



Accounting and ERP?

You really can have it all with
QuickBooks Online Advanced...

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Before you consider jumping into the ERP arena

It's important that you first ask yourself: "What solution does my business really need to grow and thrive?" The truth is that it's the accounting module that makes or breaks a sound ERP solution. Why? Because financial reporting is at the center of everything—it's the data that businesses live by to make actionable, profit-driving decisions.

This leads to the next question: "Instead of transitioning to a full-scale ERP, can I scale

QuickBooks to scale with my business?" The answer: Yes!

Moving to [QuickBooks Online Advanced](#) (Advanced) offers the power and familiarity of QuickBooks and the muscle of key ERP features. You really can have it all with Advanced. Even better, you get it all without the high price tag and painful implementation process.

Why upgrade your accounting solution to function like an ERP?

If accounting is at the center of your business and affects virtually every department (and financial data does), scaling your existing accounting system makes perfect sense. When you compare the financial module of a standard ERP solution to QuickBooks Online Advanced, you'll find that Advanced gives you all you need to support your growing enterprise.



Consider all you get with Advanced and the ease of scaling up to create a custom ERP system:

Accounting:

Timely, accurate financial data is what drives informed decisions—everything from approving large purchases, hiring new staff, and implementing new technology. The accounting function is responsible for recording and tracking every financial transaction across multiple sales channels and departments. Business leaders can slice-and-dice data to gain full transparency into their financial position—at any point in time.

Workflow automation:

Automate repeatable (and critical) processes that support streamlined operations and promote heightened efficiency across departments and roles. For example, build workflows for accounts payable and receivable to automate tasks such as launching unsent invoices, sending batch invoices¹, and sending payment due and overdue reminders. This also includes automating internal invoice and bill approval workflows.

Department integration:

When all departments within your organization are connected, visibility across business functions is possible. For example, syncing data across accounting, inventory and fulfillment, and sales and marketing enables real-time access to financial information on an as-needed basis. This helps safeguard against bottlenecks, misinformation, and lackluster customer service.

Specialized reporting:

The key to gaining complete visibility into data is reporting, reporting, and more reporting. Advanced offers custom reporting functionality, allowing you to select the data you want to see and create reports that are most impactful to your business. You can filter, group, and summarize to highlight key KPIs and other industry-specific benchmarks.


Standard and custom app integrations:

Supporting business functions beyond accounting as well as those that support your industry is critical to operations. For example, construction, wholesale, and manufacturing verticals rely heavily on efficient inventory management. With Advanced, you get a built-in inventory module to support visibility across sales channels and the ability to set automatic alerts for when inventory runs low.

¹ **Batch invoices and expenses:** QuickBooks Online Advanced supports the upload of 1000 transaction lines for invoices at one time. 37% faster based off of internal tests comparing QuickBooks Online regular invoice workflow with QuickBooks Online Advanced multiple invoice workflow.]

As your business grows, you can also integrate custom apps to extend core system functionality including [QuickBooks Online Payroll](#), [QuickBooks Time](#) (time card tracking), [QuickBooks Capital](#) (business funding), [DocuSign](#) (e-signature), [Salesforce²](#) (CRM), [Bill.com](#) (A/P), and [Fathom](#) (KPI reporting).

² **Salesforce® Connector app by QuickBooks:** Available to QuickBooks Online Advanced subscribers only. Requires a Salesforce account, acceptance of Salesforce Master Subscription Agreement and Privacy Statement. Integration supports Salesforce Professional and Enterprise only. Additional fees will apply. Features are accessible to only company admin roles. Connector only supports USD currency.




Salesforce Connector by QuickBooks

Get paid faster with Salesforce® Connector by QuickBooks

★★★★★

(5)




HubSpot

Integrated software for marketing, sales, and service, built on a free CRM.

★★★★★

(37)




Fathom

Insightful dashboards and performance reports for your business.

