

2014 QB Module/Feature Comparison	Pro	Premier	Enterprise	Premier/ES Accountant	MAC	QBO Essentials	QBO Plus	QBOA	Notes to Consider
<p><i>Radical Departure: QuickBooks Online has been completely revamped, called the New QBO or QBO New. You will see some and then more until all of your QBO clients have the new QBO User Interface. It is "Desktop" fast with a simpler and easy to adopt workflow and less clicks to achieve action. Here is a link to a 10 minute video on the New QBO: <a href="http://youtu.be/nTijnPNMiRA">http://youtu.be/nTijnPNMiRA</a></i></p>									
<p><b>***Features below shaded light blue are either 2014 new feature enhancements or improvements to existing features</b></p>									<p><b>QBOA inherits features of client QBO level plus additional accountant tools</b></p>
Accept Credit Card payments from customers	x	x	x	x	x	x	x	n/a	Additional fees apply, free for ProAdvisors
Accountant Center				x				x	Customize and access accountant tools from one view. QBPB has a Bookkeeping Center
Accountant's Copy (Send to Accountant)	x	x	x	x		n/a	n/a	n/a	Ability to create a file (QBX) to send to accountant
Accountant's Copy Conversion				x		n/a	n/a	n/a	Convert QBX to QBA, or QBA to QBY and send changes back to client's QBW
Activity Log--Not only track txn changes but when users log in/out						x	x	x	
Adjusted Trial Balance Report			x	x				x	7 column report detailing unadjusted/adjusted TB
Advanced Pricing Add-On \$399/yr			x	x					Add-on to QBES 14, like Advanced Inventory. Active Full Service Plan required. Offers ability to create Price Rules, Make rules exclusive, and Set quantity discounts on items.
Anywhere, Anytime Access						x	x	x	QBO is built for this. QB desktop would require hosting provider or terminal server, citrix, lynux, etc
Audit trail tracks changes to transactions	x	x	x	x	x	x	x	x	Audit Trail in QB desktop, Activity Log in QBO
Audit trail tracks lists changes	X	X	X	x		x	x	x	Need CDR to track changes to lists in QB desktop. Non-accountant editions, signed in as EA, can access CDR
Audit trail tracks when users log in and out						x	x	x	No way in QB desktop
Auto Deliver Reports						x	x	x	Set reports or report groups to auto-send
Auto Sales Price Markup			x	ESAE					Markup items automatically when costs change, set by amount or % above cost or sales price
Automatic offsite backups	x	x	Free with FSP	x		x	x	x	Requires IDP subscription for QB desktop, ES free with FSP

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Automatic upgrades						x	x	x	QBO requires no installations or maintenance releases
Average cost inventory valuation method	x	x	x	x	x				
Balance Sheet by Class		x	x	x					
Bank Reconciliation	x	x	x	x	x	x	x	x	
Bank Reconciliation -- List of Previous Monthly Reconciles		x	x	x	x			x	Mac supported 2013
Bank Reconciliation--Undo previous	x	x	x	x	x			x	Mac supported 2013
Bar Code Scanning			Advanced Inventory	ESAE with AI					ES 13 with additional Advanced Inventory purchase
Batch Enter Transactions			x	x					Now supports Invoices/Credit memos, Bills/Bill Credits. This was a 2013 QBA/ES enhancement that supported Checks, Deposits, and Credit Card Charges/Credits
Batch Invoicing	x	x	x	x	x				Create the same invoice for multiple customers at once. Mac supported for 2013
Batch invoicing for Time and Expense		x	x	x					Create different invoices for multiple customers at once
Batched Timesheet Entry	x	x	x	x					Create timesheet for multiple employees/vendors
Billable Time and Expense Preference	x	x	x	x					When entering time or expenses, you now have the option control whether QuickBooks automatically bills for them
Billing Rate Level		Contractor Professional	Contractor Professional	x					Allows user to create and assign different billable rates to their employees/subcontractors for service performed
Bin Tracking: Row Shelf Bin tracking, Sub-sites			Advanced Inventory	ESAE with AI					ES with AI can now track up to a million locations for inventory, including rows, shelves and bins
Bounce Check Feature	x	x	x	x					Instead of the rather involved workaround in Help, users can record a bounced check against a customer payment in a few clicks.
Budgets	x	x	x	x	x		x		

