

Automatically Create Invoices for Unbilled Activity

Automation

- Pre-fill forms with previously entered content <sup>?</sup> Off
- Automatically apply credits <sup>?</sup> Off
- Automatically invoice unbilled activity <sup>?</sup> On
  - Automatically create invoices and notify me ▾
  - Schedule  
Monthly ▾ on day ▾ 1st ▾ of every 1 months(s)
- Copy estimates to invoices On

Auto add rule to books and Split by % or amount (including across class!)

### Set one or more of the following

Transaction type

Expense ▾

Payee

Applebys ▾

Percentage (%) ▾

PERCENTAGE	CATEGORY	CLASS	
	Travel Meals ▾	Overhead ▾	🗑️
	▾	▾	🗑️

Add line

Memo

Automatically add to my books

**Delayed charges—Non-posting sales form to invoice later or auto invoice at recurring interval**

Delayed Charge #3 ? X

Abercrombie, Kristy AMOUNT  
**\$500.00**

Delayed Charge Date: 01/27/2017 Delayed Charge no.: 3

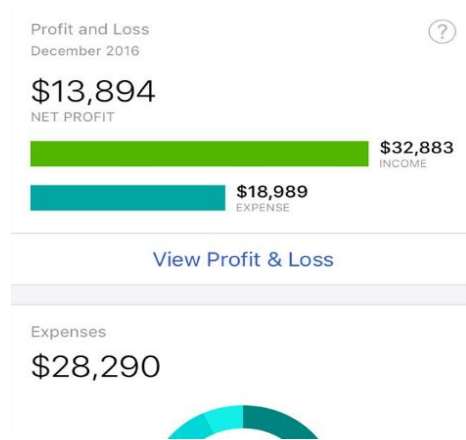
#	PRODUCT/SERVICE	SKU	DESCRIPTION	QTY	RATE	AMOUNT	TAX	CLASS
1	Labor			1	500	500.00		
2								

Add lines Clear all lines

Memo Total \$500.00

Attachments Maximum size: 25MB  
Drag/Drop files here or click the icon  
[Show existing](#)

**Mobile app—Take pic of receipt creates expense transaction in QBO file with receipt attached!**



**Location tracking**

Categories  Track classes ? On

Warn me when a transaction isn't assigned a class

Assign classes

One to each row in transaction

Track locations ? On

Location label

Territory

### Re-label Customers

Other preferences

Date format: MM/dd/yyyy

Number format: 123,456.00

**Customer label** (highlighted in red)

Customers (highlighted in green) (dropdown menu with options: Clients, Customers, Donors, Guests, Members, Patients, Tenants)

Warn if duplicate check number is used

Warn if duplicate bill number is used

Sign me out if inactive for

Cancel Save

### Better Audit report

## Audit Log

Filter All

User: All Users

Date: All dates From To

Events

Show all events

Show only these events

Sign in/sign out  Lists

Budgets  Time events

Recurring templates  Statements

Settings  Sales customizations

Reconciliations  Data exchange

Transactions

Show: All Transactions

Using: Select Account

Reset Apply

## Choose user type

Choose a type of user.

- Regular or custom user**  
You specify which areas of QuickBooks Online Plus this user can access.
- Company administrator**  
Company administrators have all access rights within QuickBooks Online Plus. They also have all access rights for every other service your company subscribes to.
- Reports only**  
This type of user signs in to a special version of QuickBooks Online Plus that shows reports only. A Reports only user can access virtually all reports, except payroll reports and those listing contact information of customers, vendors, or employees. This user does not count toward your current user limit.
- Time Tracking only**  
This type of user signs in to a special version of QuickBooks Online Plus that only has time sheets. A Time Tracking only user can fill out and change his or her own time sheets (but not other users' time sheets). This user does not count toward your current user limit.

Export manage report to Word and use review feature to add comments

Recommended   **Management Reports**   Frequently Run   My Custom Reports   All Reports   Accountant Reports

NAME ▾	CREATED BY	LAST MODIFIED	REPORT PERIOD	ACTION
Expanded Company Financials	QuickBooks		This Year ▾	<a href="#">Edit</a> ▾
Basic Company Financials	QuickBooks		This Year ▾	<ul style="list-style-type: none"> <li>View</li> <li>Send</li> <li>Export as PDF</li> <li style="background-color: #e0e0e0;">Export as DOCX</li> <li>Copy</li> </ul>

Better Payment to Invoice and Deposited vs. Not Deposited Visibility (QBO users with new Left Hand Panel only for now...)

<input type="checkbox"/>	1064	Teschner, ...	10/05/2016	10/20/2017	\$0.00	<input type="radio"/> Sent	<input type="radio"/> Viewed	<input checked="" type="radio"/> <b>Paid</b>	<input type="radio"/> Deposited
									Dec 5

- Payment on Dec 3: You recorded the payment on Dec 3. Payment: \$1,200.00 | Method: CreditCard
- Payment on Dec 5: You recorded the payment on Dec 5. Payment: \$760.00 | Method: CreditCard