★★★★★

(249)




LeanLaw - Legal Billing Software

Legal billing with QuickBooks as the source of truth, 2-way integration.

★★★★★

(74)




QuickBooks Time

Simplify payroll and invoicing with QuickBooks Time (formerly TSheets)!

★★★★★

(7192)




DocuSign eSignature Connector by QuickBooks

Sign, send, and manage documents directly from QuickBooks Online Advanced

★★★★★

(12)




Bill.com

Most popular QuickBooks payment app in 2020. Take financial control & save time.

★★★★★

(942)



QuickBooks Payroll, HR & Benefits

The #1 payroll provider for small business.

★★★★★

(346)



Seamless integration with premium apps³ helps you scale QuickBooks Online Advanced to operate like an ERP.

³ **Premium Apps:** Apps may require a third-party subscription. Subject to additional eligibility criteria and fees.

Experience accounting in the cloud

There are many good reasons why companies opt to work within a cloud-based technology ecosystem. For those already in the cloud, you're more than familiar with the pros—including ease of access to data, unmatched security, reduced risk of data loss, and the ability to run a seamless operation across distributed teams.

With QuickBooks Online Advanced, you'll enjoy all the benefits of operating in the cloud:

Ease of access:



Running a business is never-ending, which is why you need constant access to your data. When you operate in the cloud, you can access key information at any time, from anywhere, and on the device of your choice.

Unmatched security:



Applying industry-leading security protocols, Advanced safeguards your data and protects your privacy. Get peace of mind that your data is safe from security breaches because our security specialists are always working to keep your data secure.



Reduced risk of data loss:

With regular backups to the cloud, [rest assured that your data is safe](#) because the system enables you to restore data to a specific point in time.



Support of distributed teams:

Give access to those who need it by using the system's sophisticated roles and permissions features. Take control of who sees and does what across the teams that comprise your business.

Optimizing QuickBooks Online Advanced to be your cloud ERP:

What features you need and why they matter

While every industry is different, they all have one thing in common—a need for timely, accurate financials to support smart, profit-driving decisions. QuickBooks represents a powerful accounting solution—the nucleus of a strong business model. QuickBooks Online Advanced offers added muscle with sophisticated ERP-like features and functions required by growing businesses.

Beyond accounting, every industry is unique—each requiring its own “tools of the trade” to operate efficiently and effectively. This includes such ERP functions as inventory management, workflow automation, and custom reporting to name a few. When upgrading solutions, businesses (no matter the industry) also require proper support and training to ensure ongoing success.



Let's first start by listing what select ERP features and functions are important:

Reporting:

Powerful reporting, like offered via the Custom Report Builder in Advanced, allows you to select the data you want to see and create reports that are most impactful to your business. You can also filter, group, and summarize data for deeper insight into the numbers. Seamless integration with Fathom supports deeper KPI analysis.

Inventory management:

Maintain visibility of inventory across channels to safeguard against low stock or stock-outs. You can easily earmark inventory items for a specific job directly from an estimate to ensure availability of stock later.

Classes:

Make easy work of assigning transactions to a specific class. This feature enables you to separate the P&L (profit and loss) into departments or divisions (classes) to view exactly what was spent on each within a defined period.

