

ProAdvisor Product Overview Kit

QuickBooks 2005: EasyStart, Basic, Pro, Premier & Premier Custom Editions

Including: How New Enhancements in Basic/Pro/Premier
Can Benefit Your Clients

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Purpose of Document

This document was created to provide accounting professionals, tax professionals, and consultants with the information they need to understand the new features in QuickBooks 2005, specifically the new functionality in Basic, Pro, and Premier Edition 2005.

In addition to this document, QuickBooks Financial Software trials and online product demonstrations are available for professionals who wish to evaluate these products. These resources are accessible in the members-only section of <http://www.proadvisor.ca>.

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HOW QUICKBOOKS PROADVISORS CAN USE THIS DOCUMENT

The ProAdvisor Sales Kit is designed to keep ProAdvisors up-date on product releases, features and promotional pricing for all QuickBooks products. Our goal is to educate you so that you can deliver the best, most current service to your clients. With this kit, you'll be able to:

- Deliver current QuickBooks product information to your clients and prospects before they learn about it through other distribution channels.
- Offer your clients special promotional pricing (the pricing offered is the best available to Intuit clients).
- Accumulate ProAdvisor Reward Points through the QuickBooks sales you complete.

How to Use your Inventory Items during Client / Prospect Visits

Step 01	During a client or prospect visit, use this document to support your QuickBooks recommendation that is Right for Your Clients Business.
Step 02	Call 1 .800.823.0083. Confirm with your ProAdvisor Liaison (PAL) that you are a ProAdvisor with QuickBooks Inventory – and the PAL will take proper sale / Advisor & client information.
Step 03	Repeat steps 1 & 2. As a ProAdvisor your reward points can be accumulated towards a FREE membership renewal as well as additional Summer Bonus items.

Sections of the ProAdvisor Sales Kit includes:

- **Product Line Overview**

Ranging from QuickBooks EasyStart to QuickBooks Premier, the product line overview provides information on features, system requirements, benefits and support/payroll options.

- **Who needs QuickBooks?**

QuickBooks small business accounting software consists of several products including, EasyStart Basic, Pro, Premier, and industry-specific Premier Editions.

- **Product Comparison Charts**

Product comparison charts provide a quick QuickBooks comparison between all products.

- **ProAdvisor Promotional Pricing Sheet**

?Help you quickly identify promotional pricing available to you and your clients – as well as the different offers currently available and their expiry dates.

- **Purchasing for Yourself and Your Clients**

?Help you quickly identify promotional pricing available to you and your clients – as well as the different offers currently available and their expiry dates.

- **Professional Rewards for Recommending QuickBooks**

Reward Points are a powerful method to be rewarded for recommending QuickBooks purchases to your clients and prospects. This section describes the program, as well as how you and your clients can accumulate points that can be redeemed for:

- FREE ProAdvisor memberships
- FREE Intuit software products

PRODUCT LINE OVERVIEW

QuickBooks is the #1 best-selling small business accounting software in North America: over 2.5 million small businesses have QuickBooks. It offers comprehensive set of accounting tools, including general journal, chart of accounts, accounts receivable, accounts payable, inventory, and financial reporting. Intuit payroll service integrates with the I Software to provide payroll functionality.

The QuickBooks Financial Software line consists of several products, including, Easy Start Basic, Pro, , and Premier Edition. Separate, industry-specific Premier Editions, which contain all the functionality of the generic Premier product, are also available. With the new product line launch in August 2004, there are now a total of three distinct Premier Editions (see list below).

Following is a list of the available QuickBooks Financial Software products as of August, 2004:

- QuickBooks: EasyStart
- QuickBooks: Basic 2005
- QuickBooks: Pro 2005
- QuickBooks: Premier 2005 (for any business)
- QuickBooks: Premier Industry-Specific Editions:
- QuickBooks: Premier Accountant Edition 2005
- QuickBooks: Premier Contractor Edition 2005
- QuickBooks: Premier Retail Edition 2005

For additional details about the difference between the products, see the [Comparison Chart](#) section of this document.

QuickBooks products offers many benefits, both to the professional accountant/consultant and to his or her clients. For the professional, the decision to work with and support QuickBooks has the following benefits:

Improved efficiency. QuickBooks standardizes the financial data coming from different clients, which makes the professional's job easier.

Reduced software support requirements. Because QuickBooks is so widely used, professionals have the option to spend less time learning about and working with other accounting software products.

Opportunity to build business. Working with QuickBooks allows the professional to grow his/her practice by tapping into a base of over 2.5 million small business owners

Some of the benefits for the professional's business clients include:

Quickly and easily manage basic accounting tasks. QuickBooks allows clients to easily print cheques, pay bills, track expenses, payments, and sales taxes, invoice customers, generate reports, and manage payroll.

Fast and easy to set up, learn and use. Clients don't need to be accounting experts to use QuickBooks. They can fill in familiar forms, such as cheques and invoices, onscreen.

Organizes information one place. QuickBooks acts as the repository for important business data, and can facilitate the accountant-client exchange of information.

QUICKBOOKS & CLIENT FIT

We understand that decisions regarding which software product to recommend to which client are made on a case-by-case basis, and depend on the client's industry, business requirements, level of sophistication, and need for training and support, among other factors. In most instances, professionals will want to consult the available product comparison charts and feature information to determine client-product fit. That said, understanding a few of the general characteristics of potential users may help in the product identification and selection process. The following criteria should be considered directional; they are, of course, not a substitute for a thorough client-needs evaluation.

