> – Allows for much greater control when setting up new customers, vendors or items.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Hide zero reorder quantity</b> – Make your inventory reorder report more meaningful by hiding these items.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only

Key Features	2018	2017	2016	2015
<b>Maximum stocking levels</b> – You now have a maximum quantity to go with a minimum quantity (reorder point) per item.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>“Where Used” in assemblies</b> – Query by part number to see anywhere and everywhere that part is used in assemblies.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Automatically build nested subassemblies</b> – Have QuickBooks build any and all subassemblies (nested assemblies) needed when building the main assembly.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Assembly cost and price rollups</b> – 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.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Markups AND Margins</b> – See both figures when making changes to item costs.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>The new “Advanced Pricing” module</b> – A new way to apply price rules and promotions at the item level (extra fees apply).	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Limit user access</b> – Limit access to specific bank accounts.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Default Classes</b> – Save time and help improve accuracy by assigning default classes to items, accounts or names.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Bin Location &amp; Barcode Scanning</b> - (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.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only

Key Features	2018	2017	2016	2015
<b>Inventory Reorder Reports Now Include Available Quantity</b>	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>FIFO inventory costing</b> – (Requires Platinum level subscription to QuickBooks Enterprise) Use this as an alternative to the average costing. Be sure to understand the implications of choosing this option on your existing QuickBooks data.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Serial Number / Lot tracking</b> – (Requires Platinum level subscription to QuickBooks Enterprise) Assign lot numbers or serial numbers (but not both) to your inventory items. NOTE: Other advanced inventory software exists that works with QuickBooks too!	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Automatic price markup</b> – Get the option to change your selling prices if the cost of an items changes.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Create Custom Reports with ODBC-compliant applications</b> – Using a new direct connection to the QuickBooks database (applications sold separately).	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Work in two company files at one time in QuickBooks Enterprise</b>	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Multi-location/Multi-warehouse tracking</b> – (Requires Platinum level subscription to QuickBooks Enterprise) Track the quantity and value of inventory in multiple locations.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Remote Desktop Services</b> – Connect multiple locations and remote workers.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only
<b>Additional Custom Fields</b> – More custom fields for items and names, with new data formats and data validation.	Enterprise Only	Enterprise Only	Enterprise Only	Enterprise Only

Key Features	2018	2017	2016	2015
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**Build Assemblies** – This transaction form is now a template. Line items can be modified on the fly and printed.

**Enterprise Only**   **Enterprise Only**   **Enterprise Only**   **Enterprise Only**

**Combine reports from multiple company files**

**Enterprise Only**   **Enterprise Only**   **Enterprise Only**   **Enterprise Only**

**User Security** – Set up far more secure user accounts.

**Enterprise Only**   **Enterprise Only**   **Enterprise Only**   **Enterprise Only**

Key Features	2018	2017	2016	2015
<p><b>Multi-monitor support</b> - Users can use up to three connected monitors to view multiple pages.</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Payroll liability payment reminder</b> - 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.</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Past due stamp on invoices</b> - 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.</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Merge vendor records</b> - This feature provides a consolidated window to identify and merge duplicate vendor records</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Copy and paste keyboard shortcuts</b> - Users can now copy and paste entire transaction rows with the shortcuts Ctrl+Alt+Y and Ctrl+Alt+V</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Cash/accrual toggle on reports</b> - Users can toggle displayed reports between cash or accrual basis.</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Search chart of accounts</b> - There is a new search box on the chart of accounts window that can be used to find and select a chart of account</p>	<p><b>NEW!</b> ✓</p>			
<p><b>Email security</b> - 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.</p>	<p><b>NEW!</b> ✓</p>			



Key Features	2018	2017	2016	2015
<b>Smart Search</b> - Save time with faster searching. Begin typing a name and QB automatically fills in the rest.	✓	✓		
<b>Reports filters</b> - Now one click is all it takes to see which filters have been applied to a report.	✓	✓		
<b>Improved Multi-User experience</b> - QuickBooks makes it easier than ever to work with multiple users.	✓	✓		
<b>Remind users of undeposited funds</b> - Clearly see what deposits require action with a new badge.	✓	✓		
<b>Deleted user names continue to appear in audit reports</b> - Track transactions by deleted users with better accuracy.	✓	✓		
<b>Vendor and Customer Type filter</b> - Find the information you need faster with the ability to filter by vendor type and customer type.	✓	✓		
<b>Cleared Flag on credit card charges</b> - Easily see if a credit card charge is reconciled.	✓	✓		
<b>Copy and paste in time sheets</b> - Save time when entering time sheet information by copying and pasting data from one line to the next.	✓	✓		
<b>Support for higher resolution monitors</b> - Make QB comfortable and delightful on higher resolution computers.	✓	✓		
<b>New "Bill Tracker"</b> – Allows you to see important details about the "money out" side of your business.	✓	✓	✓	
<b>Improved verify and rebuild process</b> – Better information in an easier-to-read format.	✓	✓	✓	
<b>Bulk clear of Send Forms window</b> – Clear out any and all e-mail forms that are still sitting to be sent.	✓	✓	✓	
<b>New default date range of "This Fiscal Year to Last Month"</b>	✓	✓	✓	
<b>Auto copy of ship-to address on purchase orders</b> – No need to manually type in your customer address when creating a PO.	✓	✓	✓	