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Business Planner, Forecasting, Balance Sheet by Class (Premier and ES)		x	x	x					
Calendar View	x	x	x	x					Track appts, current and overdue transactions, To Do's
Change Orders on Estimates		Contractor	Contractor	x					Track changes to your job estimates/contracts
Class Tracking	x	x	x	x	x		x		Track most business activity by department, etc
Class Tracking--Assign Default classes to names, accounts and items			x	ESAE					
Client Collaborator				x					Converse with your clients about transactions within the data file.
Client Data Review	x	x	x	Full Version				x	In QBA/ESA 2014, the Reclassify Transactions tool now supports batch reclassifying transactions Written From the wrong account. QB 2009-2012, Accessible in non-accountant QB when signed in as External Accountant user. QBOA offers Batch Reclassify and Write-Off Invoices. New for CDR 2013, write invoices to credit memo
Collections Center	x	x	x	x					Track overdue and almost due invoices
Company Scorecard						x	x		QBO has a Trend Tracker as well
Company Snapshot	x	x	x	x	x	x	x		
Comparative Balance Sheet and P&L	x	x	x	x	x			x	
Condense Data file	x	x	x	x	x	n/a	n/a	n/a	
Condense Data--Period Copy				x					Create a file for a specific period of data
Condense Data--Summary Journal Entry			x	x					Condense now allows for one summary entry
Condense Data--No Summary Entry			x	x					
Create Estimates	x	x	x	x	x		x		
Current Availability		x	x	x					Tracking what is available to promise to a customer, not just QOH

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Current Availability Window		Retail, M&W	x	x					Window details what is on SO, PO or Assembly per item, QOH and what is currently available to sell
Custom Fields	x	x	x	x	x	x	x		Desktop QB custom fields for items and names, QBO allows 3 fields on forms. Pro/Premier is 5 for items, 15 for names, ES is 15 for item, 30 for names
Customer Snapshot	x	x	x	x					
Delayed Charges/Billing						x	x		QBO feature--Enter charges to be billed later
Document Center/Management	x	x	x	x	x	x	x		Doc Center for local storage in QB desktop free. Attached Docs still requires subscription to store online, not included for PAP anymore. QB Mac 2013 now supports Document Management and QBO supports for invoice/sales receipt
Enhanced Item Receiving			x	ESAE					Bill and Item receipt are separate/unlinked transactions
Express Setup of QB Company file	x	x	x	x	x	x	x		QB Mac 2013 has a better easier setup
FIFO Inventory Valuation			Advanced Inventory	ESAE with AI			x		ES 12 AI. Inventory Cost First In, First Out method
FIFO Cost Lot History Report			Advanced Inventory	ESAE with AI					Track acquisitions and disbursements for cost liting
File Manager/Client File Dashboard				x				x	
Find and Select Items			x	ESAE					Quickly find and select items on transaction, add multiple at once
Go from Estimate to a PO or SO		x	x	x					Very important to contractors
Improved Excel Reporting	x	x	x	x	x				Export report to existing excel spreadsheet
Income List/Transaction Center	x	x	x	x	x	x	x		QB Pro/Premier/ES/Mac all now have an Income Tracker/List module.
Industry specific reporting		x	x	x					QBA and ESA have all edition reports
Integrated Help	x	x	x	x	x	x	x	x	QB 2011 Plus too: Help, KB and Community articles
Inventory Assembly/Bill of Materials		x	x	x					Manufacture finished good from component parts

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Inventory Assembly--Edit Build/Variable Builds			x	ESAE					To edit build in Premier, must edit the actual assembly item. Time consuming, not ideal like ES
Inventory Assembly--Build Nested Assemblies and auto-Update BOM cost when BOM component cost changes			x	x					QBES 14.0 supports Building Nested (sub-assemblies of final assemble) assemblies when the final assembly is built. Industry term is "exploding builds". Also, when assembly component cost changes, BOM cost and sales price auto update.
Inventory Center		x	x	x					ES supports item picture
Invoice Automation						x	x		Automatically create invoice from unbilled activity
Job Costing Module and Reports	x	x	x	x	x		x		2014 Pro/Premier supports linking Sales Rep to Job, Filtering reports by Job Status. QBES supports customizing bill, check, and credit card charge columns, and two new reports, Job WIP and Committed Costs. QBO Plus does not offer a lot of "job" reports. No Estimate v Actual
Journal Entries: Adjusting			x	x				x	Mark a JE as an adjusting entry
Journal Entries: List of Previous Entries			x	x					
Journal Entries: Debit and Credit Totals			x	x		x	x	x	
Journal Entries: Reversing		x	x	x		x	x	x	
Journal Entries: More than on AR/AP per...						x	x	x	
Journal Entries: Send JE to client				x					Send JE to client via email, import into data file. For QBA 2014, Accountant can send JE's to QB Mac 2014 clients.
Lead Center	x	x	x	x					
Line Items copy/paste on forms	x	x	x	x					2014 supports copy/paste of line items on a transaction
Location Tracking							x	x	A secondary level of class tracking
Manage Fixed Assets			x	x					Track your fixed assets and post depreciation to QB
Mileage Tracking	x	x	x	x	x				Enter vehicle mileage and assign to customer/job

