QuickBooks Product & Sales Guide for
Affiliates

Table of Contents

How to use this Guide

This QuickBooks Product Guide for Affiliates is designed to help you better understand the many QuickBooks products and services, available to you and your clients.

WHAT'S INCLUDED

The Guide provides summary information on each of the QuickBooks products available for your clients. The guide can also be used as marketing colleteral for email and product specific mailings.
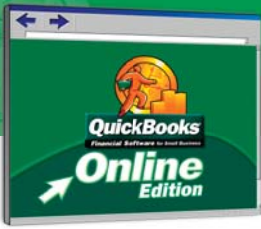
QuickBooks: Online Edition

WEB-BASED FINANCIAL MANAGEMENT FOR MULTIPLE USERS AND LOCATIONS

QuickBooks: Online Edition is right for those who need to connect multiple users and locations to their business finances—anytime, anywhere… and is right for accounting professionals providing outsourced bookkeeping services.

NEW and improved for 2005:

→ **New!** Prepare estimates for customer proposals.
→ **New!** Easier-to-use navigation.

Anytime, anywhere access for you[6]

→ You can access your finances from any Internet-connected PC.
→ Up to 20 people can use it simultaneously.
→ The perfect solution for those who:
  → Want to work on their finances from multiple locations.
  → Have multiple users who need to access the books.
  → Need access to their books while traveling.
  → Value the ability to work from home.

Reliable, on-demand accounting

→ Financial data is backed up automatically every day.
→ Data is protected at Intuit's Data Center with physical and electronic guards.
→ Product support is included at no extra charge.
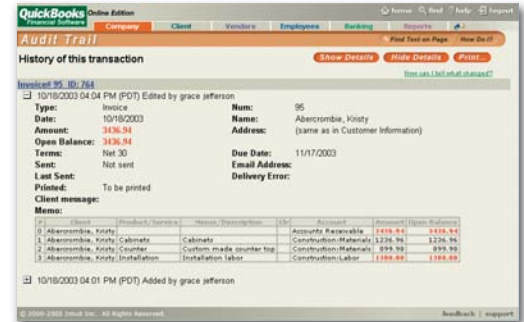
Get more control with an always-on Activity Log and Audit Trail

> *"QuickBooks: Online Edition is wonderful. I have multiple offices and I can manage my accounts from anywhere. My accountant can also access my books without having to come to my office."*
>
> — CHETAN TEMKAR, PRESIDENT, CVP TECHNOLOGIES

QuickBooks: Simple Start Edition

THE SIMPLEST WAY TO GET STARTED MANAGING SALES, EXPENSES AND CUSTOMERS

~~$99.95~~

Only $79.95
(after discount)

QuickBooks: Simple Start Edition is designed for new businesses or small "manual-method" businesses who need simple to use financial software.

Simple Start features the ability to:

→ Automatically track sales and expenses to help you keep complete and accurate records for taxes.

→ Generate reports to show precisely where the business stands.

→ Use simple tools for income and expenses—print checks, pay bills, track customer payments, and generate sales receipts and invoices.

→ Organize all your business, customer and vendor information in one place.

→ Manage your business anytime, anywhere[6] with Simple Start Online Edition if web based access is preferred.

Plus, 100 free checks and 30 days of support included with purchase.[34]

Primary Simple Start Navigator

It's simple to get started—or get your money back.
Get a refund of the purchase price when you return the product within 60 days.

2 editions available:

QuickBooks: Simple Start is available in a desktop and online edition. Both platforms include nearly the same features. The decision primarily comes down to preference.

Important notes:

→ **QuickBooks: Simple Start Edition** is only for new-to-QuickBooks users. It does not import data from existing QuickBooks users.

→ **QuickBooks: Simple Start Edition** does not process payroll, track accounts payable, inventory, purchase orders or do online banking.

~~$199.95~~ Upgrade

Only $79.95
(after discount
and mail-in rebate)

~~$199.95~~ New User

Only $179.95
(after discount)

QuickBooks: Basic 2005 is right for those who need basic check printing, bill paying and expense tracking; value the ability to organize data in one place; and would benefit from learning tools and in-product help.

Valuable features include:

→ **NEW** Learning Center to increase your confidence with QuickBooks.

→ **IMPROVED** Manage customer payments more quickly, including over and underpayments.

→ **IMPROVED** Use the Report Navigator to instantly find and generate reports, financial statements, sales reports, and more.

→ **IMPROVED** Manage payroll and direct deposit with new state form updates (additional fees apply).[16]

→ **IMPROVED** Easy-to-use Help features.

→ **IMPROVED** Enter multiple downloaded transactions from banks or credit cards in just a few clicks.

→ Easily pay bills, print checks, and track expenses.

→ Easily create invoices, track payments and manage sales taxes.

→ Easily reconcile and "undo" a reconciliation.

→ Centralize tax information for you.

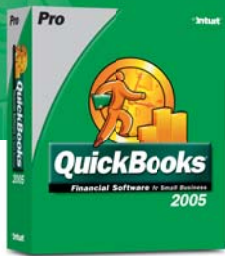→ New Business Checklist with key forms/resources.
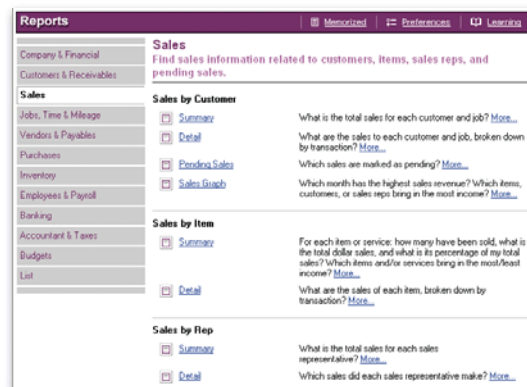
New Report Navigator makes it easier to find the right report

"I found information about my company that I never knew existed. The Report Navigator is a really slick new tool in QuickBooks. In plain English I found report descriptions that helped me learn more about my company's financial situation. It just took a click to get the report."

QUICKBOOKS: PRO 2005 | AWARDS

2004
Small Business
Computing.com
Excellence in
Technology Award
· WINNER ·

Excellence in Technology Award,
Accounting/Finance

QuickBooks: Pro 2005

ADVANCED FINANCIAL MANAGEMENT TOOLS

QuickBooks: Pro 2005 is right for those who have more advanced needs or would like to provide simultaneous access to more than one user. <u>Includes all the features in QuickBooks: Basic</u>, plus advanced tools and customization options.

How Pro is different from Basic:

QuickBooks: Pro 2005 includes everything found in Basic, plus more advanced features such as:

→ `IMPROVED` Easily create and print letters/envelopes in Microsoft® Word.[30]

→ `IMPROVED` Print packing slips and shipping labels from FedEx and UPS.[19]

→ Easily transfer data to and from Microsoft® Excel.[31]

→ E-mail forms & reports as PDFs.[6]

→ Add up to 5 simultaneous users (with purchase of additional licenses).

→ Easily customize and choose professional designs for forms.

→ Customize prices with up to 100 price levels.

→ Manage loans easily.

→ Track employee time and job costs.

→ Create estimates.

→ Automatically create a budget.

→ Project cash flow.