Key Features	2018	2017	2016	2015
<b>Filter for custom fields in item-based reports –</b> These filters now work properly.	✓	✓	✓	
<b>Continuous label feed printer support –</b> Allows for printing from Zebra compatible printers.	✓	✓	✓	
<b>E-invoicing –</b> Get paid electronically via a link in your invoices (separate fees apply).	✓	✓	✓	
<b>Add the customer PO number to the Customer Center –</b> A highly requested feature to tie the customer PO to the sales order and/or invoice.	✓	✓	✓	✓
<b>Select specific lines when converting from sales order to invoice –</b> A new “check box” simplifies this process for you.	✓	✓	✓	✓
<b>New “Insights” tab on the Home Page –</b> Key financial metrics in a cleaner, easier-to-use screen than the Company Snapshot (which is still included).	✓	✓	✓	✓
<b>New “Time and Expenses” tab within the Income Tracker –</b> Quickly see time and/or expenses that have not been billed to a customer.	✓	✓	✓	✓
<b>Pin a “master note” for customers, vendors or items –</b> Prominently see this “master note” in the upper portion of the customer, vendor or inventory centers.	✓	✓	✓	✓
<b>Send multiple reports in a single e-mail –</b> Another highly requested feature to enhance productivity.	✓	✓	✓	✓
<b>“Flags” on billable time and costs –</b> Quickly see how many entries are in each of the time, expenses, mileage and items tabs when billing for time/costs.	✓	✓	✓	✓
<b>Update to Reminders window –</b> A much cleaner look to this area of QuickBooks.	✓	✓	✓	✓
<b>Warning when inactivating items with quantity on hand –</b> Nice new feature that alerts you to this so you can zero out the quantity first.	✓	✓	✓	✓

Key Features	2018	2017	2016	2015
<b>Estimates automatically closed when invoiced</b> – No more need to manually mark your estimates as closed with this new feature.	✓	✓	✓	✓
<b>Easier to read reports on-screen</b> – Shading and other visual cues to improve readability.	✓	✓	✓	✓
<b>Add comments directly to reports</b> – A great way to quickly and easily share thoughts and insights directly inside the report.	✓	✓	✓	✓
<b>Report filters are now sorted alphabetically and searchable</b> – Finally!	✓	✓	✓	✓
<b>Add Manufacturers Part Number (MPN) to sales transactions</b> – Finally!	✓	✓	✓	✓
<b>Add “Other1” and “Other2” to reports</b> – You can now integrate data from these fields into various transaction detail reports.	✓	✓	✓	✓
<b>Kick users out</b> – Now you can boot a user, even if they are in the middle of a transaction.	✓	✓	✓	✓
<b>Maintenance alerts and other notifications</b> – Now these are displayed right on the home screen for easy reference.	✓	✓	✓	✓
<b>Customize the “view balances” area of the home screen</b> – Add or remove accounts to this area as you prefer.	✓	✓	✓	✓
<b>E-mail tracking</b> – The Customer Center now tracks all sent e-mails so you have a record of them.	✓	✓	✓	✓
<b>Send a customer payment receipt via e-mail</b> – Many businesses have been asking for this.	✓	✓	✓	✓
<b>Tag sales reps to jobs, not just customers</b>	✓	✓	✓	✓
<b>Filter many reports by job status</b> – See reports by open, in process, closed and other status levels.	✓	✓	✓	✓
<b>Copy and paste entire lines, not just fields within a line</b>	✓	✓	✓	✓

