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TO: ALL QUICKBOOKS USERS
FROM: The QuickBooks Consultants at Sabel & Oplinger, CPA, PC

The world continues to move toward web-based solutions. Online accounting software is always improving, providing more rapid and efficient access from multiple platforms & devices, real-time accounting, bank feeds and superior connectivity compared to the desktop-based software. They are the way of the future and offer ease of access to your business anywhere, anytime with mobile apps.

- **QuickBooks Online (QBO)** – QBO has continued to make great strides in improving the product and has increased the number of its technology partnerships with outside software companies. QBO offers several accounting & payroll solutions depending on the number of employees and level of service required. QBO now offers certified Bookkeepers to assist with categorizing and reconciling transactions, provide monthly reports on your business and offers one-way video chatting with your bookkeeper.
- **Gusto Payroll** – Gusto Payroll offers full-service internet-based payroll and HR support. It is a preferred payroll provider for XERO and QBO and integrates almost seamlessly with them. It also integrates with the QB desktop applications. Gusto has multiple levels of service including HR & can provide certain fringe benefits.
- **ADP and Paychex** both offer a menu of payroll/HR solutions for their clients. Please feel free to contact our office for a representative.

For QuickBooks desktop users, 2021 is now available. Our Certified QB Advisors recommend that you use a version of QB 2019 or newer. Please review some of the 2021 enhancements and new features below:

- **Automated Statements** – Remind customers when payments are due. These reminders can be sent as a statement or as individual invoices.
- **Receipt Management** – Upload your expense receipts via the mobile application to make entering expenses into QB easier and faster.
- **Customized Payment Receipts** – Enhanced templates for customization of invoices, sales receipts, estimates, statements and purchase orders.
- **Data Level Permission** – Allows you to restrict access and roles for each user.
- **Create Customer Groups** – Group customers together based on shared criteria such as location, type or status. You are then able to generate automated statements, reminders and mailing lists to specific groups of customers.
- **Improved Bank Feeds** – Updates to the bank feed module to improve the ability to match existing transactions in your file or create new transactions based on information downloaded from your bank.
- **While QB is now offering 2021 Desktop for Mac Users, we do not recommend it. – The QuickBooks Online version is recommended for anyone with a Mac.**

Feel free to call the office (631) 283-2370 for more information.