QuickBooks Premier – Right for clients who meet any one of the following criteria:

Work in construction businesses, or retail businesses, and who have industry-specific needs (for more information on the industry-specific versions of QuickBooks Premier, visit <http://accountant.intuit.ca>.)

- Aspire to considerable growth
- Have more complex finances
- Interested in planning and analysis
- Have a product-based business with inventory
- Need to access their finances remotely
- Are planning to apply for a small business loan

QuickBooks Pro – Right for clients who meet any one of the following criteria:

- Are expecting moderate growth
- Are interested in presenting a professional image
- Need estimating, time tracking, or job costing
- Need simultaneous user capability
- Need integration with other business applications

QuickBooks Basic – Right for clients who meet any one of the following criteria:

- Anticipate little growth
- Have very basic needs such as cheque printing, paying bills, and tracking expenses
- Would benefit from automated data backups and easy to use in-product Help

RECOMMENDED SYSTEM CONFIGURATION

IBM PC or compatible PC with at least 350 MHz Intel Pentium II (or equivalent) with 96 MB of RAM.

Minimum System Requirements

- IBM PC or compatible PC with 200 MHz Intel Pentium (or equivalent) computer with 64 MB of RAM
- Microsoft® Windows 98/Me/2000/XP
- 400 MB of disk space for QuickBooks Premier installation; 250 MB of disk space for QuickBooks Pro installation; 230 MB of disk space for QuickBooks Basic installation.
- 2X CD-ROM
- At least 256 color SVGA video with 800 x 600 resolution with small fonts
- All online features/services require Internet access with at least a 56 Kbps modem
- Microsoft® Internet Explorer 6.0 required (6.0 provided on CD; requires an additional 70 MB hard disk space)
- Works with any printer supported by Microsoft Windows 98/Me/2000/XP

Integration Requirements (Premier and Pro only, Basic has no integration capability)

- Microsoft® Word and Excel integration requires Microsoft Word and Excel 97, 2000, or 2002
- Microsoft® Outlook synchronization requires Microsoft Outlook 97, 98, or 2000
- Symantec® ACT! synchronization requires Symantec Act 3.08, 4.02, 2000, or Interact 2000

Multi-User (Premier and Pro only, Basic has no multi-user capability)

- Multi-user mode is optimized for Microsoft Windows 2000 Server or Microsoft Windows Server 2003 client-server networks, and Microsoft Windows 98

NEW QUICKBOOKS 2005 FEATURES, AND KEY EXISTING FEATURES AND BENEFITS

For those professionals new to QuickBooks Financial Software, a brief review of some of existing features in the product line may be beneficial.

QuickBooks 2005 compatible with QuickBooks 2004 file format - New

Customer Issue QuickBooks ProAdvisors and accounting professionals are required to keep multiple versions (years) of QuickBooks on their computer to support clients' older version data files.

QuickBooks 2005 Solution There is no need to have both products installed if you have a client with 2005 you can read and work on the file in 2004, and vice versa. This eliminates the need to have many QuickBooks installs.

Available in: Basic, Pro, Premier

Integrated Customer and Contact Manager - New

Customer Issue Customers are unable to see at a glance all the activities they have with a customer, including meetings, reminders, and outstanding receivables.

QuickBooks 2005 Solution Customer Manager Provides a complete overview of your customer information all on a single screen with key customer documents accessible with a single click. Integrates with QuickBooks and Microsoft Outlook™, so you save time on data entry and reduce errors due to inaccuracies.

Available in: Premier

Loan Manager - New

Customer Issue Customer cannot automatically track loans with an amortization schedule, or payment schedule.

QuickBooks 2005 Solution Helps you track the loans that you've set up in QuickBooks based on the information in your long-term liability and other current liability accounts. Keeps track of all your loans in one location and reminds you of upcoming payments.

Available in: Premier

Cash Flow Projector - New

Customer Issue	A lack of information regarding cash flow can lead to “surprise” out-of-cash situations. Previously, QuickBooks did not provide users with the ability to easily estimate future cash flows.
QuickBooks 2005 Solution	<p>The Cash Flow forecaster has a six-week forward-looking horizon, on a weekly basis. Our research shows that this is the period most vital to small business owners, one that they can take action on. The horizon moves forward automatically as a week passes.</p> <p>First, select which relevant accounts you want to include in the projection. You can manually adjust the balance of the sum of those accounts.</p> <p>Next, choose the method by which the next six weeks of cash receipts will be projected from the following:</p> <ul style="list-style-type: none"> Manually Use last six weeks Use an average of the last six weeks Use a weighted average of the last six weeks Same six week period as last year (for example, if you have seasonality) Average of same six week period last year <p>For each of the six weeks you can make a manual adjustment up or down to take into account foreknowledge you have that isn't reflected in the past numbers.</p> <p>After that, business expenses are brought in. This is also an opportunity to set up recurring known expenses that might be outside the automatic-projection period. For example, you can enter a biannual car insurance expense; then when that time comes, it will be included in your projection, even though it didn't happen in the past six weeks (assuming your projection method is one of those that looks at the last six weeks).</p> <p>Finally, your accounts payable are brought in. You have the ability to manually modify the planned payment date (some you may want to pay earlier, others later) as well as make manual adjustments.</p> <p>The output is a weekly cash flow projection report that you can print or save as a PDF. It shows Cash Available for Disbursement as well as Ending Cash Balance for the next six weeks.</p> <p>Available in: Premier</p>

