

# QuickBooks Accountant Desktop PLUS

## feature comparison by year



Key features by version year	2021	2020	2019	2018	2017
<b>Improved bank feeds</b> Automatically categorize bank transactions with more detail by using enhanced rules, batch editing and improved matching. <sup>1</sup>	✓				
<b>Automatically send statements</b> Automate regularly sent statement emails, tailored to different customer needs.	✓				
<b>Customize payment receipts</b> Customize payment receipt formatting, including logos, for a professional and consistent look across your customer communications.	✓				
<b>Create Customer Groups</b> Create rule-based customer groups based on fields like customer type, status, location and balance, so you can easily manage and communicate to them.	✓				
<b>PDF Preview</b> Automatically preview attachments before emailing them to customers.	✓				
<b>QuickBooks Desktop Manager</b> Easily find and install all of your QuickBooks Desktop products from a single management tool.	✓				
<b>QuickBooks Capital</b> Get access to transparent, easy, flexible business funding --- with no origination fees, prepayment penalties, or hidden charges.	✓				
<b>QuickBooks Tool Hub</b> Fix common problems and errors with a hub containing easy to use troubleshooting tools.	✓				
<b>Automatic payment reminders</b> Easily set reminders for customers when their invoices are due.	✓	✓			
<b>Customer PO numbers in emails</b> Easily add customer PO numbers to email subject lines in QuickBooks	✓	✓			

Key features by version year	2021	2020	2019	2018	2017
<b>Combine multiple emails</b> Simplify customer payment processing by consolidating multiple invoices into just one email.	✓	✓			
<b>Smart Help</b> Press "F1" for enhanced help content and search experience, or access to live experts through messaging and call back options. <sup>ii</sup>	✓	✓			
<b>View inactive items in inventory reports</b> A new filter to include/exclude inactive inventory items gives an up-to-date assessment of inventory.	✓	✓	✓		
<b>Transfer credits across different jobs</b> Simplified 1-click transfer of credits across customer jobs for streamlined workflow.	✓	✓	✓		
<b>Quickly merge duplicate vendors</b> Search and sort to identify duplicate vendors, designate the master vendor, and merge up to four records at a time. <sup>iii</sup>	✓	✓	✓	✓	
<b>Increase productivity with Multi-Monitor support</b> Increase your efficiency and visibility into your QuickBooks files through multi-monitor viewing. <sup>iv</sup>	✓	✓	✓	✓	
<b>Accountant Toolbox</b> Unlock access to powerful accountant tools on-the-go. <sup>v</sup>	✓	✓	✓	✓	✓
<b>Send Portable Company File</b> Clients can send you a portable company directly from QuickBooks. No more technical support. <sup>vi</sup>	✓	✓	✓	✓	✓
<b>Send files securely</b> Send Accountant's Copy files through secured Intuit servers with Accountant's Copy File Transfer Service. <sup>vii</sup>	✓	✓	✓	✓	✓
<b>Find and Fix errors fast</b> Find and Fix client entry errors faster with Client Data Review.	✓	✓	✓	✓	✓
<b>Take a cross-edition expedition</b> See what your clients see with instant access to all QuickBooks editions in one software package. <sup>viii</sup>	✓	✓	✓	✓	✓

## **Important disclaimers, disclosures, and notes:**

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<sup>i</sup> Pro and Premier customers may download data from participating banks until May 2024. This date does not apply to Pro Plus, Premier Plus or Enterprise customers. Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions and fees.

<sup>ii</sup> Available from 6am-6pm Mon-Fri; 6am-3pm Sat (PST) for Pro, Premier, Standard and Plus. Enterprise access available 24/7. Hours exclude occasional downtime due to system and server maintenance, company events, observed U.S. Holidays and events beyond our control. Access to messaging with live experts or call back features requires a QuickBooks Care Plan, and internet connection. Care plan is included with Standard, Plus and Enterprise subscriptions. A la carte Annual Care Plan MSRP \$299.95.

<sup>iii</sup> Specific vendors that cannot be chosen for a merge: tax authorities; vendors that have been paid using online banking; vendors with direct deposits.

<sup>iv</sup> Up to 3 monitors supported. Not available in a hosted environment. University of Utah study from 2008 indicated that productivity can increase by up to 44% for routine office tasks by upgrading from single monitor to dual monitor configuration.

<sup>v</sup> The Accountant Toolbox feature is available to Accountants who have QuickBooks Accountant Desktop Plus. The Accountant must be using the latest QuickBooks Accountant Desktop Plus and the Client must be using the latest QuickBooks Pro or Premier.

<sup>vi</sup> Requires use of a third-party shared folder that utilizes an internet service.

<sup>vii</sup> Works with Accountant Copy files from QuickBooks Pro, Premier, and Premier Industry Editions 2019, 2020, and 2021. Payroll transactions cannot be adjusted. Not all fields can be accessed in QuickBooks 2019, 2020, and 2021 files; including 1099 Account Mapping and modify and merge class lists. Previous versions of Accountant's Copy restricted reconciliation after dividing date. Additional fees apply for file transfer services across Intuit servers.

<sup>viii</sup> Works with QuickBooks Pro, Premier, and Industry Editions 2021. Does not work with QuickBooks Enterprise Solutions, QuickBooks for Mac, or QuickBooks Online.