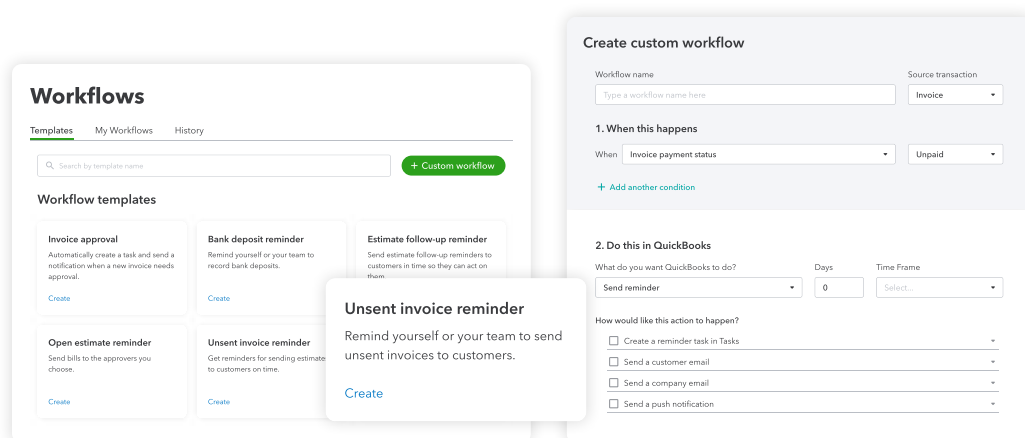
Locations:

Allows you to assign transactions (sales, expenses) to a specific location. For example, if your business has multiple offices, you can track sales receipts by location to compare revenue by site.



Left: Choose from a list of workflow templates offered in Advanced to get you started quickly.

Right: Create custom workflows within the Workflow Center.



Workflow and tasks:

Use the Workflow feature to automate detailed processes for your staff to ensure they stay on track. The Tasks feature can be used to create to-do lists manually (e.g., tasks for the day). Tasks can also be linked to a Workflow to automate tasks that are integral to a specific process.

App integration:

Extend the core capabilities of QuickBooks Online Advanced via premium app integrations including QuickBooks Online Payroll⁴, QuickBooks Time, QuickBooks Capital, DocuSign, Salesforce, Bill.com, and Fathom. Other apps help further customize Advanced to support your industry-specific needs such as Knowify (construction project management) and [Lean Law](#) (legal firm project management).

Expertise and knowledge:

Ensure you have access to the best training and team of experts. With QuickBooks, you get [free training](#), a highly dynamic user forum, and a library of helpful how-to docs and videos.

⁴ **QuickBooks Online Payroll:** Requires a separate QuickBooks Online Payroll subscription. Additional fees will apply. For more information about QuickBooks Online Payroll see [here](#).

Let's now look at why these features matter to your industry:

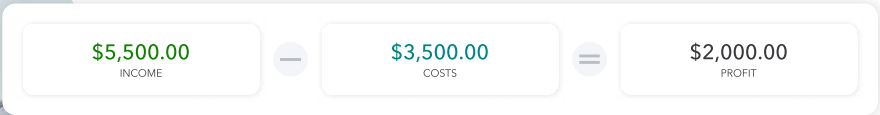
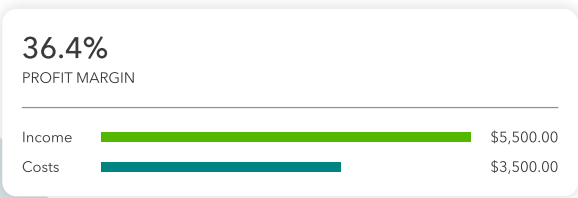
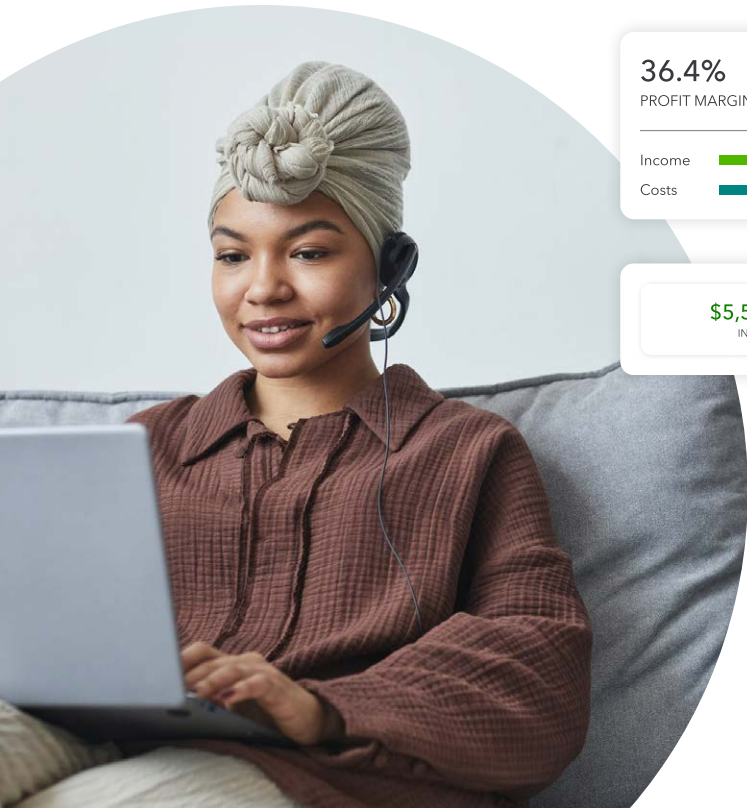
Depending on the specialty, your ERP needs will differ. Consider a few select features and functions you get with Advanced and why they matter to your business.