Follow-Me Help - New

Customer Issue	There is no easy way to see all relevant help topics for a screen. For some it is difficult to navigate though the help system.
QuickBooks 2005 Solution	<p>We've made it even easier for you to get your QuickBooks questions answered with help that follows what you are doing in QuickBooks and automatically gives you important information without you searching for it.</p> <p>Available in: Basic, Pro, Premier</p>

Help 1-2-3 - New

Customer Issue	Some users are not aware of the ways to search for help in QuickBooks, or search online. Some are unaware of other support options such as ProAdvisors or the variety of technical support methods.
QuickBooks 2005 Solution	Type in your QuickBooks question and click "Ask." QuickBooks will first search the extensive on-screen help system to find your answer. Still stuck? Next, QuickBooks goes online to search the entire knowledgebase for the most up to date information. Still no luck? No problem - we'll show you how to contact a QuickBooks Consultant or an ProAdvisor. Available in: Basic, Pro, Premier

Learning CD - New

Customer Issue	Some users would like to have video tutorials to help them learn the product. Some users would like a manual available with the software.
QuickBooks 2005 Solution	The QuickBooks Learning CD contains multi-media tutorials and electronic User Guides, which can get you up and running with QuickBooks quickly and with confidence. Available in: Basic, Pro, Premier

GST and Payroll Overviews - New

Customer Issue	GST and Payroll are areas that are hard to understand for some users. These are complex tasks with unfamiliar steps for some small business owners.
QuickBooks 2005 Solution	We've enhanced our help to include step-by-step illustrations on how to collect, pay, track, file, and report sales tax as well as set up payroll, pay employees, and remit payroll deductions. Available in: Basic, Pro, Premier

Show-Me Videos - New

Customer Issue	It would be beneficial to have training in specific problem areas when learning the software.
QuickBooks 2005 Solution	Master QuickBooks procedures and learn hundreds of tips and tricks through over 30 "show-me" videos. Videos are context sensitive and were recorded by Intuit Canada employees familiar with the feature. Available in: Basic, Pro, Premier

Automatic Base TD1 Amount Update - New

Customer
Issue

When updating to the new tax table, if there is a change to the base TD1 amount, you have to manually update each employee.

QuickBooks
2005 Solution

If the Base TD1 amount changes for a Tax table, then QuickBooks Automatically changes it to the new one. Non - base TD1 amounts need to be changed manually.

Available in: Basic, Pro, Premier

Required Fields for Employee Set up - New

Customer
Issue

Setting up employees could lead to errors or omissions of important data.

QuickBooks
2005 Solution

Required fields let you know what is essential for set up.

Available in: Basic, Pro, Premier

Automatic Ph# Formatting- Preference for () or dashes - New

Customer
Issue

Customers had to format phone numbers themselves by entering () for area codes.

QuickBooks
2005 Solution

Now choose in the preferences how you want Phone Numbers displayed and just enter the digits, QuickBooks will auto format the rest.

Available in: Basic, Pro, Premier

Automatic Postal Code Formatting- Keeps Postal Code fields in Capital letters only - New

Customer
Issue

It takes a tedious amount of time to enter a postal code. As the field is lower case.

QuickBooks
2005 Solution

The postal code fields now are caps only fields.

Available in: Basic, Pro, Premier

Easily Print Cheques, Pay Bills, and Track Expenses

Customer Issue

Writing cheques by hand, completing purchase orders manually, and keeping track of bills and expenses on paper all require a significant investment of time for the small business owner.

QuickBooks 2005 Solution

Easily type in information in the onscreen check form and print checks with one click. Or store checks and print them later in one batch. Easily create purchase orders, receive bills, and enter them into QuickBooks with their due date. QuickBooks will automatically remind you when you need to pay them. QuickBooks helps keep track of expenses so you can easily see the money you're spending in each category.

Available in: Basic, Pro, Premier

Easily Invoice Customers, Track Payments and Sales Taxes

Customer Issue

Manual invoicing is very time consuming. It can be difficult to match payments to invoices (matching one payment to multiple invoices, for example). Small businesses need to track GST and PS, as well as they need a method of recalling which items were or were not taxable.

QuickBooks 2005 Solution

Easily Create an invoice with a click of a button, or select from QuickBooks specialized invoice templates. Easily track customer payments and apply payments to invoices. You can even apply specific credits to invoices or apply a single customer payment to multiple jobs or invoices. The "Paid" stamp on invoices quickly lets you know which invoices are paid or unpaid. QuickBooks helps you fill out your sales tax form in minutes and makes sure your sales tax balance is accurate and up-to-date. Use the new sales tax codes to indicate more accurately why an item is non-taxable.

Available in: Basic, Pro, Premier

Manage Payroll Processing and Direct Deposit

Customer Issue

Various tax and withholding issues can make managing payroll complex. Errors can lead to penalties and/or dissatisfied employees.

QuickBooks 2005 Solution

Process your employee payroll and handle payroll taxes right from QuickBooks. You can also use Direct Deposit by signing up for the integrated service.

