QuickBooks Enterprise 24.0

In-Depth Guide | 2024

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Overview

QuickBooks Desktop Enterprise is the most powerful and flexible QuickBooks ever, designed to help companies growing in size or complexity run their businesses from end to end. Specialized industry editions offer customized capabilities, reports, and features designed for your industry.

With QuickBooks Desktop Enterprise, you get access to a full suite of services including payroll, payments, time tracking, point of sale, and a robust app ecosystem:

- Best-in-class accounting, inventory management, reporting, pricing, job costing, payroll, time tracking, and more.
- Capacity for 1 million customers, vendors and inventory items, 100,000 classes, 45 custom fields, and 40 users.
- More control of user permissions than any other QuickBooks product.
- Remote access so you can work anywhere, anytime.

If you are currently using QuickBooks and you need more functionality or room for more data, more list items, or more users, you may benefit from the flexibility of Enterprise. Moving up from Pro or Premier is as easy as any other QuickBooks upgrade. You and your team can transition seamlessly with Enterprise's familiar QuickBooks look and feel. And if you're changing from another software, chances are someone in your office already knows QuickBooks.

Key Features Overview

Get room to grow without sacrificing control over user access
Scale from 1 to 40 individual users.[1]
Let users work at the same time with more activities in multi-user mode.
Set individual user permissions for more than 115 different activities.
14 predefined user roles are included to help you set up new users quickly.
Data-level permissions in Platinum and Diamond allow you to customize user access for specific customers, vendors, and data.[2]
Keep your growing data history to provide the best financial data about your business
Track hundreds of thousands of customers, vendors and inventory items with more than 6 times the capacity of any other QuickBooks product.[3]
High list limits let you add more Accounts, Classes, Customer and Vendor Types, To Do's, Customer Messages, and much more.
Access Enterprise any way and anywhere you want, anytime[4]
Add our monthly Hosting Service to run your Enterprise in the cloud, and connect all your users and get anywhere, anytime access with no network to set up or maintain.[5,6]
Manage your end-to-end workflow inside QuickBooks Desktop Enterprise
Manage inventory and sales fulfillment right inside QuickBooks with end-to-end pick, pack, and ship capability. Advanced Inventory gives you the option of tracking more details about your inventory right in QuickBooks — so there's no need for separate software.[7]
Advanced Pricing lets you control, customize and automate your pricing, markups and margin right inside QuickBooks, so you don't have to update them manually.[8]
Industry editions have specialized workflows and reports designed for contractors, manufacturers, wholesalers, nonprofits, professional service firms and retailers.
See data the way you want with the most customizable reporting tools in QuickBooks
Twice as many custom data fields as in other QuickBooks products. Combine reports from multiple company files for clearer business insights.[9]
Get a deep understanding of your business with over 200 built-in, customizable reports, and the power to create your own.

1 Licenses are available in single-user increments from 1 to 10 users or up to 40 users. Fees apply.

2 Record level permissions only available in Customer, Employee, and Vendor Centers.

3 Enterprise allows you to add up to one million names (e.g., customers, vendors, employees) and up to one million items (e.g., inventory, non- inventory, and service items). Some performance degradation is likely as your lists approach these size thresholds.

4 Internet connection required. Access is subject to Internet provider network availability and occasional downtime due to systems and server maintenance and events beyond our control. Subject to change without notice.

5 Additional fees may apply. Requires certain hardware, Microsoft Server operating systems, Microsoft Windows Server software licenses, and Remote Desktop Services Server Client Access Licenses, sold separately. For multiple remote users, a Remote Desktop Services Client Access License is required for each user.

6 Additional fees apply for QuickBooks Desktop Enterprise Hosting Service subscription. Hosting Service is available for QuickBooks Desktop Enterprise only and is valid for the number of users equal to or fewer than the number of QuickBooks Desktop Enterprise users assigned to the customer's Intuit account. QuickBooks Desktop Enterprise sold separately; a valid QuickBooks Desktop Enterprise license code must be provided to Right Networks. Contact Right Networks to contract third party software. Support for Hosting Service provided by Right Networks.

7 Advanced Inventory is included in the Platinum and Diamond subscriptions. Requires QuickBooks Desktop Enterprise with an active QuickBooks Desktop Enterprise subscription and an Internet connection.

8 Advanced Pricing is included in the Platinum and Diamond subscriptions. Requires QuickBooks Desktop Enterprise with an active QuickBooks Desktop Enterprise subscription and an Internet connection.

9 Company files must all be on the same version of QuickBooks Desktop Enterprise. Requires Microsoft Office 2010 SP2 – 2019, or Office 365 (32 or 64 bit). Requires Office 2013 – 2019, or Microsoft 365 (32 and 64 bit).

New in 24.0

Customer Prepayments[1]

Improve efficiency and productivity by easily recording and tracking customer prepayments on sales orders. See page 65 for details.

Item Category Enhancements[2]

Improve productivity with enhanced search/edit and bulk edits of categories, and set up granular pricing rules by category. See page 42 for details.

Inventory Reports Enhancements[2]

Gain better insight into inventory levels, costs, and sales to make informed decisions with enhanced inventory reports organized by categories. See page 43 for details.

Integrated 401(k) Retirement Plans[3,4,5]

Invest in your team by offering affordable 401(k) retirement plans that integrate with QuickBooks for a seamless experience from enrollment to management. See page 64 for details.

Improvements to Employee Center[5]

Improve administrator productivity with detailed employee profile information available in a single enhanced Employee Center. See page 18 for details.

Enhanced Security and Encryption

Protect sensitive financial information and critical customer data with industry-leading AES 256-bit encryption. See page 24 for details.

Seamless Product Updates[6]

Install product updates in the background without interrupting your work and easily learn when an update is available. See page 22 for details.

Improved Search of Item Lists

Improve productivity by using enhanced search to find specific items within a large list of memorized transactions, fixed assets, or payroll items. See page 79 for details.

1 Feature not available with multi-currency.

2 Report “Inventory Stock Status by Lot Numbers” only available with QuickBooks Enterprise Platinum, Diamond and Accountant subscriptions.

3 Additional fees apply.

4 401(k) plan: 401(k) offerings are provided and administered by Guideline, an independent third party and not provided by Intuit. Intuit is not a 401(k) plan administrator, fiduciary, or other provider. Requires acceptance of Guideline’s Client Relationship Summary and Privacy Policy. Additional 401(k) plan fees will apply. Employees may manage their contributions directly with Guideline. Admin and payroll access required to sign up for a 401(k) plan with Guideline. Guideline live US-based support is available Monday through Friday, 6:00 AM to 4:00 PM PT.

5 Must have access to Payroll.

6 Only available versions 24.0 or higher.

User Interface Basics

Home Page

The Enterprise home page provides an overview of QuickBooks activities, which makes it easy to access the most frequently used functions and tasks in QuickBooks. A workflow view shows the key tasks and how they are related. Users simply click on a task icon to get started performing that task. Get instant access to account balances in QuickBooks and the ability to customize QuickBooks easily by turning features on and off from a central location.

The home page is customized to each business based on their preferences and answers to questions in setup.

Here are two examples of a customized home page:

Example 1: Customized home page for simple businesses

Example 2: Product-based business which tracks inventory and uses Payroll and MAS

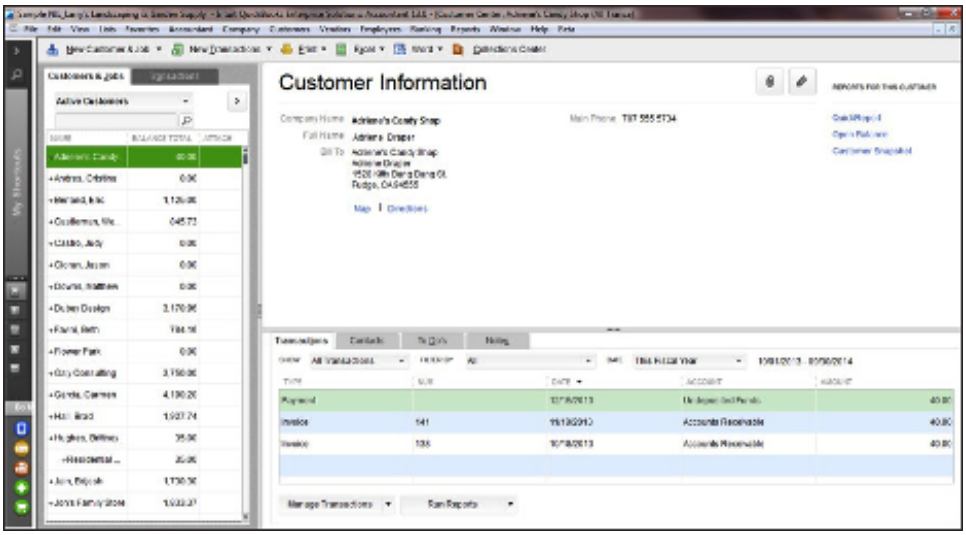
The home page includes:

- **Workflow area**, which provides a graphical overview of key QuickBooks tasks and shows how they are related, including key steps in the workflow (e.g., first you enter a bill, then you pay the bill). Each step is represented as an icon, which the customer can click to do the task.
- **Sample file indicator**, which reminds the user if they are in a sample file and gives them a way to start a new company file.
- **Account balances**, which displays the account name and balances of bank account and credit card accounts, using the account balance information available in QuickBooks. This section can be closed, if desired, for privacy. If a user does not have permission to see a particular account, that account is not listed here. If a user does not have permission to see any account balances, this box does not appear.
- **Customize QuickBooks link**, which links the user back to where they can set preferences to determine which features are on/off in the home page and which features are on/off throughout the product. Note: There is limited customization available—not all features can be turned on/ off on the home page, and not all features can be turned on/off throughout the product.

Customer Center

The Customer Center is a single place for accessing and managing all information and tasks related to customer management, making information faster to find and easier to manage. In one screen you can see all your customers and exactly what they owe. Clicking on a customer's name will immediately display all the activity you have had with them. All pertinent customer contact information (phone number, fax number, and payment terms) is also available in this view so you don't have to go to a different screen to obtain this information. If a customer is past due, getting in touch with the customer is a snap.

The Customer Center consists of two contexts and the tabs allow a user to switch between contexts.



The first context is the "Customer List" context. This context has three panes:

- Customer List Pane (left)
- Customer Detail Pane (top)
- Customer Transactions Pane (bottom)

In the customer list pane, the user selects a customer and that selection drives what is seen in the other two panes. The user can also "maximize" the customer list (and hide the other two panes). In this maximized view, the user can also customize the columns and see other information from the customer record (e.g., customer account number, ZIP code, sales rep, typical payment method).

The customer detail pane provides a quick, at-a-glance view of the most important (non-transactional) information for the selected customer. The customer's contact information is in this detail pane, along with key information such as the standard payment terms extended to this customer. This pane also includes two lines of free-form notes that are particular to this customer and provides access to a few key reports for this customer. Easily edit contact information from this window if you need to update any contact information.

The customer transactions pane provides easy access to the transaction information for the selected customer. Users can select a particular customer in the left pane, and transactions for that customer appear on screen in the bottom pane. The user can then sort and filter the transactions and choose to view exactly they want—by filtering on transactions of a certain type (e.g., Invoices), by status (e.g., see only Open Invoices) and/or by date (e.g., see only Invoices for the last month). Users can also choose which data columns to display, choose the order of the columns, and sort by any of the columns simply by clicking on the column headers. Double click on any transaction to see all the details.

The second context is the “Transaction Lists” context. By using the Transactions tab, the user can also switch to the transaction lists context. This context is useful when a user wants to look for data across all their customers.

This transaction lists context has two panes:

- Transaction Folders Pane (left side)
- Transactions Pane (right side)

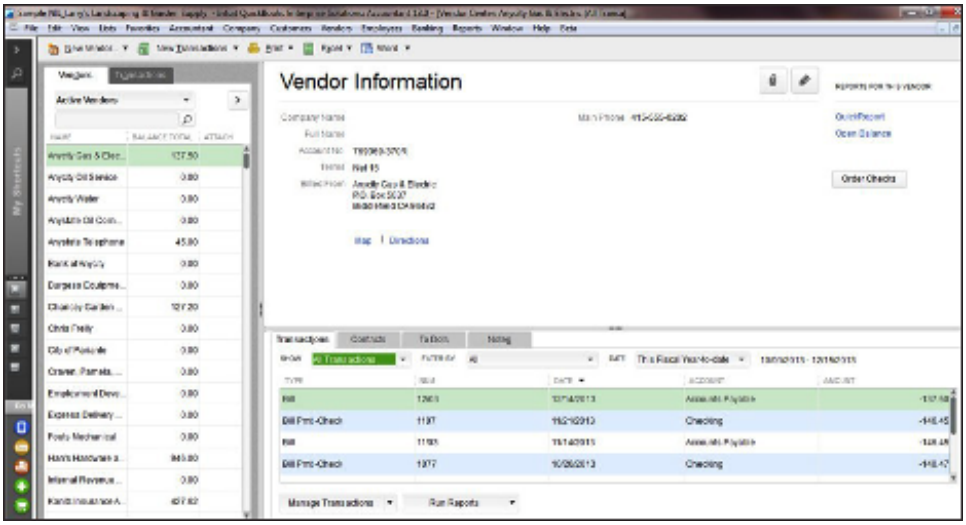
For example, if a user wants to see all the unpaid invoices (for all the customers that you deal with), the user would go to the Transactions List tab and select invoices to view. The user could then choose to subfilter the invoice list to only show unpaid invoices. This list of unpaid invoices appears in the right pane.

The Customer Center also includes a toolbar, from which a user can start new tasks, such as creating a customer or job. They can also create new customer-related transactions like new estimates, new invoices, new sales receipts and more. The toolbar also allows the user to print any of the information in the various panes of the Center.

Vendor Center

The Vendor Center works exactly like the Customer Center. You can see all your vendors and what balance is owed to them. Click on a vendor name to see the vendor's contact information and transaction history.

You can filter the vendor list to scan the list of vendors and see which ones you owe money to.



Accounts payable filters let you select:

- All vendors
- Only active vendors
- Only vendors with an open balance
- A Custom Filter that enables even more advanced filtering

A Bill Entry Form makes it easy to accurately pay bills by entering the invoice number and matching a vendor's address with an invoice. The onscreen layout makes it easy to determine that the correct vendor address will print out before checks are written.

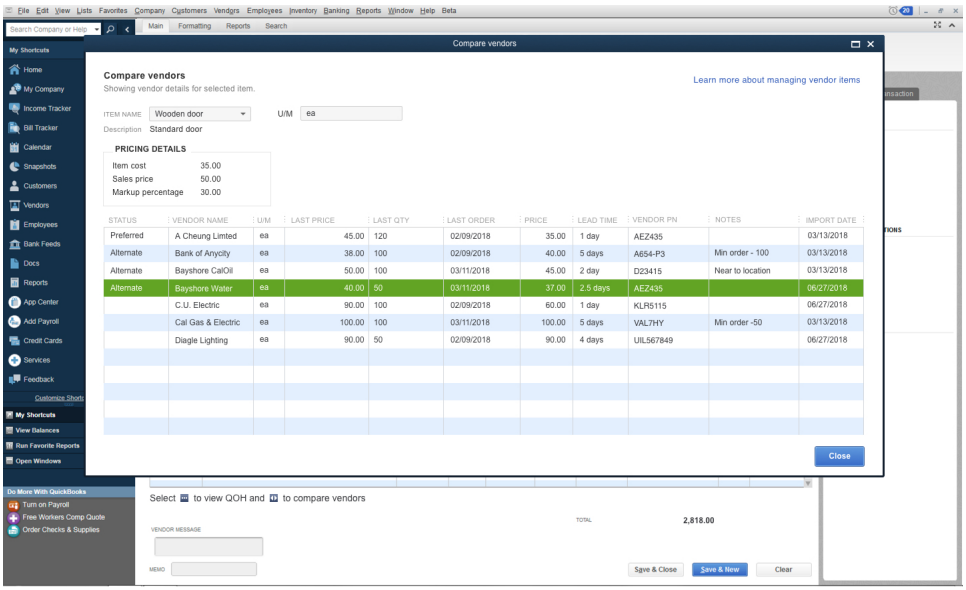
Alternate Vendors Center

The Alternate Vendors Center gives you one place to see all vendor contact, item, and pricing information so you can easily compare costs to ensure you're getting the best deal. You'll also be able to easily contact alternate vendors if your first choice is out of stock and you need an item right away.

With Advanced Inventory, the Alternate Vendors Center makes it easy to match vendor items with your inventory.[1] When it's time to make a purchase, you can easily compare and choose which vendor to purchase from at any given time. Once you set up items in your vendor lists, you can assign up to four alternate vendors for any given item. When you add items to a purchase order, you select an item, then just select the "compare vendor" icon, which will show the vendor price lists and all vendors you've purchased from in the last 12 months. Then you can choose your preferred vendor for that item in that PO, by price or other criteria.

Alternate Vendor Reports

You can also improve visibility into alternate vendors by listing them in key inventory reports like Inventory Stock Status by Item and Inventory Valuation Summary. Plus, you can simplify reordering from alternate vendors by easily accessing them in frequently used reports.



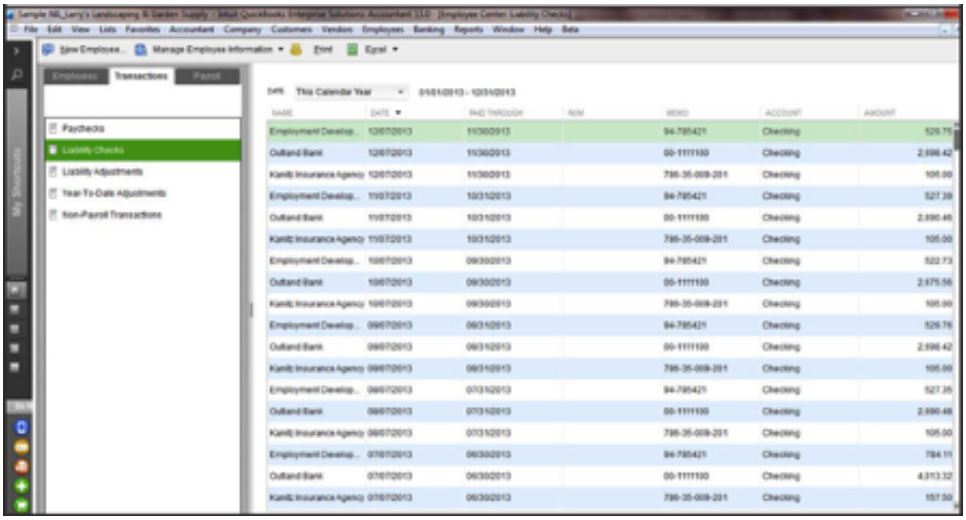
1 Advanced Inventory is included in the Platinum and Diamond subscriptions only. Requires an Internet connection.

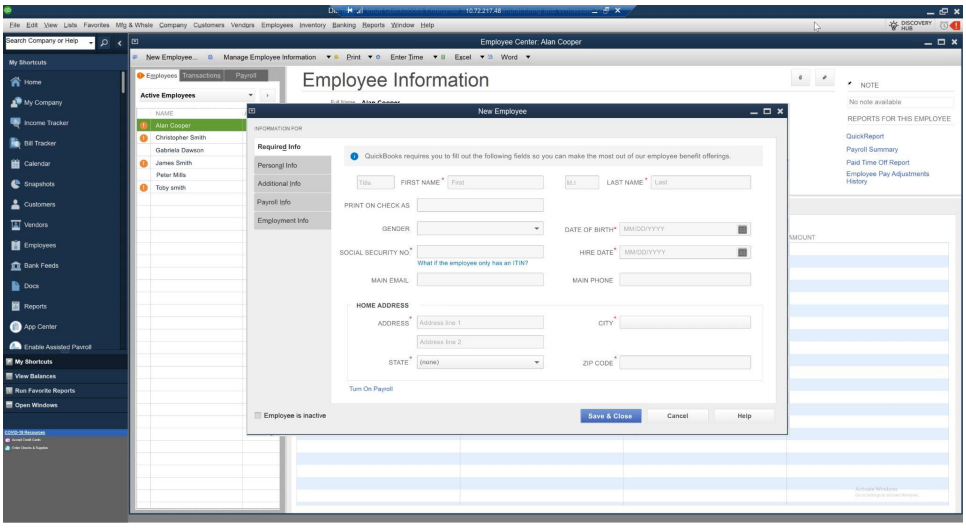
Employee Center

The Employee Center works in the same fashion as the Customer and Vendor Centers to put important employee details in one simple screen. Click on an employee's name to view their contact information, payroll[1] and non-payroll transaction history.

Improvements to Employee Center[2]

Enterprise 24.0 makes it easier for administrators to access detailed employee information and determine which employee profiles aren't complete with an enhanced Employee Center. Administrators receive proactive notifications that let them know when a profile is incomplete, enabling fast follow-up and improved productivity.





1 Add-on services require subscription, EIN, and Internet access for certain features, including tax table updates and direct deposit.

2 Must have access to Payroll

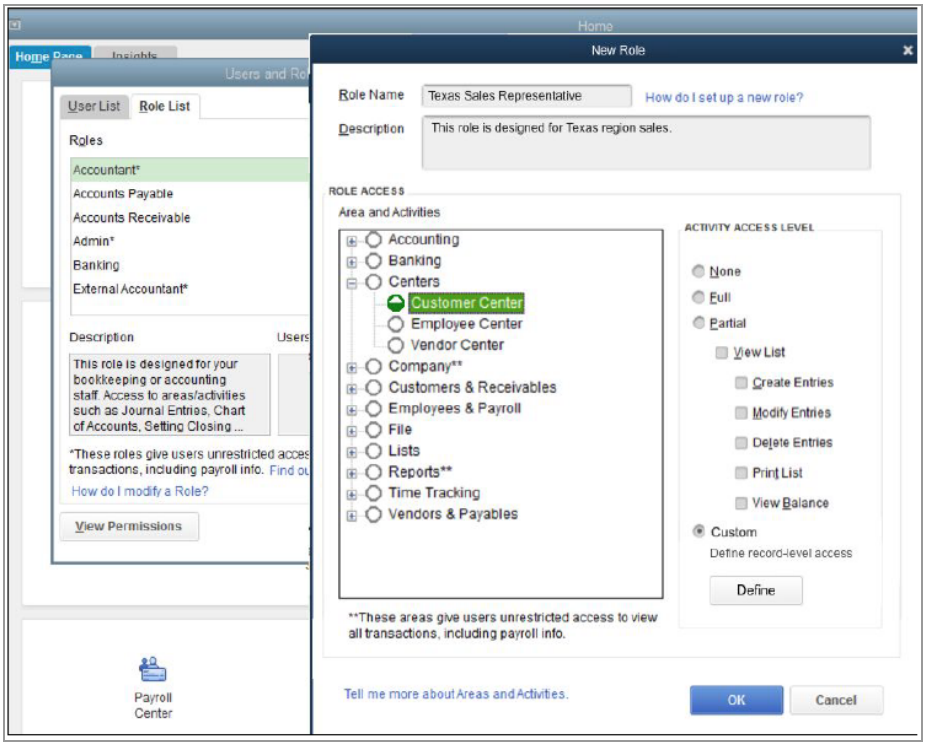
Key Features & Benefits

Get Room to Grow Without Sacrificing Control

Add Up to 40 Users

QuickBooks Desktop Enterprise is the most scalable QuickBooks product, allowing you to add up to 40 users with granular permissions that allow you to keep control of your sensitive information by limiting user access to only specific data, transactions, and reports.[1]

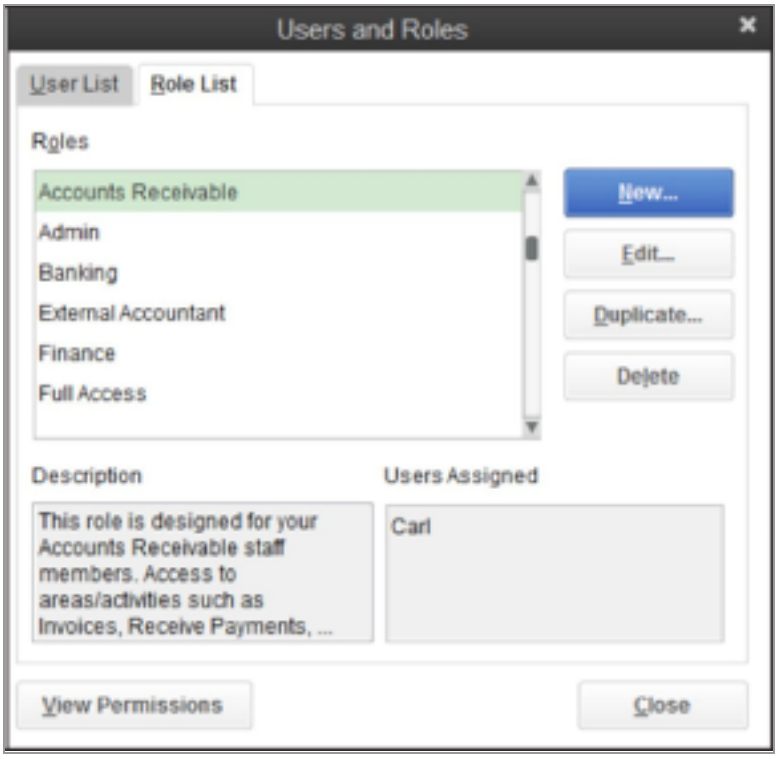
- Enterprise gives you more control over user permissions than any other version of QuickBooks and more power to customize user roles.
- 14 predefined roles make it easy to set up and maintain controls.
- You can assign distinct user access levels to 115 individual activities, from creating invoices to reconciling the accounts.
- Data-level permissions let you customize access levels for each user to view, edit, or delete only the specific customers, vendors, and data they are responsible for.



1 Licenses are available in single-user increments from 1 to 10 users or up to 40 users. Fees apply.

Predefined User Roles

Enterprise gives you 14 predefined, ready-to-use roles to make setting up controls fast and easy. Your staff will see everything they need to succeed while you still keep your sensitive information secure.



Predefined roles include:

- Accountant
- Accounts Payable
- Accounts Receivable
- Admin
- Banking
- External Accountant
- Finance
- Full Access
- Inventory
- Payroll Manager
- Payroll Processor
- Purchasing
- Sales
- Time Tracking
- View-only

Managing and Customizing Roles

Permissions settings can be viewed and modified by user and role. You can copy designated user or role permissions and assign them to a new user or role by clicking the “Duplicate” button. This allows you to quickly and easily add new users and roles based on the permissions you are accustomed to and make modifications as needed to suit your business needs.

A single role can be assigned to multiple users. If you decide a certain role needs more or less access, just change the role and it will be updated automatically for every user assigned to it.

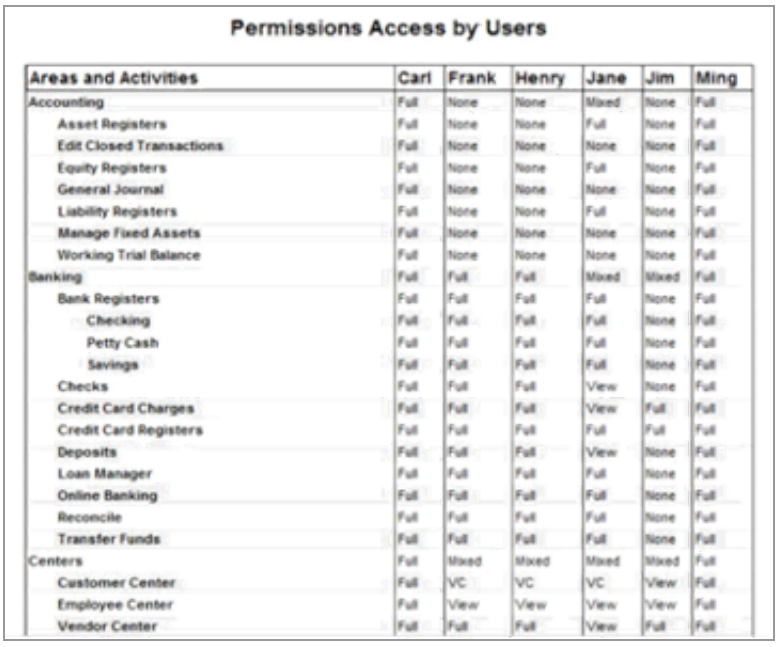
You can assign multiple roles to a single user, too. For instance, one person can manage multiple areas like sales and inventory - but they can do so without having access to bank accounts or payroll. Activities such as setting company preferences can be assigned to other users while still limiting administrative control over accounting activities, like closing the books, to the Admin.