Manage customer payments more easily

"QuickBooks 2005 is clearly the fastest and easiest way to accurately write and customize one or many mail merge letters, emails and faxes. You can write to anyone in your QuickBooks file and merge in any QuickBooks data, so it really pays to add names solely for contact management. The new invoice letters are perfect for anyone wanting custom invoices or better client relations."

ADVANCED TOOLS FOR FAST AND EASY FINANCIAL MANAGEMENT TO BOOST EFFICIENCY AND ACCURACY

~~$299.95~~ Upgrade

Only $154.95
(after discount
and mail-in rebate)

~~$299.95~~ New User

Only $254.95
(after discount)
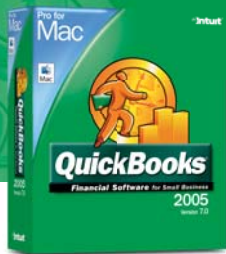
*QuickBooks: Pro 2005 for Mac helps you work the way you want with more customizable forms and easier ways for Windows-based accountants to support QuickBooks for Mac users. And, Pro 2005 takes advantage of more Mac OS X features, including iCal[39] and .Mac.[40]*

Valuable features include:

→ **IMPROVED** Customize forms. You can change fonts or add a background image from a PDF file. You can choose from professionally designed images or use your own. Also, select printed fields or add status stamps.

→ **IMPROVED** Share QuickBooks data with Windows[41] users, including your accountant. Open QuickBooks for Windows data files (.QBW) and back up files (.QBB).

→ **NEW** Match menus with QuickBooks for Windows, making it easier for Windows-based accountants to support Mac clients.

→ **NEW** Make list items inactive and sort lists on any column.

→ **NEW** See cash flow and unbilled hours or expenses with one click on new reports.

→ **NEW** Avoid underbilling with automatic alerts of any unbilled hours or expenses when invoicing.

→ **NEW** QuickZoom® to individual bills and invoices from Pay Bill and Receive Payment windows.

→ **NEW** Back up financial data to .Mac.[40] You can upload a copy of a QuickBooks file to Apple's .Mac service for extra protection.

→ **IMPROVED** Add reminders to iCal.[39] Now you can post reminders to the Apple® iCal application to help avoid late payments and meet important deadlines.

→ Easily print checks, pay bills and track expenses.

→ Easily invoice customers, track payments and sales taxes.

→ Create purchase orders and track inventory.

→ Instantly generate reports (Profit and Loss, Balance Sheet and more).

→ Export reports to Microsoft Excel.[42]

→ Email[43] invoices, statements or reports.

→ Payroll (stand-along Top Pay by Aatrix Software, Inc.).[44]

→ Use time tracking, job costing and estimating tools.

→ Built for Mac OS X (10.2.8 or 10.3.5).

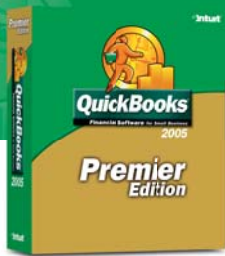→ Easy upgrade from QuickBooks for Mac, QuickBooks for Windows[45] or Quicken for Mac[46].
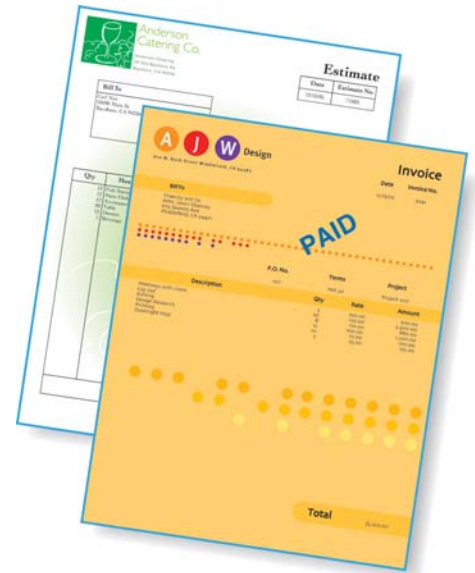
Customize forms

QuickBooks: Premier 2005

~~$499.95~~ Upgrade

Only $279.95
(after discount
and mail-in rebate)

~~$499.95~~ New User

Only $399.95
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)

~~$1499.95~~ 5-user, New User

Only $1199.95
(after discount)

QUICKBOOKS: PREMIER 2004 | AWARDS

cnet
Editors'
Choice
FEB 2004

CNET Editors' Choice —

"...the best and most comprehensive
small-business accounting program out
there..."*

PC MAGAZINE
EDITORS'
CHOICE

March 16, 2004
QuickBooks Premier 2004
Intuit Inc.

PC Magazine: Editors' Choice —

"...you can't go wrong buying it
for your small business."

"...an impressive stable of add-ons"

"...broad base of third-party
developer support is perhaps
QuickBooks' greatest asset."

PC Magazine, March 16, 2004**

QuickBooks: Premier 2005 is right for those who have more complex or specialized finances, or need to access their books remotely.[7]

QuickBooks: Premier includes all the features of QuickBooks: Basic and Pro 2005, plus additional tools for forward-looking analysis, planning, and growth to help achieve better results. Specialized tools also allow Premier users to meet more complex inventory, accounting, and customer needs.

How Premier is different from Pro:

QuickBooks: Premier includes the following features found only in **Premier**:

→ `IMPROVED` Create and customize your business plan.

→ `IMPROVED` Use Expert Analysis[22] tool to compare your businesses against industry standards.

→ `IMPROVED` Industry-specific versions of Premier are available to meet customized needs.

→ Access and use your QuickBooks data remotely from another location.[7]

→ Track and manage inventory items and "assemblies".

→ Create a business plan, including 3-year projected financial statements, which can be used for loan applications.

→ Automatically create an annual forecast.

→ Predict your cash balance with the Cash Flow Projector.

→ Set "Per Item" price levels to match the right price to the right item.

→ Track sales orders for out-of-stock items or other items you need to fill—without affecting accounts receivable.
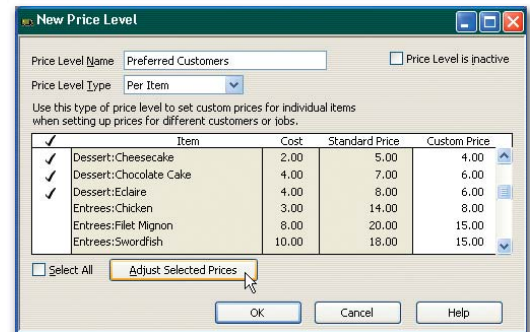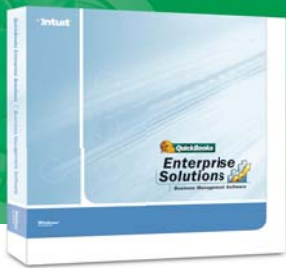

Set "Per Item" price levels

ALSO AVAILABLE:

Stand-alone industry-specific Editions of QuickBooks: Premier

These include ALL the functionality of the regular QuickBooks: Premier, PLUS navigators, industry-specific reports, Help files, and more to make QuickBooks even easier for your clients in certain industries.