Available in: Basic, Pro, Premier

Create Purchase Orders and Track Inventory

Customer Issue	Tracking inventory and POs separately, and receiving goods against a PO, require manual reconciliation, knowledge of whether a PO had been fulfilled, and the average cost of inventory.
QuickBooks 2005 Solution	<p>Create complete purchase orders with detailed vendor and item information from within QuickBooks.</p> <p>Use QuickBooks inventory reports, the Items list, and the Purchase Orders list to get the following information about your inventory:</p> <ul style="list-style-type: none"> Average cost of items Current prices Current value of your inventory Status of your purchase orders Quantity on hand or on order for items <p>Use the pending builds report to get the following information about inventory assembly builds:</p> <ul style="list-style-type: none"> Status of pending builds <p>Available in: Basic, Pro, Premier</p>

Build Inventory Assemblies

Customer Issue	Product-based businesses needed to perform substantial manual work to keep track of inventory items that are part of an assembly. In worst case scenarios, incorrectly monitored inventory might lead to surprise out-of-stock situations
QuickBooks 2005 Solution	<p>Track both individual inventory items (components, raw material) and “assemblies” (combined inventory items, finished goods or products)</p> <p>QuickBooks makes it easy to define the assemblies you wish to track.</p> <ul style="list-style-type: none"> Easily assign a unique sales price to assemblies Set alerts to remind you when you need to build new assemblies <p>Available in: Premier</p>

Instantly Generate Reports

Customer Issue	Locating data and manually entering it into a spreadsheet to create a report can take time, and with each step in the process there’s the possibility of error.
QuickBooks 2005 Solution	<p>Instantly generate the reports you need, including standard Profit and Loss, Balance Sheet, Statement of Cash Flows, Sales Reports, and many more</p> <p>QuickBooks has over 120 ready-to-go reports to show how your business is doing.</p> <p>The Report Finder helps you easily find the right report by showing the types of reports and a preview of what reports will look like.</p> <p>Available in: Basic, Pro, Premier</p>

Easy "Find" Feature

Customer Issue Small business owners waste valuable time searching through paper files or spreadsheets to find important business information.

QuickBooks 2005 Solution Easily search for specific transactions using customer information like name, phone, address or email. You can also search by date, dollar amount, invoice number, or a combination of fields to find the exact information you're looking for.

Available in: Basic, Pro, Premier

Up to 5 Simultaneous Users

Customer Issue Multiple employees sharing one software application among them leads to decreased work productivity and inefficient business processes.

QuickBooks 2005 Solution Up to 5 users can simultaneously work in QuickBooks Pro and Premier Editions across a local area network (LAN). Up to 5 people can work on the same company file at the same time. Set different levels of access permissions for each user, and assign them a password. QuickBooks Pro and Premier Edition 2005 work together when networked. *Note:* Requires multiple copies of QuickBooks Pro or Premier Edition 2005 and LAN. Simply buy copies for the number of users you have or save with the 5-user Value Pack.

Available in: Pro, Premier

Advanced Journal Entry Options

Customer Issue Accounting professionals and more sophisticated small business owners want to work quickly and effectively by making direct entries into the general journal.

QuickBooks 2005 Solution Make general journal entries, easily auto-reverse entries and automatically number entries. Use a repeatable memo line to save time.

Available in: Premier

Class Tracking

Customer Issue Users need to track information using categories other than customer name, account, or item (for example, by office branch or sales region/area covered).

QuickBooks 2005 Solution Track all income and expense items more precisely by class. Tracking capabilities include finance charges, service charges, interest earned, discounts on received payments, and paid bills.

Available in: Basic, Pro, Premier

Audit Trail

Customer Issue Identifying the events behind a transaction is difficult, and locating the root cause of an error can take considerable time.

QuickBooks 2005 Solution Turn on the audit trail to have a record of all changes made to your QuickBooks data so, if necessary, you can go back and understand the sequence of events around particular transactions.

Available in: Basic, Pro, Premier

Password Protected Closing Date

Customer Issue Changes are sometimes made in an accounting period that has been closed.

QuickBooks 2005 Solution Set a closing date and password-protect it to limit access to the transactions of prior accounting periods so that no one changes the transactions without your knowledge.

Available in: Basic, Pro, Premier

Closing Date Exception Report

Customer Issue Changes made after the closing date are sometimes difficult to track down.

QuickBooks 2005 Solution Easily see any changes made before the closing date in a convenient report. The report shows the transactions that were changed after the period was closed, along with details of the original transaction so you can easily track down what was changed.

Available in: Premier

Why Choose QuickBooks?

All QuickBooks products...

Have Superior Reporting

Other accounting software products require you to learn another application just to get at your own business information. We don't.

One click and your data is automatically shown in up-to-the-minute reports. No need to know how to set up financial reports – it's already done for you. Use the pre-set templates or customize your own.

Are Much Easier to Use

No complicated set-up required. Get started right away by entering expenses, sales...whatever you like. You can set up QuickBooks as you go. Simply follow a series of illustrated steps to complete a task.

Are Designed for Small Business

No accounting knowledge is needed. QuickBooks handles the accounting for you – flawlessly. You work in business language, not accounting language and simply fill in familiar forms – like cheques and sales orders – onscreen.

Are Supported and Recommended by Accountants

Accounting professionals and advisors across Canada support and recommend QuickBooks. QuickBooks advisors are available to small businesses through a free online referral database.