Not seeing exactly what you need for the right user role? You can create one from scratch.

If you’re upgrading from Pro or Premier, all your existing user permissions can be migrated to Enterprise, where they can be further customized.

Tracking User Permissions

You can keep track of who has access to what data in just a few clicks. You can easily generate reports of permissions to get a bird’s eye view of existing controls by user or role. Simply select the type of view and the roles or users you want to see, and an easy-to-read report is created for you.



Permissions Access by Users

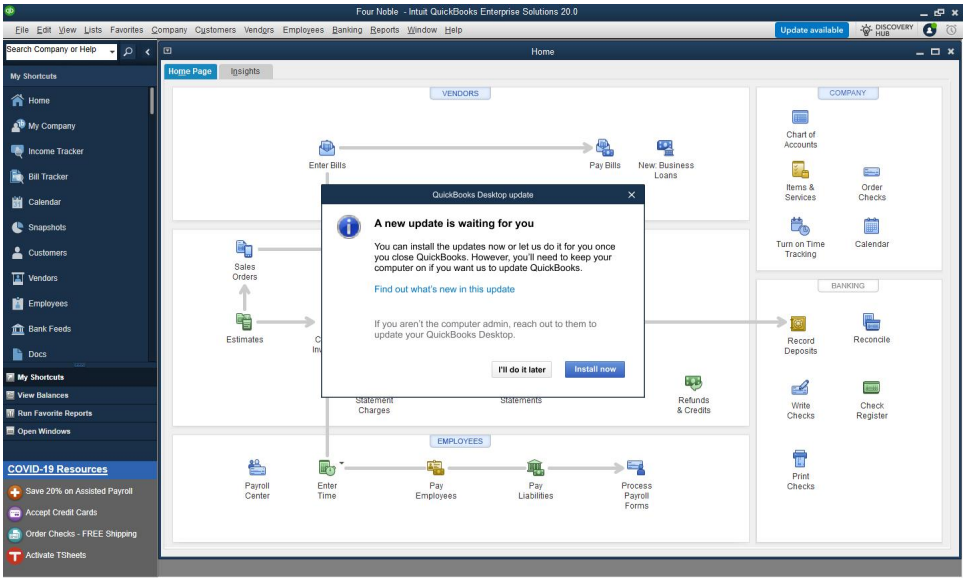
Areas and Activities	Carl	Frank	Henry	Jane	Jim	Ming
Accounting	Full	None	None	Mixed	None	Full
Asset Registers	Full	None	None	Full	None	Full
Edit Closed Transactions	Full	None	None	None	None	Full
Equity Registers	Full	None	None	Full	None	Full
General Journal	Full	None	None	None	None	Full
Liability Registers	Full	None	None	Full	None	Full
Manage Fixed Assets	Full	None	None	None	None	Full
Working Trial Balance	Full	None	None	None	None	Full
Banking	Full	Full	Full	Mixed	Mixed	Full
Bank Registers	Full	Full	Full	Full	None	Full
Checking	Full	Full	Full	Full	None	Full
Petty Cash	Full	Full	Full	Full	None	Full
Savings	Full	Full	Full	Full	None	Full
Checks	Full	Full	Full	View	None	Full
Credit Card Charges	Full	Full	Full	View	Full	Full
Credit Card Registers	Full	Full	Full	Full	Full	Full
Deposits	Full	Full	Full	View	None	Full
Loan Manager	Full	Full	Full	Full	None	Full
Online Banking	Full	Full	Full	Full	None	Full
Reconcile	Full	Full	Full	Full	None	Full
Transfer Funds	Full	Full	Full	Full	None	Full
Centers	Full	Mixed	Mixed	Mixed	Mixed	Full
Customer Center	Full	VC	VC	VC	View	Full
Employee Center	Full	View	View	View	View	Full
Vendor Center	Full	Full	Full	View	Full	Full

Always-On Audit Tracking

An “always on” audit trail greatly reduces the time spent investigating changes to the QuickBooks files since the last time they were reviewed. Always-on audit trail records the transactions that are being entered, edited or deleted from the system. Always-on Audit Trail provides users with controls to protect against employee fraud and detect employee errors. Reliable audit trails protect against employees who attempt to make fraudulent transactions and then cover their tracks by deleting or editing the transactions to appear normal. You can have peace of mind knowing that changes to your QuickBooks data will always be tracked.

Seamless Product Updates[1]

Now your work will never be interrupted by a product update. QuickBooks installs them quietly in the background. Plus, you can easily learn when product updates are available as well as what's in them so you can decide when to install.



1 Only available versions 23.0 or higher.

Keep Your Growing Data History

Track 100,000+ Names and Items

Enterprise offers the most capacity of any QuickBooks product. Add hundreds of thousands of customers, vendors, and employees, and hundreds of thousands of inventory, non-inventory, and service items so there's virtually no limit to your growth.

QuickBooks Desktop Enterprise is built with a powerful industry-standard SQL database to scale as your business grows.

List Limits

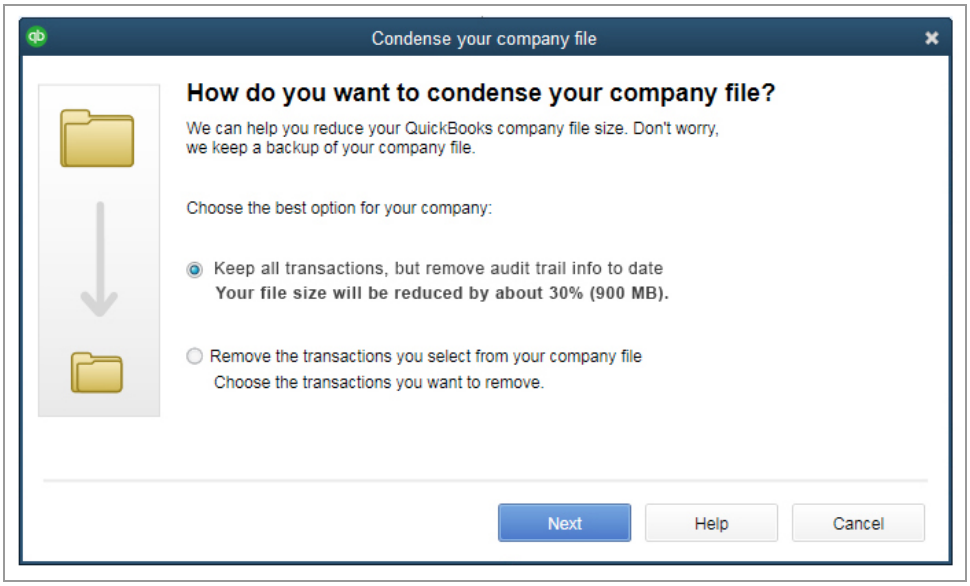
Bumping up against the limits of your lists? QuickBooks Desktop Enterprise allows more Accounts, Classes, Customer Types, Vendor Types, To Do's, Customer Messages, components in a Group Item, and Memorized Transactions.[1]

Enhanced Computing Power (64 bit)

Take advantage of 64-bit processors that maximize QuickBooks' performance and stability to help you run your business more efficiently. QuickBooks meets modern operating system standards that help you work faster than ever and maintain seamless third-party integrations by utilizing developer preferred infrastructure.

Data File Optimization

Data File Optimization lets you significantly reduce the size of your company file without deleting data. It's a simple, self-serve solution that you can do on your own with confidence. The file is reduced by removing an audit trail of historic transactions and a few tables from the database that are not used or needed by the company file. (Not available in CA or UK)



1 Enterprise allows you to add up to one million names (e.g., customers, vendors, employees) and up to one million items (e.g., inventory, non-inventory, and service items). Some performance degradation is likely as your lists approach these size thresholds.

Enhanced Security and Encryption

You can be confident your data is protected with our enhanced security using industry-leading AES 256-bit encryption.[1] QuickBooks safeguards your reputation by protecting critical customer and vendor data, such as business financials, banking information, and credit card details. And you can extend the same top-of-the-line encryption of your business data from your desktop to the cloud, when you use online backup[2] or cloud hosting.[3]

1 QuickBooks Pro, Premier and Enterprise now utilize 256-bit encryption. It applies to local data files, data hosted remotely in the cloud, or data backed up online via the cloud.

2 Any time, anywhere, on any device: QuickBooks Desktop Enterprise with Hosting is a subscription and is only available on a monthly payment plan. Additional fees apply. If you purchase QuickBooks Desktop Enterprise with Hosting user licenses 1-10, you must purchase the same number of hosted users as you purchase Enterprise licenses. If you wish to purchase QuickBooks Desktop Enterprise with Hosting with 11 or more licenses, please call for custom pricing.

Each month, your account will be automatically charged the agreed-upon price unless and until you cancel. Cancel at any time by calling Intuit at 800-300-8179, prior to your monthly renewal date. When you cancel, you'll be refunded at the date through the end of your current billing period. The QuickBooks Desktop Enterprise software portion of the QuickBooks Desktop Enterprise with Hosting bundle is an annual subscription. (Enterprise Diamond is a monthly subscription with no annual commitment; see Enterprise Diamond subscription for details.)

Right Networks: Support for QuickBooks Desktop Enterprise with Hosting is provided by Right Networks. A valid QuickBooks Desktop Enterprise license code must be provided to Right Networks to receive support. Contact Right Networks to contract third-party software.

Right Networks performs backups of all Hosted data on a nightly basis and retains the back-ups for a rolling 90-day period in a protected offsite facility as an additional level of protection. There is no limitation to the size of a customer's back-up. Customers are responsible for verifying the integrity of the hosted data at least every 90 days. Right Networks employs Snapshot technology to backup customer data. Snapshots are taken daily and then replicated to another physical Right Networks facility for Disaster Recovery.

Right Networks uses top-tier data centers and multiple layers of redundancy within its infrastructure to provide 24x7 availability. However, availability can vary, is subject to occasional downtime and may change without notice. Right Networks encrypts all backup files and backup tapes. Virtual desktop connections are protected via TLS with a minimum of 128 bit encryption and authentication. Each customer has a unique Right Networks virtual desktop. Access to each QuickBooks company file is controlled at multiple layers including file access permissions. Access is locked out after multiple failed login attempts for the same user. Security features, functionality and access are subject to change without notice as deemed necessary by Right Networks. Availability can vary and are subject to occasional downtime and may change without notice. Click here for a list of compatible devices.

Internet connectivity required: Desktop Enterprise with Hosting is subject to availability of a reliable Internet connection. See detailed list of systems requirements, and a list of what RDP clients work with the hosting service here.

Remote Desktop Services compliant: QuickBooks Desktop Enterprise is Remote Desktop Services compliant. Additional fees may apply. Requires certain hardware, Microsoft Server operating systems, Microsoft Windows Server software licenses, and Remote Desktop Services Server Client Access Licenses, sold separately. For multiple remote users, a Remote Desktop Services Client Access License is required for each user.

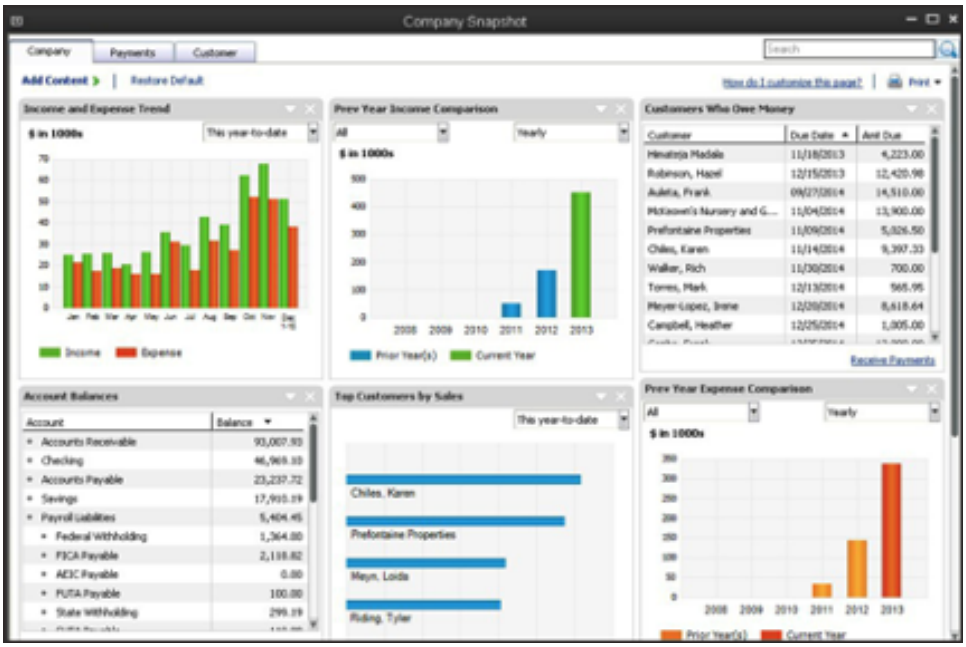
3 Hosting / Cloud Access: The Cloud access service is a monthly subscription. Each month, your account will be automatically charged the agreed-upon price of the service unless and until you cancel. Cancel at any time by calling Intuit at 800-300-8179, prior to your monthly renewal date. When a customer calls to cancel, it is canceled and refunded at the date through the end of the current billing period. The QuickBooks Desktop Enterprise software portion of the QuickBooks Desktop Enterprise with cloud access bundle is an annual subscription. If you choose to purchase a QuickBooks Desktop Enterprise subscription using the Monthly Payment Plan or QuickBooks Desktop Enterprise with cloud access, you elect to pay your annual subscription in equal payments over the course of 12 months. Purchasing an annual subscription for QuickBooks Desktop Enterprise commits you to a 12 month term. You must pay for all 12 months of the subscription in full based on the then current rate of QuickBooks Desktop Enterprise. If you choose to cancel inside the first 60 days, you can opt to receive a refund per the 60 day money back guarantee (see https://quickbooks.intuit.com/software-licenses/ for details). However, if you choose to cancel after the first 60 days and prior to the end of month 12 you will be subject to a termination fee equal to the amount of monthly payments left on your annual subscription. For purpose of clarity, if you pay for 6 months and have 6 months remaining on your annual subscription, which starts at date of enrollment, you will be charged a termination fee equal to the then current monthly fee of QuickBooks Desktop Enterprise multiplied by 6 months (remaining months left on annual subscription).

See Data the Way You Want to See It

Company Snapshots

QuickBooks Desktop Enterprise gives you access to consolidated views of your business with Company Snapshot, Payments Snapshot, and Customer Snapshot.

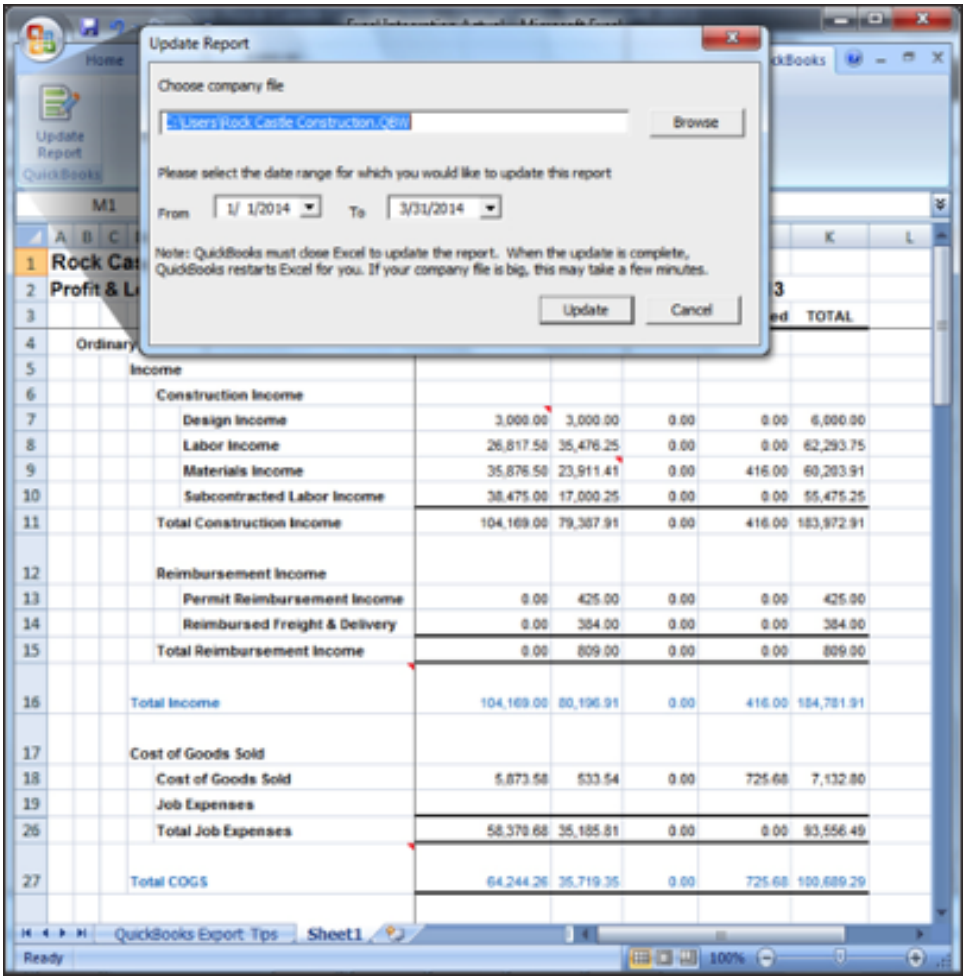
- **Company Snapshot**
  Stay on top of your business from a single screen, with data presented just the way you want it. Choose at-a-glance reports that are most crucial for managing your business. New report options include yearly expense and income comparison, detailed expense and income breakdown, and a top customer list.
- **Payments Snapshot**
  Visualize your business revenue with Payments Snapshot. View invoice payment status, recent transactions, receivables reports, and payment reminders all in one place.
- **Customer Snapshot**
  Prioritize customers with ease with the Customer Snapshot. Customer Snapshot gives you a consolidated view so you can assess at a glance your customer's purchase history, average days to pay, and outstanding balance and make timely decisions on customer requests. You can also identify your top customers by revenue and payment consistency, and prioritize them accordingly.



Built-In Reports

Enterprise includes more than 200 built-in, industry-specific, customizable reports that can easily be tailored to your business needs.

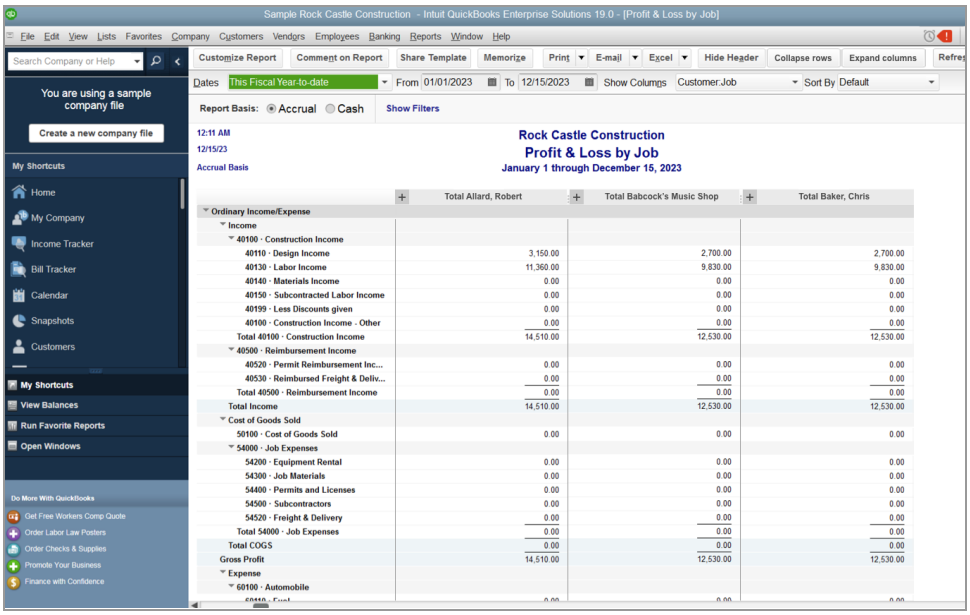
- Modify any of 200+ built-in reports, including 70 industry-specific reports, by applying filters, adding or removing data points, editing columns and rows, or adding custom fields to focus on critical metrics for your business.
- Combine financial reports from multiple entities or businesses so you can see the full picture.
- Save customized reports as templates so you can run them again any time without starting over.
- Industry-specific reports and Chart of Accounts for manufacturing and wholesale/distribution, contractors, nonprofits, professional services, and retail.
- Budgeting and forecasting tools help you plan for the future.



Popular Reports

Access report templates created by other QuickBooks users in your industry. Search by popularity, user rating and industry. Choose the template you like and QuickBooks will populate the report with your business data in one click. Seeing your data is easy, too. You can hide columns to see simple, easy-to-read customer totals in reports

with jobs and classes. With easy navigation of customer summary details, you'll spend less time scrolling through exports or lengthy reports.



Combined Reports from Multiple Files

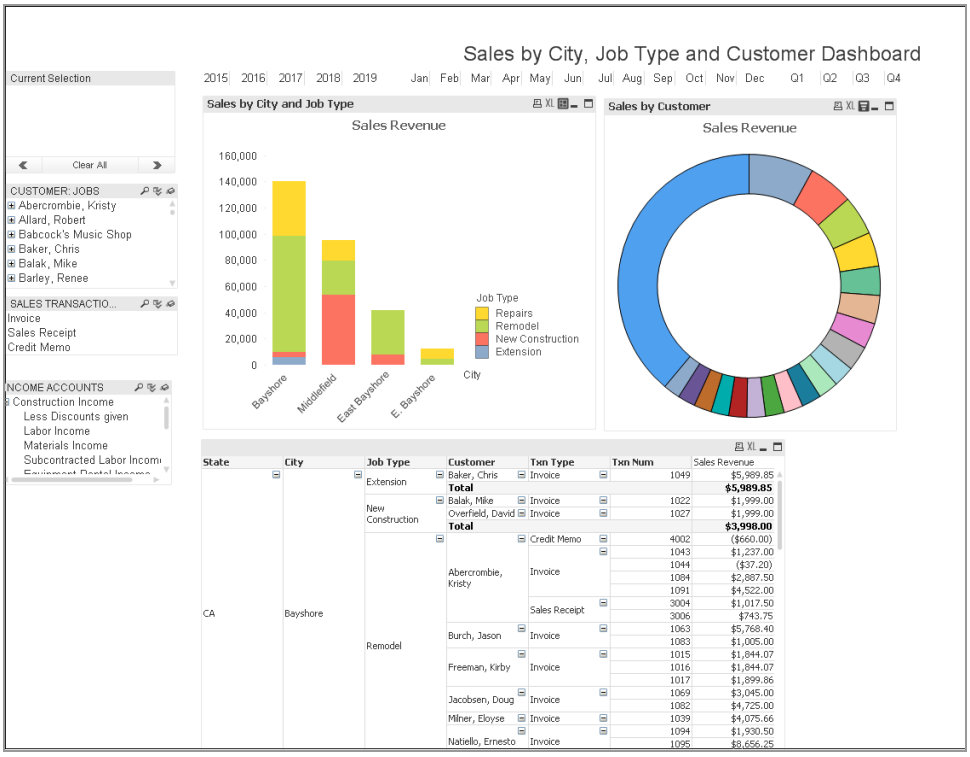
Exclusive to QuickBooks Desktop Enterprise, you can consolidate financial reports from multiple company files in one easy step. No manual calculations or mistakes. Just choose a report: Balance Sheet, Profit & Loss, Profit & Loss by Class, Statement of Cash Flows, Trial Balance, or Sales by Customer Summary. Select the data files to draw from, and Enterprise creates a Microsoft Excel spreadsheet with a column for each location, and a column that totals them all.[1]

1 ODBC-compliant applications sold separately.

Advanced Reporting

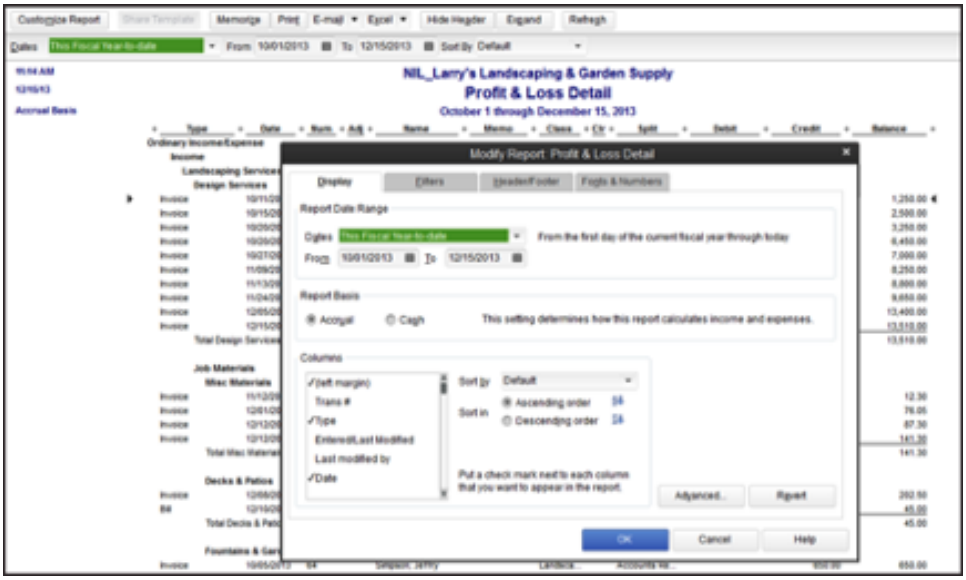
Advanced Reporting helps you go deeper with your data so you can make the right decisions for your business. Included with all Enterprise subscriptions, Advanced Reporting lets you access your raw data in QuickBooks and build new reports from scratch, complete with charts and graphs that are easy to understand and offer key business insights. You can create reports based on any data in QuickBooks Enterprise.

Advanced Reporting's comprehensive Help Portal includes how-to videos packed with pro tips like how to access and display more information in your reports. Plus, there are tutorials, FAQs, and examples—all designed to help you get answers quickly and create the best reports for your business.



Customizable Invoices, Estimates, and Sales Orders

Enterprise lets you customize not only all 200+ built-in reports, but all the forms—like invoices and estimates—within them.



All forms can also be easily tailored—add logos, delete or add new form fields, or customize existing fields. Designate fields to appear only on the screen or in the print out as well—so you always look professional to your customers.

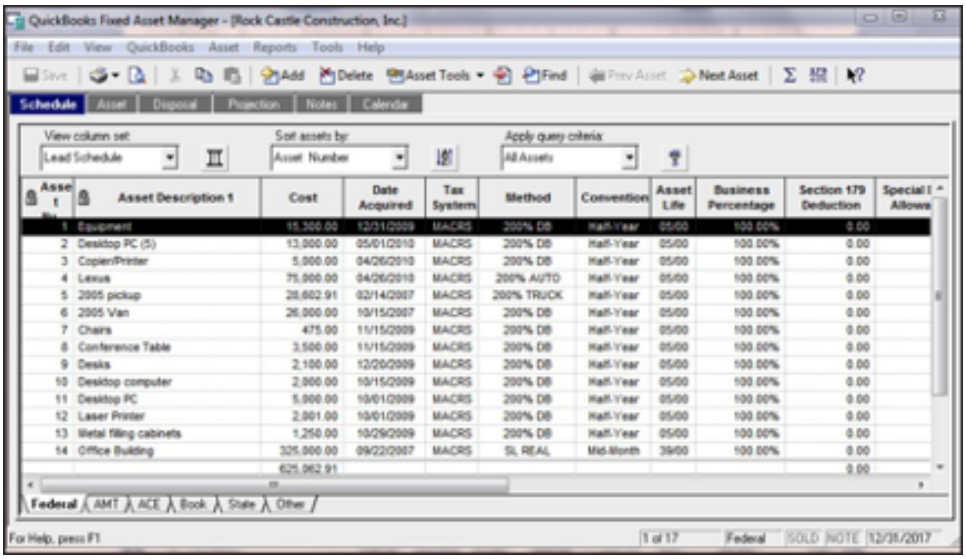
Intuit Statement Writer

Create financial statements quickly and accurately with Intuit Statement Writer, which links your QuickBooks files with Microsoft Excel® so you can build and update professional statements directly in QuickBooks using these robust features:

- Create up to 16 statements in one workbook
- Create Microsoft Word-based letters, cover pages and documents in your report, and bring QuickBooks financial data into your documents[1]
- Batch print your statements and documents
- Generate financial statements on a per-class or per-job basis, or as a combination of classes
- Conveniently access over 50 statement and document templates in-product or online
- Set any date range for reports, including 4-week months or 13-week quarters
- Save documents and statements as custom templates for easy reuse
- Send consolidated reports in a .pdf format[2]

Fixed Asset Manager

Fixed Asset Manager enables you to manage fixed assets from acquisition to disposition. Users can enter the asset's information, such as description, purchase date, cost, depreciation method, life and the general ledger accounts, and instantly calculate depreciation on assets such as autos, computers, and equipment.