QuickBooks Enterprise Solutions 5.0

OUR TOP OF THE LINE FINANCIAL AND BUSINESS MANAGEMENT SOLUTION WITH THE BEST MULTIPLE USER PERFORMANCE, CONTROLS, FUNCTIONALITY AND CAPACITY

~~$3500.00~~
Includes Full Service Plan

Only $2800
(after discount)

QUICKBOOKS: ENTERPRISE SOLUTIONS 4.0 | AWARDS

THE CPA
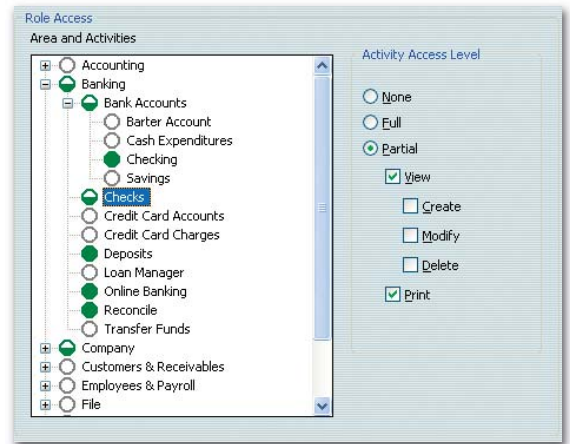TECHNOLOGY ADVISOR

CPA Software News —
"4 of 5 stars"

QuickBooks Enterprise Solutions 5.0 is our top-of-the-line business solution that can help larger small businesses accelerate their growth. It enables many functions of your business to be more productive, gives you greater control and provides the insight to make smarter decisions. Choosing QuickBooks Enterprise Solutions enables your business that is outgrowing Pro and Premier to stay in the QuickBooks family—a brand they trust.

Valuable features include:

→ **NEW** Flexibility to customize access levels for each user: increased granularity with over 115 separate entitlements.

→ **NEW** Set up new users quickly by maintaining permissions through 13 predefined user roles.

→ **NEW** Easily create custom financial statements with Financial Statement Designer.

→ **NEW** Quickly find customer and item records by searching across a variety of fields including addresses, phone numbers, item descriptions and custom fields.

→ **NEW** Automatically calculate depreciation and taxes for fixed assets with Fixed Asset Manager.

→ **IMPROVED** Advanced audit tracking reports and enhanced audit trail performance to provide visibility into changes to financial data.

Quickly and easily assign permission levels

Enterprise Solutions includes all the features of QuickBooks: Pro and Premier PLUS it offers these significant benefits to help accelerate your growth:

→ Critical reports run up to 90% faster than QuickBooks: Pro or Premier.[1]

→ Store and manage twice as many items, customers and vendors than QuickBooks: Pro and Premier and get the ability to add up to 10 simultaneous users.

→ Gives you peace of mind with the Full Service Plan.[9]

ALSO AVAILABLE:

Stand-alone industry-specific Editions of QuickBooks Enterprise Solutions

These include ALL the functionality of the regular QuickBooks Enterprise Solutions, PLUS navigators, industry-specific reports, Help files, and more to make QuickBooks even easier for you in certain industries.

Industry-Specific Editions of QuickBooks Premier and Enterprise Solutions

Industry-specific editions of QuickBooks make it easier for businesses in those industries to use QuickBooks. The industry-specific editions include enhancements to the existing QuickBooks products that streamline activities for certain industries. The results? **Routine tasks are more efficient, new employee training is simplified, work-arounds are eliminated, and time is saved.**

Industry-specific editions are available at both the Premier and Enterprise Solutions levels. In addition to the respective Premier or Enterprise Solutions features, specific work tasks have been customized and augmented for the industry-editions:

Industry Specific Edition	More Robust Functionality
Contractor	Job Costing
Manufacturing & Wholesale	Profitability and Sales Reporting
Nonprofit	Donor Tracking
Professional Services	Time Tracking and Invoicing
Retail	Sales Tracking (Should be thought of as a complement to QuickBooks Point-of-Sale solution)

WHY CHOOSE AN INDUSTRY-SPECIFIC EDITION?

The industry-specific editions are ideally suited for those who need a combination of the industry-specific functionality coupled with the power of QuickBooks: Premier or QuickBooks Enterprise Solutions.

Each industry-specific edition features:

- → *Industry Menus and Navigators for easy access to industry-specific features*
- → *Specialized Reports designed for specific industries*
- → *Industry-specific Sample Company Files to aid in setting up QuickBooks*
- → *Chart of accounts to help you get up and running quickly*
- → *Forms, Letters and Worksheets specific to the industry*
- → *QuickBooks Help and Tips from experts in the industry*

PREMIER OR ENTERPRISE SOLUTIONS?

In summary you should choose the industry-specific editions of Enterprise Solutions if you need between 5 and 10 simultaneous users or the top-of-the-line QuickBooks performance, controls, functionality and capacity.
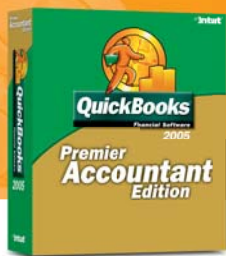
~~$499.95~~ Upgrade

Only $279.95
(after discount
and mail-in rebate)

~~$499.95~~ New User

Only $399.95
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)

~~$1499.95~~ 5-user

Only $1199.95
(after discount)

Accountant Edition of QuickBooks: Premier and QuickBooks Enterprise Solutions are packed with advanced bookkeeping, write-up and financial reporting tools to help you work more efficiently than ever.

NEW and improved for 2005:

→ **New!** Unlimited customization of financial statements using new spreadsheet-like designer.

→ **New!** Integrated Working Trial Balance.

→ **New!** Payroll Processing including Federal and State Forms (additional fees may be required).[37]

→ Set a closing date and password to prevent changes to prior periods.

Other valuable features include:

→ Fixed Asset Manager.

→ General ledger, transaction history reports.

→ Remote access.[7]

→ Save reports and forms as PDFs, and email directly from QuickBooks.

→ Easily transfer data to and from Microsoft® Excel.[31]

→ Audit trail.

→ Standard accounting: GL, AR, AP, Bank Reconciliation.

→ "Rapid data entry" including quick-fill of accounts and names.

→ Retained Earnings QuickZoom®.

→ Integrates with ProSeries® and Lacerte® tax products.[28]

→ Compatible with all QuickBooks 2005 programs—works with all your 2005 QuickBooks files, including Basic, Pro and all Premier industry-specific editions.[4]

Create and customize financial statements for yourself faster and more efficiently—you never have to leave QuickBooks.