Are Risk Free and Guaranteed

Put QuickBooks to the test for your own business for a full 60 days. It's completely risk free. If you're not completely satisfied, return your product for a full refund.

WHICH QUICKBOOKS SHOULD I CHOOSE?

QuickBooks Qualifying Questions	QuickBooks Choice
<p>Do you run a business that you want to keep separate from your personal bank account?</p> <p>Are you managing your expenses with pen and paper, or a simple spreadsheet?</p> <p>Do you want the simplest way to manage sales, expenses, and customers?</p>	<p>QuickBooks EasyStart</p>
<p>Do you carry inventory?</p> <p>Do you have employees?</p> <p>Do you need to create and manage budgets?</p> <p>Do you pay your bills on payment terms (e.g. 30 days after receipt)?</p> <p>Will more than one person work on your financial files at the same time?</p>	<p>QuickBooks Basic</p>
<p>Do you have customers or suppliers outside of Canada?</p> <p>Do you need to integrate with other business software (Microsoft® Excel, Word, Outlook™)?</p>	<p>QuickBooks Pro</p>
<p>Do you assemble inventory items to create finished goods?</p> <p>Do you have employees that need to track mileage or company cars?</p> <p>Do you want to access your QuickBooks files while traveling, or working from different locations?</p>	<p>QuickBooks Premier</p>
<p>Do you want advanced accounting controls and features?</p> <p>Are you tired of settling for accounting software designed for just anyone?</p> <p>Do you want accounting software that uses correct terminology for your industry?</p> <p>Do you want accounting software designed and set-up for you with industry-specific help?</p> <p>Are you in one of the following industries: Accounting, Contractor, Retail & Repair</p>	<p>QuickBooks Premier: Custom Editions</p>

WHO IS QUICKBOOKS IDEAL FOR?

<p>QuickBooks EasyStart New or start-up businesses with no payroll or inventory requirements. Anyone new to business or new to software.</p>
<p>QuickBooks Basic Small businesses wanting to add integrated payroll service more accounting features such as inventory, budgeting, payables, or more reporting.</p>
<p>QuickBooks Pro Small businesses that may have more than one person accessing their bookkeeping at a time, deal in multi-currency, or want to integrate Microsoft® Excel/Word/Outlook™, Symantec® Act!™ or other business products.</p>
<p>QuickBooks Premier Companies who want top-of-the-line accounting software for their business. They may travel, work from home, or have employees who need to enter expenses, quotes, or run reports when they are way from the office.</p>
<p>QuickBooks Premier: Retail & Repair Edition Any retail business including gift or flower shops, hair salons, and more.</p>
<p>QuickBooks Premier: Contractor Edition Plumbers, carpenters, roofers, mechanical contractors, landscapers, concrete workers, electricians, painters, framers.</p>
<p>QuickBooks Premier: Accountant Edition Accountants and bookkeepers who want their software to work with their clients' software – seamlessly, who are working with current QuickBooks customers, or are setting up their practice and looking for new clients.</p>

QuickBooks Editions Comparison Chart (2005)	EasyStart	Basic	Pro	Premier
SPEED & PERFORMANCE				
Remote Access				√
Customizable Estimates and Bids		√	√	√
Archive/condense data	√	√	√	√
Onscreen Tutorial & set-up wizard	√	√	√	√
Email Forms	√	√	√	√
Online Banking	√	√	√	√
POWERFUL ACCOUNTING CAPABILITIES				
Vehicle Mileage Tracker				√
Change orders for estimates				√
Auto-reverse, auto-number, repeatable memo line for journal entries			√	√
Track changes in reconciliation reports and view reports from previous periods				√
View any changes made in data file with Closing Date Exception Report				√
Fixed Asset Tracker			√	√
Create Sales Orders, Purchase Orders and Invoices from Estimates			√	√
Enhanced Price Levels			√	√
Create a budget		√	√	√
Track all income & expenses by class		√	√	√
Multiple estimates per job			√	√
Multicurrency			√	√
Automated Job Costing		√	√	√
Progress Invoicing			√	√
Time Tracking (TT) / Timer Program (TP)			√	√
Locate Reconciliation Discrepancies		√	√	√
Automated GST/PST Tracking	√	√	√	√
Audit Trail	√	√	√	√

Job Costing: Basic or Advanced		B	A	A
FLEXIBLE, COMPREHENSIVE REPORTING				
Combined reporting for multiple companies or projects				
Save reports, invoices, sales orders, purchase orders and other forms as PDF			√	√
Import and Export integration with Microsoft® Excel™			√	√
Customize Packing Slips and label printing			√	√
Improved Customer statements			√	√
Business Reports and Graphs	15	111	127	127
INTEGRATION				
Integration with 3rd party applications (more than 100 applications)			√	√
Enhanced Email Integration			√	√
Integrates with			√	√
Integrates with Microsoft® Word/Excel & Outlook™ Symantec® ACT!™			√	√
Imports Simply Accounting® data (v.5,6,7)		√	√	√
Imports MYOB data		√	√	√
Integrated Canadian Payroll Service ¹				
Credit Card Service ²		√	√	√
INVENTORY				
Buy, sell and stock items in different units of measure			√	√
Assemble inventory items to create finished goods			√	√
Sales order/back order			√	√
Multiple Price Levels			√	√
Manage Inventory			√	√