Key Features	2018	2017	2016	2015
<b>Online Banking is now called Bank Feeds</b> – See the improvements to streamline the flow of bank and credit card information into your QuickBooks.	✓	✓	✓	✓
<b>New “income tracker” replaces the collections center</b> – See unbilled and unpaid balances at a glance.	✓	✓	✓	✓
<b>Create multiple e-mail templates for each form you send</b> (invoices, quotes, etc.)	✓	✓	✓	✓
<b>Attach additional documents to web mail based e-mails</b> – Include drawings, pictures and any other type of digital document you like.	✓	✓	✓	✓
<b>Auto suggestions provided as you search for information</b> – Find information faster in QuickBooks.	✓	✓	✓	✓
<b>Print Vendor Bills</b> – Now it is easy to print the bill screen just as you enter it.	✓	✓	✓	✓
<b>Bill Credits Print on Check Stubs and Bill Payment Stubs</b> – Finally!	✓	✓	✓	✓
<b>Improved Navigation</b> – Simplified and improved navigation helps you get to the information you need, more quickly and easily.	✓	✓	✓	✓
<b>Centers Customization</b> - 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.	✓	✓	✓	✓
<b>Ribbon and Layout Updates</b> – 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.	✓	✓	✓	✓
<b>Lead Center</b> – Manage leads/prospects in QuickBooks before they become customers.	✓	✓	✓	✓
<b>Inventory Center</b> – Built just like the customer and vendor centers, but for inventory and inventory assembly items.	✓	✓	✓	✓

Key Features	2018	2017	2016	2015
<b>QuickBooks Calendar</b> – Calendar-like view of important and overdue transactions, and tasks that need to be done.	✓	✓	✓	✓
<b>Batch invoicing for time and expenses</b> – Reduces the time spent invoicing your customers.	✓	✓	✓	✓
<b>Batch timesheet creation</b> – Batch capability for entering the same timesheet information for multiple employees or vendors.	✓	✓	✓	✓
<b>Simplified Excel integration</b> – Update data in existing Excel worksheets and preserve formulas and formats.	✓	✓	✓	✓
<b>Batch Invoicing</b> – Create a template once and invoice many customers at once.	✓	✓	✓	✓
<b>Customer Snapshot</b> – Allows users to quickly prioritize customers.	✓	✓	✓	✓
<b>Easy Access to Information</b> – Convenient access to customer or vendor balances and transaction history.	✓	✓	✓	✓
<b>Collection Center</b> – Stay on top of receivables and email collection notices.	✓	✓	✓	✓
<b>Yahoo!, Gmail and Hotmail</b> – Send invoices and estimates right from business Yahoo!, Gmail or Hotmail account.	✓	✓	✓	✓
<b>Vendor Remittance Addresses</b> – Keep track of these addresses with a convenient new field.	✓	✓	✓	✓
<b>Paid Date Stamp</b> – Mark which invoices have been paid with the Paid Date stamp.	✓	✓	✓	✓
<b>Document Management</b> – Attach files of any type to the appropriate QuickBooks record (names, items, accounts, etc.).	✓	✓	✓	✓
<b>Rapid List Entry</b> – Allows users to enter, edit and save multiple list items (customer, vendor, etc.) all in one table.	✓	✓	✓	✓

Key Features	2018	2017	2016	2015
<b>Favorites Menu</b> – Users can configure this menu to centralize favorite, commonly-used and hard-to-find menu items.	✓	✓	✓	✓
<b>Check Signatures</b> – Electronically print signatures on checks and paychecks from signature image files.	✓	✓	✓	✓
<b>Electronic Check Processing</b> – Check scanning service offering through QuickBooks Merchant Service accounts.	✓	✓	✓	✓
<b>Forms Customization</b> – Easier and faster to make QuickBooks forms look more professional.	✓	✓	✓	✓
<b>Company Snapshot</b> – Allows users to customize what widgets they want to see and provides additional widgets for insight into the business.	✓	✓	✓	✓
<b>Condense/Archive</b> – Improved logic to more reliably reduce the amount of data in the company file.	✓	✓	✓	✓
<b>Quick Filter</b> – Save time with customer, vendor and item lists – find information quickly.	✓	✓	✓	✓
<b>E-mail directly from QuickBooks using Outlook</b>	✓	✓	✓	✓
<b>Multiple unit of measure feature</b> – Easily handles the need to purchase in one unit and sell in another.	✓	✓	✓	✓
<b>Track international sales and expenses with multiple currency support</b>	✓	✓	✓	✓
<b>Dashboard</b> – Get a real-time snapshot of your business in one central location.	✓	✓	✓	✓
<b>Backup Data in Multi-User Mode</b> – Allows others to work while you back up the data.	✓	✓	✓	✓
<b>QuickBooks Messenger</b> – Instantly communicate with others using your QuickBooks file.	✓	✓	✓	✓
<b>Instant View</b> – See any customer balance, transaction history and contact information in the Customer Center.	✓	✓	✓	✓
<b>View your balance with any vendor</b> – See a list of POs, bills, and payments in the Vendor Center.	✓	✓	✓	✓
<b>Upgrade data from prior versions of QuickBooks</b>	✓	✓	✓	✓

*"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!

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