- Depreciation can be computed for up to six asset bases, including tax and book
- Depreciation journal entries can be created, including disposals
- Up to 20 reports can be printed, including asset schedules by G/L account, location, and category
- Gains and losses can be calculated on asset sales

1 Microsoft products sold separately. Word and Excel integration requires Office 2010 SP2 and above, or Office 365.

2 Requires Microsoft Office 2010 SP2 – 2019, or Office 365 (32 or 64 bit). Requires Office 2013 – 2019, or Microsoft 365 (32 and 64 bit).

Enhancements to Accounts Receivable Reporting

New performance improvements help you run Accounts Receivable Aging Detail reports more quickly. You'll gain insights more quickly into outstanding customer invoices. You can also send out batch reminders to customers who are behind in their payments so you get paid faster.

Excel Integration Refresh

Save worksheet formatting when you export your QuickBooks reports to Excel. Refresh your previously saved worksheet and your formats will be applied to the new report.[1]

Custom Reporting with ODBC-Compliant Applications

In addition to our Advanced Reporting functionality, you can also create custom reports by linking to ODBC-compliant business applications such as Microsoft Excel or Access. Build custom queries or tools so you can see your data just the way you want to.

1 Microsoft products sold separately. Word and Excel integration requires Office 2010 SP2 and above, or Office 365. Synchronization with Outlook is also possible with Contact Sync for Outlook 2010 (32-bit) downloadable for free here.

Manage Your End-to-End Workflow Inside QuickBooks

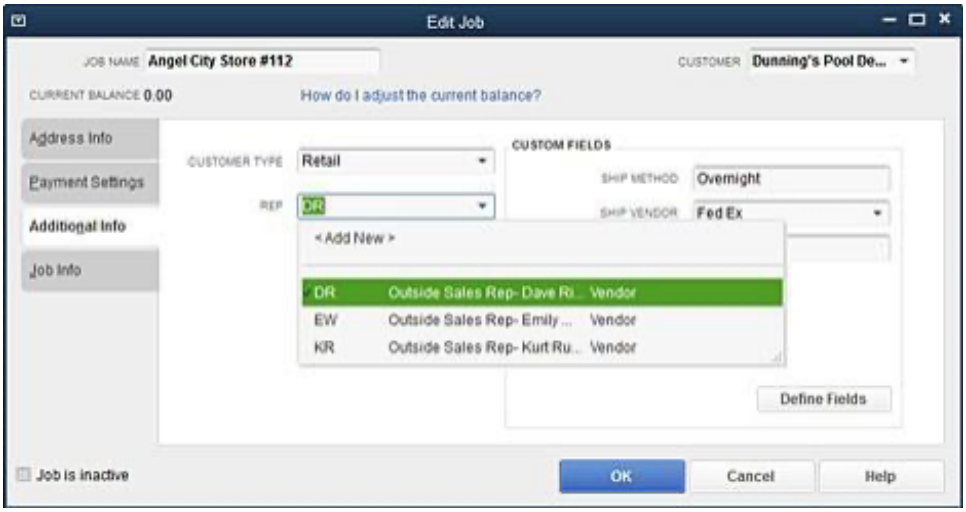
You can manage many of your complex businesses and accounting processes right within QuickBooks. Powerful modules like Advanced Inventory and Advanced Pricing are built right into the software so the functionality can be unlocked seamlessly and there is no need for data or workflow integration.

Real-Time Job Costing

Tracking job costs in real-time gives you the knowledge you need to react quickly when costs are running higher than expected and cutting into profits. With accurate data, you can maintain or improve project profits, satisfy your clients with accurate estimates, and focus on your most profitable services.

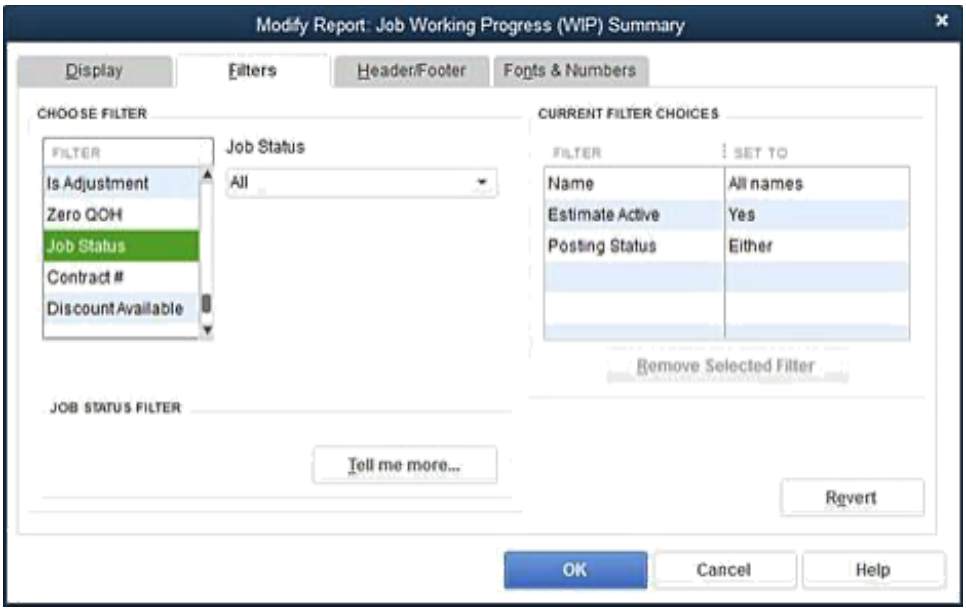
Track Reps by Job

Get a better handle on the current financial state of your jobs or projects. We've added a rep field to jobs, so you can track reps by job, or track multiple reps per customer.



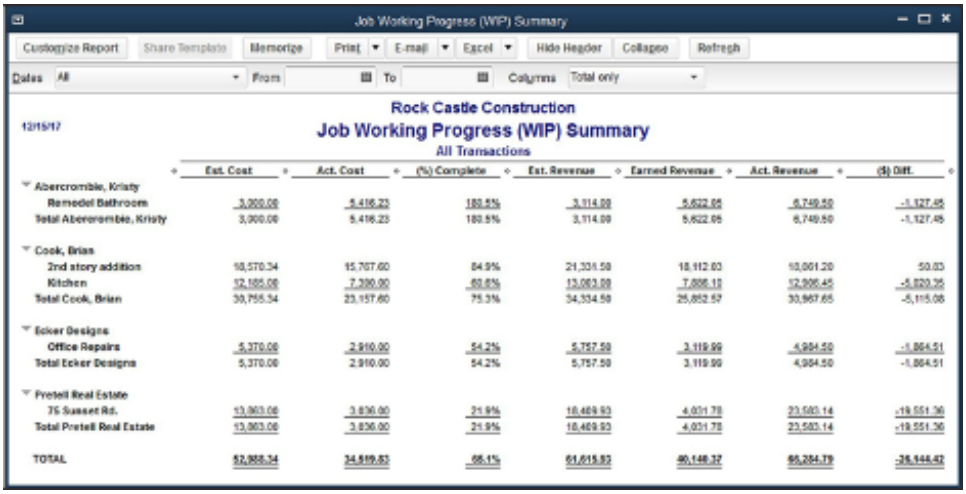
Filter Reports by Job Status

Filter reports by job status, for example to view reports for your jobs that are in progress now, have not yet started, or are behind.



WIP Report

Display a WIP report to see up to the minute information on expected and actual revenue for jobs in progress.



Committed Costs Report

The Committed Costs report adds POs with no bills and unpaid wages for employees who have spent time on jobs for a much more complete understanding of job costs.

Customizable Purchase Forms

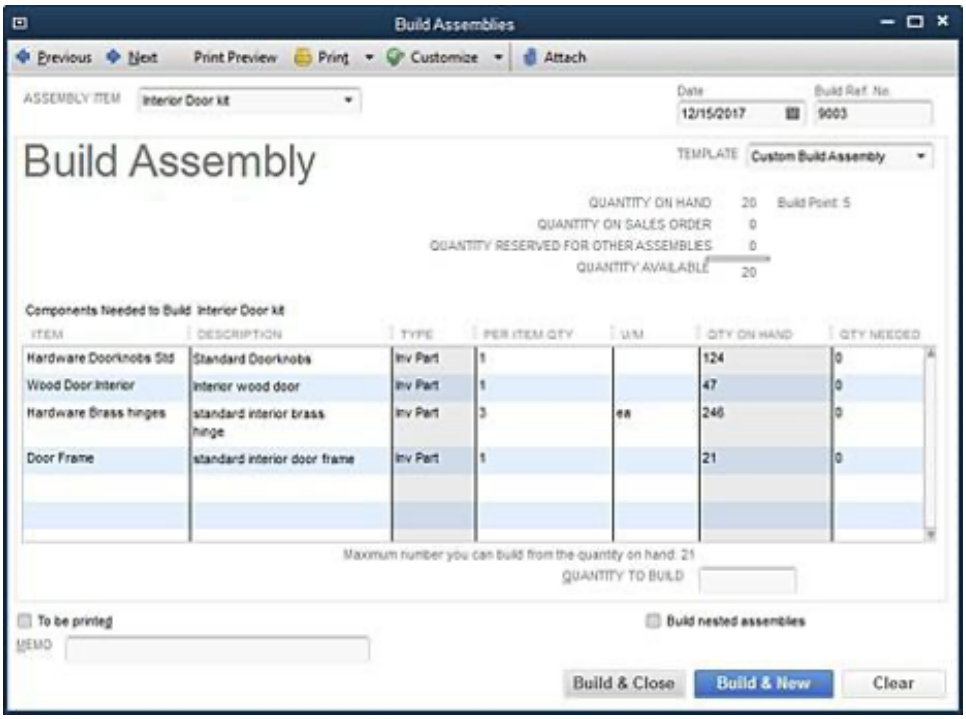
Customize purchase forms to track the expense side of your business and get more detailed information on where your money is going, not only from where it's coming in.

Assemblies Management

Assemblies management in Enterprise lets you see how many finished goods you can build with on-hand materials and subassemblies. You can automatically create build or purchase orders when inventory drops below preset points. You can build all subassemblies automatically with a final build order, instead of entering them individually. And you can easily replace components across multiple assemblies.

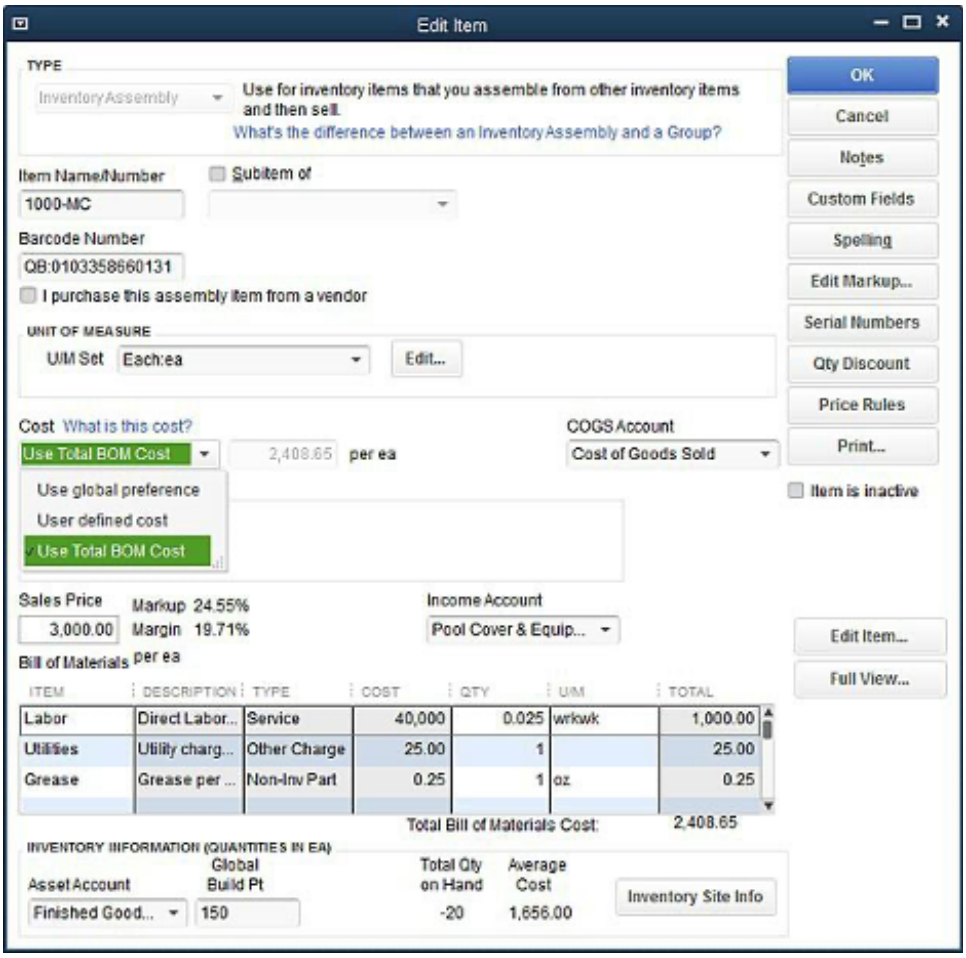
Nested Assemblies

Build all subassemblies automatically with a final build, instead of entering each one into QuickBooks individually.



BOM as Cost of Assemblies

Use the BOM cost as the cost for an assembly and choose to allow QuickBooks to update assembly costs and price when component costs change, instead of manually updating costs.



Where-Used Report

Track down components using the 'Where-used' report and avoid opening every assembly to see where the component is used. See all assemblies in which a component is used, and replace the component with another in some or all of the assemblies at once.

Add/Edit Multiple List Entries

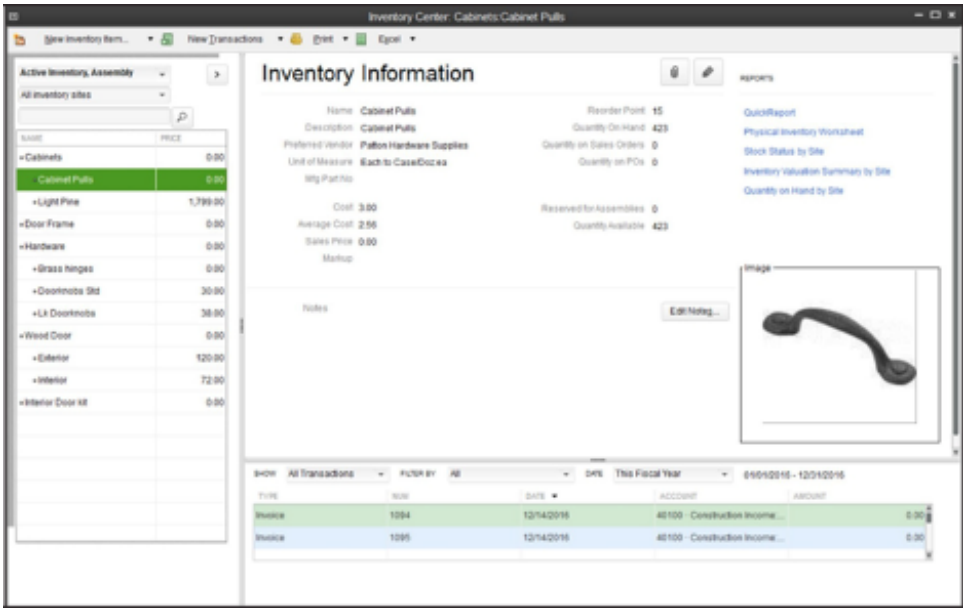
Work with assemblies in Add/Edit Multiple List Entries, similar to manipulating a spreadsheet.

Inventory and Order Management

QuickBooks Enterprise helps you automate inventory and order management from the warehouse to your customer's doorstep. It gives you the tools to optimize and gain visibility into your inventory and order management process, keep costs down to protect your profit margins, and keep customers happy with efficient, accurate order fulfillment.

Inventory Center

Easily find and locate inventory tasks by accessing your inventory items and reports all in one place with QuickBooks Inventory Center. Add a notes field or image to each item for quick identification.



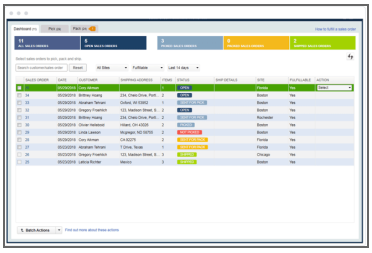
Sales Order Fulfillment

With Enterprise's end-to-end pick, pack and ship functionality, users can manage the entire sales order fulfillment process from start to finish. A single Sales Order Fulfillment Dashboard puts the user in control, showing each step of the order fulfillment process along the way. See which warehouse is the best one to fulfill an order from, and split an order between multiple warehouses to fulfill it more quickly. Sort orders by fulfillment status, order date, customer, or value of the order, and prioritize accordingly which orders to fulfill first.

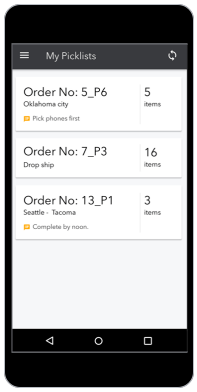
Users can send picking and packing instructions directly from the Dashboard to their staff on the warehouse floor, who receive picking and packing instructions via a barcode scanner, or the QuickBooks Desktop app on their mobile device (Android only). Their mobile device also becomes a barcode scanner, and as items are scanned for picking or packing, status updates on the dashboard in real time. After the order is packed, users can print a discounted shipping label from UPS, Fedex or USPS right from inside QuickBooks. Once new inventory shipments are received, users can immediately see which orders can be fulfilled as a result of the new inventory.

Sales Order Fulfillment Workflow

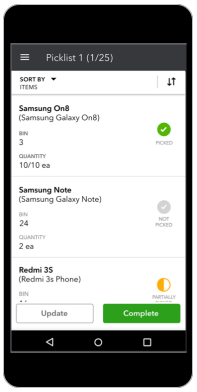
Step 1: Order Received
When an order comes in, the manager can choose which warehouse to fulfill it.



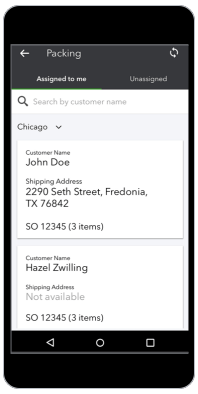
Step 2: Picker Assigned
The manager assigns the order to a picker, who receives it wirelessly on their device, including notes and details.



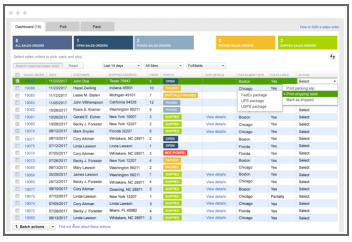
Step 3: Order Picked
The picker confirms via the barcode scanning app when the items are gathered for the order.



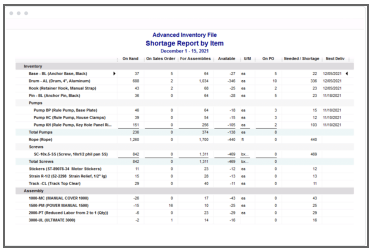
Step 4: Packing
The manager is notified when the items are packed.



Step 5: Shipping
Once the order is packed, the manager can mark it for shipping and print the shipping label.



Step 6: Inventory Updated
After the package is shipped, inventory is updated automatically. If inventory drops below pre-set order points, Enterprise can generate build and purchase orders automatically.



E-commerce integration

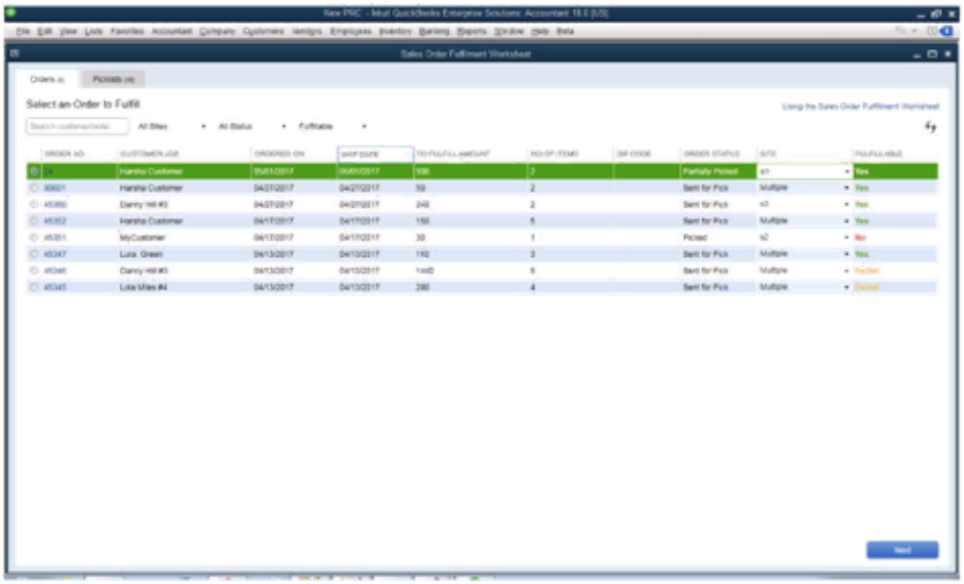
Integrate QuickBooks with industry leading e-commerce platforms,[1] marketplaces, and shipping solutions to help simplify e-commerce management, avoid stockouts, and gain a clearer picture of your profitability. Enjoy seamless integration with top online stores such as Shopify, WooCommerce, Big Commerce, Magento and industry leading online marketplaces like eBay, Amazon, and Walmart.com.

Reduce busywork when inventory, sales, product details, pricing, and customer data sync automatically with QuickBooks. Inventory counts update with every sale—regardless of how many channels you sell in. One easy-to-use dashboard lets you see online sales, cash flow, and profitability. Easily add new product listings and push updates directly from your online channels. Work with your preferred shipping providers like UPS, FedEX, ShipStation, and Stamps.com right from QuickBooks.

Pick, Pack, and Ship

Enterprise's pick, pack, and ship functionality lets you manage the entire order fulfillment process from one Sales Order Fulfillment Dashboard, including prioritizing orders, sending pick, pack and ship instructions to workers, and receiving status updates.[2]

You can also consolidate the picker/packer roles, actions, and approvals to save time if it suits your business. Mobile integration streamlines the entire process and helps you easily track order fulfillment progress.[3]



1 E-commerce integration: Requires an active and current version subscription of QuickBooks Pro Plus, Premier Plus or Enterprise and a separate Webgility e-commerce account subscription. E-commerce integration subscription will be billed directly from Webgility. Your Webgility account will automatically be charged the package price on a monthly or annual basis, starting at sign up, until you cancel. To cancel your e-commerce subscription at any time, log into your Webgility account customer portal or contact Webgility customer success team at customersuccess@webgility.com or by calling 877-753-5373 ext. 2. Your cancellation will become effective at the end of the monthly billing period and your subscription will terminate at that time. You will not receive a prorated refund; your access and subscription benefits will continue for the remainder of the billing period. Cancellation or termination of QuickBooks will not automatically cancel your Webgility subscription.

2 Enhanced Pick, Pack, and Ship: Only available in the Advanced Inventory module. Shipping subject to terms and conditions set forth by UPS, FedEx, and USPS.

3 Barcode scanners: Sold separately for use with Advanced Inventory.

Barcodes and Mobile Barcode Scanning

With mobile barcode scanning, you can accelerate order fulfillment, reduce incorrect unit counts, catch mismatched SKUs, and alleviate human errors.

Users can use pre-existing barcodes or generate new ones for each product, including printed prices. Barcode scanners can be hand-held devices or the QuickBooks Desktop app on an Android mobile device. Users can scan and capture each item's barcode, which allows the system and users to know the exact status of each item, in real-time. Mobile barcode scanners are used to receive items arriving at the warehouse, to pick items off the shelf, and to run cycle counts. Actions taken with mobile barcode scanners automatically sync to QuickBooks Enterprise, updating inventory status as well as pick, pack and ship status.

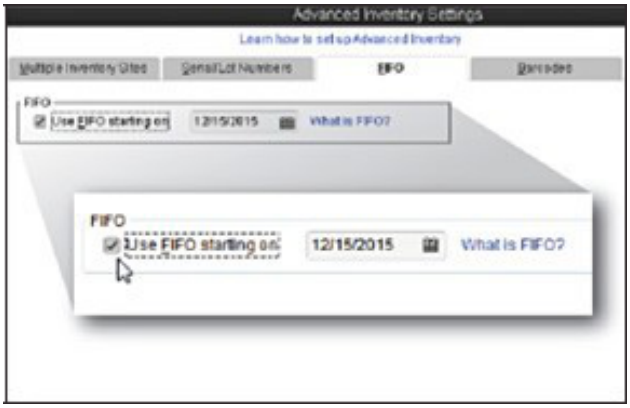
Mobile barcode scanning lets you send a sales order via a picklist from any location directly to anywhere on a warehouse floor.

Barcode Label Prices

Add sales prices to barcode labels so both customers and employees can clearly see an item's price, name, and description.

FIFO Inventory Costing

Users have the flexibility to work in FIFO (first in, first out) costing in addition to average costing for tracking inventory. You can switch between costing methods at any time.