Professional services

The term “professional services” covers a variety of business types. Whether you’re an engineering firm or a graphic design business, the following select features are important.

What features matter	Why they matter
Projects Provides an organized, centralized dashboard of all active projects by client.	Track project profitability easily Offers a profitability center where you can easily monitor profit on a project-by-project basis. Within Projects, you can add invoices, payments, expenses, time, and other essential data for accurate, real-time views of profit by project. This is important to ensure profitability across jobs. For example, for projects showing low or no profit, you can make adjustments early on. This could include raising fees or lowering expenses by limiting outsourced contractor hours.
App integration Customize Advanced for your industry by integrating a timecard/time tracker that enables you to capture employee or contractor hours with ease. App example: QuickBooks Time	Enjoy accurate time tracking Employees and contractors can enter time from their laptop or smart device at any time and from anywhere so billable hours are never lost. The time center in Advanced allows you to allocate time accurately to each project. This helps to properly manage profitability by project or client because it offers full, real-time visibility into all billable activity.



Add activity as it happens (e.g., payments received, expenses paid) to maintain a real-time view of project profitability.



Legal

What features matter

Custom reporting

Pull the data that matters the most to your firm at any time.

App integration

Customize Advanced for your industry by integrating project management functionality.

App example: Lean Law

Why they matter

Optimize client management

The ability to slice-and-dice data supports deeper analysis of financial data and provides real-time views of realization rates.

For example, firms can create a custom report on billable versus non-billable hours to assess realization rates and ensure maximum profitability by client.

Consistently pulling the data that matters most allows you to be proactive with client cases that are not showing a profit. This could lead you to make such adjustments as reassigning lower-value administrative work from an attorney to an admin staff member—freeing the attorney to take on higher-value work.

Get accurate, timely reporting

Full integration with premium app Lean Law supports legal firms with a project management solution to handle everything from case management, billing, client intake, and more. Two-way integration with QuickBooks Online Advanced streamlines the accounting function for real-time, accurate financials.

Nonprofit

What features matter

Classes

Allows you to assign a transaction to a department or division (class) within the organization.

Why they matter

Enjoy powerful, impactful reporting

For non-profits, detailed tracking of financial activity is crucial for the purposes of reporting to the Board, supporting annual audits, and monitoring profitability across events.

The ability to track every transaction by assigned class allows you to separate the P&L by departments (e.g., fundraiser or other unique event) to analyze profitability and ensure proper allocation of funds. This feature is also helpful in tracking use of restricted versus non-restricted funds.

It's important to note that QuickBooks Online Advanced offers unlimited classes. This means that nonprofits can assign as many classes as needed to continuously track financial data at a granular level year after year.

Budgeting

Enables you to create as many budgets as needed (for each class if required).

