

## FROM THE OFFICES OF...

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The QuickBooks® Client Newsletter

# The QBC

Helping You Grow A Profitable Business with QuickBooks® Software

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## QuickBooks 2010: Worth the upgrade?

Every QuickBooks upgrade has something for everyone, but some releases raise the bar more than others. QuickBooks 2010 is one of them. New features in the Pro and Premier versions help you:

- Save time
- Keep a closer eye on your bottom line
- Present a more polished image
- Better manage documents
- Stay in touch with old and new customers

So if you're using an earlier version, you should consider treating yourself to a present that will pay for itself quickly and help you better promote and manage your company in less time.

### Modifiable Company Snapshot

The Company Snapshot—a one-page screen of key reports and graphs—is the best first place to look when you fire up QuickBooks in the morning. In the past, its content has been static, but now you can choose from myriad reports and customize this printable page to meet your needs, as shown in **Figure 1**.

### Add/Edit Multiple List Entries

This new feature solves two common problems. First, it lets you—in just a couple of steps—add or edit multiple customers, vendors, services, inventory items, and non-inventory items. Second, it lets you easily copy and paste Excel list data into QuickBooks. To get started, go to **Lists|Add/Edit Multiple List Entries** and follow the instructions.

### Attach Documents to Forms

Good software should minimize your use of paper. A new feature in QuickBooks 2010 helps you do just that. You can scan documents from within QuickBooks and attach them to forms and records, storing them on Intuit's online servers, as shown in **Figure 2**. You can store up to 100 MB for free; monthly subscription plans start at \$4.95/month. Of course, you can also attach files stored on your local drives.

### Manage Checks Better

Paper checks can be the bane of your existence, whether

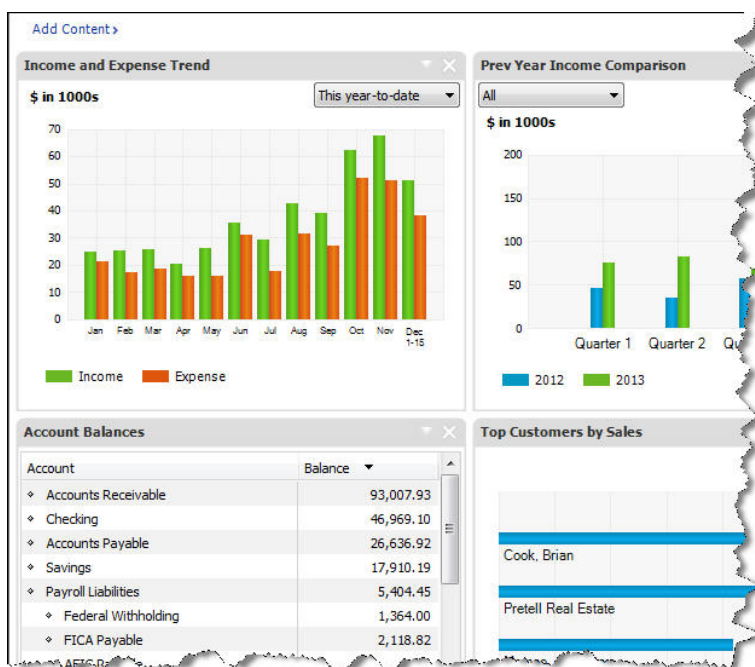


Figure 1: The Company Snapshot in QuickBooks 2010 can now be modified.



We believe in the value of relationships. We view every client relationship like a partnership, and truly believe that our success is a result of your success. We are committed to providing close, personal attention to our clients. We take pride in giving you the assurance that the personal assistance you receive comes from years of advanced training, technical experience and financial acumen. Our continual investment of time and resources in professional continuing education, state-of-the art computer technology and extensive business relationships is indicative of our commitment to excellence.

you're producing them or receiving them. QuickBooks 2010 includes tools to help with both processes.

First, you can now add an electronic signature to checks you create and print in QuickBooks. It's easy; you simply go into the printer setup tool and designate the correct graphic file.

Second, Intuit Check Solutions can help you get paid faster. Instead of ferrying incoming checks to the bank every night, you can either scan them or take the information over the phone, and then transmit the financial data to the bank.

You must have a merchant account to use the service, which Intuit can help you acquire. Intuit Check Solutions costs \$59.95 for setup, with a monthly fee of \$19.95. There's also a 23-cent charge for each check transmission.

### Customize Forms for a More Polished Image

QuickBooks has always offered limited customization of forms, but the 2010 adds new tools to help you present a uniform, professional look to your outgoing documents. For one thing, you can now build a design and apply it simultaneously to multiple forms.