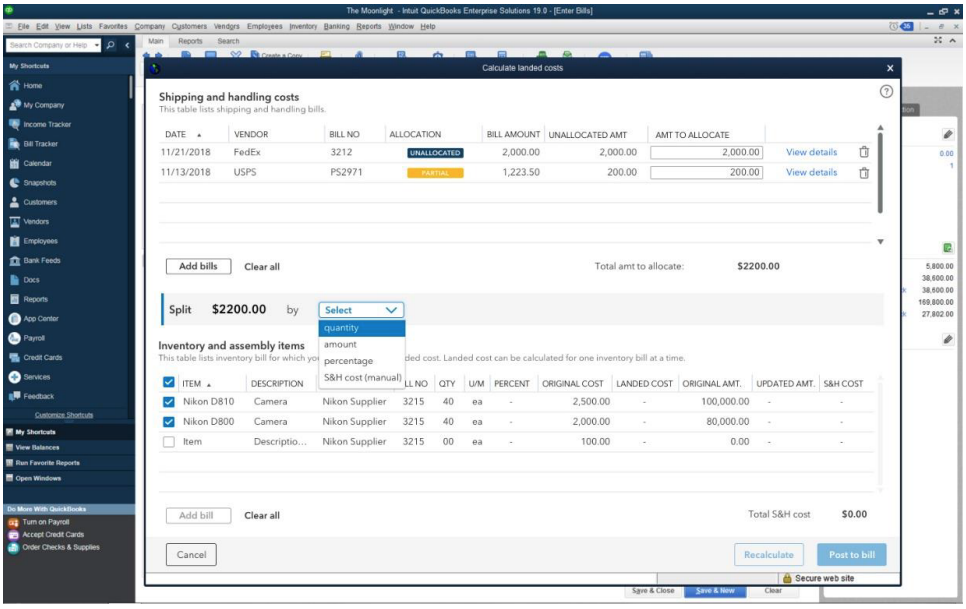


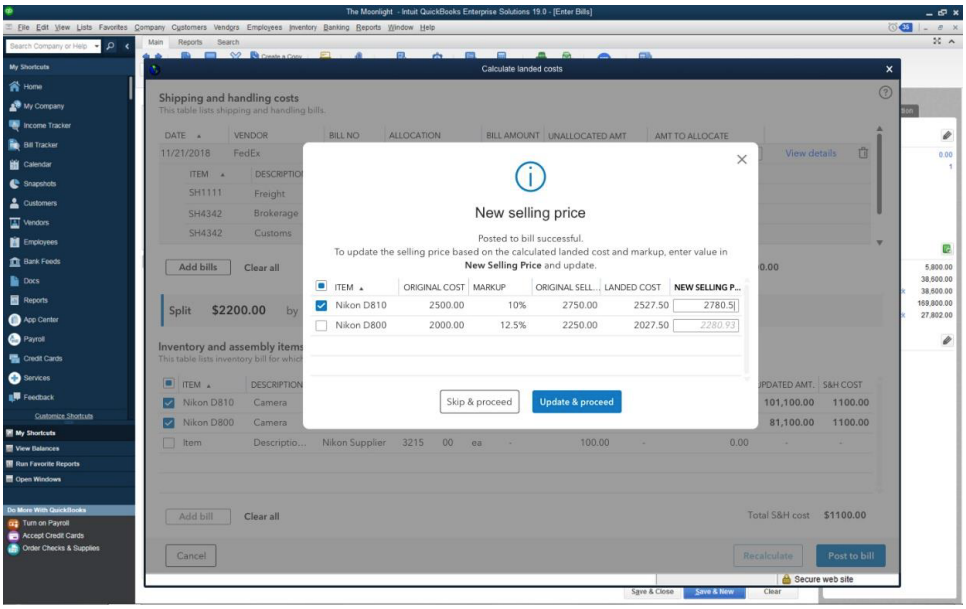
Landed Cost

Landed Cost calculations give you greater visibility into actual product costs by factoring in freight, duties, insurance and other miscellaneous costs by quantity, value, weight or volume.[1] When you can identify true product costs, you can make better asset valuations and profit, pricing, and sales decisions.

In Enterprise, you can set up landed costs accounts as "COGS" or "Other current assets." Plus, you can accurately calculate landed cost for old item bills from closed accounting periods, and print bills with or without landed cost for better control over sensitive information.

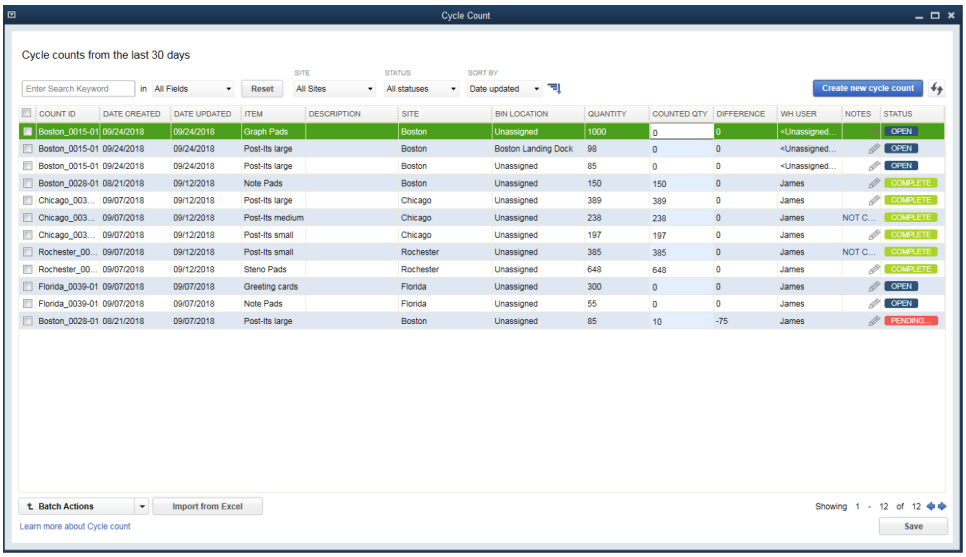
1 Landed Cost: is included in the Platinum and Diamond subscriptions only. Requires an Internet connection.

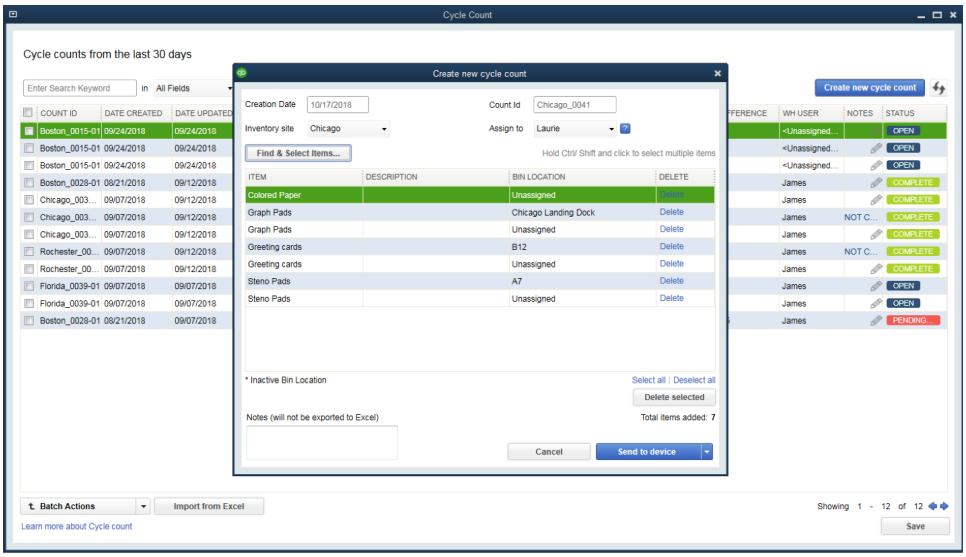

Calculate landed costs
Shipping and handling costs
This table lists shipping and handling bills.
DATE
VENDOR
BILL NO
ALLOCATION
BILL AMOUNT
UNALLOCATED AMT
AMT TO ALLOCATE
11/21/2018
FedEx
3212
UNALLOCATED
2,000.00
2,000.00
2,000.00
View details
11/13/2018
USPS
PS2971
PARTIAL
1,223.50
200.00
200.00
View details
Add bills
Clear all
Total amt to allocate:
$2200.00
Split
$2200.00
by
Select
quantity
amount
percentage
S&H cost (manual)
Inventory and assembly items
ITEM
DESCRIPTION
QTY
U/M
PERCENT
ORIGINAL COST
LANDED COST
ORIGINAL AMT.
UPDATED AMT.
S&H COST
Nikon D810
Camera
Nikon Supplier
3215
40
ea
2,500.00
100,000.00
Nikon D800
Camera
Nikon Supplier
3215
40
ea
2,000.00
80,000.00
Item
Descriptio...
Nikon Supplier
3215
00
ea
100.00
0.00
Add bill
Clear all
Total S&H cost
$0.00
Cancel
Recalculate
Post to bill
Secure web site
Save & Close
Save & New
Clear


Calculate landed costs
Shipping and handling costs
New selling price
Posted to bill successful.
To update the selling price based on the calculated landed cost and markup, enter value in
New Selling Price and update.
ITEM
ORIGINAL COST
MARKUP
ORIGINAL SELL...
LANDED COST
NEW SELLING P...
Nikon D810
2500.00
10%
2750.00
2527.50
2780.5
Nikon D800
2000.00
12.5%
2250.00
2027.50
2280.93
Skip & proceed
Update & proceed
Add bills
Clear all
Split
$2200.00
Add bill
Clear all
Total S&H cost
$1100.00
Cancel
Recalculate
Post to bill
Secure web site

Cycle Count

Cycle count allows users to audit inventory in real time, using mobile barcode scanners or the QuickBooks Desktop app on an Android mobile device, without shutting down the warehouse to take physical inventory.[1] You can scan and automatically upload exact counts from one or multiple locations to a central dashboard. You can also easily find and adjust discrepancies between expected and actual inventory counts.





Inventory Categorization and Expiration Dates[2]

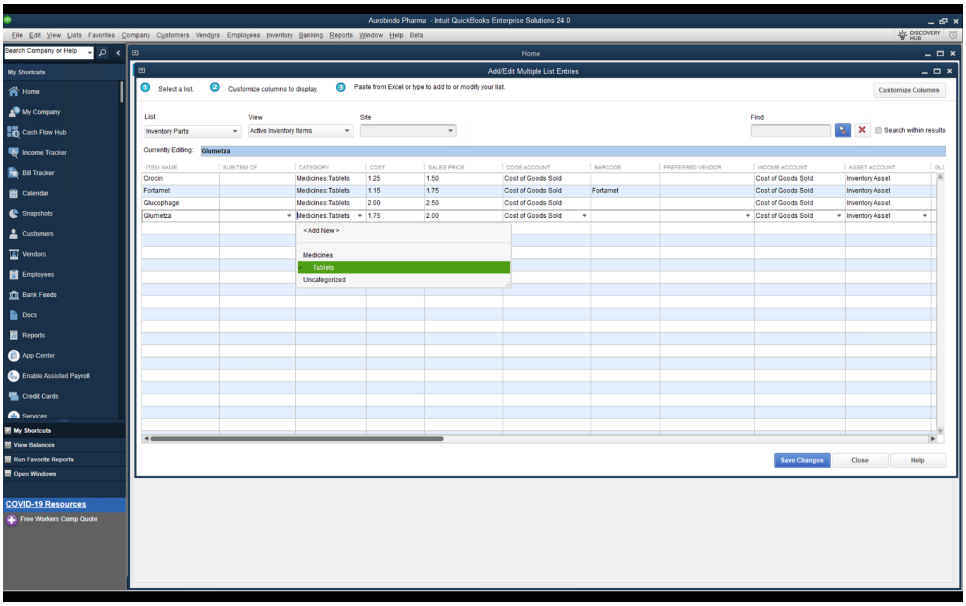
Establish up to four levels of categorization on inventory and save time by using categories to report on items. Keep your inventory up to date, sell more quickly, and reduce business losses by assigning expiration dates, which can also be included on sales orders, invoices, and other customer communications.

1 Barcode scanners sold separately. Cycle count available in the Advanced Inventory module for Platinum and Diamond subscriptions only.

2 Expiration dates are available with QuickBooks Enterprise Platinum and Diamond subscriptions.

Item Category Enhancements[1]

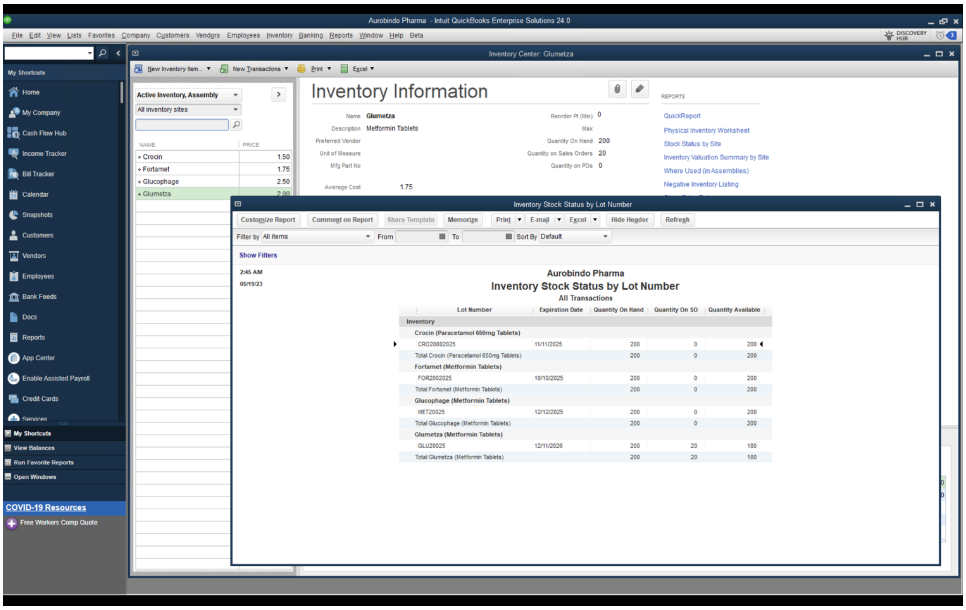
Manage inventory more effectively with comprehensive multi-level categorization. Improve your productivity with enhanced search, add, edit, and delete options. Save time with bulk edits and by copying and pasting from Microsoft Excel to add or edit multiple list entries. You can also set granular pricing rules by categories in Advanced Pricing to help improve the bottom line.



1 Report “Inventory Stock Status by Lot Numbers” only available with QuickBooks Enterprise Platinum, Diamond and Accountant subscriptions.

Inventory Reports Enhancements[1]

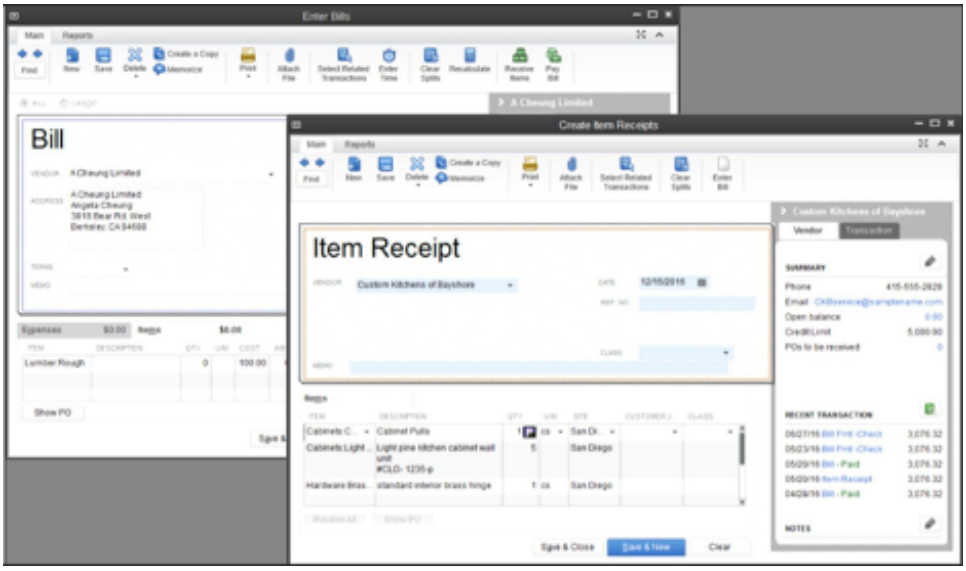
Gain insights, stay on top of sales, and control inventory costs using a hierarchical view of categories in “Inventory Valuation Summary,” “Inventory Stock Status by Item,” and “Sales by Item Summary” reports. Additionally, an "Inventory Valuation Summary by Site" report includes component quantity used on assemblies and pending builds to help you maintain optimal levels of inventory. You can also track inventory of products developed in the same batch with a report on “Inventory Stock Status by Lot Numbers."



1 Report “Inventory Stock Status by Lot Numbers” only available with QuickBooks Enterprise Platinum, Diamond and Accountant subscriptions.

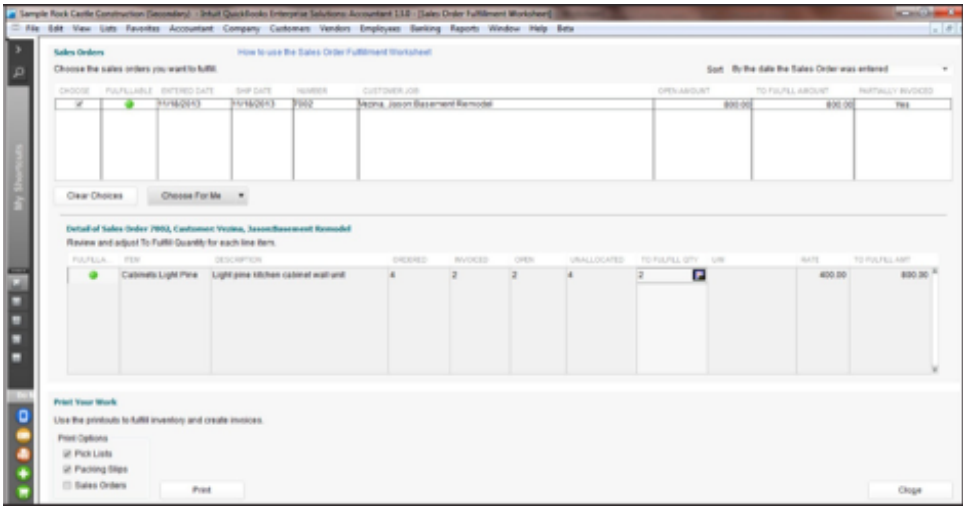
Enhanced Inventory Receiving

Keep item receipts and bills separate when receiving new inventory. Maintain reliable inventory counts, regardless of the order in which transactions are entered.



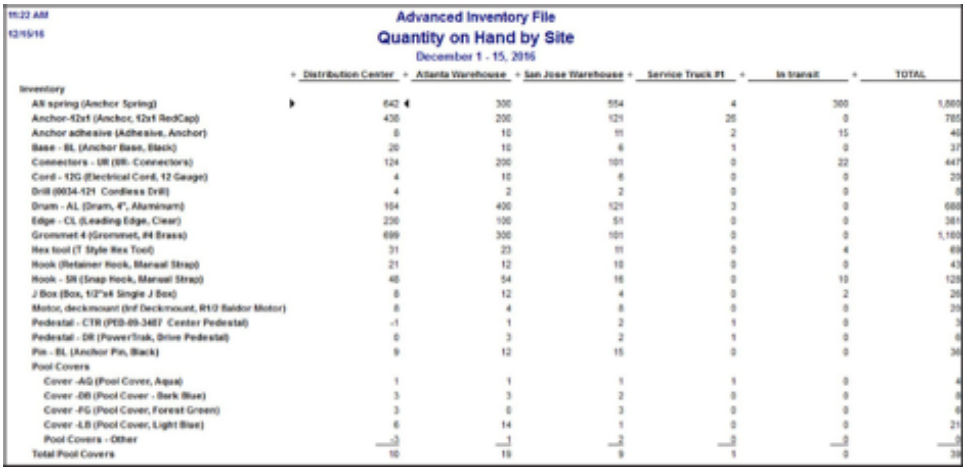
Change Assembly Components on the Fly

Change quantity and item components on the fly to make substitutions or accommodate special customer requests.



Multi-Location Inventory

With Advanced Inventory, you can accurately track the quantity and value of inventory in multiple locations right within QuickBooks.[1] For each location, you can see how many items are on hand, on sales order, on purchase order, and your reorder point—and QuickBooks will automatically calculate which items you need to restock. If one location is running low on inventory, you can transfer stock from another warehouse to meet demand. You can also track inventory in different staging areas within a single warehouse, on service trucks, and on consignment. You can even track imported goods 'on the water.'



11:22 AM
12/15/15

Advanced Inventory File
Quantity on Hand by Site
December 1 - 15, 2015

Inventory	Distribution Center	Atlanta Warehouse	San Jose Warehouse	Service Truck #1	In transit	TOTAL
All spring (Anchor Spring)	642	300	554	4	300	1,800
Anchor-12x1 (Anchor, 12x1 RedCap)	430	200	121	26	0	785
Anchor adhesive (Adhesive, Anchor)	6	10	11	2	15	46
Base - BL (Anchor Base, Black)	20	10	6	1	0	37
Connectors - UR (UR- Connectors)	124	200	101	0	22	447
Cord - 12G (Electrical Cord, 12 Gauge)	4	10	6	0	0	20
Drill (6634-121 Cordless Drill)	4	2	2	0	0	8
Drum - AL (Drum, 4", Aluminum)	164	400	121	3	0	688
Edge - CL (Leading Edge, Clear)	230	100	51	0	0	381
Grommet 4 (Grommet, #4 Brass)	699	300	101	0	0	1,100
Hex tool (T Style Hex Tool)	31	23	11	0	4	69
Hook (Retainer Hook, Manual Strap)	21	12	10	0	0	43
Hook - SR (Snap Hook, Manual Strap)	48	54	16	0	10	128
J Box (Box, 1/2"x4 Single J Box)	8	12	4	0	2	26
Motor, deckmount (Inf Deckmount, R10 Baldor Motor)	8	4	8	0	0	20
Pedestal - CTR (PED-00-3467 Center Pedestal)	-1	1	2	1	0	3
Pedestal - DR (PowerTrak, Drive Pedestal)	0	3	2	1	0	6
Pin - BL (Anchor Pin, Black)	9	12	15	0	0	36
Pool Covers						
Cover -AG (Pool Cover, Aqua)	1	1	1	1	0	4
Cover -DB (Pool Cover - Dark Blue)	3	3	2	0	0	8
Cover -FG (Pool Cover, Forest Green)	3	0	3	0	0	6
Cover -LB (Pool Cover, Light Blue)	6	14	1	0	0	21
Pool Covers - Other	-3	-1	-2	0	0	-6
Total Pool Covers	10	19	9	1	0	39

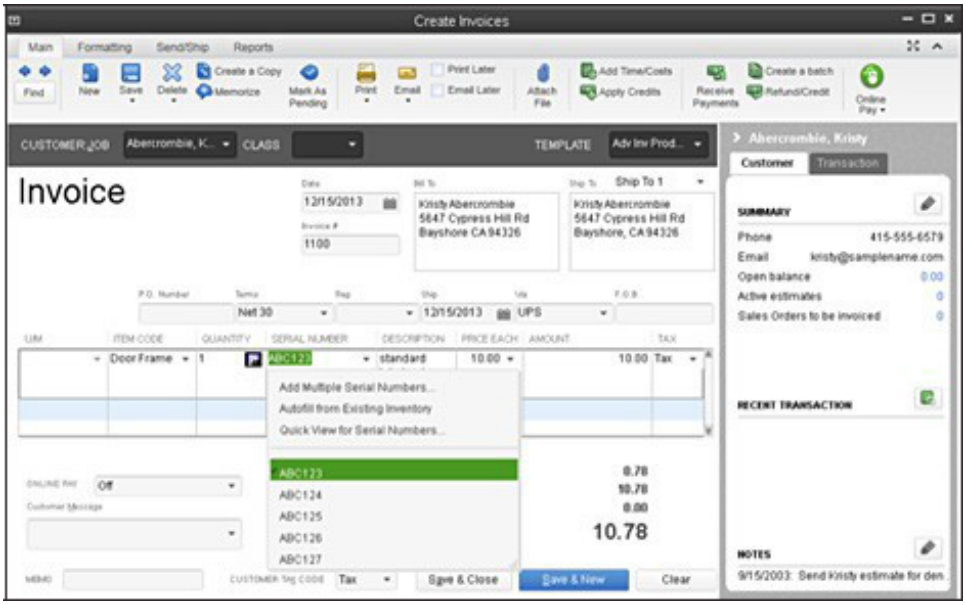
Serial Number Tracking

You can apply serial numbers to individual items to manage inventory and stock, and match specific customers to purchased products and make warranty claims easier.

1 Advanced Inventory is included in the Platinum and Diamond subscriptions only. Requires an internet connection.

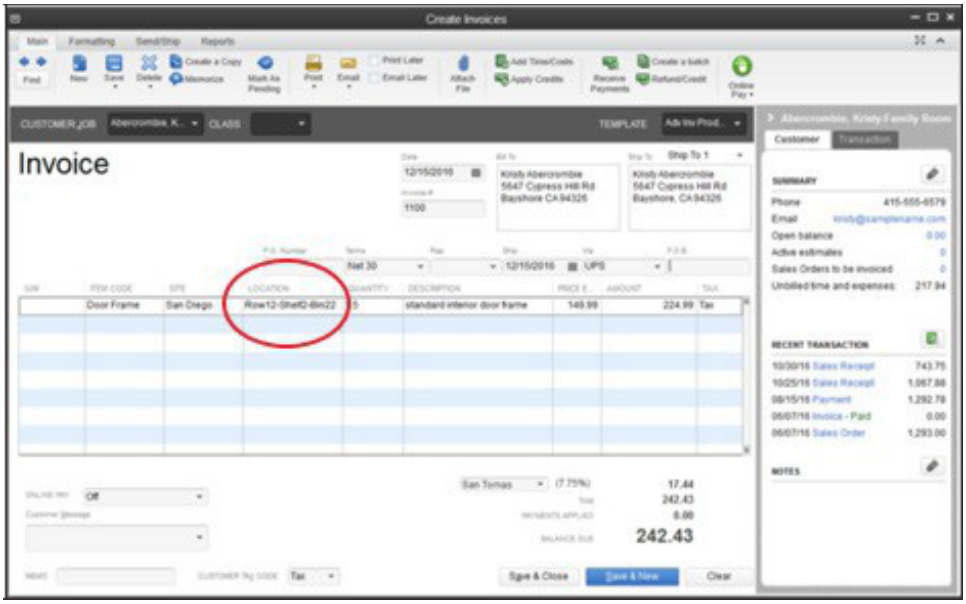
Lot Number Tracking

You can track products developed or processed together in the same batch so if problems occur from a specific batch you can recall items from that lot rather than recall all items. This is especially important for manufacturing, pharmaceutical, food production and agricultural businesses.



Bin Location Tracking

Track specific inventory items down to the exact location in one or more warehouses or trucks. See where something is down to the pallet, row, or section in your warehouse with a flexible, three-level hierarchy of location tracking. You can also sort pick lists and item receipts by location for efficient picking and stocking.



Unit of Measure Conversion

You may buy the same item in one unit of measure, stock it in another, and sell it in yet another. Enterprise can automate the conversion from one unit of measure to another as the item moves through your business, helping you avoid costly mistakes. With a click, you can instantly convert from cases to pallets, or whatever units of measure you define. The correct units are then printed on invoices, purchase orders, sales orders, pick lists, and packing slips to help streamline your workflows and enable you to easily buy and sell products in precisely the way your vendors and customers prefer.

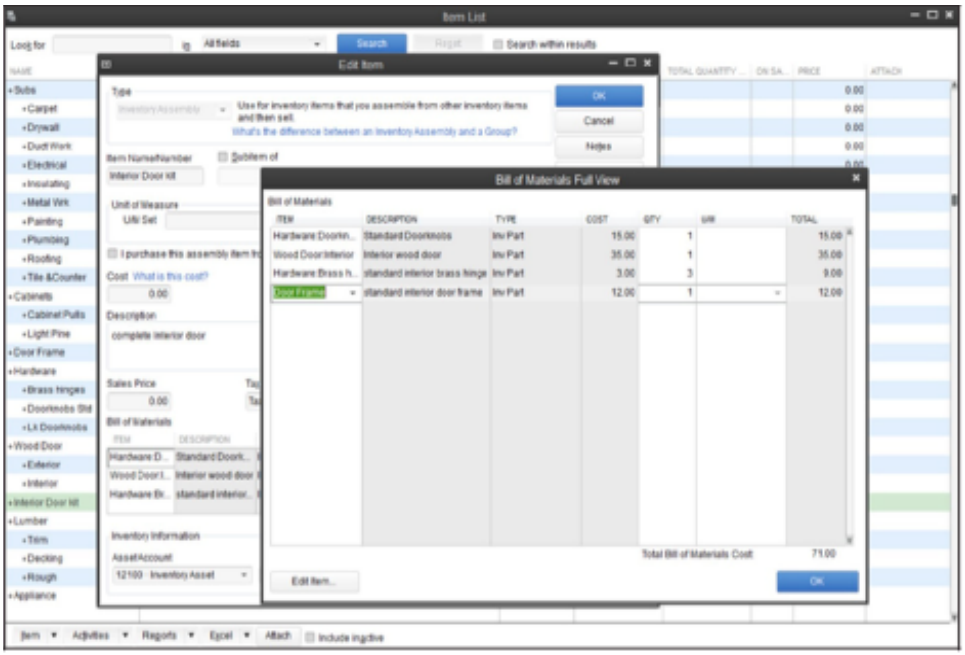
Available to Promise

This feature enables users to manage items in inventory by displaying information on items on hand, items on order. Users can see on each line of a sales order how many items are on-hand (available to sell), committed (sold on other open sales orders), on a pending build (on an assembly), and on-order (on open purchase orders). By showing details the user can see when items are due in (promised date), due to be assembled (pending builds). With this information displayed in one place, users can more easily manage large orders, incomplete shipments / fulfillment, and rare / difficult to make or buy parts.