Benefit from highly efficient budget management

The budgeting feature is exceptionally helpful in keeping your non-profit on track to meet financial goals.

Because most nonprofits develop budgets using spreadsheets (based on ease of use), Advanced supports easy import of CSV files. This is a huge timesaving feature based on the mere volume of budgets nonprofits create throughout the year.

Annual Banquet Profitability 2020 Report

[Back to report list](#)

Report Period

Last Year 01/01/2020 to 12/31/2020

Display columns by

Classes

Show non-zero or active only

Active rows/Non-zero Columns

Compare another period

Select period

Accounting method

☐ Cash ☒ Accrual

Run report

Enjoy granular level views of transactions separated by assigned classes.



Construction

What features matter

Why they matter

Project

Provides an organized, centralized dashboard of all active projects by client.

Experience accurate forecasting and project financials

The construction industry is unique in that every job can be different—with a unique set of factors that drive timeline, labor costs, administrative expenses, and other direct and indirect costs. All of these factors impact profitability.

The Projects feature allows you to track activity in detail—from supply expenses and subcontractor fees to labor and increases in material costs. From the Projects center, you can even display revenue and project expenses in graphic form for easy data management and review of profit margin percentages.

With accurate, on-demand data at your fingertips, this feature supports accurate forecasting and allows you to proactively make adjustments to projects to stay within set budgets.

QuickBooks Online mobile app⁵

Offers great flexibility when working in the field (e.g., creating bids and collecting payments).

Enjoy faster invoicing to get paid quickly

Based on the example above, the mobile app offers added flexibility and convenience for those in the construction niche.

For example, from a tablet, you can create an estimate in the field and enable clients to digitally sign on the spot. Clients can also make a payment via the QuickBooks Payments app.

App integration

Customize Advanced for your industry by integrating project management and costing method functionality.