~~$499.95~~ Upgrade

Only $279.95
(after discount
and mail-in rebate)

~~$499.95~~ New User

Only $399.95
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)
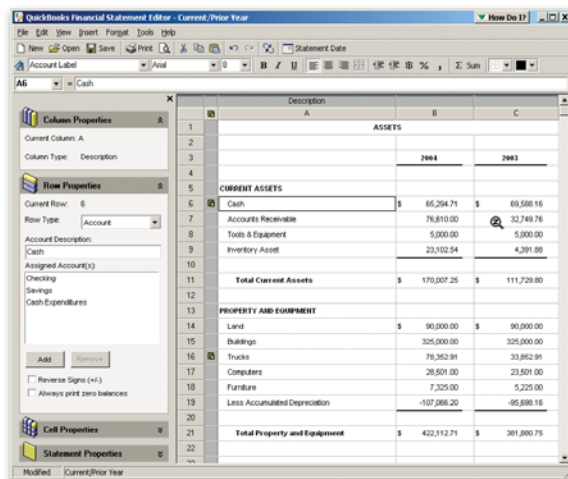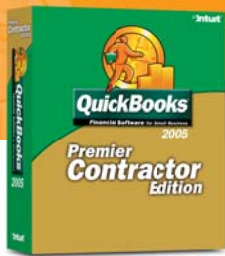
~~$1499.95~~ 5-user

Only $1199.95
(after discount)

Enterprise Solutions
Business Management Software
Contractor Edition

~~$3500.00~~
Includes Full Service Plan[9]

For up to 10 simultaneous users

Only $2,800
(after discount)

Contractor Edition of QuickBooks: Premier and QuickBooks Enterprise Solutions include ALL the functionality of the non-industry specific Premier and Enterprise Solutions software respectively, PLUS additional features that help make QuickBooks easier to use for contractors.

Valuable features include:

→ **NEW** Stay on budget with five new Job Costing reports including Cost to Complete and Job Costs by Vendor & Job.

→ **NEW** Learn how to use Job Costing and other powerful features with built-in tutorials and learning tools.

→ **NEW** See a snapshot of job profits on the Job Costing Center.

→ **NEW** Create invoices formatted as letters right from QuickBooks.

→ **NEW** Create faster, more accurate time-and-materials billing with billing rate levels by employee.

→ **Help boost job profits with automatic job costing.**
Find ways to make more money from jobs with 18 job-costing reports.

→ **Keep all job details in one place.** Contractors can manage an entire job—from estimate to purchase orders, invoices, and job cost reports. Tracks and bills for change orders automatically.

→ Run a contracting business more efficiently and accurately.

→ Contractor-specific reports give your clients just the information they need.

New Job Costing Center

Use the Job Type field of the New/Edit Job window to assign a job to a specific type of work. From there, you can produce a profit & loss report and sort it by job type. You can then decide if you want to refocus your marketing or other efforts in the direction of your most profitable types of work.

Key features in Contractor Edition:

The **Contractor Edition** includes all the features of the regular Premier 2005 and Enterprise Solutions 5.0 products respectively. Some of the features of particular value to contractors are:

→ Turn an estimate or sales order into a purchase order with one click.

→ **IMPROVED** Process payroll and offer employees Direct Deposit.[16]

→ Forecast income and expenses automatically form actual financial data.

→ **IMPROVED** Integrate with Microsoft Word to more easily create letters and envelopes.[30]

→ **IMPROVED** Enter downloaded bank and credit card transactions in a few clicks.[23]

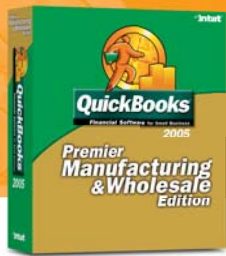*"Contractor Edition makes it easier for me because all the reporting, invoicing, estimating and bill paying features are all in one window. Everything contractors need to do is right there, easy to find,"* says **Susan Adelle of Design 2 Construction.**

~~$499.95~~ Upgrade

Only $279.95
(after discount
and mail-in rebate)

~~$499.95~~ New User

Only $399.95
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)

~~$1499.95~~ 5-user

Only $1199.95
(after discount)

QuickBooks
Enterprise Solutions
Business Management Software

**Manufacturing &
Wholesale Edition**

~~$3500.00~~
Includes Full Service Plan[9]

For up to 10 simultaneous users

Only $2,800
(after discount)

Manufacturing & Wholesale Edition of QuickBooks: Premier and QuickBooks Enterprise Solutions include ALL the functionality of the non-industry specific Premier and Enterprise Solutions software respectively, PLUS *additional features that help make QuickBooks easier to use for manufacturers and wholesalers.*

Valuable features include:
→ **IMPROVED** Process shipments and print shipping labels with UPS, in addition to FedEx.[19]
→ Gain insight with 10 industry-specific reports summarizing sales, orders, purchasing and profits.
→ Work efficiently from the customized Manufacturing & Wholesale Navigator and Menu.
→ Use the Expert Analysis tool to get industry advice based on real data.[22]
→ Track more relevant information with a chart of accounts just for manufacturers and wholesalers.
→ Learn from manufacturing and wholesale experts how to best use QuickBooks.
→ Track individual inventory components and assemblies automatically and get reorder reminders.
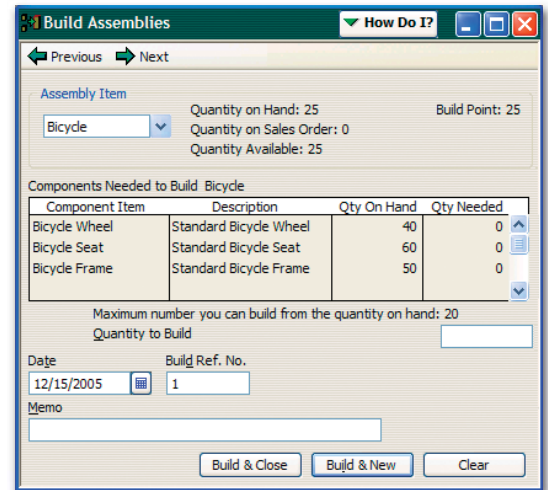
Build and manage inventory assemblies

Key features in Manufacturing & Wholesale Edition:

The **Manufacturing & Wholesale Edition** includes all the features of the regular Premier 2005 and Enterprise Solutions 5.0 products respectively. Some of the features of particular value to manufacturers & wholesalers are:

→ Set "per item" price levels to set exact prices for each item in inventory.
→ Turn an estimate or sales order into a purchase order with one click.
→ **IMPROVED** Process payroll and offer employees Direct Deposit.[16]
→ Forecast income and expenses automatically form actual financial data.

~~$499.95~~ Upgrade

Only $279.95
(after discount
and mail-in rebate)

~~$499.95~~ New User

Only $399.95
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)

~~$1499.95~~ 5-user

Only $1199.95
(after discount)

QuickBooks
Enterprise Solutions
Business Management Software
Nonprofit Edition

~~$3500.00~~
Includes Full Service Plan[9]

For up to 10 simultaneous users

Only $2,800
(after discount)
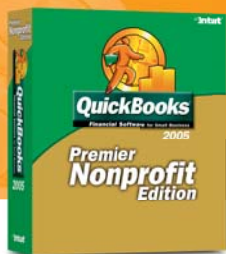
Nonprofit Edition of QuickBooks: Premier and QuickBooks Enterprise Solutions include ALL the functionality of the non-industry specific Premier and Enterprise Solutions software respectively, PLUS additional features that help make QuickBooks easier to use for nonprofit organizations.

Valuable features include:

→ **NEW** Turn QuickBooks pledge forms into acknowledgement letters with just a few clicks.

→ **NEW** Get help with nonprofit issues with the Nonprofit Learning Center.

→ Create nonprofit reports instantly and transfer expense totals directly to IRS forms, line by line.

→ Track more relevant information with a chart of accounts designed specifically for nonprofits.

→ Create a budget easily and check budgeted amounts against actual spending at any time.