This feature can also enable a telesales force to sell items without having to know everything about what is going on in manufacturing or production. For items that are not currently available (out-of- stock), the user (or sales rep) will be able to give a reasonable promised fulfillment date.

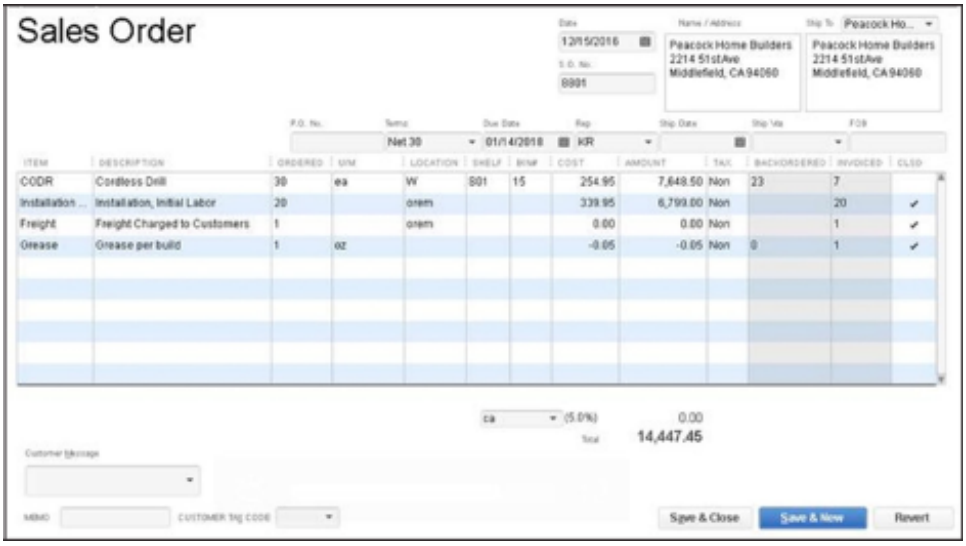
Bill of Materials Cost Tracking

Users can track consumed labor, and accurately plan labor based on production or assembly forecasts. Users can manage COGS (by including the cost of labor in the cost of assemblies), set prices to reflect true costs, and manage their flexible manufacturing resources (people and machines). This feature also allows the user to add Non-Inventory Parts and Other Charges types of items to the Bill of Materials' Assembly Item. By understanding how the cost of labor impacts the cost of goods sold, users can have a more accurate measurement of costs (COGS), increased capability for scheduling labor, and better understanding of profitability for produced, assembled, or manufactured items.

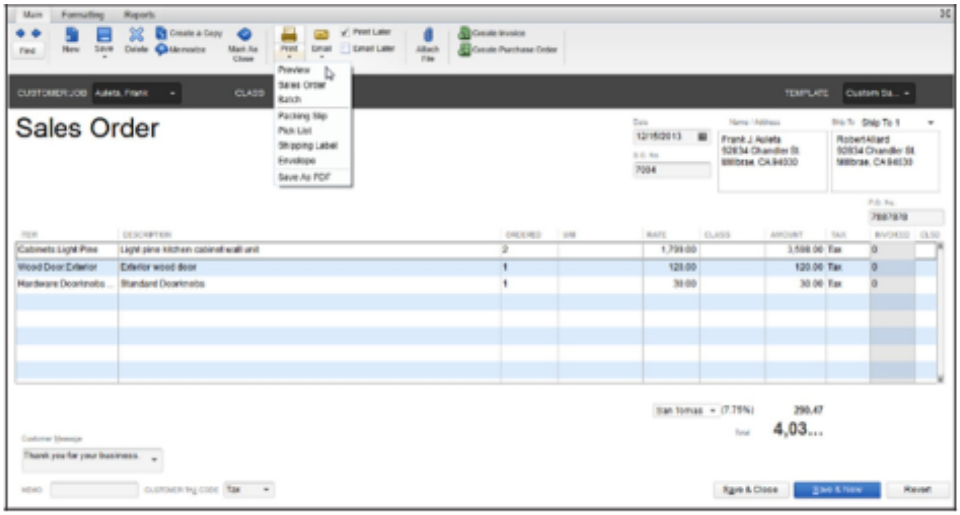


Backorder Functionality on Sales Orders and Invoices

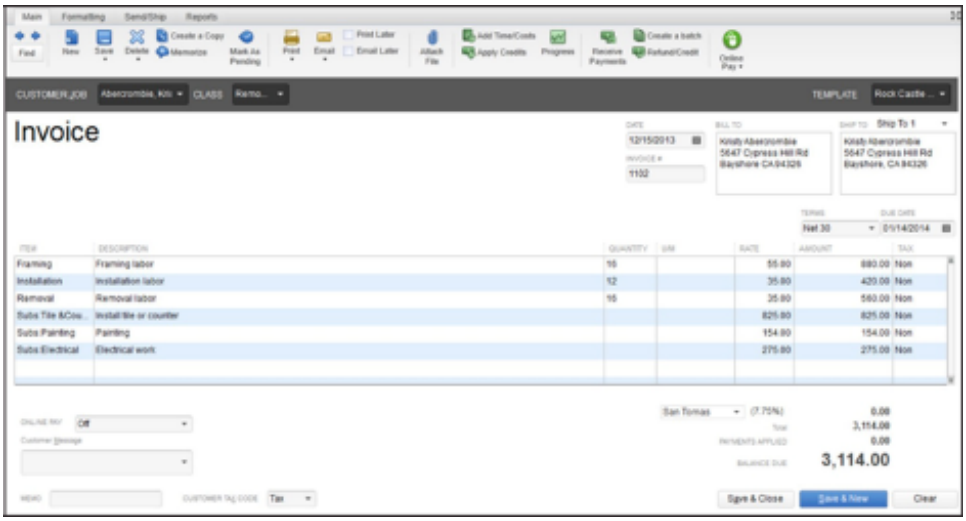
Back order functionality makes it easier for users to understand if an order has been completely fulfilled or not so that they can better manage incomplete orders, sales orders and invoices. When an order cannot be completely fulfilled, the sales order automatically keeps track of how many items were fulfilled by earlier partial shipments. A Backordered column on the sales order indicates fulfilled and still open quantities and line items.



In addition, the user can create pick lists for the shop floor or packing lists for shipment directly from the sales order. Users can easily create all documentation necessary to support and complete partial shipments.

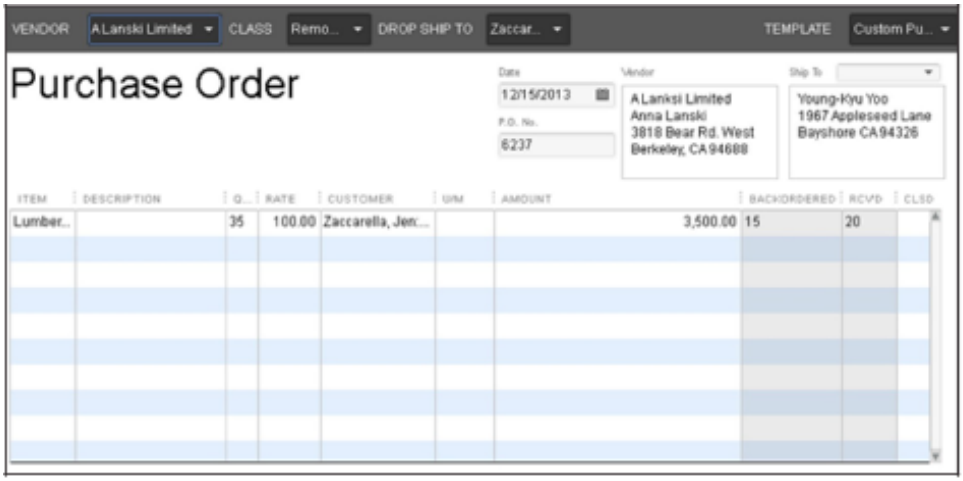


The Backordered column on Invoices reflects quantity shipped and quantity remaining open by line item, and by quantity.



Backorder Functionality on Purchase Orders

Partial shipments from vendors display in the Backordered column on the Purchase Order. Purchase orders show the amount back ordered, and purchase orders with both backordered and received amounts can be printed. Better backorder functionality enables users to see exactly what remains on an open purchase order from vendors. Purchase orders will indicate quantities required to fulfill outstanding sales orders (further detail below in the Available To Promise section).



Auto POs

Turn purchasing into a two-click operation without worrying about minimum or maximum stock levels. Specify inventory quantities to reorder, and QuickBooks will put those quantities directly into PO's—automatically.

Multiple Sales Orders to a Single Invoice

Users can batch process sales orders into a single invoice, eliminating duplicate work. Users can see all of the sales orders for a specific customer and select any number of them to be combined into a single invoice. Users can select one or more items from each Sales Order to be included in the invoice.[1]

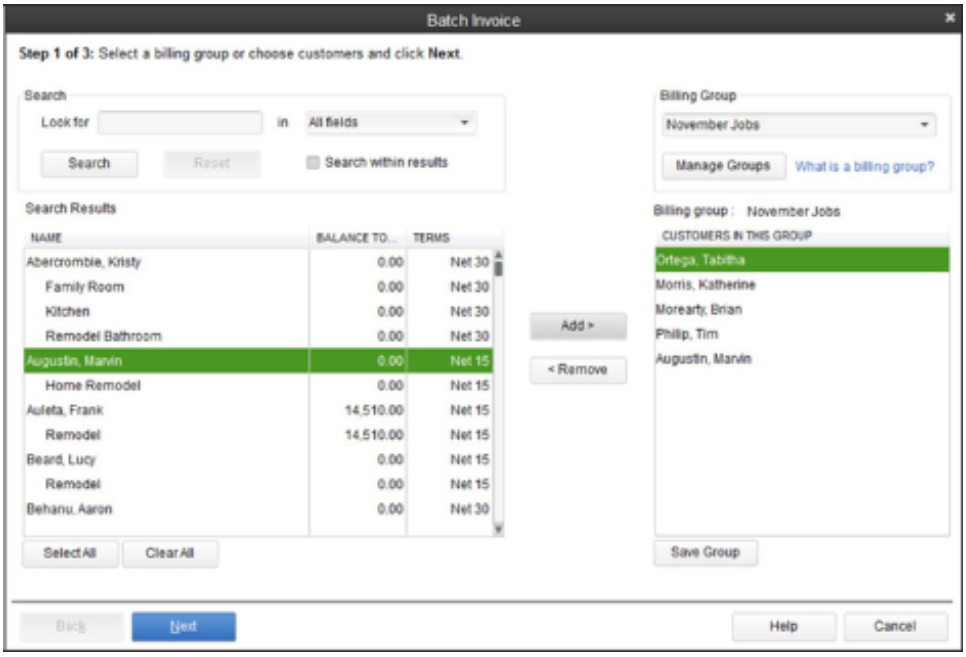
Batch Delete for Sales Orders

You can batch delete unlinked sales orders, similar to the batch delete function for invoices, bills, and checks. This capability helps you manage client files more efficiently by allowing you to batch delete both invoices and their corresponding sales orders.[1]

1 Available in Enterprise Accountant Edition only.

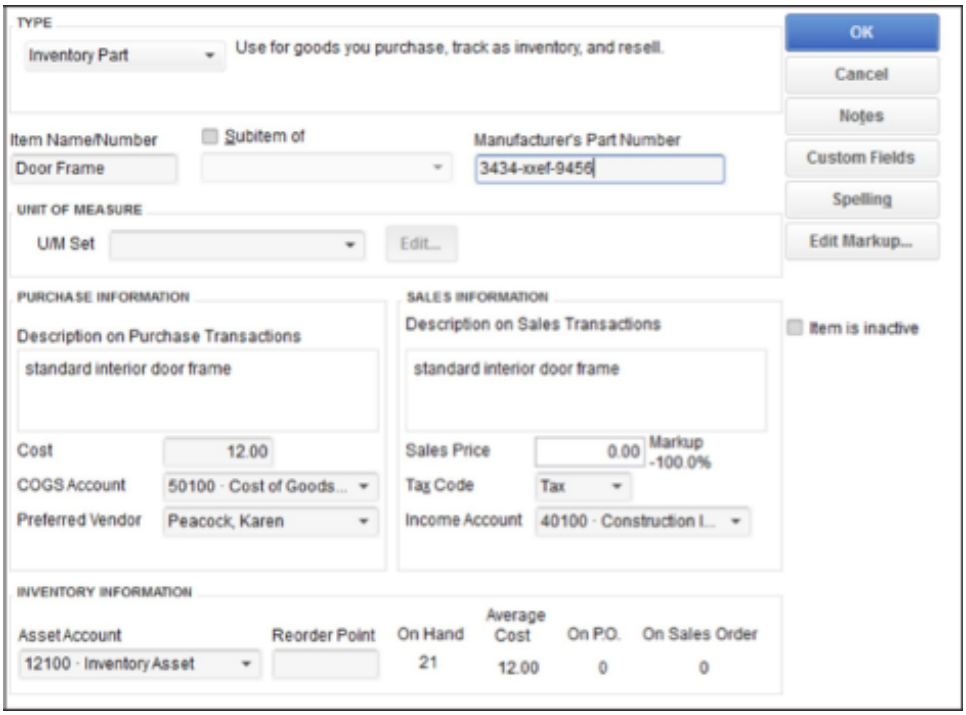
Auto Copy Ship-to Address from Sales Order to Purchase Order

Save time manually inputting addresses from your Sales Order to your Purchase Order with the auto-copy ship-to address function. When creating your POs from your SOs, you can check a box that will automatically copy the ship-to address from the SO to the PO. Better yet, QuickBooks Desktop Enterprise remembers your preferences, so once you check this box it will continue to be checked by default.



Store Manufacturer's Part Numbers on Items

Users can store manufacturer part numbers (MPN) on items. MPN enables users to enter manufacturers' part numbers as part of the main item definition, which makes it easier to cross-reference their inventory with vendors' and manufacturers' parts. Using the same parts numbers to identify inventory items enables more accurate communication, ordering and precise inventory tracking.



Cost Management and Sales Management

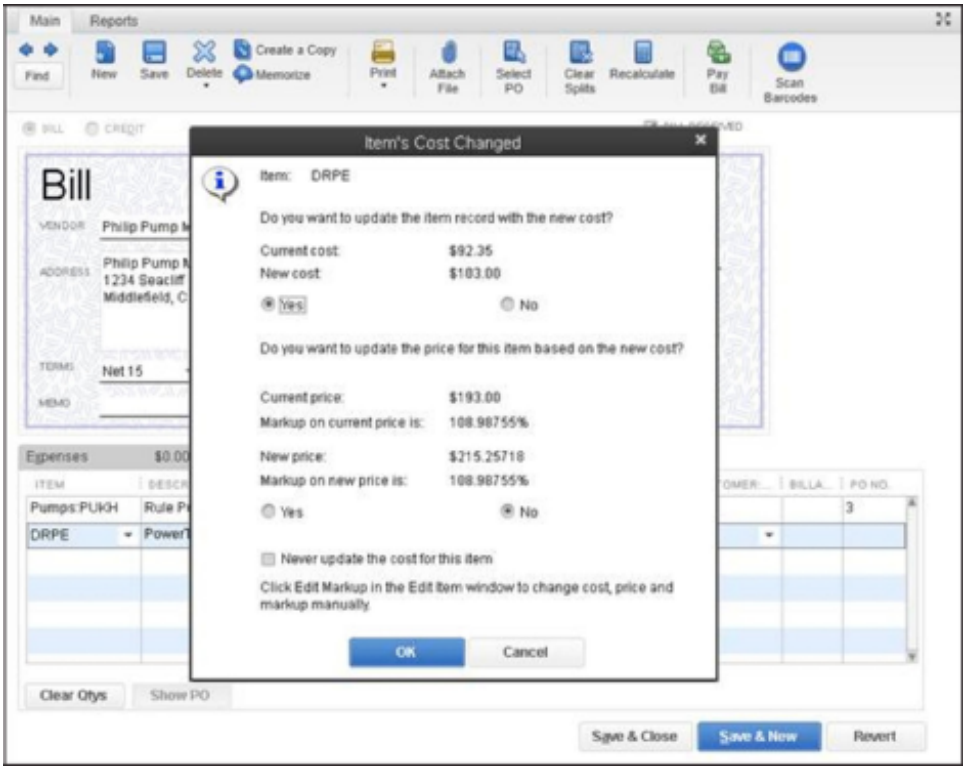
Users have the option to accurately update the cost of an inventory or service item when creating a new purchase transaction. The ability to change item costs directly from forms saves time by eliminating the need to open each item record and manually update the cost. This feature provides enhanced flexibility in managing item costs, and should help with profitability analysis and pricing decisions. For instance, you can base Change Item Prices on Unit Cost.

This feature enables users to manage cost increases/decreases in items more accurately. When the cost of an item changes, users can choose to update the item cost in the item record. If the item is a component in an assembly, the Bill of Materials average cost will also change when the assembly is built. Users can see the impact of cost increases (and decreases) on the profitability (and potential selling price) of purchased items and assembled goods.

The one time message displays when a user modifies the default item cost on any of the following forms: checks, credit card charges, bills, purchase orders, and item receipts. For example, the user changed the cost of "DRPE" on the bill. The user can choose "Yes" to automatically update the item cost record with the new cost.

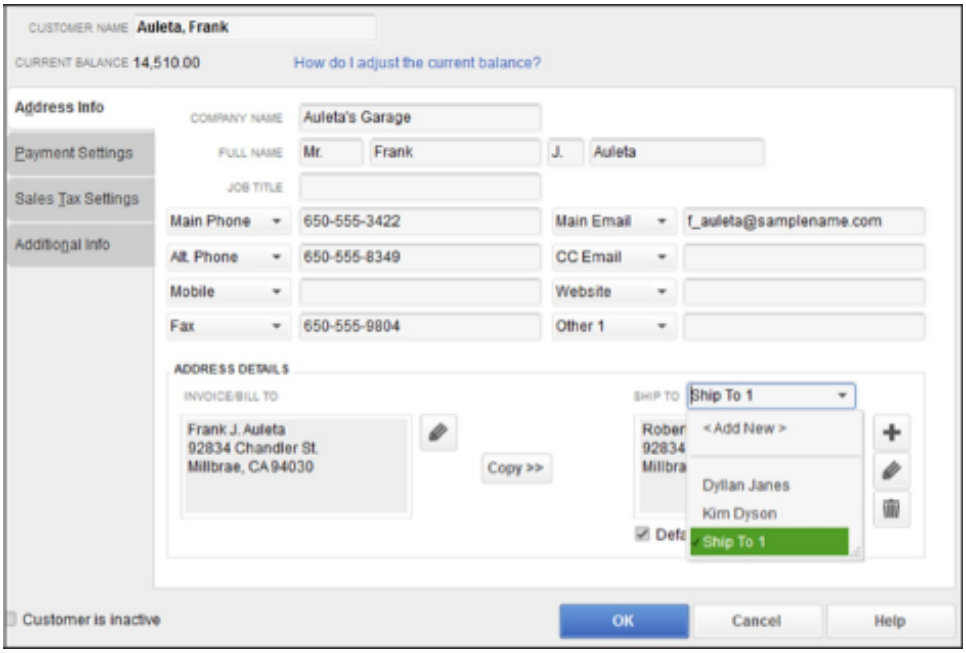
When the user chooses not to see the message any longer, whatever he elects to do at that time will become the default behavior. So, if the user chooses to update the item's cost, from that time forward, whenever he modifies a cost on a form, the item's cost will be updated in the item record. If the user chooses not to, the item's cost will not

be updated in the future. The user's decision can be reversed by selecting the "bring back all one time messages" option in the general preferences dialog.



Multiple Shipping Addresses per Customer

This feature simplifies customer shipping address management by making it easier to find and use the correct customer shipping address when creating a Sales Order, Estimate, Purchase Order, Invoice, Sales Receipt, and Credit Memo. Users can store an unlimited number of shipping addresses per customer. Addresses are selectable from a dropdown list where shipping addresses are entered.



Large Bill of Materials Management—View, Print, Report

Users can create, edit, view, and print large Bills of Materials (BOM), making it easier to track inventories comprised of parts, assemblies, and sub-assemblies. An expanded onscreen view lists consumed parts to indicate all pieces of a BOM, and indicates sub- assemblies (consumed BOMs). Users can set the Sales Price by seeing each item cost and the total cost of the Bill of Materials.

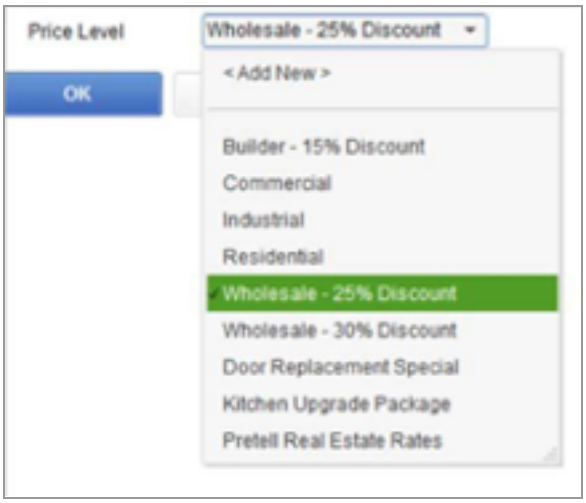
Pricing Management

Enterprise gives you control over your pricing, markups, and margins, letting you execute strategies to meet your business goals with ease. Our Advanced Pricing module, included in the Platinum and Diamond subscriptions, adds even more customization and automation. From promotions to discounts to special prices for loyal customers, you can do it all with Enterprise.

Pricing Controls

Users can set up to 100 different prices for different groups of customers to reflect pricing for corporate, loyal, and high-volume purchasers. For example, a 10% price discount could be created for “loyal customers.” When the “loyal customers” price level is attached to a customer, pricing is automatically reduced by 10%.

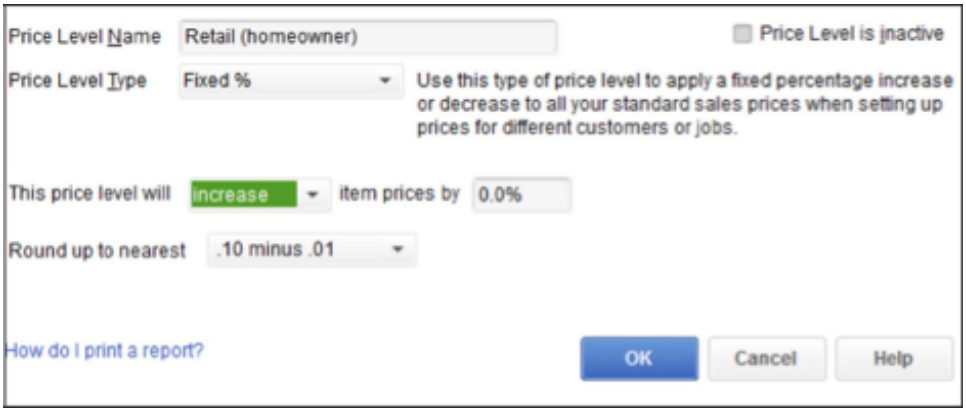
Print Price Lists
Users can easily discover, select, and print price lists from the Reports menu.



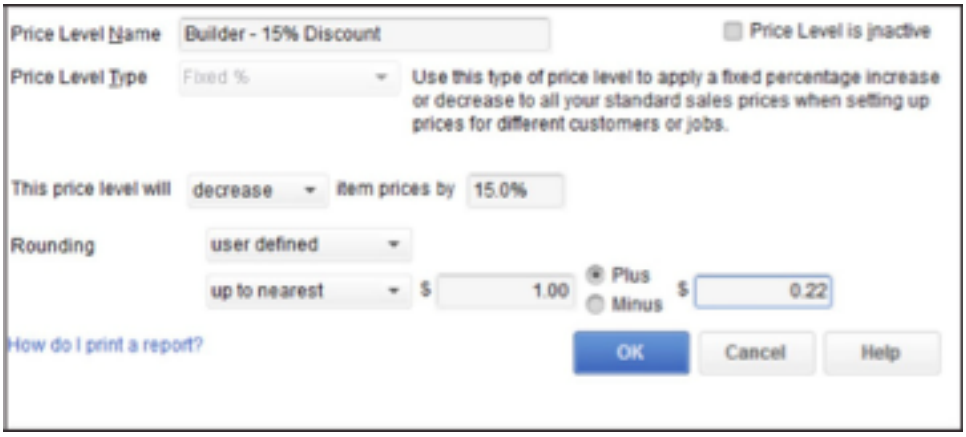
Sales Price Rounding Options for Items

Users have the flexibility to set and manage prices. Change Item Prices includes advanced pricing and rounding models by enabling users to choose from a variety of default and customizable rounding options based on Current Price and/or Unit Cost. For instance, a default option rounds up to the nearest 1.00 minus .01.

Users can use the default rounding options or create a user defined rounding scheme for a Per Item Price Level. This Retail (homeowner) Price Level rounds the Custom Price up to the nearest .10 and subtracts .01. This makes all prices end in .X9.

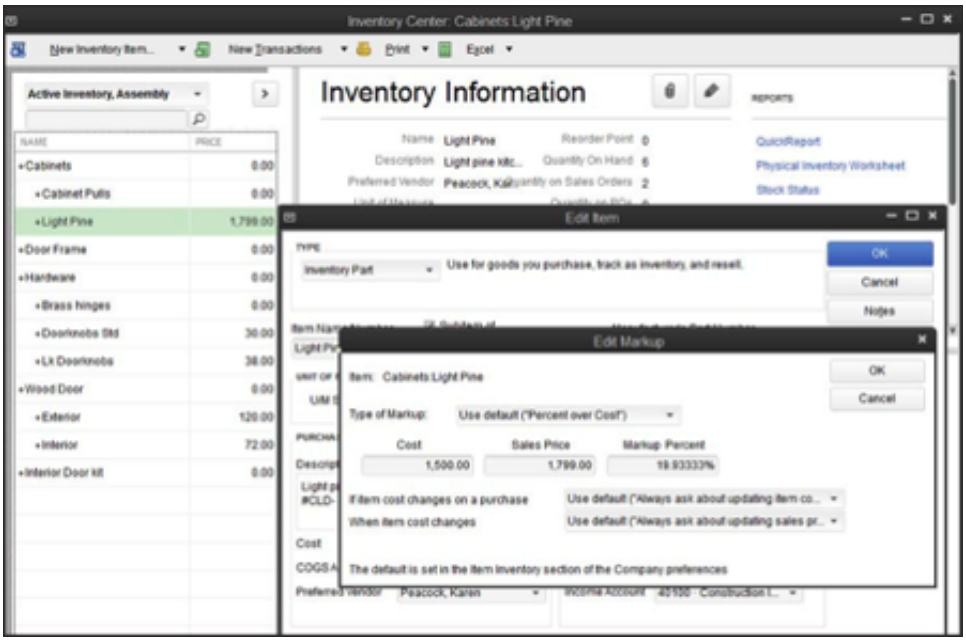


Alternatively, users can create their own rounding scheme to match their needs.



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.



Advanced Pricing

The Advanced Pricing module, included in the Platinum and Diamond subscriptions, simplifies the complexity of pricing management by allowing you to customize and automate pricing rules to reduce the human errors that occur with manual workarounds.[1] You'll have confidence that customers are paying what they're supposed to on every transaction and help protect your profit margins with the ability to set markups and control exceptions.

1 Advanced Pricing is included in the Platinum and Diamond subscriptions. Requires QuickBooks Desktop Enterprise with an active QuickBooks Desktop Enterprise subscription and an Internet connection.