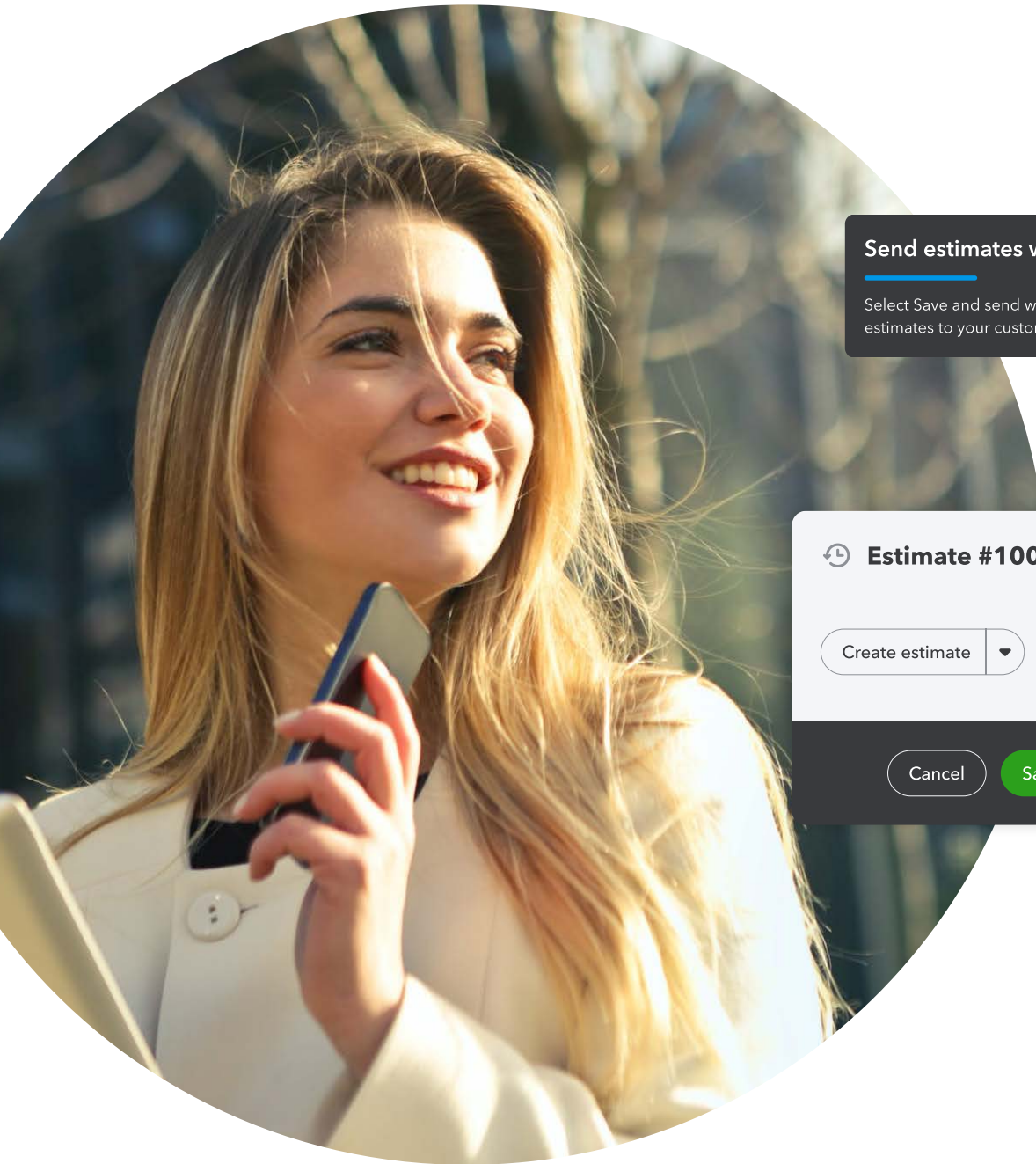
App example: Knowify

Take advantage of seamless integration of financials and project data

Fully integrating Knowify provides a full-scale project management module for creating estimates and contracts, tracking inventory, and scheduling jobs.

The app also supports inventory costing methods beyond FIFO (First In, First Out). You can choose to apply LIFO (Last In, First Out) or WAC (Weighted Average Cost) to apply the best inventory control technique for your construction business.

⁵ **Mobile app** References to Mobile or Connecting with a team “wherever they are” or “anywhere” **QuickBooks Online Advanced Mobile:** QuickBooks Online Advanced requires a computer with a supported Internet browser (see System Requirements for a list of supported browsers) and an Internet connection (a high-speed connection is recommended). The QuickBooks Online mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.



Send estimates with DocuSign



Select Save and send with DocuSign to start sending estimates to your customers

Estimate #1003

AMOUNT

Create estimate



\$15,980.00

Cancel

Save and send with DocuSign

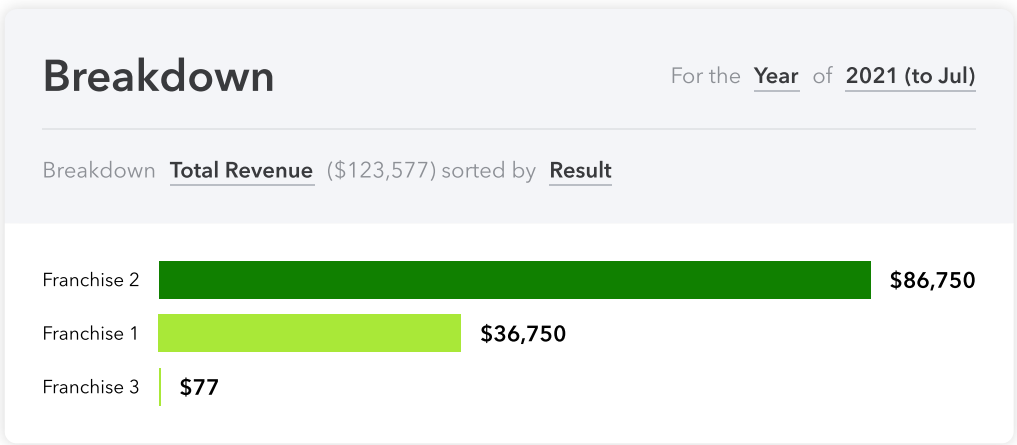


Move jobs forward faster by creating estimates while in the field and getting signatures on the spot when you use the mobile app.