→ Create thank-you letters, pledge forms and receipts automatically by sending donor names to Microsoft Word templates.[30]

→ Get a snapshot of any donor or vendor, including pledge status, recent activity and more.

→ Prepare your IRS form 990 with ease and accuracy.
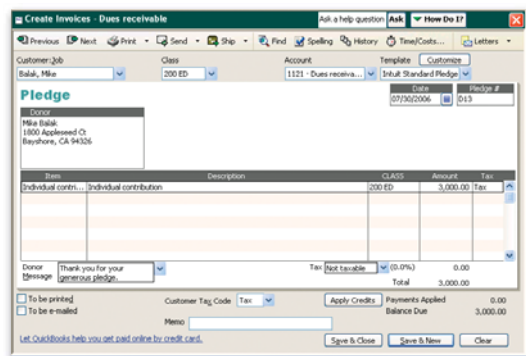
Turn pledge forms into pledge acknowledgements

Use Customer Lists to easily track income and expense items, by donor.

Key features in Non-Profit Edition:

The **Nonprofit Edition** includes all the features of the regular Premier 2005 and Enterprise Solutions 5.0 products respectively. Some of the features of particular value to nonprofits are:

→ **IMPROVED** Integrate with Microsoft Word to more easily create letters and envelopes.[30]

→ **IMPROVED** Process payroll and offer employees Direct Deposit.[16]

→ **IMPROVED** Enter downloaded bank and credit card transactions in a few clicks.[23]

→ Forecast income and expenses automatically from actual financial data.

→ Create a professional business plan painlessly for loan applications or yearly planning.

> *"For the first time in eighteen years, we now have a consolidated statement that includes the total activities for the foundation,"* says Joe Geist of Elizabeth Gamble Garden, a nonprofit company. *"We needed a product that could include operational performance, capital funds and endowment funds all on one statement and no other software was able to do that."*
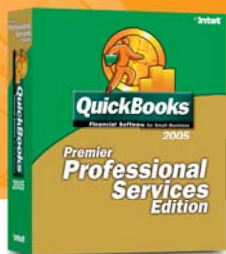
QUICKBOOKS MADE EASIER FOR PROFESSIONAL SERVICES FIRMS

~~$499.95~~ Upgrade

Only $279.95
(after discount
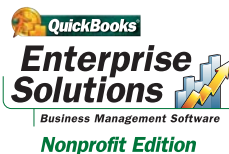and mail-in rebate)

~~$499.95~~ New User

Only $399.95
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)

~~$1499.95~~ 5-user

Only $1199.95
(after discount)

QuickBooks Enterprise Solutions
Business Management Software

Professional Services Edition

~~$3500.00~~
Includes Full Service Plan[9]

For up to 10 simultaneous users

Only $2,800
(after discount)

Professional Services Edition of QuickBooks: Premier and QuickBooks Enterprise Solutions include ALL the functionality of the non-industry specific Premier and Enterprise Solutions software respectively, PLUS <u>additional features that help make QuickBooks easier to use for professional services firms</u>.

Valuable features include:

→ **NEW** Set billing rates by employee, as well as by client or service.

→ **NEW** Get a better handle on project costs with 5 new project costing reports.

→ **IMPROVED** Get more insight into your business with 16 reports designed specifically for professional services firms.

→ **IMPROVED** Send invoice data to Microsoft Word templates and get professional, personalized invoices.[30]

→ **IMPROVED** Save time applying received payments with new payment settings and reminders.

→ Track time and bill clients more efficiently with flexible options that support the way your clients do business.

→ Look more professional with invoice and proposal templates designed specifically for professional services firms.

→ Access information and tools faster from the Professional Services Navigator or Menu.

→ Get help when it's needed with help content specifically written for professional services firms.

Reports specially designed for professional services firms

Use the Billed vs. Proposal report to track project costs and prevent yourself from exceeding an agreed-upon client fee.
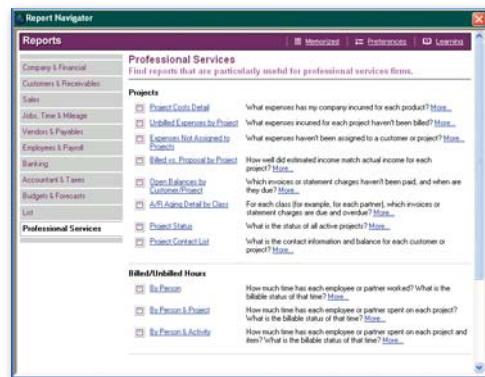
Key features in Professional Services Edition:

The **Professional Services Edition** includes all the features of the regular Premier 2005 and Enterprise Solutions 5.0 products respectively. Some of the features of particular value to professional services firms are:

→ Forecast income and expenses automatically from actual financial data.

→ Use the Expert Analysis tool to get reliable advice based on real data.[22]

→ Set "per item" price levels to set exact prices for services offered to different clients.

→ Create a professional business plan painlessly for loan applications or yearly planning.

→ **IMPROVED** Enter downloaded bank and credit card transactions in a few clicks.[23]
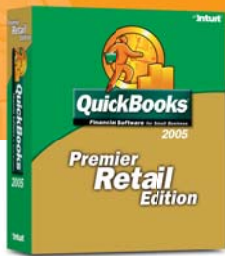
"With the new QuickBooks Professional Services Edition, somebody was listening to consultants, engineers and architects," says Neal Langerman of Advanced Chemical Safety. *"They modified the software to meet our needs."*

~~$499.95~~ Upgrade

Only $279.95
(after discount
and mail-in rebate)

~~$499.95~~ New User

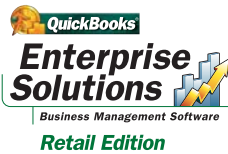**Only $399.95**
(after discount)

~~$1499.95~~ 5-user Upgrade

Only $1049.95
(after discount
and mail-in rebate)

~~$1499.95~~ 5-user

Only $1199.95
(after discount)

Retail Edition

~~$3500.00~~
Includes Full Service Plan[9]

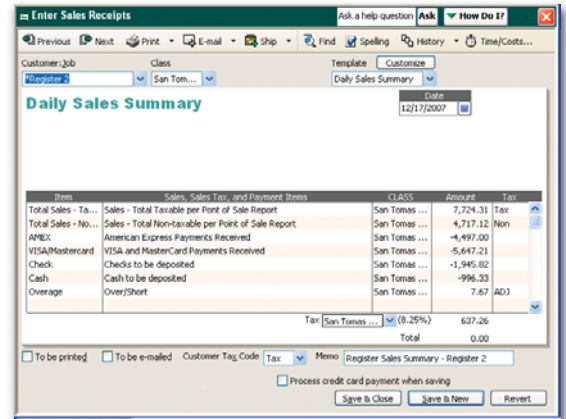For up to 10 simultaneous users

Only $2,800
(after discount)

Retail Edition of QuickBooks: Premier and QuickBooks Enterprise Solutions include ALL the functionality of the non-industry specific Premier and Enterprise Solutions software respectively, PLUS additional features that make QuickBooks easier to use for retailers.

Valuable features include:

→ Track daily sales easily by day, week or any time period with the Sales Summary Form.

→ Calculate sales tax liability automatically based on your tax rate and sales information.