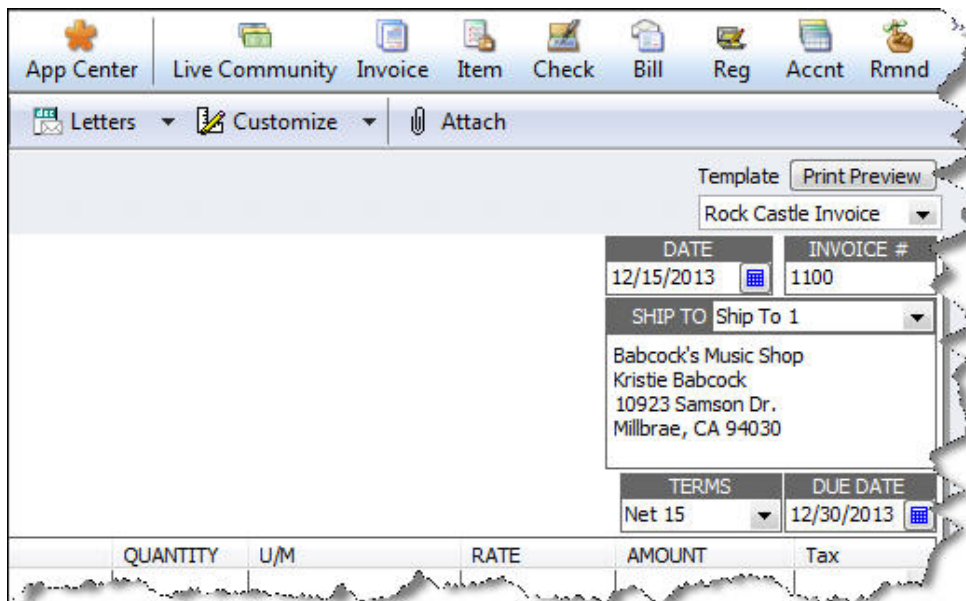


Figure 2: You can easily attach and manage documents from your local drives or an online inbox.

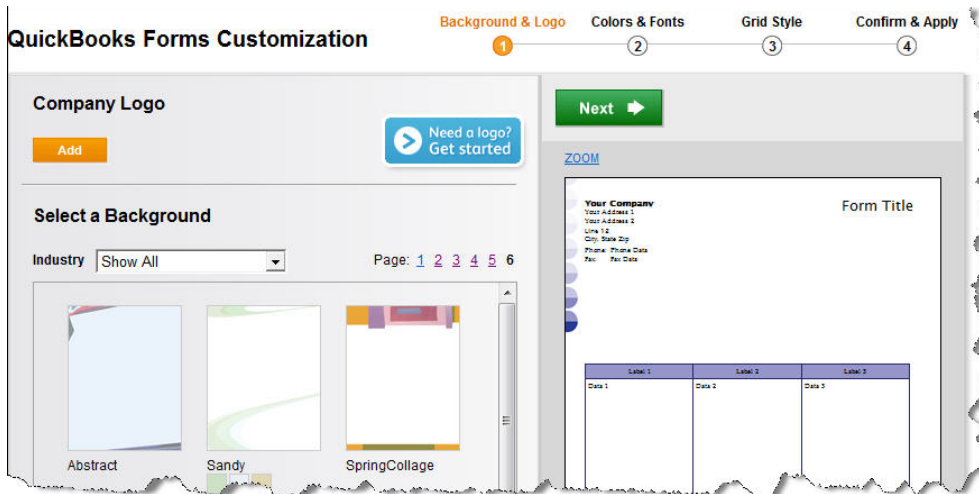


Figure 3: New design tools help you impress your customers with customized, uniform forms.

QuickBooks also includes several free background designs that will work with QuickBooks forms. A layout preview window lets you see how your changes will look as you make them, as shown in **Figure 3**. To find these tools, click Customize on any form screen.

### Beef Up Your Marketing Efforts

QuickBooks had already made inroads into supporting your marketing efforts in earlier versions, like its Website services and local listings. The 2010 release offers even more tools with its Marketing Center.

The new Marketing Center pulls your data in from QuickBooks and analyzes it, and then makes recommendations for email marketing campaigns that you could implement. As seen in **Figure 4**, you select the design and content, and QuickBooks automatically fills in contact information and displays your results so you can see what worked and what didn't.

A free trial gives you up to 500 emails. After that, prices start at \$15 for up to 1,000 pieces.

### Find Reports Faster

Finally, Intuit has revamped QuickBooks' reporting tools so they're easier to find and open quickly. You can choose between list, grid, and graphical carousel views, and tab quickly among memorized, favorite, and recently viewed reports.

### Verdict: A Worthy Upgrade

This tweaking, along with all of the other new features listed here (and more), make QuickBooks 2010 the best small business accounting software upgrade to come down the pike in awhile.

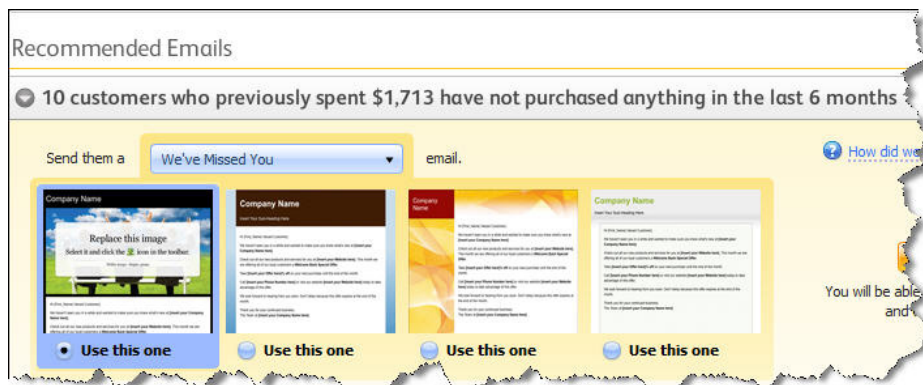


Figure 4: QuickBooks 2010 helps you build targeted email marketing campaigns based on your customer data.

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