¹ Additional fees apply

² Additional fees apply

QUICKBOOKS YEAR-OVER-YEAR FEATURES COMPARISON CHART

QuickBooks Feature	6.0	6.0 Pro	2000	2000 Pro	2001 Basic	2001 Pro	2002 Basic	2002 Pro	2002 Premium	Basic 2003	Pro 2003	Premie 2003	EasySt 2003	Basic 2004	Pro 2004	Premie 2004	Basic 2005	Pro 2005	Premie 2005	
Integrated Customer/ Contact Manager																			√	
Loan Manager																			√	
Cash Flow Projector																			√	
Follow-Me Help																			√	
Employee Setup Required Fields.																	√	√	√	
Automatic Ph# Formatting																	√	√	√	
Automatic Postal Code Formatting																	√	√	√	
Automatic Base TD1 Adjust (Payroll Only)																	√	√	√	
Show Me Videos																	√	√	√	
Learning CD																	√	√	√	
Fixed Asset Tracker Lets you keep track of the assets purchased															√	√		√	√	
Vehicle Mileage Tracker Enter vehicle mileage the same way that you enter time sheets																√			√	
New Links between Sales Orders and Estimates From a sales order: you can create an invoice and from an estimate you can create a sales order.															√	√		√	√	
New Links between Sales Order, Estimates and Purchase Orders: From a sales order you can create a purchase order or invoice and from an estimate you can create a sales order or purchase order.															√	√		√	√	
Save as PDF																√	√		√	√
New Excel Import: Now you can import items, accounts, customers and vendors directly from Excel.																√	√		√	√
Error Reporting: Many of you have probably seen the error messages that appear in Windows XP. When they appear the user has the option to send those error messages to Microsoft.													√	√	√	√	√		√	√
Software Development Kit 3.0: The SDK has been extended to allow third party applications better integration with QuickBooks. Version 3.0 offers event notification, so that the third party application is notified of events as the occur in QuickBooks. We also have added the User Interface (UI) integration so that the third party application can add menu options or display reports in QuickBooks. You can also add, modify or delete custom fields using the SDK.																√	√		√	√

Customer and Vendor Address Fields - Cut/Copy/Paste whole address fields																		√	√	√	√	√	√	
Mail Merge Functionality - Display Qty Invoiced on Open Sales Order by Item report																			√	√	√	√	√	√
Warning on closing QuickBooks - QuickBooks now asks if you want to close it																			√	√	√	√	√	√
Change orders for estimates																			√				√	
Create a forecast																			√				√	
Improved Financial tools																			√				√	
Integrates with more business applications																			√	√			√	√
Buy, sell and stock items in different units of measure																			√	√			√	√
Assemble inventory items to create finished goods																			√	√			√	√
More customization options for forms																			√	√			√	√
Improved Customer statements																			√	√			√	√
Improved GST/PST tracking																			√	√	√	√	√	√
Create a budget																			√	√	√		√	√
Track all income & expenses by class																			√	√	√		√	√
Real-language, question-based help																			√	√	√		√	√
Advanced Backup options																			√	√	√	√	√	√
Customize printing options																			√	√	√	√	√	√
Imports MYOB data																			√	√	√		√	√
Print T4s on blank paper																			√	√	√		√	√
Prepare Record of Employment																			√	√	√		√	√
Use repeatable memo line for faster data entry																			√				√	
Auto-reverse journal entries																			√				√	
Track changes in reconciliation reports and view reports from previous periods																			√				√	
View any changes made in data file with Closing Date Exception Report																			√				√	
Use remote access to connect to the QuickBooks files on your computer via the Internet																			√				√	
Multiple estimates per job																			√	√			√	√
Sales order/back order																			√	√			√	√
Simple upgrade utility																			√	√	√	√	√	√
Improved year-end close																			√	√	√	√	√	√
Improved reconcile																			√	√	√	√	√	√
New fields in layout designer																			√	√	√	√	√	√
Archive/condense data																			√	√	√	√	√	√

Improved keyword search							√	√	√	√	√	√		√	√	√	√	√	√
New launch feature from help							√	√	√	√	√	√		√	√	√	√	√	√
New TD1 report							√	√	√	√	√	√		√	√	√	√	√	√
Windows XP support							√	√	√	√	√	√	√	√	√	√	√	√	√
Payroll year-to-date amounts							√	√	√	√	√	√		√	√	√	√	√	√
Auto-numbered journal entries							√	√	√	√	√	√		√	√	√	√	√	√
Paid stamp on invoice							√	√	√	√	√	√	√	√	√	√	√	√	√
Multicurrency						√		√	√		√	√			√	√			
Multiple Price Levels						√		√	√		√	√			√	√			
Prints RL-1s				√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Backup Service				√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Financing Service				√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Credit Card Service				√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Online Invoice Payment				√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Onscreen Tutorial				√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Customizable Estimates and Bids			√		√		√	√		√	√		√	√	√	√	√	√	√
Email Forms		√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Automated Job Costing	√		√		√		√	√		√	√		√	√	√	√	√	√	√
Integrates with Symantec® ACT!™			√		√		√	√		√	√		√	√		√	√		
Integrates with Microsoft® Word/Excel & Outlook™	√		√		√		√	√		√	√		√	√		√	√		
Imports Simply Accounting® data (v.5,6,7)	√	√	√	√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Multi User Ready		√		√		√		√	√		√	√			√	√			
Customer and Vendor Tracking	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Statements and Financing Charges	√	√	√	√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Customizable Forms	√	√	√	√	√	√	√	√	√	√	√	√		√	√	√	√	√	√
Online Banking	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Progress Invoicing		√		√		√		√	√		√	√			√	√			
Time Tracking (TT) / Timer Program (TP)		√		√		√		√	√		√	√			√	√			
Prints T4s, T4 Summary	√	√	√	√	√	√	√	√	√	√	√	√		√	√	√	√	√	√