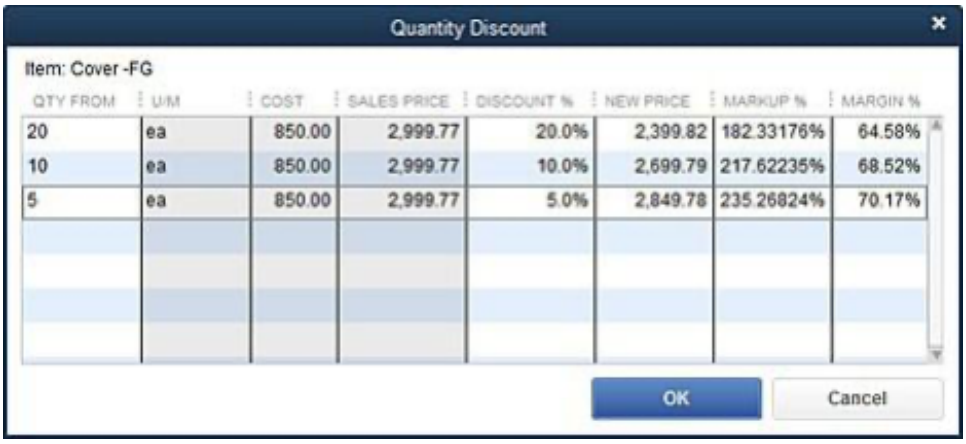
Advanced Pricing lets you do all of the following:

- Create and apply multiple rules that change prices automatically when the conditions you set are met.
- Schedule promotions ahead of time with price rules that set start and stop dates.
- Set volume discounts, manufacturer markdowns, and rules for high-value customers.
- Create guardrails to ensure sales deals aren't cut outside the parameters you set.
- Automatically track and apply complex city-specific sales tax on invoices, sales orders, and receipts.
- Customize which rules to apply at the time of transaction.
- Automatically apply volume discounts by setting price rules for a fixed percent off for a quantity.

Create Thousands of Price Rules

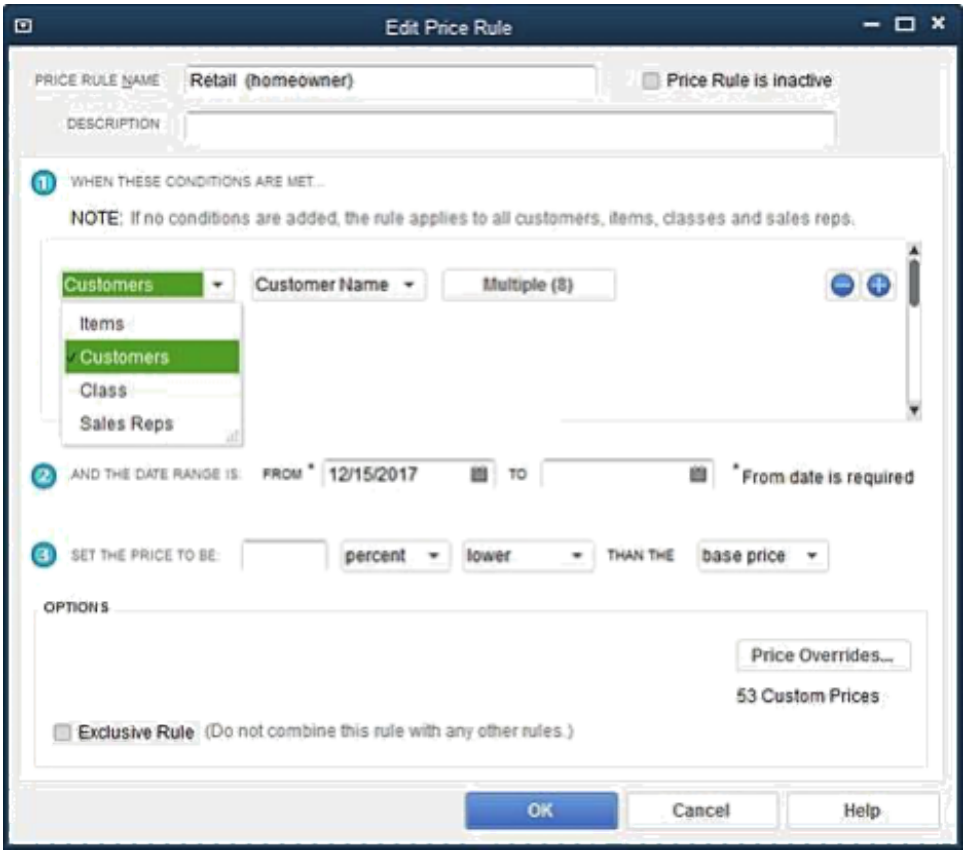
Advanced Pricing lets you set sophisticated price rules based on any combination of customers, items, vendors, classes, custom fields and more. For example:

- Create quantity discounts
- Pass on a one-month manufacturer markdown
- Charge different prices by class (i.e., location)
- Create an upcoming promotion using a future start date
- Offer seasonal discounts with expiration dates to apply on top of your regular wholesale discount



Manage Price Rules with Great Flexibility

Advanced Pricing lets you apply multiple price rules at once or mark rules as exclusive. You can also change which price rules apply at the time of transaction.



Cloud Access

Run Your Business from Anywhere

Enterprise offers optional cloud access so you can access QuickBooks from anywhere, on any device, with the confidence that your data is always accessible and protected with state-of-the-art security.[1] Running your business in the cloud lets you boost collaboration and provide up-to-date information for your whole team with the freedom to track inventory, process payments, and update your books simultaneously from different locations. You get seamless integration to Microsoft Office Suite, Chrome, and other available apps to give you full access to your data wherever you are. Cloud access requires no installation, training, new equipment, or IT capital investment.[2] And your data is backed up daily—automatically.

- Redundant infrastructure allows for 24×7 availability to the hosted environment and integrated applications.
- Virtual desktop connections are protected via TLS with a minimum of 128-bit encryption and authentication.
- Continuous intrusion monitoring systems with multiple levels of malware detection.
- Data is stored at diverse locations within the United States owned by our partner, Right Networks.
- All backup files are encrypted and kept safely, and there is no limitation to the size of your backup.
- Data is protected in the same data centers used by multinational corporations.

1. Any time, anywhere, on any device: QuickBooks Desktop Enterprise with Hosting is a subscription and is only available on a monthly payment plan. Additional fees apply. If you purchase QuickBooks Desktop Enterprise with Hosting user licenses 1-10, you must purchase the same number of hosted users as you purchase Enterprise licenses. If you wish to purchase QuickBooks Desktop Enterprise with Hosting with 11 or more licenses, please call for custom pricing.

Each month, your account will be automatically charged the agreed-upon price unless and until you cancel. Cancel at any time by calling Intuit at 800-300-8179, prior to your monthly renewal date. When you cancel, you'll be refunded at the date through the end of your current billing period. The QuickBooks Desktop Enterprise software portion of the QuickBooks Desktop Enterprise with Hosting bundle is an annual subscription. (Enterprise Diamond is a monthly subscription with no annual commitment; see Enterprise Diamond subscription for details.)

Right Networks: Support for QuickBooks Desktop Enterprise with Hosting is provided by Right Networks. A valid QuickBooks Desktop Enterprise license code must be provided to Right Networks to receive support. Contact Right Networks to contract third-party software.

Right Networks performs backups of all Hosted data on a nightly basis and retains the back-ups for a rolling 90-day period in a protected offsite facility as an additional level of protection. There is no limitation to the size of a customer's back-up. Customers are responsible for verifying the integrity of the hosted data at least every 90 days. Right Networks employs Snapshot technology to backup customer data. Snapshots are taken daily and then replicated to another physical Right Networks facility for Disaster Recovery.

Right Networks uses top-tier data centers and multiple layers of redundancy within its infrastructure to provide 24x7 availability. However, availability can vary, is subject to occasional downtime and may change without notice. Right Networks encrypts all backup files and backup tapes. Virtual desktop connections are protected via TLS with a minimum of 128 bit encryption and authentication. Each customer has a unique Right Networks virtual desktop. Access to each QuickBooks company file is controlled at multiple layers including file access permissions. Access is locked out after multiple failed login attempts for the same user. Security features, functionality and access are subject to change without notice as deemed necessary by Right Networks. Availability can vary and are subject to occasional downtime and may change without notice. Click here for a list of compatible devices.

Internet connectivity required: Desktop Enterprise with Hosting is subject to availability of a reliable Internet connection. See detailed list of systems requirements, and a list of what RDP clients work with the hosting service here.

Remote Desktop Services compliant: QuickBooks Desktop Enterprise is Remote Desktop Services compliant. Additional fees may apply. Requires certain hardware, Microsoft Server operating systems, Microsoft Windows Server software licenses, and Remote Desktop Services Server Client Access Licenses, sold separately. For multiple remote users, a Remote Desktop Services Client Access License is required for each user.

2. QuickBooks Enterprise software sold separately; a valid QuickBooks Enterprise license code must be provided to Right Networks. No down payment or contract required.

Optional Add-Ons

Need even more robust, integrated tools right in QuickBooks? Enterprise offers a customizable, integrated suite of productivity tools designed to work together to automate routine processes, streamline workflows, minimize double data entry, and give you more time to focus on your customers.[1] You'll gain visibility across your business to make better business decisions. And you can customize Enterprise to meet your business' evolving needs.

Track Time with QuickBooks Time Elite

Included in Enterprise Diamond, QuickBooks Time Elite[2] allows employees to track time from anywhere—in the office, or in the field with mobile devices.[3] Managers can assign jobs to individual workers and track progress to plan to make adjustments and improve profitability.

- All your data syncs with QuickBooks for easy and accurate invoicing.[4]
- Real-time collaboration and communication keep your team on the same page.
- Advanced geolocation lets workers clock in and clock out effortlessly.[5]

1 Enterprise Diamond includes QuickBooks Assisted Payroll and QuickBooks Time Elite time tracking. Assisted Payroll is $1 per employee per pay period; maximum of 4 pay periods each month. Assisted Payroll cannot file employee payroll or state taxes in IN and WY. QuickBooks Time Elite is $5 per month per employee. (See QuickBooks Desktop Payroll and QuickBooks Time Elite disclosures below.) Enterprise Diamond is sold in increments of 1-10, 20, 30, and 40 users. Enterprise Diamond is compatible with, but does not include hosting. (Hosting sold separately.) Enterprise Diamond is a subscription and is only available on a monthly payment plan with no annual commitment. Each month, your account will be automatically charged the agreed-upon price unless and until you cancel. Cancel at any time by calling Intuit at 800-300-8179, prior to your monthly renewal date. When you cancel, you will have access to Enterprise Diamond for the remainder of the month for which you have already paid. The following month, you will no longer have access to the product or any of its connected services. We will authorize your card to ensure prompt order processing, resulting in a temporary hold on your account. See Subscription Terms & Conditions.

2 QuickBooks Time Elite time tracking is included in the base subscription for Enterprise Diamond. Per-employee monthly fees apply. Each employee is $5 per month. Requires an Internet connection.

3 Mobile time tracking: Requires downloading the QuickBooks Time application, acceptance of the QuickBooks Time Terms of Service and Privacy Statement, and an Internet connection. The QuickBooks Time 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 Time mobile access is included with Enterprise Diamond 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.

4 Sync with QuickBooks Desktop Enterprise: Manual sync required.

5 GPS tracking: GPS tracking enabled when employees are clocked in via the QuickBooks Time mobile app. GPS points can be pulled at clock in and clock out, opening the app, switching job codes, and while on the clock. GPS points are not stored when employees are on a break, clocked out, or signed out of the app.

Connect to Salesforce with the CRM connector

With Enterprise Diamond, you can also add the CRM connector to sync QuickBooks to Salesforce and automate more work.[1] The CRM connector provides one source of data between sales and support to serve customers better, and it helps you reduce duplicate data entry and generate invoices automatically so you get paid faster.[2,3]

- Enter data once and your sales, accounting, customer service, and procurement teams all work from the same data set. You're in control—you decide what and when to sync, and set permissions by user or role to determine who can see what data.
- Automatically generate a sales order or invoice in QuickBooks when a lead is closed in Salesforce.
- Set up your sales and support teams for success by putting customer information like order status and payment history at their fingertips so they can process orders faster and resolve customer issues quickly.
- With more visibility into the entire sales pipeline—from lead to invoice to payment--you'll have a more accurate view of projected revenue and can make better business decisions.
- Map your data the way you want to by connecting Salesforce fields like Accounts and Opportunities to QuickBooks fields like Customers, Sales Orders, and more.

1 CRM connector works with Salesforce Professional, Enterprise and Unlimited versions only; Salesforce is sold separately. CRM connector is a service provided by DBSync and is available as a paid add-on subscription to QuickBooks Enterprise Diamond.

2 CRM connector subscription: You are required to have an active, paid QuickBooks Enterprise Diamond subscription to be eligible for CRM connector. CRM connector subscription supports one company file per subscription; limited to one subscription purchased from Intuit. Your account on file will automatically be charged the then current list price on a monthly basis, starting at sign up, until you cancel. To cancel your CRM connector subscription at any time, call 1-800-4-INTUIT or contact your account manager. Your cancellation will become effective at the end of the monthly billing period and your subscription will terminate at that time. You will not receive a prorated refund; your access and subscription benefits will continue for the remainder of the billing period. Cancellation or termination of QuickBooks Enterprise Diamond will result in termination of CRM connector subscription. You will be billed monthly by Intuit for your initial CRM connector subscription and will be billed separately by DBSync for each setup and/or subsequent subscription(s).

3 CRM connector set-up: CRM connector setup is required and is provided by DBSync. Various setup packages are available. Pricing varies depending on the setup package chosen. For setup pricing, to purchase additional subscriptions, or for general DBSync billing questions, call 877-739-2818 or email support-intuit@mydbsync.com.

Pay Employees More Easily with Enhanced Payroll

With QuickBooks Enhanced Payroll,[1] included with Enterprise Gold and Platinum, you can create unlimited checks, use direct deposit,[2] file payroll taxes,[3] and generate W-2s—with no monthly fees.[4]

- **Pay employees quickly:** Cut paychecks for W-2 employees and 1099 contractors in three easy steps: Just enter hours, approve time, and pay your team.
- **Be ready for tax time:** Federal and state payroll taxes are calculated for you automatically in QuickBooks.
- **Simplify IRS forms:** Enhanced Payroll automatically fills in the latest federal and most state payroll tax forms. Then all you need to do is click to e-file.

Get Even More Help With Assisted Payroll

With QuickBooks Assisted Payroll,[5] included with Enterprise Diamond, we'll take care of your payroll tax payments and filings for you—guaranteed accurate and on-time.[6] You'll be able to issue paychecks in minutes, and all compensation and tax calculations are automatically entered in QuickBooks.

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How Assisted Payroll Works:

1. **Guided payroll setup:** Our payroll experts will help you get set up and answer any questions you might have.
2. **Pick paycheck preferences:** Choose direct deposit, printed checks, or both—whatever you prefer.
3. **Start running payroll:** Sign into QuickBooks and enter the hours your employees worked. When you're done, run payroll.
4. **We handle taxes:** We take care of all your quarterly and year-end tax filings for you—guaranteed accurate and on-time.[7]

1 QuickBooks Desktop Enhanced Payroll is included in Enterprise Platinum and Diamond, and as a discounted add-on to Enterprise Silver. Enterprise Silver with the Enhanced Payroll add-on is known as Enterprise Gold which is an upgraded plan. Enhanced Payroll does not limit the number of payrolls scheduled per month and there are no additional monthly per employee fees. Standard fees apply.

2 QuickBooks Desktop Assisted Payroll is included in the base subscription for Enterprise Diamond; $1 per employee per pay period; maximum of 4 pay periods each month. If you file taxes in more than one state, each additional state is currently $12/month. Active subscription, Internet access and Federal Employer Identification Number (FEIN) required. Direct deposit is included for employees. Additional fees may apply for direct deposit for vendors. QuickBooks Desktop Payroll requires a supported version of QuickBooks Desktop Enterprise updated to the most current maintenance release. QuickBooks Desktop Enterprise supports over 100,000 employees, customers, vendors and other names combined. However, performance may slow when processing files containing more than 250 employees. Support is available M-F 6:00 AM - 5:00 PM PT. 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 limit each telephone contact to one hour and to one incident. Intuit reserves the right to change these hours without notice.

3 E-file and e-pay taxes features are available for federal and select state taxes. Please check availability at www.payroll.com/fileandpay. You may need to register with tax agencies in order to use e-file and e-pay features.

4 Direct deposit service is included for W-2 employees with your Payroll subscription. Additional fees apply for 1099 contractors paid by direct deposit.

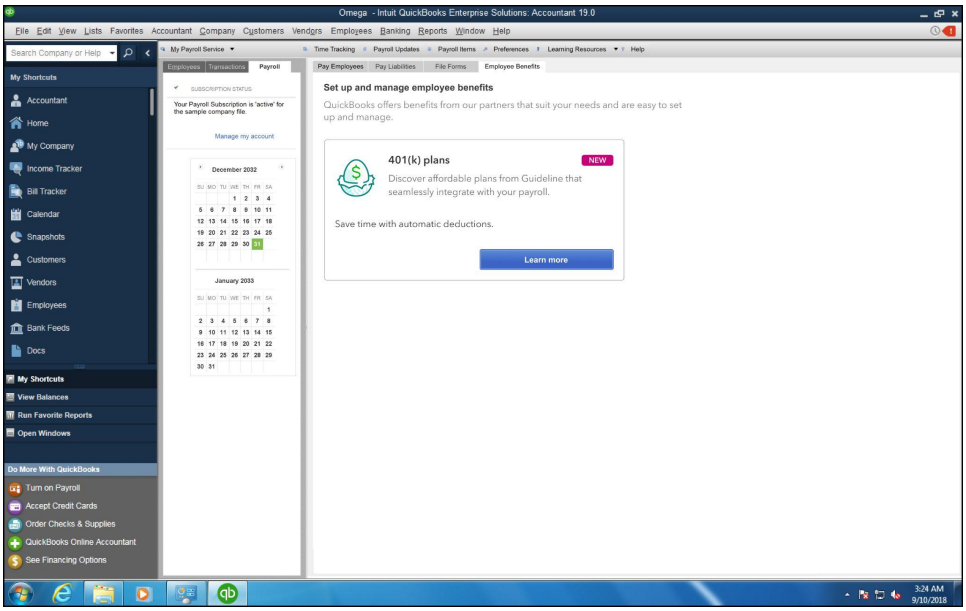
5 Issue a paycheck in 3 minutes or less: Intuit survey March 2018, based on respondents who saved time by issuing a paycheck in 3 minutes or less.

6 Guaranteed accurate tax filing: When you use QuickBooks Desktop Assisted Payroll, we assume responsibility for federal and state payroll filings and payments directly from your account(s) based on the data you supply. As long as the information you provide us is correct and on time, and you have sufficient funds in your account, we'll file your tax forms and payments accurately and on time or we'll pay the resulting payroll tax penalties. Guarantee terms and conditions are subject to change at any time without notice.

7 Accuracy guaranteed: We assume responsibility for federal and state payroll filings and payments directly from your account(s) based on the data you supply. As long as the information you provide us is correct and on time, and you have sufficient funds in your account, we'll file your tax forms and payments accurately and on time or we'll pay the resulting payroll tax penalties. Guarantee terms and conditions are subject to change at any time without notice.

Integrated 401(k) Retirement Plans

Invest in your team by offering affordable 401(k) retirement plans that cover administration, investment management, and tax filing through our partnership with Guideline.[1] The plans are fully integrated with QuickBooks, so you can set them up quickly and take advantage of tax credits. You can schedule automatic contributions or let employees decide on the amount deducted from each paycheck.

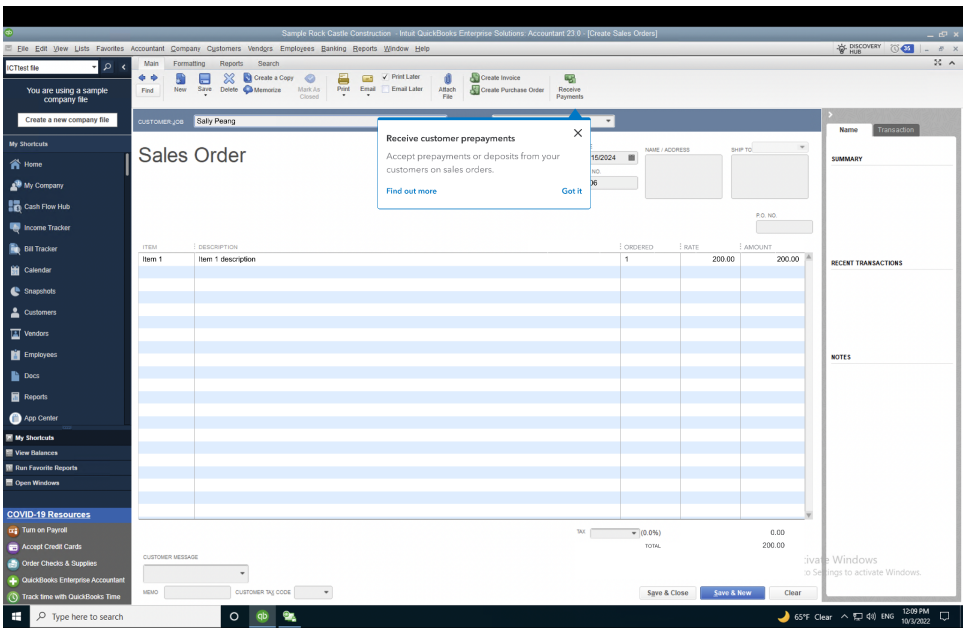


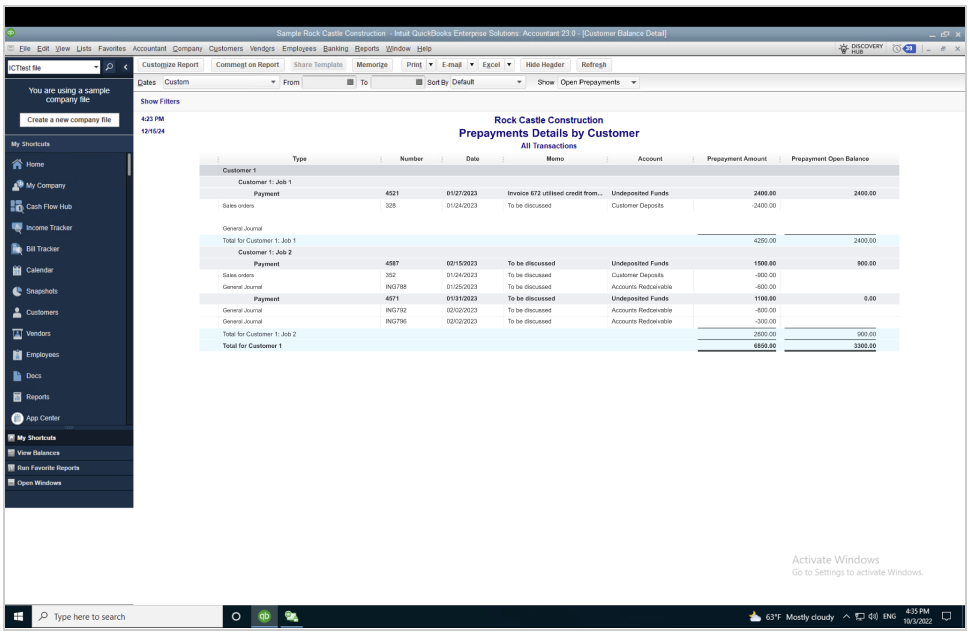
1 401(k) plan: 401(k) offerings are provided and administered by Guideline, an independent third party and not provided by Intuit. Intuit is not a 401(k) plan administrator, fiduciary, or other provider. Requires acceptance of Guideline's Client Relationship Summary and Privacy Policy. Additional 401(k) plan fees will apply. Employees may manage their contributions directly with Guideline. Admin and payroll access required to sign up for a 401(k) plan with Guideline. Guideline live US-based support is available Monday through Friday, 6:00 AM to 4:00 PM PT.

Cash Flow Tools

Customer Prepayments[1]

Easily record and track customer prepayments and deposits on sales orders. Then automatically apply the payments when sales orders are converted to an invoice. You'll also be able to build customer trust by sharing proof of payment. And when it comes to accounting, you can record prepayments as a current liability instead of accounts receivable.





1 Feature not available with multi-currency.

Intercompany Transactions[1]

Intercompany transactions help you manage multiple business entities more efficiently. Easily establish and track relationships between entities via one dashboard. Track transactions by assigning assets and liabilities accounts. Bulk transactions will help you reduce manual entry. You can also create intercompany transactions reports for better insight on completed historical transactions.

Bill and PO Workflow Approvals[1]

Manage cash flow, boost transparency, and help protect against fraud with customizable bill and purchase order workflow approvals that create a digital audit trail for each transaction. Delegate with confidence while keeping oversight. One dashboard lets you maintain cash flow oversight and track bills and POs that need approval. Employees get timely reminders so they don't miss an approval deadline. Customize your workflow approvals your way, or use out-of-the-box templates to make it easy to set up approval flows that cater to your business.

Cash Flow Hub

Get a single dashboard to monitor your incoming and outgoing cash flow. Track invoices, sales receipts, credit memos, payments, and more. Manage expenses by tracking paid and upcoming vendor bills, and consolidate multiple reports without manual calculations.

Payment Links Dashboard[2]

When you don't have to send an invoice, you can get paid by sending a payment link, and you can check payment status and send reminders from a single dashboard, too. QuickBooks Payments[3] users can quickly collect payments for initial consultations, advance deposits, and more. Just email or text your customers a link that asks them to pay online.

Contactless Payments[3]

QuickBooks Payments[3] users can accept contactless payments via a single card reader and record them automatically in QuickBooks Desktop. Accept Apple Pay®, Google Pay™, EMV chip, and debt and credit card payments.

Sales Order Fulfillment Worksheet

Get paid faster and reduce billing complexity with convenient batch invoice creation from within the sales order fulfillment worksheet. Get paid faster with a prompt to generate an invoice when you mark an item as shipped.

1 Available with QuickBooks Enterprise Platinum and Diamond subscriptions.

2 QuickBooks Payments account subject to eligibility criteria, credit and application approval. See Important Info, Pricing, Acceptable Use Policy and Merchant Agreement. Access to features above may require download of the latest QuickBooks update.

3 QuickBooks Payments account subject to eligibility criteria, credit and application approval. See Important Info, Pricing, Acceptable Use Policy and Merchant Agreement (https://quickbooks.intuit.com/payments/legal/). Access to features above may require download of the latest QuickBooks update.

Pay Vendor Bills Online

Schedule and pay bills within QuickBooks using a bank transfer, credit card or debit card while allowing vendors to receive the money via bank transfer or physical check. QuickBooks saves you time by automatically marking the bill paid and notifies you once the money is sent.

Upload Bills

Save time by having QuickBooks automate bill entries from the QuickBooks Desktop Mobile App or an email address. Just photograph, import, and review. Your vendors can send email invoices directly to QuickBooks, which automatically drafts bill transactions for your review. Stay organized by attaching files to bill transactions for simplified audit trails. Automatically upload or edit multiple bill transactions at once.

Attach Documents to Transactions

Attach documents to transactions faster by directly uploading them via the QuickBooks Desktop mobile app. Say goodbye to archaic scanning and emailing processes. Save time by directly attaching multiple documents to transactions at once. Stay organized by eliminating the need to store physical documents.

