

## What's new in

# QuickBooks 2017



**Alan Stoffer**

Product Marketing Manager  
QuickBooks Desktop 2017

We asked Alan Stoffer, Product Marketing Manager for QuickBooks Desktop software, what customers can expect from QuickBooks 2017.

### How do you decide what will be in QuickBooks?

Essentially, we listen to our customers. They give us thousands of suggestions. We even visit customers and watch them use QuickBooks to see how we can make it easier.

### What surprised you the most?

Making even a small change can have a huge impact. Eliminating just a few clicks from a process, can add up to hours of time savings.

### What's new for this year?

Most of the improvements are related to reporting, sending and finding information.

We saw people struggling to keep up with the demands for reports. One customer summed it up best, he said 'I know some people would like to see my reports more often but it is not worth the effort to create and send these out every single day.'

That pain point was echoed by a lot of customers, so we created the **Scheduled Reports Center**. Now you can automatically send standard reports and memorized reports on a schedule you set. You'll see when reports are

SCHEDULE NAME	SCHEDULED FOR
Financial reports of Crawfish Company	Weekly, on Mondays 7:00 am
Payroll summary reports to James & Edith	Biweekly, on Fridays 5:00 pm
Cash flow reports	Monthly, on the 25th 11:00 am
Journal entries today to accounts dept	Daily, at 4:00 pm

### Automatically generate and send reports

scheduled, when the last one was sent and the date for the next send.

One thing to note - scheduled reports are not available in Multi-User mode, in hosted deployments, or when there are multiple versions of QuickBooks 2017 installed.

### How did you improve searching for data?

On customer visits, we often saw post it notes all around the desk of the QuickBooks user. They'd have cheat sheets with account numbers, names and parts or items. We wanted to make

ITEM	DESCRIPTION
Door	
✓ Door Frame	Inventory Part
Hardware	Inventory Part
Std Doorknobs	Inventory Part
Lk Doorknobs	Inventory Part

Enter data faster with Smart Search

**Applied Filters:** Account: All accounts receivable X Name: All customers/jobs X Paid Status: Open X

it easier to find this information in QuickBooks, without having to write it down, so we designed **Smart Search**.

With Smart Search, you just start typing in any field that uses a list, like items or customers, and QuickBooks instantly searches for all words or phrases that match. For example, if your item list has door frames and standard doorknobs, when you type "D-o-o" you'll see everything in your list that contains those letters, wherever it is in the item name. Even if it is the second or third word. Before you needed an exact match. This is really useful if you organize lists around customer numbers. I might be customer number "0014537 Stoffer" and you could find me by typing in "Stoffer".

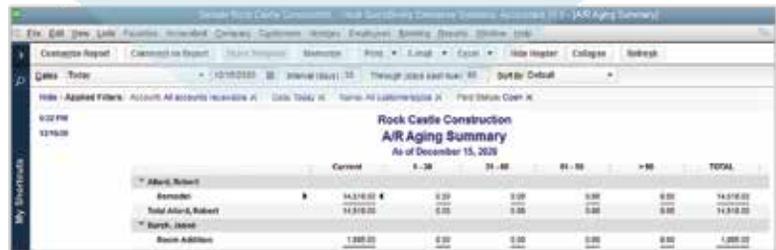
### Anything else new for this year?

We've made it easier to use Report Filters. Customers use filters to customize reports and memorize them. But after it's memorized, you may not remember what filters you put on it. Now you can reveal the applied filters with just a click. You can also toggle off a filter by clicking an "X" next to it.

If you want to add more filters, you click on one of the filters and it's a shortcut to the filter dialog box.

We added another small feature that helps people find data. You used to have to know the exact amount you were looking for or scan through a list with values above or below a number. Now you can search between say \$100 to \$200. This helps you pinpoint what you need much faster.

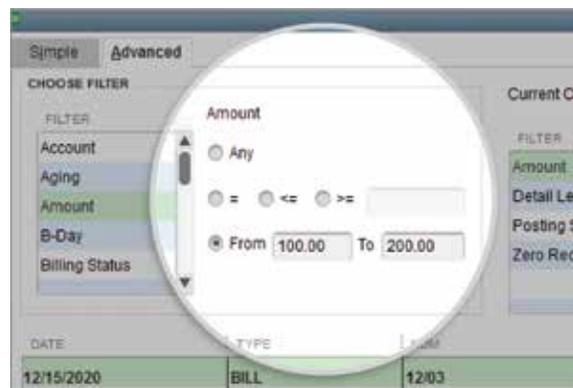
People have been using QuickBooks 2017 for awhile now and the reviews are great. People tell us they're much more productive.



The screenshot shows the 'A/R Aging Summary' report for 'Rock Castle Construction' as of December 15, 2018. The report is filtered by 'Account: All accounts receivable', 'Name: All customers/jobs', and 'Paid Status: Open'. The table below shows the aging schedule:

	Current	1-30	31-60	61-90	>= 90	TOTAL
Amount	14,310.00	0.00	0.00	0.00	0.00	14,310.00
Total Amount, Balance	14,310.00	0.00	0.00	0.00	0.00	14,310.00
Bank Balance	-1,000.00	0.00	0.00	0.00	0.00	-1,000.00

See the filters applied to your reports



Easily search between values

"The 'look-up' while you type feature is the best."

- Professional Service Provider - Pro User

Call **1-800-669-7981** to find out more about QuickBooks 2017