PRICING INFORMATION

QuickBooks Financial Software 2005 Product Pricing

The following prices are for QuickBooks Financial Software products purchased directly from Intuit sales staff, as well as promotional pricing available to ProAdvisors and their clients. (Pricing subject to change)

Note: Continuous Service promotional pricing is in effect for the first six months of a new annual subscription only.

QuickBooks Financial Software Products (Dec 15, 2004)	Direct Price	Advisor Promotional Price
	MSRP	Campaign 2040784
EasyStart Outright	\$ 149.95	\$ 119.40
EasyStart Continuous Service	\$ 9.95 /m	7.96 /m
EasyStart Upgrade to QuickBooks Basic	\$ 90.00	\$ 72.00
EasyStart Upgrade to QuickBooks Pro	\$ 230.00	\$ 184.00
EasyStart Upgrade to QuickBooks Premier	\$ 400.00	\$ 320.00
EasyStart Upgrade to QuickBooks Premier Custom	\$ 400.00	\$ 320.00
Basic	\$ 199.95	\$ 159.96
Basic Continuous Service w/ support	\$ 34.95 /m	\$ 27.96 /m
Basic Continuous Service w/ support & payroll	\$ 39.95 /m	\$ 31.96 /m
Pro	\$ 349.95	\$ 279.96
Pro Continuous Service w/ support	\$ 44.95 /m	\$ 35.96 /m
Pro Continuous Service w/ support & payroll	\$ 49.95 /m	\$ 39.96 /m
Premier	\$ 499.95	\$ 399.96
Premier Continuous Service w/ support	\$ 49.95 /m	\$ 31.96 /m
Premier Continuous Service w/ support & payroll	\$ 54.95 /m	\$ 43.96 /m
Premier Custom Editions (any)	\$ 499.95	\$ 399.96
Premier Custom Editions Continuous Service w/ support	\$ 49.95 /m	\$ 39.96 /m
Premier Custom Editions Continuous Service w/ support & payroll	\$ 54.95 /m	\$ 43.96 /m

Note: The Accountant, Retail, and Contractor Editions follow the Premier Edition pricing schedule.

As part of their member benefits, QuickBooks Professional Advisors can purchase QuickBooks Financial Software products at a 10-20% discount. All QuickBooks Core products are discounted 20%.

Pricing information for products such as QuickBooks and services such as Intuit Payroll, is located at <http://www.quickbooks.ca>.

Purchasing for you or your clients

The products and services available to you - and your clients - using your Advisor ID and promotional codes when shopping will be at the lowest price Intuit offers the general public.

To purchase any of the QuickBooks Core products including EasyStart, Basic, Pro, Premier or any Premier: Custom Edition, please contact your ProAdvisor Liaison (PAL) at **1.800.823.0083** and ask about special offers available to ProAdvisors. Alternatively, log in to the Intuit online store (intuit.ca) using the **2040784** promotional code.

Your clients can also access your Advisor promotional pricing

Please confirm that your client is aware of your Advisor status and available promotional pricing before asking them to purchase themselves. The ProAdvisor Liaisons requires this information in order to track your ProAdvisor reward points.

ProAdvisor Rewards Program

receive a FREE Advisor membership for you and your colleagues!

Overview

The ProAdvisor Rewards Program is designed to reward members every time they, or their clients, purchase Intuit products.

When you or your clients purchase Intuit products online or by contacting the Intuit call center - we will award you points that you can accumulate and redeem for additional Intuit products and services, including towards your, or a colleagues' future membership fees in the ProAdvisor program.

Accumulating Reward Points

You will earn Reward points when you buy products yourself and then resell them to your clients. To accumulate reward points for these purchases, please use the unique ProAdvisor promotional shopping code(s) ("Code") to identify yourself when you shop at intuit.ca or by contacting the Intuit Call Center.

Your clients can also help you accumulate Reward Points and access your exclusive ProAdvisor promotional shopping discounts by contacting the Intuit Call Center and asking about special offers available to ProAdvisor clients.

We will reward 1 reward point for every \$1 of applicable product that is sold through the online store and call center. We will annualize purchases of any monthly service or subscription for the first year only.

The products and services available to you - and your clients - using your Advisor ID and promotional codes when shopping will be at the lowest price Intuit offers the general public.

Redeeming your Reward Points

ProAdvisors with memberships in good standing may redeem reward points at any time for available Intuit product and/or Advisor membership levels. Reward points will expire from a member's account after 31 days passes from Membership renewal date. Redemption can only occur by contacting the Membership Services Team at 1.800.823.0083.

There are 2 options for members who wish to redeem Reward Points:

Option 1

You may redeem accumulated reward points towards the total required for available product and/or Advisor membership levels.