→ Run 10 retail-specific reports to help keep on top of every area of the business.

→ Track Work Orders and see complete service work histories at a glance.

→ See snapshots of any customer or vendor and recent account activity in one screen.

→ Get expert analysis[22] on the retail business. You can see where they stand in any of 25 retail segments, and get expert suggestions for improvement.

→ Get retail-specific accounting tips from industry financial experts.

→ Transfer sales data from QuickBooks Point of Sale.

Easily enter daily sales summaries

QuickBooks Point of Sale 4.0 works with either QuickBooks: Premier or Enterprise Solutions Retail Editions to provide a complete retail management solution.

Key features in Retail Edition:

The **Retail Edition** includes all the features of the regular Premier 2005 and Enterprise Solutions 5.0 products respectively. Some of the features of particular value to retailers are:

→ Forecast income and expenses automatically from actual financial data.

→ Set "per item" price levels to set exact prices for each item in inventory.

→ Turn an estimate or sales order into a purchase order with one click.

→ Create a professional business plan painlessly for loan applications or yearly planning.

→ Track inventory components and assemblies automatically and get reorder reminders.

→ **IMPROVED** Manage customer payments and deposits faster.

→ **IMPROVED** Process FedEx and UPS shipments and create shipping labels right in QuickBooks.[19]

QuickBooks Point of Sale 4.0

Priced from $799.95

From $639.95

(after discount)

QuickBooks Point of Sale 4.0 is affordable, easy-to-use retail management software that replaces your cash register, tracks all of your inventory, sales and customer information, and provides up-to-date, insightful reports to help you manage your business and serve customers better. With 3 levels to choose from, it truly is a tailored solution.

New and improved features for POS 4.0:

Easy inventory management

→ Email POs directly to your vendors (all levels).

→ Auto-generate POs for your approval for items below the reorder point (Pro/Pro Multi-Store).

→ Create special orders (Pro/Pro Multi-Store).

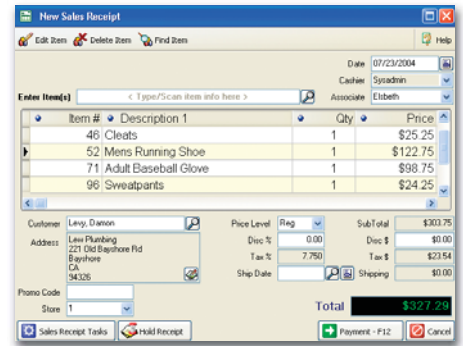**Ring up sales quickly and easily**

→ Process credit & debit card transactions within Point of Sale (all levels).[2]

→ Track service work orders (Pro/Pro Multi-Store).

→ Track employee commissions (Pro/Pro Multi-Store).

Know your best customers

→ Capture detailed customer information such as shipping and email address (Pro/Pro Multi-Store).

→ Create mailing and email lists filtered by criteria you select (Pro/Pro Multi-Store).

Ring up sales quickly and easily

Now with 30 days of included support![3] Helps you become more productive, faster.

Other features include:

→ Manages inventory so you know best and worst selling items, and what's in stock or not.

→ Rings up sales quickly and easily by scanning barcodes.

→ Manages customer information so you can track consumer preferences, purchase history, and apply discounts to certain customers.

→ Reduce costly data entry mistakes by processing credit card sales directly through Point of Sale software.[2]

→ With QuickBooks POS Merchant Service you can capture, submit, and authorize the sale with ease using this simple and integrated solution.[2]

ALSO AVAILABLE:

Software/hardware solutions

Bundled hardware includes tested and compatible receipt printer, cash drawer, barcode scanner and credit card reader. Tag printer, pole display, portable physical inventory scanner, and PIN pads also available.

"The QuickBooks Point of Sale Solution saves me almost an hour a day, and I don't have to double-check the calculations anymore. The set-up interview made it easy to identify the features that would be most useful to my business and had me up and running in no time. It's incredibly easy to use. My staff required no formal training."

— KERMIT CARPENTER, KEY WEST LIME SHOPPE, FLORIDA, BAKED GOODS AND GIFTS
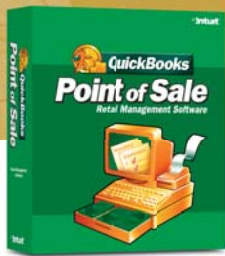
QuickBooks Point of Sale 4.0

QUICKBOOKS POINT OF SALE | AWARDS

CPA Software News, August 2003 —

QuickBooks Point of Sale 3.0, 4 of 5 stars

Brent Dirks' review:

"Intuit touts QuickBooks Point of Sale as a 'drop-dead simple solution,' and it does live up to this billing as a practical, easy-to-understand package with all the core features needed by small retail businesses with up to five point-of-sale terminals."

Integrates with QuickBooks 2005 Financial Software[2]

QuickBooks Point of Sale: BASIC 4.0 includes:

→ Easy inventory management.

→ Real-time sales data and tracking.

→ Integration with QuickBooks Financial Software (Pro and Premier 2002-2005 and Enterprise Solutions versions 1.0–5.0.)

→ Optional built-in credit card and debit card processing.[2]

→ Customer information and purchase history tracking.

→ Microsoft Excel data import and export.[4]

→ And more.

QuickBooks Point of Sale: PRO 4.0 includes:

Everything in Basic 4.0, PLUS

→ Layaway tracking.

→ Sales order and special order tracking.

→ Tracking of inventory assemblies (kits) and groups.

→ Serial number tracking.

→ Employee commission tracking.
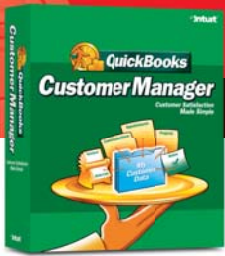
→ Work order creation and tracking.

→ And more.

QuickBooks Point of Sale: PRO MULTI-STORE 4.0 includes:

Everything in Basic and Pro 4.0, PLUS

→ The ability to link up to 10 stores together.[5]

→ Easy inventory management for all stores at a central location.

→ Multi-store reporting and inventory transfer.

TAKE CUSTOMER SERVICE TO THE NEXT LEVEL

~~$79.95~~

Only $63.95
(after discount)

**Works alone or with QuickBooks, Outlook and Outlook Express**

QuickBooks Customer Manager is the easiest way for you to give your customers great service that keeps them coming back. It puts all the information you need at your fingertips, and synchronizes information between the key applications you already use.

With QuickBooks Customer Manager, you will be able to:

→ **See customers at a glance:** View contact information, emails[1], events, related contacts, projects, document files and QuickBooks transactions[2], all on one screen.

→ **Synchronize all key applications at once:**[3] Change information in QuickBooks Financial Software, Outlook, Outlook Express, or Customer Manager—then, update the others with just a few clicks. No retyping.

→ **Launch activities:** Write notes, letters[4] and emails[5], schedule appointments, create financial transactions and launch related documents and applications, all with one click.

→ **Create group mailings instantly:** Merge contact information into letters and labels to create personalized batch mailings.

→ **Stay on top of project details:** Track all the details of any project together. Link related contacts and files, such as spreadsheets, images or plans. Set pop-up alerts for important tasks and appointments—nothing falls through the cracks.