Franchises

What features matter	Why they matter
Online backup and restore Easily copy a company from one QuickBooks system to another to support multiple franchises.	Secure user access to data This built-in Advanced module allows you to easily set up a new franchise based on a "template" file. This means that if you have twenty franchise locations, you can create a company file for each complete with a chart of accounts and list of vendors within the solution. You can then set permissions and roles so that users can only see data related to their specific franchise.
App integration Customize Advanced for your industry by integrating powerful KPI and benchmarking functionality. App example: Fathom ⁶	Consolidate tracking and benchmarking across locations and stores Smart reporting in Fathom allows Franchises to connect multiple companies within a single place to create combined financial statements. This allows you to perform benchmarking and compare locations on sales, expenses, profitability, and more.

⁶ **Smart Reporting by Fathom:** QuickBooks Online Advanced includes one license of Smart Reporting powered by Fathom at no additional charge. Fathom supports up to 3,000 active or inactive accounts in the QuickBooks Online chart of accounts, and up to 20 classes for the importing, reporting, and analysis of QuickBooks data. Additional Fathom licenses can be purchased at \$39 per month, as of 1/07/2020. More information [here](#). Fathom [terms and conditions](#). Fathom [privacy policy](#). Fathom [support](#).



Quickly pull reports to compare revenue by franchise.

When do you make the move?

Making the jump to a full-scale ERP takes a lot of pre-planning. You have to consider technology costs and the added expense of staff training and ERP specialist consulting fees. There's also system implementation to consider and the disruption a multi-month process can cause—including hits to productivity, elevated staff frustration (which further impacts productivity), and the time investment required to redefine each department's processes.

You should only make the move to a full-scale ERP after you've weighed all the pros and cons. And only after you've considered how QuickBooks Online Advanced can meet your ERP needs.

The truth is that with all the powerful built-in features and app integration available in Advanced, companies can [build a highly customized ERP-like system](#) that is tailored to their unique needs. If you're already invested in and love the functionality and intuitive-factor you get with QuickBooks, scaling your system can be as easy as an upgrade to QuickBooks Online Advanced.

If you're considering switching to QuickBooks Online Advanced, get peace of mind knowing that 89% of users say that it was easy to get QuickBooks up and running⁷. You'll have a dedicated account team to guide you every step of the way through your [Priority Circle](#) membership⁸.

7 Based on a survey of QuickBooks customers conducted September 2019. Customers remunerated for their responses.

8 QuickBooks Online Advanced - Priority Circle: Membership in Priority Circle and its benefits are available only to customers located in the 50 United States, including DC, who have an active, paid subscription to QuickBooks Desktop Enterprise or QuickBooks Online Advanced. Eligibility criteria may apply to certain products. When customers no longer have an active, paid subscription, they will not be eligible to receive benefits. Phone and messaging Premium support is available 24/7. Support hours exclude occasional downtime due to system and server maintenance, company events, observed U.S. holidays and events beyond our control. Intuit reserves the right to change these hours without notice. Terms, conditions, pricing, service, support options, and support team members are subject to change without notice.

Have it all with QuickBooks Online Advanced

Before you rush to an ERP to relieve business growing pains, take a closer look at QuickBooks Online Advanced and the powerful ERP functions that come with it. Save yourself the hassle of a long implementation process and the high price tag. With Advanced, you really can have it all!

Learn how QuickBooks Online Advanced can give your business the power of an ERP with the intuitive interface of QuickBooks—without the high price tag or complex implementation required.

Try now

888-566-4498

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