Customize Bill Payment Stubs

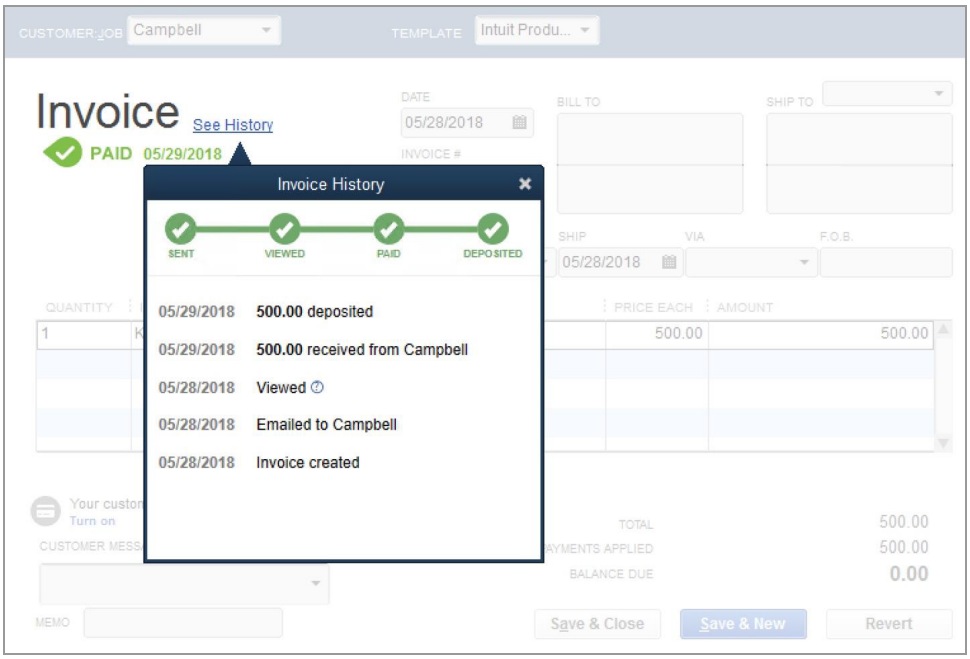
Maintain professional and consistent communications by emailing customizable bill payment stubs from within QuickBooks. Save time by immediately emailing bill payment stubs to one or multiple vendors at once. Easily edit your logo, formatting, balance paid to date and other required billing information—all from within QuickBooks.

Choose from Multiple Email Contacts

Send emails more quickly by choosing the right recipients from a list of your customer or vendor contacts. Reduce errors and miscommunication resulting from the manual entry of email addresses.

Invoice Status Tracker

Invoice Status Tracker lets you track the status of your invoices at a glance. It gives you real-time visibility into what's outstanding so you can expedite collections and stay on top of your cash flow.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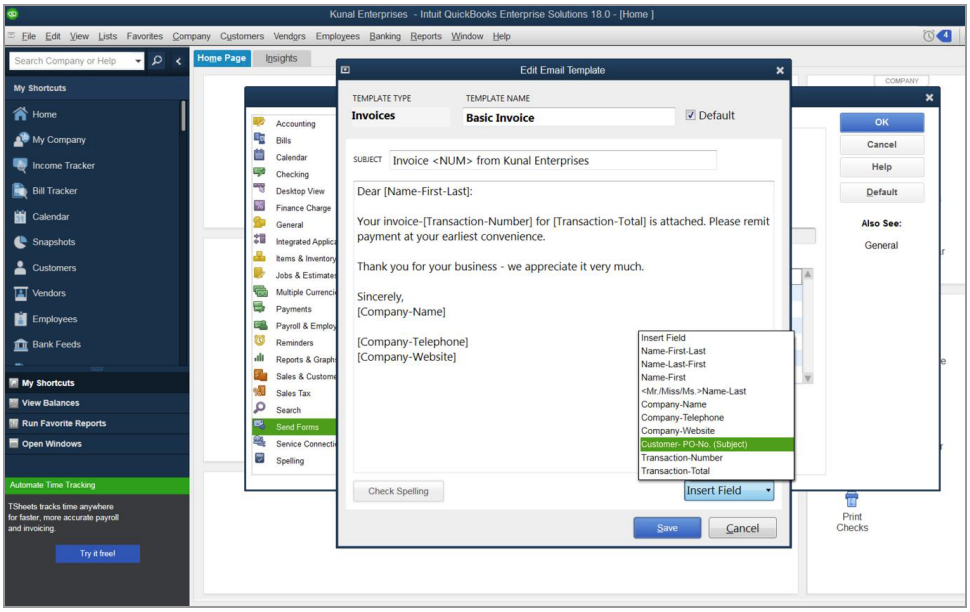
MEMO
Save & Close
Save & New
Revert

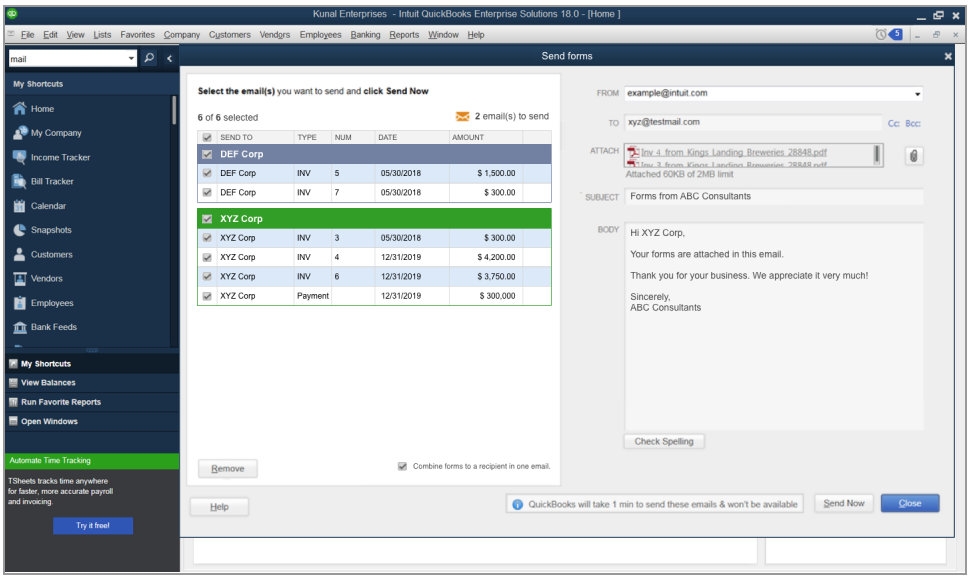
Customer PO Numbers in Emails

You can automatically add customer PO numbers to email subject lines in QuickBooks, making it easier for customers to find your invoices. Customers can easily search their email for PO numbers and you can get paid faster.



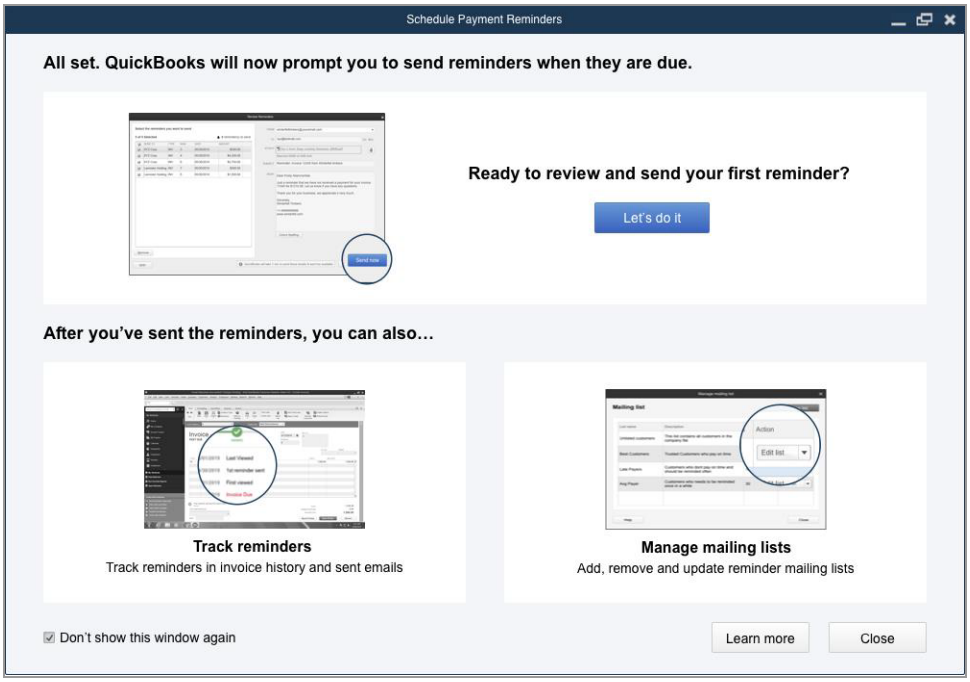
Combine Multiple Emails

You can simplify customer payment processing by consolidating multiple invoices into just one email. This feature reduces the risk of customers overlooking invoice emails and saves you time by letting you send multiple invoices at once.



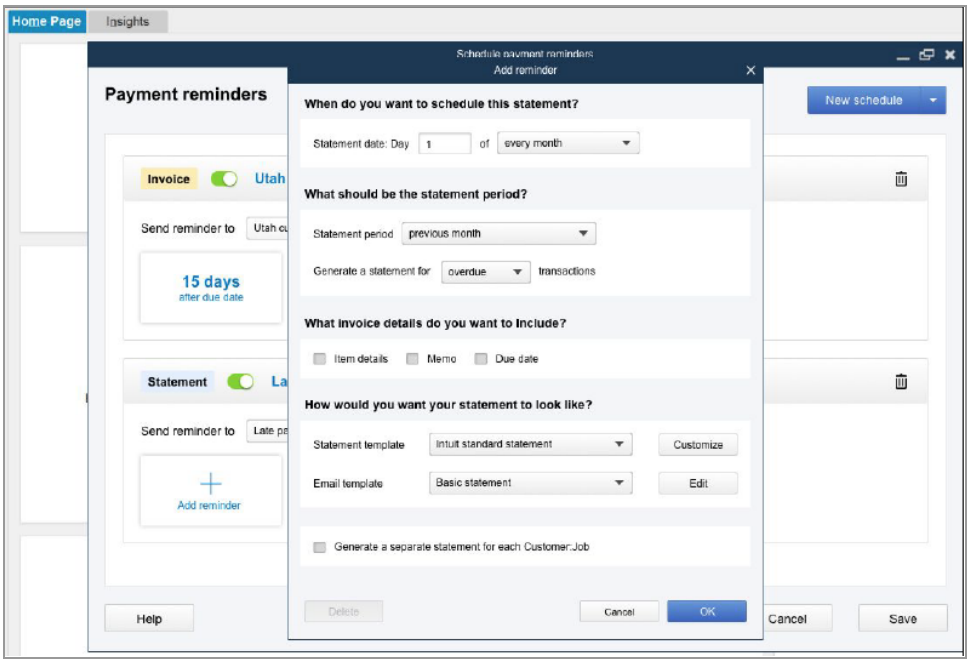
Automatic Payment Reminders

Automatic Payment Reminders help you get paid faster by letting you automatically set payment reminders for your customers when their invoices are due. They'll save you time by reducing the need to follow up with late-paying customers. You can also customize them for specific customers.



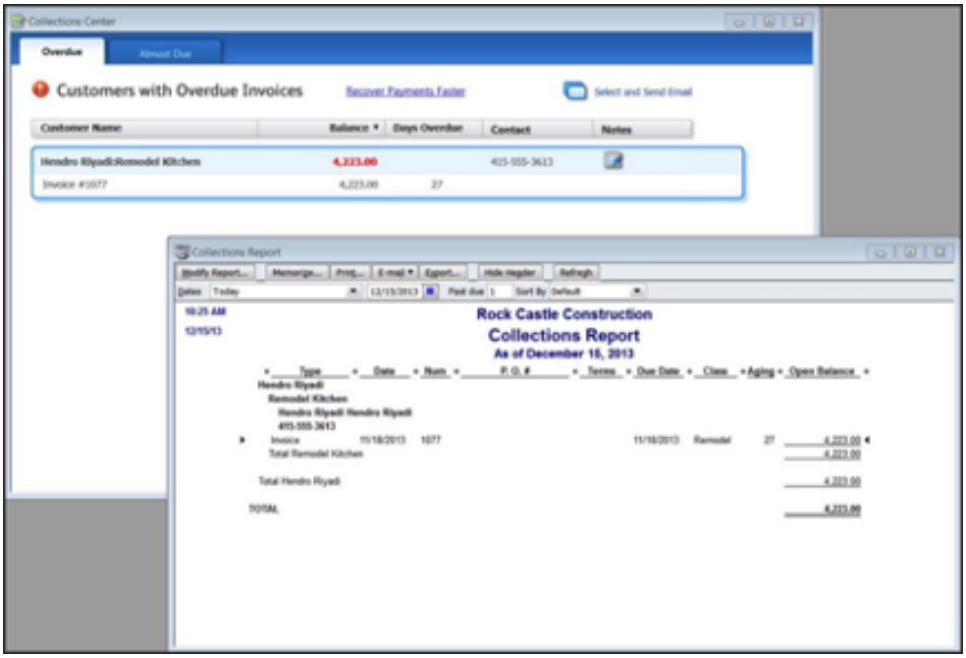
Automatically Send Statements

You can save time by automating recurring statements to different customer groups based on their needs or tendencies. This helps you stay on top of outgoing statements by reviewing them before they go out, and it helps you get paid faster by regularly reminding customers what they owe.



Collections Center

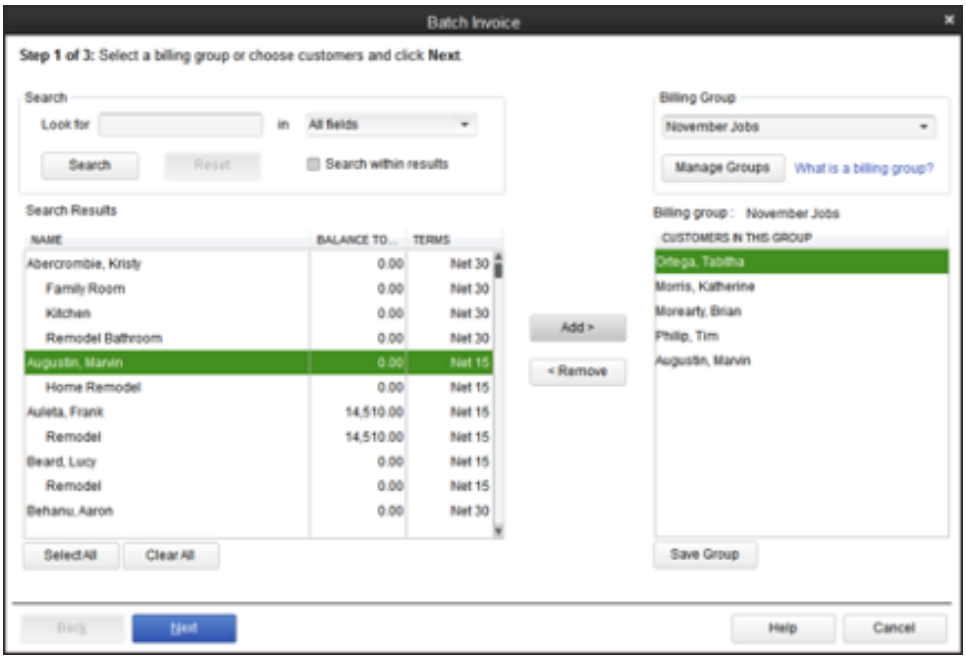
Quickly identify overdue and almost due invoices, and email all collection notices from your Outlook, Yahoo, Gmail, or Hotmail[1] account in a few steps.

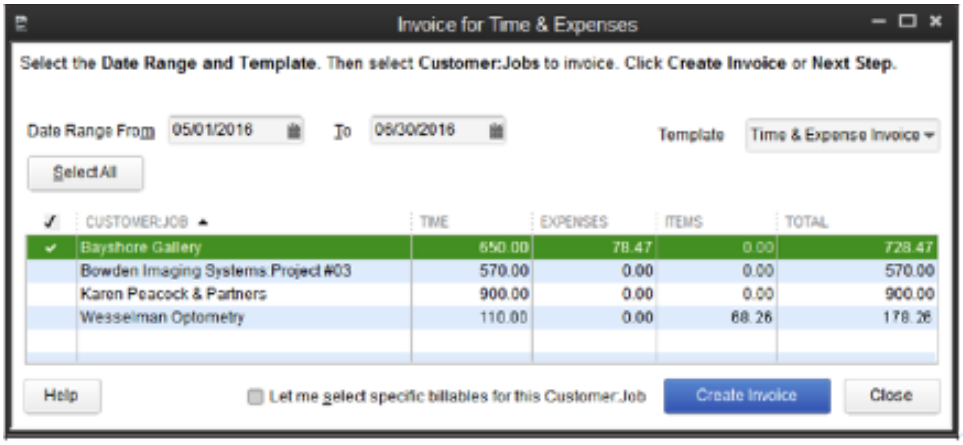


1 Works with Outlook 2003, 2007, and 2010; Yahoo and Gmail require an Internet connection.

Batch Invoicing

Create a template and invoice many customers at once with Batch Invoicing. Instead of creating individual invoices for many customers on the same service, you can create the invoice once, and pick the customers you want to invoice; Batch Invoicing will automatically create the full set of invoices for you. You can also Invoice multiple customers for time and expenses in one batch. Create a single invoice for customers who share regularly scheduled expenses and QuickBooks will process them, no additional reentry needed.





More Productivity Tools

Mileage Tracker[1]

Efficiently record mileage for business trips on Desktop or mobile so you can more accurately charge back your customers. Run a report of all your business trips in one place. And simplify your year-end taxes by consolidating your mileage data and automatically accessing the latest IRS rates to calculate deductions.

Document Center

Scan and attach receipts, estimates and other important business documents to your QuickBooks records with drag and drop ease. Store files locally on your hard drive.

Lead Center

Create and manage your business leads, and easily import and track existing leads. When a lead becomes a customer, move all the lead information to the Customer Center with a single click.

Calendar View

View timely information, including invoice and billing dates and other scheduled tasks, all in one place. Improved To-Do List captures relevant dates and displays them in the Calendar View. Past due transactions are automatically flagged.

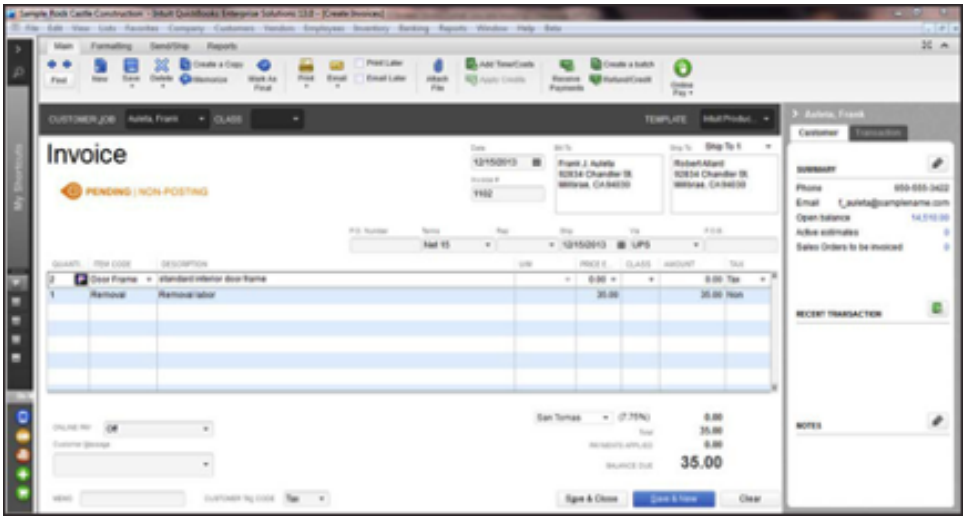
Memorized Transactions

Automate recurring transactions like weekly and monthly bills and invoices. Easily select which transactions to run and which to postpone. Includes bi-monthly option.

Faster Form Completion

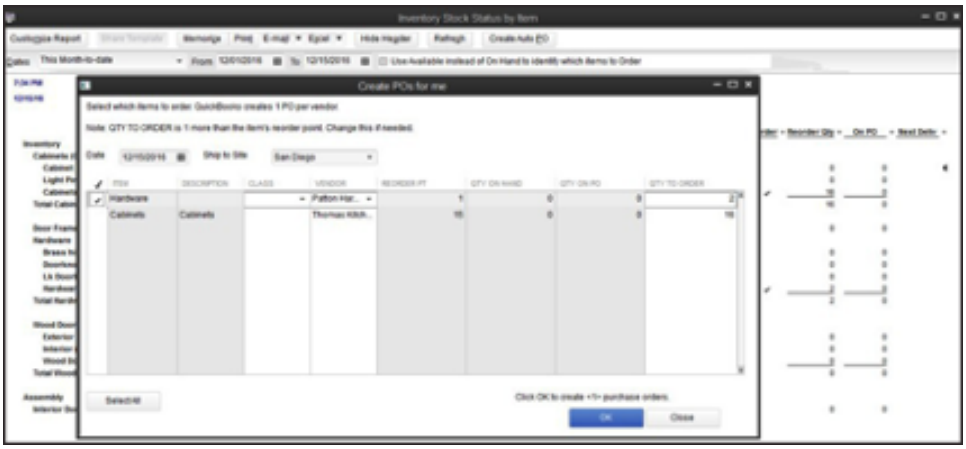
Find items in your sales forms based on item detail, including custom fields, directly from your sales order, invoice, or sales receipt. With the click of a button, populate the selected items into the form you're working on.

1 Track mileage mobile functionality is only available on iOS-enabled mobile phones for QuickBooks Desktop Enterprise, Pro Plus, and Premier Plus customers.



Default Classes

Save time and help improve accuracy by assigning default classes to items, accounts or names. When filling out transactions, QuickBooks automatically assigns the default class—you can change it at any time.



Bank Feeds

Bank Feeds is the online banking feature in QuickBooks Desktop that lets you connect to your financial institution so you can download transactions and use other online services.[1] You can automatically categorize bank transactions with more detail than ever by using enhanced rules, batch editing, and improved matching.Through Bank Feeds, you can process bank and credit card transactions efficiently, giving you more time for your other business needs.

- Rapidly import bank feeds by automatically categorizing or batch-editing your bank transactions by payees, accounts, and classes.
- Improve data integrity with enhanced matching and less manual entry.
- Gain flexibility and efficiency with enhanced rules that let you quickly search for and define categorization criteria.
- Quickly review or resolve transaction discrepancies.

Enhanced Banking Connections[1]

Save time with direct feeds from leading customer-preferred banks so you don't have to manually import banking data. Our banking connections use encrypted technology for added security and peace of mind. And they're easy to use with a simple, familiar user interface.

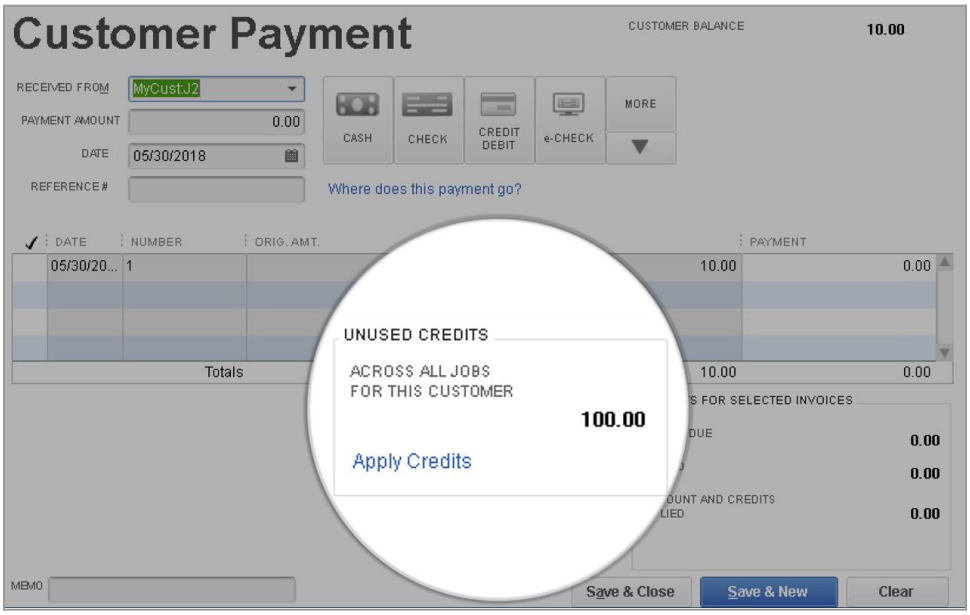
Receipt Management[2]

You can automatically create and categorize receipt expense transactions in QuickBooks by using the QuickBooks Desktop Mobile App to capture receipt data. Just photograph, import, and review.

- Stay organized by attaching digital receipt images to expense transactions for audit trails.
- Accurately categorize and record multiple receipt transactions at once.
- Get peace of mind with an easy and efficient review process.

Transfer Credits

You can transfer credits across customer jobs with one click. There's no accounting knowledge required and no need to figure out how to apply an overpayment from one job to another, so you can streamline your workflow with ease.

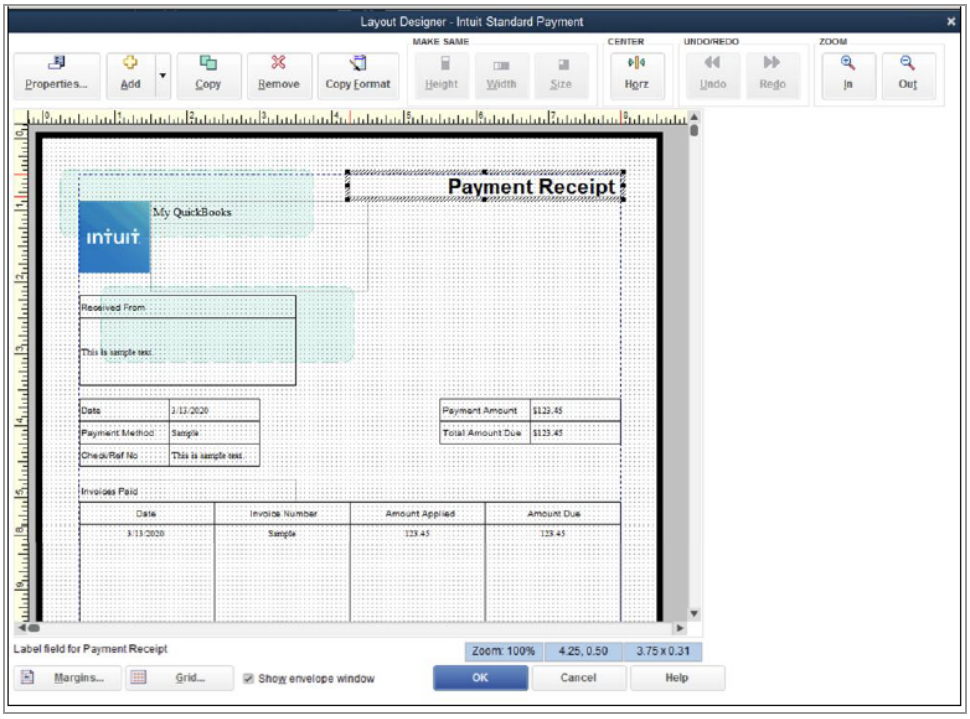


1 Online services vary by participating financial institutions or other parties and may be subject to application approval, additional terms, conditions and fees.

2 Receipt management: Requires a Pro Plus, Premier Plus or Enterprise subscription. Must have the QuickBooks Desktop App installed on a camera enabled mobile device using Android 5.0 (API level 21, Lollipop or onwards), or iOS 13 or later. Requires internet connection. Works only with expense receipts, not inventory item receipts.

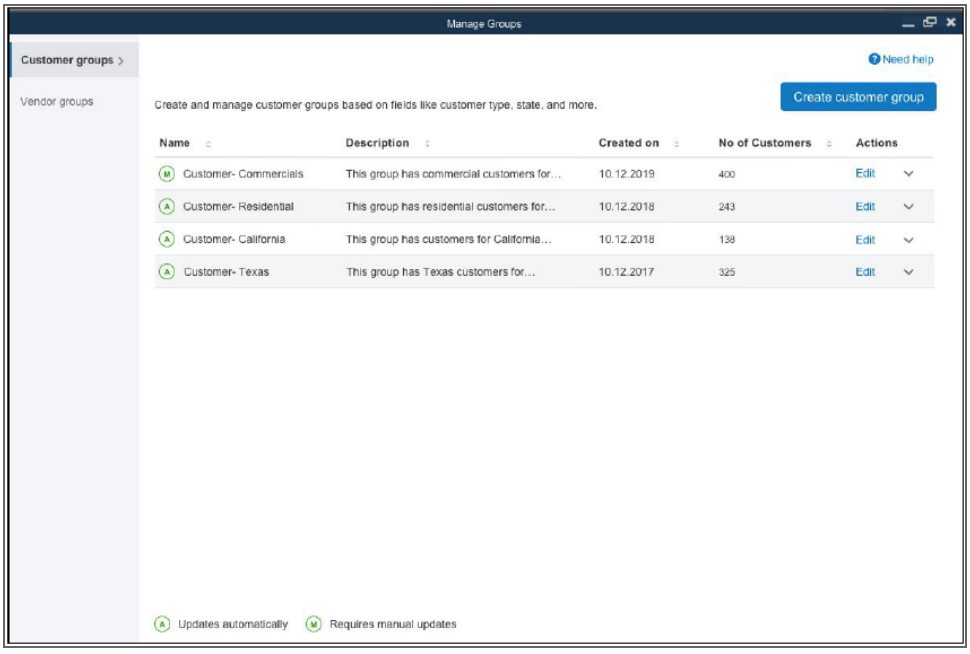
Customize Payment Receipts

You can customize payment receipts for a professional and consistent look across your customer communications. Leverage the same style, design, and logos. Set your unique format as the default and then tailor it to different customers to suit your needs. You can save time by saving multiple customized format settings as well.