Option 2

You may redeem accumulated reward points towards the total required for available product and/or Advisor membership levels through a combination of Reward Points and cash payment.

Please contact the ProAdvisor Membership Services Team at 1.800.823.0083 to confirm your Reward Points total and/or redeem your Reward Points.

Accumulated reward points can be redeemed as follows:

	Option 1	Option 2
QuickBooks Basic (value \$199.95)	2300 pts	1150 pts + \$90
QuickBooks Payroll Service 12 months (value \$239.40)	2760 pts	1380 pts + \$108
QuickBooks Pro (value \$349.95)	3795 pts	1900 pts + \$149
QuickBooks Pro Payroll Service - 12 months (value \$359.40)	4140 pts	2070 pts + \$162
QuickBooks Premier (value \$499.95)	5750 pts	2875 pts + \$225
QuickBooks Premier Custom Editions (value \$499.00)	5750 pts	2875 pts + \$225
Quicken XG (value \$99.95)	1150 pts	575 pts + \$45
WillExpert (value \$49.95)	575 pts	288 pts + \$23
ProAdvisor Membership	4000 pts	2000 pts + \$162
Certified QuickBooks ProAdvisor Membership	7000 pts	3500 pts + \$270

Please contact the ProAdvisor Membership Services Team at **1.800.823.0083** for additional information.

ProAdvisor Inventory Request Form*

Advisor Number _____

Complete this QuickBooks Inventory Request form today to receive QuickBooks CDs at no up-front cost to you. Together, QuickBooks Inventory and your ProAdvisor membership give you more solutions for your clients.

For our most popular QuickBooks Premier and QuickBooks Pro versions, we also offer optional retail box sleeves.

What about the cost? There is no charge for QuickBooks Inventory software until you complete a sale by calling to make payment and obtain the Installation Key Code (IKC). You and your clients will pay the best price Intuit offers to the general public.

*QuickBooks EasyStart is not currently available as inventory software.

<input checked="" type="checkbox"/>	Please send my QuickBooks Inventory 3-pack of CDs.	\$ no charge
	Include 3 QuickBooks Pro box sleeves**	\$ no charge
	Include 3 QuickBooks Premier box sleeves**	\$ no charge
	Include 3 QuickBooks manuals**	\$ no charge
<input checked="" type="checkbox"/>	Shipping and Handling (Ground \$4.95)	\$ no charge
<input checked="" type="checkbox"/>	Total	\$ no charge

**While supplies last. Quantities are limited. Please choose one edition of box sleeves only.

ProAdvisor Shipping and Contact Information

Name _____

Company _____

Address _____

City _____ Province _____

Postal Code _____ Email _____

Day phone () _____ Fax () _____

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PLEASE FAX TO 1.888.856.8357

ATTN: QuickBooks ProAdvisor Liaisons

Advisor Solutions Form P 1 of 2

Advisor Number: _____

QuickBooks Financial Software 2004 Product Pricing

QuickBooks Financial Software Products (December 15, 2004)	Direct Price	
	MSRP	Partner
EasyStart Outright	\$ 119.40	
EasyStart Continuous Service	\$ 9.95 /m	
EasyStart Upgrade to QuickBooks Basic	\$ 90.00	
EasyStart Upgrade to QuickBooks Pro	\$ 230.00	
EasyStart Upgrade to QuickBooks Premier	\$ 400.00	
EasyStart Upgrade to QuickBooks Premier Custom	\$ 400.00	
Basic	\$ 199.95	
Basic Continuous Service w/ support	\$ 34.95 /m	
Basic Continuous Service w/ support & payroll	\$ 39.95 /m	
Pro	\$ 349.95	
Pro Continuous Service w/ support	\$ 44.95 /m	
Pro Continuous Service w/ support & payroll	\$ 49.95 /m	
Premier	\$ 499.95	
Premier Continuous Service w/ support	\$ 49.95 /m	
Premier Continuous Service w/ support & payroll	\$ 54.95 /m	
Premier Custom Editions (any)	\$ 499.95	
Premier Custom Editions Continuous Service w/ support	\$ 49.95 /m	
Premier Custom Editions Continuous Service w/ support & payroll	\$ 54.95 /m	
Order SubTotal		

Special Notes

Advisor Solutions Form P 2 of 2

Advisor Number _____

(A) Order Sub-total from Page 1	\$
(B) Shipping and Handling (Ground \$4.95/Courier \$20.00)	\$
(C) Subtotal (A) + (B)	\$
(D) GST/HST*	\$
(E) PST/QST**	\$
Total (C) + (D) + (E)	\$

*If you live in BC, AB, SK, MB, ON, QC, PE, NT, YT or NU calculate 7% GST on line (C). If you live in NB, NS or NL calculate 15% HST on line (C).

**On line (C) calculate 8% PST for ON, 7.5% for BC, 7% for MB, 6% for SK. In PE calculate 10% on total of lines (C) + (D) . In QC calculate 7.5% QST on total of lines (C) + (D).

Shipping and Contact Information

Name _____

Company _____

Address _____

City _____ Province _____

Postal Code _____ Email _____

Day phone () _____ Fax () _____

Choose Credit Card Payment

Advisor Credit Card Client Credit Card VISA MasterCard American Express

Card # _____ Expiry Date _____

Cardholder Signature _____

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ATTN: QuickBooks ProAdvisor Liaisons