NEW and improved for version 2:

→ Print customized labels to easily send a mailing to all customers.

→ Customize the "Names" list with flexible filters and select which columns to show.

→ Search results now based on all information, not just names.

→ Create the same personalized letter to send out to all customers.

→ Schedule recurring appointments.
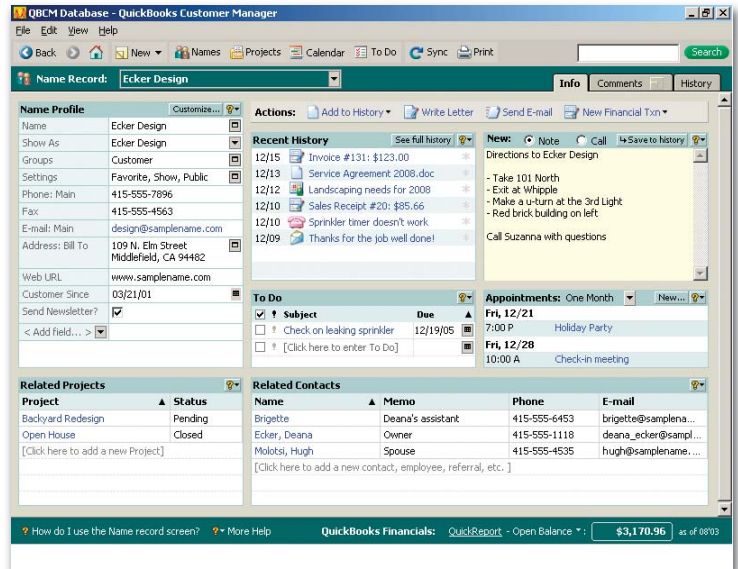
> *"It is much easier to look up records. I find that I have much more information at hand with Customer Manager. I used to have information scattered among Rolodexes and several software programs-now I just use Customer Manager."*
>
> — ELAINE PILKINS, CLAY

Checks

Simplify your work by printing checks directly from your software. Intuit's Voucher and Standard Checks work perfectly, even for first-time users. And you can customize your selection to project the perfect image for your businesses.

Envelopes

Forget hand-addressing. Envelopes specially designed to work with our checks and forms free your time for more important jobs.

Deposit Slips

Streamline your deposit process with QuickBooks printable or traditional manual Deposit Slips.

And… Manual Checks, Pre-Printed Forms, Statements and Invoices, Business Cards and Stationery, Pre-Inked Stamps, and more. All available from Intuit.

Footnotes and disclaimers for all Intuit products and services referenced in this QuickBooks guide

We at Intuit are committed to bringing you great products and services that work with QuickBooks. Occasionally we may decide to update our selection and change our product and service offerings. Please check accountant.intuit.com for the latest information, including pricing and availability on our products and services. Prices do not include taxes. Terms and conditions subject to change without notice.

For QuickBooks Financial Software:

(1)   Based on standard testing environment results versus QuickBooks: Premier Edition 2005. Results may vary based on configuration, size and contents of data file, system and network traffic. For information on testing environment refer to test reference guide at www.usequickbooks.com/testspecs.

(2)   Requires Microsoft Excel 2000, 2002 or 2003. Company files must all be on the same version of QuickBooks Enterprise Solutions.

(3)   Based on standard testing environment results versus QuickBooks: Premier 2005. Results may vary based on configuration, size and contents of data file, system and network traffic. For information on testing environment refer to test reference guide at www.usequickbooks.com/testspecs

(4)   Does not include industry-specific navigators. Does not include QuickBooks for Mac or QuickBooks: Online Edition. Premier Accountant Edition does not include QuickBooks Enterprise Solutions.

(5)   Works with QuickBooks Point of Sale versions 1, 2, 3, and 4.

(6)   Registration required. Microsoft Windows 98, Me, NT, 2000, or XP, a high-speed Internet connection, and at least Microsoft Internet Explorer 5.0 (IE 6.0 recommended). Service availability subject to occasional downtimes for systems or service maintenance.

(7)   Internet access required. One single-user subscription (12 months of service) included at no charge, valid for customers who purchase and install QuickBooks: Premier 2005 software before 12/31/2005. Remote Access subscription begins at the time of installation and registration of software. After 12 months, users can subscribe to the service for a fee. Fees apply for additional subscriptions.

(8)   For QuickBooks: Online Edition, and QuickBooks: Simple Start Online Edition users: Requires a computer with Microsoft Windows 98, Me, NT, 2000, or XP, an Internet connection (a high-speed connection is recommended), and at least Microsoft Internet Explorer 5.0 (IE 6.0 is recommended). Service availability subject to occasional downtimes for systems or service maintenance. For QuickBooks Enterprise Solutions users: Additional fees may apply. Requires Windows 2000 Server or XP Pro license. For multiple users, Windows 2000 Terminal Services Client Access Licenses required.

(9)   QuickBooks Enterprise Solution: Full Service Plan is good for 12 months from date of purchase. Dedicated support engineers available weekdays from 5 A.M.–5 P.M. Pacific Time. Intuit reserves the right to limit each telephone contact to one hour and to one incident. Support availability subject to occasional downtime for systems and server maintenance, company events, observed U.S. holidays, or events beyond our control. Terms, conditions, pricing, features, service offerings and availability of the Full Service Plan are subject to change at any time without notice. QuickBooks: Online Edition: Lifetime support means the life of the active subscription. Support availability and response time goals exclude occasional downtime due to system and server maintenance, company events, observed U.S. holidays and events beyond our control. After hours requests will receive a reply the next business day.

(10) QuickBooks Enterprise Solution: Receive a year's worth of upgrades available through Full Service plan (offer good for 12 months from date of plan purchase). QuickBooks: Online Edition: Support good for lifetime of paid subscription. Additional terms, limitations and conditions may apply.

(11) QuickBooks: Basic, Pro, Premier Edition and Enterprise Solutions: Transfers data from QuickBooks 5.0 through QuickBooks 2005 for Windows, QuickBooks: Online Edition, and QuickBooks 4.0, 5.0, 6.0, and 7.0 for Mac. QuickBooks: Pro for Mac converts data from QuickBooks: Basic, Pro, Premier, and Premier Accountant for Windows versions 2005, 2004, 2003, and 2002; and Premier Contractor for Windows versions 2005, 2004, 2003. Pro for Mac also transfers data from QuickBooks: Pro 4.0 for Macintosh or QuickBooks: Pro 5.0 & 6.0 for Mac to QuickBooks: Pro 7.0 for Mac.

(12) Additional terms, limitations and conditions apply. Full Service Plan is good for 12-months from date of purchase. Phone consultations are limited to one hour. Excludes occasional downtime for systems and server maintenance, company events, observed U.S. holidays, or events beyond our control. Terms, conditions, pricing, and availability of the Full Service Plan are subject to change at any time without notice.

(13) Mac version does job costing only.

(14) Merchant Services is an optional fee-based service available with QuickBooks financial software excluding Pro 7.0 Mac. Application approval and Internet access required. Additional terms and conditions apply. Details available at www.quickbooks.com/posmerchant.