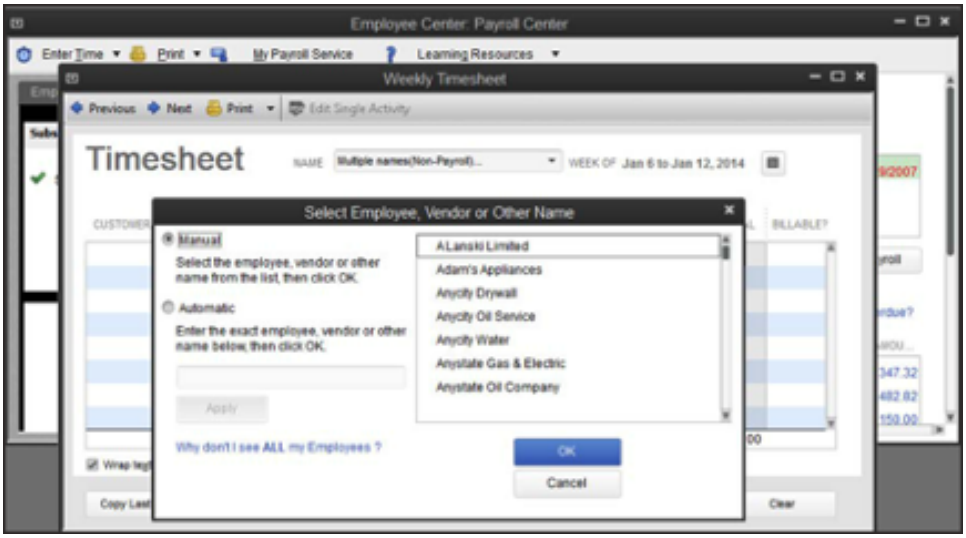
Create Customer Groups

QuickBooks lets you create rule-based customer groups based on fields like customer type, status, location and balance, so you can easily manage and communicate with your customers. You can communicate with each group separately and automatically update groups to match your specified criteria.



Batched Timesheets

Process multiple vendor and employee timesheets in one batch. Create a single timesheet for employees and vendors who share the same work hours, and QuickBooks will process them all with no additional reentry required.

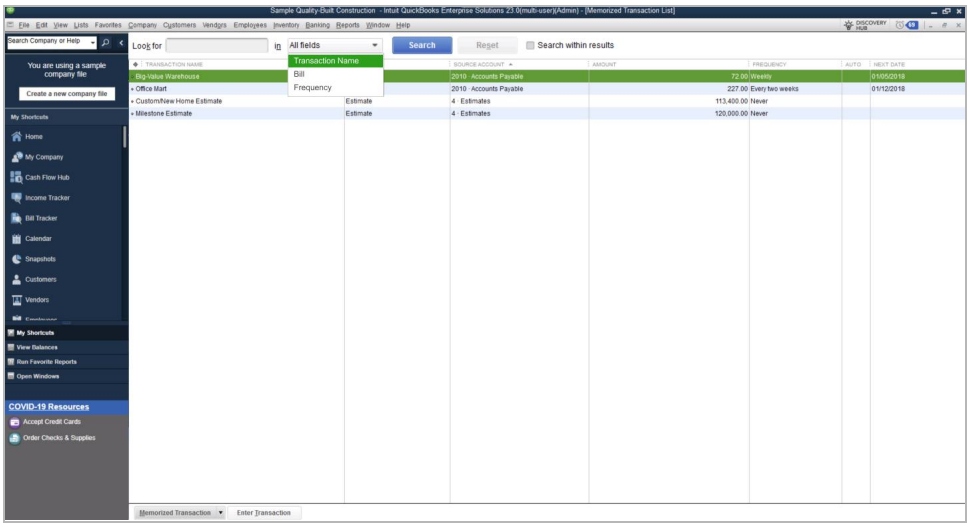


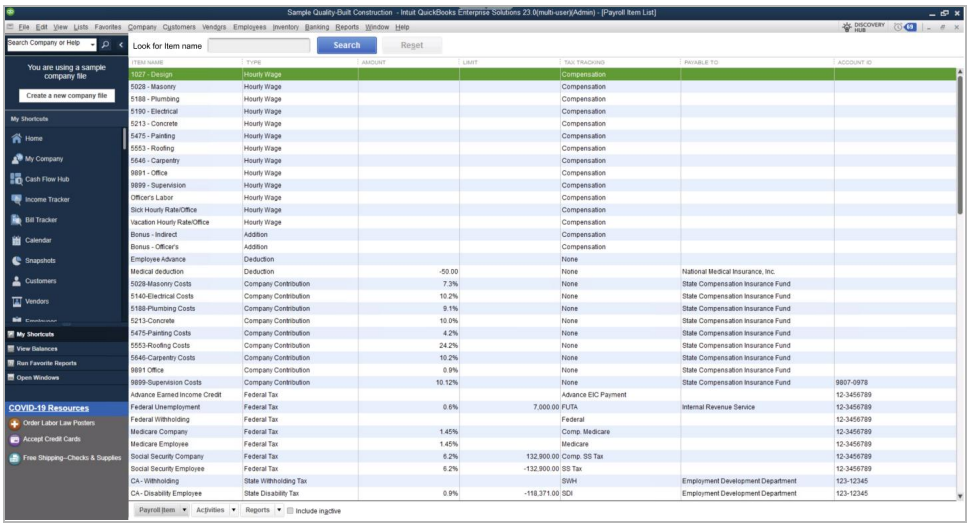
Batch Entry, Reclassify, and Delete

Mis-classify a large number of transactions under the wrong department, or mistakenly import the same transactions more than once? Get back your time by entering, reclassifying and deleting transactions in bulk. Also, write off invoices more easily than ever before, and manage your lists more actively with our review list changes function, which allows you to see what has been added, changed and deleted in the Chart of Accounts, Items, Fixed Assets and Payroll Items lists.

Improved Search of Item Lists

Power users can now work faster by using enhanced search to find specific items within a large list of memorized transactions, fixed assets, or payroll items. You can also edit transactions and items by quickly using the search functionality, rather than manually scrolling to find them.





Work in Two Company Files at One Time

Save time spent switching between QuickBooks files when you work in two instances of QuickBooks Desktop Enterprise at the same time.[1]

Rapidly Add or Edit Multiple List Entries from One Spreadsheet View

Save time by entering and editing your customers, vendors, item, or account information in bulk. You can even copy and paste data from other spreadsheets.

Additional Integrated QuickBooks Services

We know that Enterprise can't meet every unique need of every business, so we provide the ability to add what you need. That's why Enterprise easily integrates with a wide array of tested and proven third-party software applications that enable you to meet almost any business or accounting need, such as customer relationship management. You can tap into our network of software developers in the Intuit Developer Network to help you build a custom solution that integrates with Enterprise.

1 Some functionality may be limited when running two instances. See www.qbes.com/sysreq for more information.

Support and Upgrades

Included With Your Enterprise Subscription

Included in your QuickBooks Desktop Enterprise Subscription are free upgrades, enhanced customer support, and other exclusive benefits.[1]

Latest Product Upgrades: We are constantly researching customer needs and responding with new features, improvements in ease of use, and enhancements to current features. As an active QuickBooks Enterprise subscriber, you always have access to the latest product updates and upgrades to install as needed.[2]

Priority Circle VIP service: When you need QuickBooks help—no matter how much or how often—Priority Circle is there for you.[3] Priority Circle connects you with a dedicated account team, in-depth training and 24/7 premium support when you need it—so you can unlock all the power of your technology without missing a beat. No extra charge. No sign-up. Your Priority Circle membership benefits include:

- **A dedicated account team**: Get access to a team of product experts you can depend on for immediate QuickBooks expertise. They can help you to handle any issues and learn about new QuickBooks features and apps. They can also help you assess your future needs. Call or email them as often as you need to—and expect rapid response.
- **Online, on-demand training:** Your Priority Circle membership includes access to QuickBooks training courses and webinars worth $3,000. Each focused, self-paced module is available online 24/7—and your account team can point you to exactly the training you're looking for.
- **24/7 premium support:** Top-tier technical support is available to you, 24/7.* Call or chat anytime, day or night to talk to our top experts, or have them call you back. They can also help you solve problems in real time with screen-sharing.

1 The QuickBooks Desktop Enterprise subscription is good for 12 months from QuickBooks Enterprise purchase date subscription renewal date. You have the option to add Intuit Data Protect for free as an active subscriber to QuickBooks Enterprise. Service begins as of the date activated and continues through to the expiration date of your QuickBooks Enterprise subscription. Online Backup Service requires Internet access and an active QuickBooks Enterprise subscription. Entire PC is limited to 100GB total storage, which includes all 45 days which you have stored. In some cases data damage may be too extensive and the data file may be non-recoverable. QuickBooks support is available 24 hours a day, seven days a week; the U.S.-based QuickBooks Enterprise support team is available weekdays from 4:00 a.m.-7:00 p.m. Pacific Time. 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 limit each telephone contact to one hour and to one incident. Active QuickBooks Enterprise subscription members receive new versions of our products when and if released within 12 months of QuickBooks Enterprise purchase date or subscription renewal date. Online access to training is included with each QuickBooks Enterprise subscription. Terms, conditions, pricing, features, service and support options are subject to change without notice. See terms and conditions at qbes.com/terms.

2 QuickBooks product updates: Active QuickBooks Desktop Enterprise subscription members receive new versions of our products, along with updates to your current version, when and if released within 12 months of QuickBooks Desktop Enterprise purchase date or subscription renewal date.

3 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.

Industry-Specific Editions

QuickBooks Desktop Enterprise is available in industry-specific editions with specialized reports and workflows designed for manufacturers, wholesalers, retailers, contractors, professional services firms, nonprofits, and accountants.

Contractor

QuickBooks Enterprise Contractor has the same core features included with the standard edition of Enterprise, plus specialized workflows, reports, chart of accounts, job costing, and expert tips to better serve contractors. It's made to meet the needs of:

- Construction
- Carpenters
- Electricians
- Painters
- Plumbers
- Remodeling

Specialized features include:

The Job Costing Center

A single screen summarizes key information on all jobs.

Advanced Job Costing Tools

Accurate job costing estimates help you stay on top of costs and cash flow. You'll be able to see which jobs are making money and which are not, so you can make adjustments before it's too late.

Change Order Functionality

Accurate and complete estimates including Change Orders help to eliminate surprises for your clients and their customers. Users will be able to track and highlight changes to existing estimates, showing all change orders and the resulting cost impact, every time.

Flexible Billing Rates

Flexible billing rates allow users to assign different rates to different employees so they'll always have an accurate assessment of their total job's cost.

Additional Reports for Contractors

Track your job costs automatically as you pay bills, employees and subcontractors. Enterprise lets you see how you're doing at every phase of the job with 18 additional reports that help contractors make more money from jobs. Reports include:

- Job Status
- Job Costs by Vendor
- Job Costs by Job
- Cost-to-Complete
- Unpaid Bills by Job
- Unpaid Job Bills by Vendor
- Expenses Not Assigned to Jobs
- Billed/Unbilled Hours by Person & Job
- Open Purchase Orders by Vendor

Contractor Chart of Accounts

You may not have the time or accounting expertise to set up your chart of accounts to reflect your specific business. The Contractor edition of Enterprise provides you with a preset chart of accounts that have been developed by industry accounting professionals.

Manufacturing & Wholesale

QuickBooks Enterprise Manufacturing & Wholesale has the same core features included with the standard edition of Enterprise, plus specialized workflows, reports, chart of accounts and expert tips to better serve manufacturers. From inventory management to order tracking and sales fulfillment, Enterprise has everything you need to help your manufacturing business succeed. It's ideal for:

- Apparel Manufacturers
- Automotive Parts
- Food Manufacturers
- Furniture Manufacturers
- Hardware Manufacturers
- Gifts & Novelty Items

Bill of Materials Cost Tracking

Users can track costs accurately. Assemble items and track their Bill of Materials costs, including labor and overhead costs.

Available to Promise

The Product Availability feature puts all the important inventory data on one simple screen. It allows users to easily drill-down to see details on which customers have ordered the product, or view open purchase orders placed with vendors.

Sales Order Fulfillment Feature

This feature shows all open sales orders on one simple screen. Users can:

- Sort open sales orders by date, by shippable dollar amount, or by customer with 1 click
- Customize whether you want to allow partial shipment, or only complete orders
- Select the orders they want to ship, then instantly batch print pick lists, packing slips, or invoices

Create Sales Orders to Easily Track the Status of the Order

Using sales orders, you can:

- Quickly see whether an order's been shipped, or not.
- View reports of all open sales orders by customer, or by item.
- Instantly turn sales orders into work orders, purchase orders, pick lists, or packing slips.
- Create invoices from full or partial sales orders—you choose which items to invoice

Backorder Tracking on Sales Orders, Purchase Orders and Invoices

Backorder Tracking columns on sales orders, invoices, and other sales forms show exactly what still needs to be shipped. Backorder column on purchase orders shows what's still expected from vendors.

Customize Price Levels to Keep Your Prices Competitive

This feature enables users to define different prices for different types of customers, such as high-volume, retail, or preferred customers. Users can also create up to 100 customized price levels for each item using a fixed % or dollar amount.

Multiple Shipping Addresses Per Customer

This feature simplifies customer shipping address management by making it easier to find and use the correct customer shipping address when creating a Sales Order, Estimate, Purchase Order, Invoice, Sales Receipt, and Credit Memo. Clients can store an unlimited number of shipping addresses per customer. Addresses are selectable from a dropdown list where shipping addresses are entered.

Additional Reports for Manufacturers & Wholesalers

See which products, customers, and jobs are profitable…and which aren't.

- See how your sales reps are performing
- Track open sales orders by customer or by item
- Track open purchase orders
- Track customer returns with the Return Materials Authorization (RMA) form
- Monitor defective materials with the Damaged Goods Log
- Document information on materials that don't meet specifications with the Non-conforming Material Report
- Use the Physical Inventory Worksheet to check your physical inventory against your QuickBooks records

Manufacturing & Wholesale Chart of Accounts

Track the right information, right from the start. The Manufacturing & Wholesale Chart of Accounts was developed by industry financial experts to organize your financial information the way you need to see it. The accounts work with manufacturing and wholesale-specific reports to give you better insight into your business and easier tax preparation.

Nonprofit

QuickBooks Enterprise Nonprofit has the same core features included with the standard edition of Enterprise, plus specialized workflows, reports, chart of accounts and expert tips to better serve nonprofit organizations. The Nonprofit edition helps you work smarter and more efficiently so you can spend more time on what's important - your donors, charities, and foundations. It's perfect for:

- Charities & Foundations
- Religious Groups
- Human Services
- Arts
- Academia & Education
- Any other tax exempt entity

Specialized features include:

Customized for Nonprofit Accounting

Preconfigured for nonprofits with memorized reports, chart of accounts, and templates so you can quickly track and manage your organization's finances.

Streamline Fundraising Tasks

Integration with Microsoft® Word[1] enables seamless transfer of donor information directly from QuickBooks. No retyping required.

Flexible Customization Options

Users can format reports and donor forms the way they like. Add your logo or mission statement so that it is professional and customized for their organization.

The Donor Center

Manage donors. A single screen provides summary information for all donors. Click on a donor's name and clients can see that donor's contact information and every donation they've pledged.

1 Microsoft products sold separately. Word and Excel integration requires Office 2010 SP2 and above, or Office 365. Synchronization with Outlook is also possible with Contact Sync for Outlook 2010 (32-bit).

Additional Reports for Nonprofits

See the information you need to manage your organization effectively and satisfy IRS requirements. No need to spend hours adapting standard business reports or writing spreadsheet formulas. Enterprise Nonprofit includes 9 reports created specifically to provide the information nonprofits need. And you can see any of them, anytime, with one click of your mouse. Reports include:

- **Budget by Programs** – Instantly see a snapshot of funding for each of your programs. See how allocated funds and actual expenses compare with budgeted amounts.
- **Statement of Financial Income & Expense** – Summarize your income, expenses and net income in a report that uses terminology relevant to your organization. Keep your Board and the IRS up-to-date effortlessly.
- **Statement of Functional Expenses-990** – Summarize figures from appropriate accounts into expense categories that match IRS Form 990 line for line. Just transfer the totals, in order, to the form.
- **Donors & Grants** – Create an instant summary of all your donors and grantors, including contact information, contributions and expenses incurred against each donation or grant.
- **Biggest Donors** – Streamline fundraising campaigns by creating a contact list of donors, sorted from largest contributor to smallest over any time period you choose.
- **Statement of Financial Position** – Check your organization's finances, and take action to keep small problems from becoming big ones. Provide your Board with a financial snapshot in terms relevant to nonprofit organizations.
- **Track Employee Hours** – Track employee hours by program for an accurate accounting of program expenses. Enterprise tracks program costs automatically as you pay related bills and employees. Enter employee hours by day or week. QuickBooks sends totals directly to paychecks and nonprofit reports to help you make better decisions.

Nonprofit Chart of Accounts

Categorize your transactions as you enter them for faster, easier IRS reporting and more insight into your finances. The Nonprofit Edition of Enterprise incorporates the Unified Chart of Accounts (UCOA), a set of accounts developed specifically for nonprofits by nonprofit specialists. With each transaction assigned to an account in the UCOA, you can run nonprofit-specific reports that give you the information you need, exactly the way you need it. Save hours filling out government forms—just transfer the totals from your Enterprise reports.

Professional Services

Professional service firms are different from other businesses because they bill for time/services vs. sell goods. Key financial activities include creating estimates, tracking time and project costs, and billing clients. QuickBooks Enterprise Professional Services helps you manage all these tasks with minimal effort so you can keep your clients—and your firm—happy.

QuickBooks Enterprise Professional Services has the same core features included with the standard edition of Enterprise, plus special workflows, reports, chart of accounts and expert tips to better serve professional services providers.

Enterprise is made to be easier to use for professional services firms, such as:

- Consulting Firms
- Engineering Firms
- Architecture Firms
- Law Practices
- Physicians & Dental Practices
- Graphic Design Firms
- PR Agencies
- Ad Agencies

Specialized features include:

Project costing

Enterprise includes the most robust project costing of any QuickBooks product.

- Get high-level insights—like which projects bring in the most revenue—at a glance.
- Bill at multiple hourly rates on a single project.
- Costs are calculated automatically based on each employee's hourly rate, and sync automatically with reports and invoicing.
- Integrate with QuickBooks Time for easy time tracking for your employees—no matter where they are.[1]
- Special reports like billed vs. unbilled labor help ensure you're re-billing every hour to clients and nothing slips through the cracks.

Seamless Integration with Microsoft® Word[2]

Create letters and envelopes by transferring customer information directly from QuickBooks into Microsoft Word.

Flexible Billing Rates

Different billing rates can be assigned to different employees.

1 QuickBooks Time Elite time tracking is included in the base subscription for Enterprise Diamond. Per-employee monthly fees apply. Each employee is $5 per month. Requires an Internet connection.

2 Microsoft products sold separately. Word and Excel integration requires Office 2010 SP2 and above, or Office 365. Synchronization with Outlook is also possible with Contact Sync for Outlook 2010 (32-bit).

Additional Reports for Professional Services Providers

Make informed business decisions with 17 Professional Services reports, including 6 reports on job costing. QuickBooks tracks costs automatically as you write checks and pay employees. Reports include:

- Project Costs by Vendor
- Job Costs by:
    - Vendor and Job Summary
    - Vendor and Job Description
    - Job and Vendor Summary
    - Job and Vendor Detail
- Project Cost Detail
- Unbilled Expenses by Project
- Expenses Not Assigned to Projects
- Billed Versus Proposal by Project
- Billed/Unbilled Hours by Person
- Billed/Unbilled Hours by Person & Project
- Billed/Unbilled Hours by Person & Activity
- Open Balances by Customer/Project
- A/R Aging Detail by Class
- Project Status
- Project Contact List, and more!

Professional Services Chart of Accounts

You may not have the time or accounting expertise to set up your chart of accounts to reflect your specific business. Enterprise Professional Services provides you with a preset chart of accounts that have been developed by industry accounting professionals.

Retail

QuickBooks Enterprise Retail gives you one retail solution to manage your cash and take care of your customers. It has the same core features included with the standard edition of Enterprise, plus special workflows, reports, chart of accounts and expert tips to better serve retailers. Use it alone, or pair it with QuickBooks Point of Sale[1] software (sold separately) to transfer sales, inventory and customer information to your books in one quick step. It's perfect for:

- Bakeries & Donut Shops
- Food Chains & Franchises
- Candy Shops
- Boutiques & Clothing Stores
- Furniture Stores
- Toy Stores

Specialized features include:

Sales Summary Form

Users can track their sales results in one convenient place with the Sales Summary form—enter sales for the day, week, or any time period they choose. Calculate sales tax liability automatically, and quickly identify over/under amounts.

Custom Price Levels Feature

Price products competitively—the Price Levels feature lets users create up to 100 price levels for any item, or create customer price levels.

Additional Reports for Retailers

The Retail edition helps retailers track the right information easily. Track sales results accurately with the Sales Summary Form. Enter total payments and taxable/non-taxable sales for the day, wee—or any time period you choose. Or transfer the information in one quick step from QuickBooks Point of Sale software and you never have to enter it at all! Retail Edition calculates your sales tax liability automatically, and you can easily spot cash drawer over/under discrepancies.

The Retail edition also comes with 14 built-in retail-specific reports that help see where you stand in every area of your business. With just one click, you can run reports that allow you to:

- Summarize sales by type of payment and spot sales trends
- Calculate sales tax liability automatically
- Prioritize bills for payment
- Keep tabs on your vendor purchases and vendor returns
- Understand where your profits (or losses) are coming from

1 Additional fees may apply.

Retail Chart of Accounts

Set up QuickBooks for your business right from the start. Choose from predefined company files for a variety of retail business types. They'll give you the accounts and settings you need, which you can customize at any time. The Retail Chart of Accounts included only in Enterprise Retail was developed by retail industry financial experts to organize your information the way you need to see it. The accounts work with retail-specific reports to give you better insight into your business and easier tax preparation.

Accountant Edition

QuickBooks Enterprise Accountant is packed with features that make working with your clients better for you and easier for them.

Enterprise Accountant is the only application accounting professionals need to open and modify the data files of their Enterprise clients, regardless of which Enterprise Industry Edition they use.

QuickBooks Enterprise Accountant is fully compatible with all Enterprise files. It can also open other QuickBooks files (Basic, Pro, Premier), but once opened and converted to the Enterprise format, the file cannot be used again in QuickBooks Basic, Pro, or Premier, nor can it be used in prior versions of Enterprise. In other words, Enterprise Accountant is not “backwards compatible” with Basic, Pro, Premier, or prior versions of Enterprise. QuickBooks Premier Accountant is recommended to fully support clients’ QuickBooks financial files. Accountants that support business clients using both QuickBooks and QuickBooks Enterprise typically have both the Premier Accountant and Enterprise Accountant programs to manage their respective clients’ data files.

Features unique to the Enterprise Accountant Edition include:

Client Data Review

Reclassify hundreds of transactions at once, fix incorrectly recorded sales tax payments, identify changes made to list items from a single window, clear up the undeposited funds account from one screen, and more.

QuickBooks File Manager

Make it faster and easier to work with your client’s QuickBooks files—get version control, securely store client passwords, organize QuickBooks files by client, and upgrade QuickBooks clients’ files in batches.

Accountant Center

Get all of your accountant tools front and center, so you can begin reconciliation right away.

Send General Journal Entries

Quickly and easily send journal entries to your client with any changes needed in their file.

System Requirements

System Requirements

- Client: Windows 10 (64 bit) , or Windows 11, update/version supported by Microsoft. Windows 8.1 and Linux are not supported.
- Server: Windows Server 2012 (or R2), 2016, 2019, or 2022 (Regular or Small Business Server)
- 2.4 GHz processor
- Client RAM: 8GB RAM; 16GB RAM recommended
- Server RAM (for multi-user support): 8GB (5 users); 12GB (10 users); 16GB (15 users); 20GB (20+ users)
- 2.5 GB disk space recommended (additional space required for data files); Solid State Drive (SSD) recommended for optimal performance
- Enterprise subscriptions, payroll, and online features require internet access
- QuickBooks Desktop App access is included with Desktop subscriptions. Must be installed on a camera-enabled mobile device using Android 6.0 or iOS 12 or later
- Product registration required
- Optimized for 1280x1024 screen resolution or higher. Supports one Workstation Monitor, plus up to 2 extended monitors. Optimized for Default DPI settings

Integration with Other Software

- Microsoft Word and Excel integration requires Office 2013-2021, or Microsoft 365 (32 and 64 bit)
- E-mail Estimates, Invoices and other forms with Microsoft Outlook 2013 - 2019, Microsoft 365, Gmail™, and Outlook.com®, other SMTP-supporting email clients. Integration with QuickBooks POS 19.0.
- Transfer data from Quicken 2016-2022, QuickBooks Mac/Mac Plus 2021-2023 (US only) and Microsoft Excel 2013 - 2021, Microsoft 365 (32 or 64 bit)

Browser Requirement

- Google Chrome

Data Management

- Uses AES-256 for data encryption for all PCI and PII data

Operational Security

- PCI PA-DSS certified, assessed annually as a payment application
- Remainder not applicable as program is installed in customer environment and no data is stored on Intuit systems

For IT Professionals—Performance, Stability, and Database Connectivity

To maximize multiple user productivity, QuickBooks Desktop Enterprise multi-user mode is optimized for Microsoft® Windows 2008 Server and later client-server networks. You also have the option of hosting your database server on a Linux operating system.

QuickBooks Desktop Enterprise is also Remote Desktop Services compliant.[1] You can centrally locate QuickBooks Desktop Enterprise on a single server and provide access to your multiple users via the LAN or WAN for remote locations. As a result, you don't have to install QuickBooks Desktop Enterprise on each user's PC and you can maximize performance over lower bandwidth connections.

In addition, you have the option to purchase QuickBooks Desktop Enterprise with Hosting,[1] powered by Right Networks. For more info, please refer to QuickBooks Desktop Enterprise with Hosting on page 57.

1 Hosting / Cloud Access: The Cloud access service is a monthly subscription. Each month, your account will be automatically charged the agreed-upon price of the service unless and until you cancel. Cancel at any time by calling Intuit at 800-300-8179, prior to your monthly renewal date. When a customer calls to cancel, it is canceled and refunded at the date through the end of the current billing period. The QuickBooks Desktop Enterprise software portion of the QuickBooks Desktop Enterprise with cloud access bundle is an annual subscription. If you choose to purchase a QuickBooks Desktop Enterprise subscription using the Monthly Payment Plan or QuickBooks Desktop Enterprise with cloud access, you elect to pay your annual subscription in equal payments over the course of 12 months. Purchasing an annual subscription for QuickBooks Desktop Enterprise commits you to a 12 month term. You must pay for all 12 months of the subscription in full based on the then current rate of QuickBooks Desktop Enterprise. If you choose to cancel inside the first 60 days, you can opt to receive a refund per the 60 day money back guarantee (see https://quickbooks.intuit.com/software-licenses/ for details). However, if you choose to cancel after the first 60 days and prior to the end of month 12 you will be subject to a termination fee equal to the amount of monthly payments left on your annual subscription. For purpose of clarity, if you pay for 6 months and have 6 months remaining on your annual subscription, which starts at date of enrollment, you will be charged a termination fee equal to the then current monthly fee of QuickBooks Desktop Enterprise multiplied by 6 months (remaining months left on annual subscription).