



416-725-4464

COMPARISON OF QUICKBOOKS DESKTOP (QBDT) VERSUS QUICKBOOKS ONLINE (QBO) FEATURES

FEATURE	Pro	Premier	ES Enterprise	QBO Essentials	QBO Plus	Notes
Anywhere, Anytime Access				x	x	QBDT only via hosting provider or terminal server
MAC compatible				x	x	QBDT compatible for MAC by using Parallels Desktop for Mac
Automatic backups				x	x	
Automatic upgrades				x	x	QBO requires no installations or maintenance releases
Company Snapshot	x	x	x	x	x	
Free Technical Support			x	x	x	
Document Center / Management	x	x	x	x	x	Ability to upload documents and/or attach to bills or invoices
Multi-Currency	x	x	x		x	
Multi-Company			x	x	x	2 company files open simultaneously
Company Files	multiple	multiple	multiple	1	1	each company file in QBO is a paid subscription
Multi-User Access	up to 3	up to 5	up to 30	up to 3	up to 5	QBDT is a User License, regardless of concurrent use
Convert Desktop data file to QBO	x	x	x			cannot convert QBO file to QBDT
Recurring & Memorized Transactions	x	x	x	x	x	
Send Forms via Email	x	x	x	x	x	
Accountant's Copy	x	x	x	n/a	n/a	Can create QBX file in QBDT to send accountant. Accountant can logon anytime in QBO
Customize Templates (Estimate, SO's, Invoice, PO's)	x	x	x	Limited	Limited	QBDT can customize with great flexibility / QBO limited flexibility
Track changes to transactions	x	x	x	x	x	Audit Trail in QBDT, Audit Log in QBO
Track users log in and out				x	x	
BANKING						
Bank Reconciliation	x	x	x	x	x	
Online Banking / Bank Feeds	x	x	x	x	x	
BUDGETS	x	x	x		x	Create Budgets, Create Reports to compare budget vs actual
CLASS TRACKING						Track business activity by department or specific category
Class Tracking	x	x	x		x	
Class Tracking - Assign classes to names, accounts and items			x			
Income Statement by Class	x	x	x	x	x	
Balance Sheet by Class		x	x		x	
Budget by Class		x	x			
Location Tracking					x	Track sales & profitability by location
CUSTOMERS						
Customer Snapshot	x	x	x			
Lead Center	x	x	x			
Disallow sales to overdue customers			x			Disallow sales to customers who have overdue invoices.
Custom Fields	x	x	x	x	x	QBDT custom fields for items and names, QBO allows 3 fields on forms. Pro/Premier allows 5 for items and 15 for names, ES allows 15 for items, 30 for names
Bounce Check Feature	x	x	x			Record bounced check against customer payment
Sales Rep	x	x	x			Can use location tracking for Sales Rep on QBO
ESTIMATES	x	x	x	x	x	Create Estimates
Create PO or SO from Estimate		x	x			Very important to contractors
SALES ORDERS						
Sales Orders + Track Back Orders		x	x			
Add Cost Column to Sales Forms			x			Show cost of item on screen, but does NOT print
INVOICING						
Progress Invoicing / Billing	x	x	x			Create multiple invoices from a Sales Order or Estimate
Invoice Automation				x	x	Automatically create invoice from unbilled activity
Process Credit Card Payments from customers	x	x	x	x	x	Additional fees apply - QBDT uses QuickBooks Merchant Services while QBO intergrates with Square
Sort columns on transactions			x			
Total Columns on Sales Orders & Invoices			x			Ability to add totals to most columns on sales order & invoice
Batch Invoicing	x	x	x			Create the same invoice for multiple customers at once
Batch invoicing for Time and Expense		x	x			Create different invoices for multiple customers at once
Delayed Charges / Billing				x	x	QBO feature--Enter charges to be billed later
Billable Time and Expense Preference	x	x	x			When entering time or expenses, option available to control whether QuickBooks automatically bills for them

Time Tracking and billable hours by customer	x	x	x		x	
EMPLOYEES						
Batched Timesheet Entry	x	x	x			Create timesheet for multiple employees/vendors
Give employees / subcontractors access to enter time only					x	
INVENTORY						
Inventory Center		x	x			ES supports item picture
Inventory Tracking	x	x	x		x	
Average Cost Valuation	x	x	x	x	x	
FIFO Inventory Valuation		Advanced Inventory				Inventory Cost First In, First Out method
Unit of Measure		x	x			
Price Levels / Price Level List	x	x	x			Pro only has fixed %, Premier and ES per item
Auto Markup Sales Prices on Items			x			Markup items automatically when costs change, set by amount or % above cost or sales price
Set and Maintain Reorder Points	x	x	x			
Group Items	x	x	x			
Find & Select Items			x			Quickly find & select items on transaction, add multiple at once
Serial Number or Lot Tracking		Advanced Inventory				Can choose one or the other, not both at once
Bin Tracking: Row Shelf Bin tracking, Sub-sites		Advanced Inventory				ES with AI can now track up to a million locations for inventory, including rows, shelves and bins
Inventory Available		x	x			Window details what is on SO, PO or Assembly per item, QOH and what is currently available to sell
Disallow Selling Negative Inv			x			Ability to set preference to not sell inventory with QTY <0.
INVENTORY ASSEMBLY						
Bill of Materials		x	x			Manufacture finished good from component parts
Build Nested Assemblies and auto-Update BOM cost			x			ES 14.0 supports Building Nested (sub-assemblies of final assemble) assemblies when the final assembly is built. When assembly component cost changes, BOM cost updates.
Inventory Assembly Shortages			x			Report shows what components needed to build assembly
JOURNAL ENTRIES						
Show Debit and Credit Totals		x	x	x	x	
Create Reversing Entry from Journal Entry		x	x	x	x	
Add more than one AR or AP per journal entry				x	x	
REPORTS						
Excel - export data	x	x	x	x	x	
Excel - export data to update an existing excel spreadsheet	x	x	x			
Auto Deliver Reports				x	x	Set reports to auto-send
Industry specific reporting		x	x			
Job Costing Module and Reports	x	x	x		x	2014 Pro/Premier supports linking Sales Rep to Job, Filtering reports by Job Status. QBO Plus does not offer a lot of "job costing" reports. No Estimate vs Actual
VENDORS						
Multiple Vendor ship to addresses	x	x	x			
PURCHASE ORDERS						
Purchase Orders	x	x	x		x	
Purchase Orders - Receive against partially	x	x	x			
Total Columns on Purchase Forms			x			Ability to add totals to most columns on purchase forms!
BILLS						
Create Bill from Purchase orders	x	x	x	x	x	