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Multi-currency	x	x	x	x					
Multi-Location Access						x	x	x	Desktop QB requires Citrix, Terminal Server or Hosting
Multi-Instance			x	x					2 company files open in same program year
Multi-User Access	up to 3	up to 5	up to 30	x	up to 5	up to 3	up to 5		QB is a User License, regardless of concurrent use
Multiple Vendor ship to addresses	x	x	x	x					
Multiple windows	x	x	x	x	x	x	x	x	View and flip thru multiple windows in your view. For QBO/A, use multiple tabs in Google Chrome, Firefox or IE 7 and up
ODBC functionality	x	x	Free	x					Open Database Connectivity for SQL queries. Free in ES
One-click Transactions	x	x	x	x					Pay bill right from bill, Receive Pmt or Create Credit Memo from invoice. QB 2011 Plus too
Online Banking/Bank Feeds	x	x	x	x	x	x	x	x	Totally revamped in Pro, Premier and Enterprise 2014, geared towards faster, easier and batch entry. More like Quickencool.
Payroll	x	x	x	x	x	x	x		For 2014 desktop payroll--Payroll Center revamped with easier tab workflow. Subscription/Fees required. Desktop Payroll: Basic, Enhanced, Assisted, Enhanced Payroll for Accountants. Online Payroll: Intuit Online Payroll Basic/Plus/IOP4A/Full Service Payroll. IOP platform is used for QBO and QB Mac payroll
Prepare and Print 1096	x	x	x	x	x		x		
Prepare and E-File 1099s	x	x	x	x	x		x		Additional fees apply. Supported from Jan-April 15
Prepare and Print 1099s	x	x	x	x	x		x		QB 2012 improves setup, December
Price Levels/Price Level List	x	x	x	x					Pro only has fixed %, Premier and ES per item too, Pro/Premier support 100, ES 12 increased to 750
Print Bills	x	x	x	x		x	x		

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Progress Invoicing/Billing	x	x	x	x	x				Create multiple invoices from a Sales Order or Estimate
Purchase Orders	x	x	x	x	x		x		
Purchase Orders--Auto Create PO based on reorder point			x	ESAE					Auto Create PO from Stock Status by Item report. For QBES 14, users can set a Maximum order level. Auto Create PO feature will factor in the maximum QTY for item and never over-order.. Max field can be seen in edit item record and can be added to reports as a column.
Purchase Orders--Receive against partially	x	x	x	x	x				
QB Search-Like feature	x	x	x	x	x	x	x	x	Search company file or online
QuickBooks Statement Writer			x	x					Though ISW's inception was 2009, it is best used in 2011, 2012. Name changed 2012 from ISW to QSW
Recurring Billing/Memorized Transactions	x	x	x	x	x	x	x		
Remote Access	x	x	x	x					Powered by WebEx, not necessary for QBO
Reports: Add favorite, recent and memorized reports to Left Icon Bar	x	x	x	x					Add to Favorite reports menu in Left Icon Bar
Reports: Memorize	x	x	x	x	x	x	x	x	
Reports: Collapse/Expand individual rows	x	x		QBA					Also a 2012 Plus release enhancement
Send Forms via Email	x	x	x	x	x	x	x		QB 2014 supports creating email templates for forms, include attached documents, and insertion of fields
Set and Maintain Reorder Points	x	x	x	x	x				
Set Accounting Period				x				x	Set period all tools/reports in Accountant Center look at, or use CDR in AE and if signed into non-AE as External Accountant user
Shipping Manager	x	x	x	x					Ups/FedEx, QB 2012 supports USPS
Sales Orders		x	x	x					Non-posting transaction to capture customer/work order
Sales Order Fulfillment Worksheet		Retail, M&W	x	x					Manage your sales orders and print Pick List or Packing Slip

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Scan checks with Intuit Check Solution for QB	x	x	x	x	x				QB Mac supported 2010 and up, fee required
Serial Number or Lot Tracking			Advanced Inventory	ESAE with AI					Can choose one or the other, not both at once
Shared Report Templates with Intuit community	x	x	x	x					Share a custom report with online community
Sort No Company Open Window	x	x	x	x					Sort, edit and hide company files on No Company Open window
Starter Copy				x					Create company file from another file
Time Tracking and billing by customer	x	x	x	x	x		x		Pass thru Time or Expense
Toggle to another edition/version				x					
Transaction History Panel	x	x	x	x					Customer and Vendor transactions has panel detailing history/notes and transaction history. QBO shows this detail under Related Activities link at bottom of transaction
Unit of Measure		x	x	x					Multiple U/M in Premier Contractor, M&W, AE. Retail has no U/M in Premier or ES
Unlimited Report Readers and Time tracking users			View Only user	Vew Only user ESAE			x		Set up users that have only Report or Time Entry access
User Interface and Forms Interface Modern View	x	x	x	x					2014 defauly color scheme is dark blue instead of dark gray, a huge improvement viaually. With 2014, users can select the accounts that show in the left nav panel. Also, as of R6 2013 and going forward, users can change color of Top Icon bar and company files. QB Windows has new Left Icon bar, Modern User Interface, Forms refresh with new top Ribbon bar.
Voided/Deleted Transaction report		x	x	x				x	
Working Trial Balance			x	x					Spreadsheets-like UI, shows accounts, beginning balance, transactions, adjustments, ending balance and work paper references
Zoom Into Detail from reports	x	x	x	x	x	x	x	x	Dig down to the detail behind the numbers