(15) Class Tracking and Budgets are part of the QuickBooks: Online Edition Business package for an additional $7.95/month; Time Tracking, Customer Expense Tracking, Charges and Custom Invoice Styles are part of the QuickBooks: Online Edition Sales Package offering for an additional $9.95 monthly fee. Both packages available for $15/month.

(16) Add-on services require subscription. EIN and Internet access for certain features required, including tax table updates and direct deposit.

(17) QuickBooks: Pro 7.0 for Mac offers payroll through stand-alone Top Pay by Aatrix Software, Inc.

(18) Internet access required. Twelve months of Employment Regulations Update service are complimentary. Fees may apply after twelve months.

(19) No QuickBooks fee for using the shipping features, but UPS will charge shipping fees for packages shipped from within QuickBooks. Registration and agreement to terms and conditions required.

(20) QuickBooks: Online Edition and QuickBooks: Simple Start Online Edition do not create graphs.

(21) QuickBooks: Online Edition does not save forms and reports as PDFs.

(22) Recommend use by 12/31/05, based on time-sensitive industry comparison. Recommendation may not take into account all critical factors of specific businesses.

(23) Online Services vary among participating financial institutions or other parties and may be subject to application approval, additional terms, conditions and fees.

(24) QuickBooks: Online Edition and QuickBooks: Simple Start Online Edition do not have reconcile undo functionality.

(25) The desktop version of Simple Start restricts access using a password, but does not have the ability to control permissions.

(26) QuickBooks: Basic, Pro, Premier Editions 2004 & 2005, and QuickBooks Enterprise Solutions 2004 & 2005 convert data from Quicken for Windows version 5 and later. QuickBooks can convert your Quicken for Mac data for use with QuickBooks: Pro for Mac. Converts register transactions from Quicken for Mac versions 2005, 2004, 2003, and 2002 for use with QuickBooks: Pro 6.0 & 7.0 for Mac. Customers may need to make adjustments to their converted Quicken for Mac file to take advantage of QuickBooks features. Details are included in product documentation and are available online at www.quickbooks.com/support. QuickBooks: Online Edition does not convert data from Quicken, but Quicken data can be converted to QuickBooks desktop programs and then converted to QuickBooks: Online Edition.

(27) Desktop versions of QuickBooks transfer data from QuickBooks 5.0 through QuickBooks 2004 for Windows and QuickBooks 4.0, 5.0 and 6.0 for Mac. Online Edition information can be exported to QuickBooks: Pro or Premier Editions. Online Edition lists and transactions can be exported to QuickBooks 2003 and 2004 (Enterprise, Pro & Premier only), while Online Edition lists and balances to QuickBooks 2004, 2003, and 2002 (Enterprise, Pro & Premier only). Data can be exported from the Online Edition, but cannot be imported back in without starting a new Online Edition account.

(28) Lacerte and ProSeries software sold separately.

(29) iCal is included in Mac OS X from Apple Computer, Inc.

(30) Requires Microsoft Word 2000, 2002, 2003. Microsoft® Outlook synchronization requires Outlook 97, 98, or 2000. Synchronization with Outlook 2002 and 2003 requires QuickBooks Customer Manager (sold separately). Visit customermanager.com or your local retailer for more details.

(31) Integration requires Excel version 2000, 2002 or 2003. QuickBooks: Online Edition and QuickBooks: Online Simple Start do not import data from Excel. For Mac, export to Excel is available and requires Excel 2001 or X for Mac. Microsoft Excel sold separately.

(32) For a complete list of software that works with QuickBooks, visit the Solutions Marketplace at www.QuickBooks.com.

(33) Special limited time offer valid within 90 days of purchase.

(34) Thirty consecutive days of Simple Start Support included upon registration. Offer valid within 90 days of purchase. Visit http://accountant.intuit.com/products_services/quickbooks_simple_start_edition/support.html for terms and conditions.

(35) Applications sold separately.

(36) Online services vary among participating financial institutions and may be subject to additional terms, conditions and fees.

(37) QuickBooks Enhanced Payroll for Accountants sold separately, and requires a subscription, EIN and QuickBooks 2005. Internet access required for download delivery and direct deposit. Nominal additional fees apply for direct deposit. Checks sold separately. 24x7 access subject to occasional downtime due to systems and server maintenance. State forms are supported for 40 states. Terms, conditions, features, pricing and service options subject to change without notice.

(38) Only members who are certified in QuickBooks 2003 or higher can be listed in the Referral Database.

(39) iCal is included in Mac OS X from Apple Computer, Inc.

(40) Requires paid .Mac account available separately from Apple Computer, Inc.

(41) Converts data from QuickBooks: Basic, Pro, Premier, and Premier Accountant for Windows versions 2005 and 2004.

(42) Export requires Microsoft Excel X or 2004 for Mac.

(43) Requires Apple Mail 1.2.5 or 1.3.8; Microsoft Entourage X or 2004 for Mac; or Eudora Version 5.2.1 or 6.1.

(44) Optional service. Fees apply. EIN and Internet access may be required for certain features. Terms subject to change.

(45) Upgrades data from any QuickBooks 6.0, 5.0, or 4.0 for Mac. Converts data from QuickBooks: Basic, Pro, Premier, and Premier Accountant for Windows versions 2005 and 2004.

(46) Transfers register transactions from Quicken for Mac 2005, 2004, or 2003. Quicken users may need to make adjustments to converted data to take advantage of all QuickBooks features. Details included in product documentation and are available online at www.quickbooks.com/support.

For QuickBooks Customer Manager

(1)   Viewing e-mails on the Name Record requires Microsoft Outlook 2000, 2003, or 2003 or Microsoft Outlook Express 5.5 or 6.0. Outlook and Outlook Express are sold separately.

(2)   Viewing QuickBooks transactions on the Name Record requires QuickBooks: Simple Start, Basic, Pro, or Premier Editions 2003, 2004, or 2005. QuickBooks Financial Software sold separately.

(3)   Synchronization requires QuickBooks: Simple Start, Basic, Pro, or Premier Editions 2003, 2004 or 2005; Microsoft Outlook 2000, 2002 or 2003; Microsoft Outlook Express 5.5 or 6.0.

(4)   The write letter feature requires Microsoft Word 97, 2000, 2002 or 2003, sold separately.

(5)   The send an e-mail feature requires a MAPI compliant e-mail client, such as Outlook or Outlook Express.

For Retail Management Software

(1)   QuickBooks POS Version 4.0 is compatible with QuickBooks: Pro or Premier Editions (2002 to 2005) and Enterprise Solutions (Versions 1.0 to 5.0), each sold separately.

(2)   Credit card and debit card processing requires an account with QuickBooks POS Merchant Service, an optional fee-based service. Additional terms and conditions apply. Requires a merchant account through QuickBooks POS Merchant Service, provided by Innovative Merchant Solutions, LLC. Application approval and fees apply. Details available at www.quickbooks.com/posmerchant. Credit card reader and printer required for credit and debit transactions. PIN pad required for debit transactions. Internet connection or modem required.

(3)   Thirty (30) consecutive days of support are included upon registration. Offer valid within 90 days of purchase. Visit www.quickbooks.com for terms and conditions.

(4)   Requires Microsoft Excel 2000, 2002, or 2003.

(5)   Each workstation must have a separately purchased and registered copy of the same version and level of QuickBooks POS.

Intuit