



The QuickBooks® Online Newsletter  
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FROM THE OFFICE OF



ACCOUNTING ADVANTAGE

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### 5 QuickBooks Online Add-On Apps You May Need in 2017

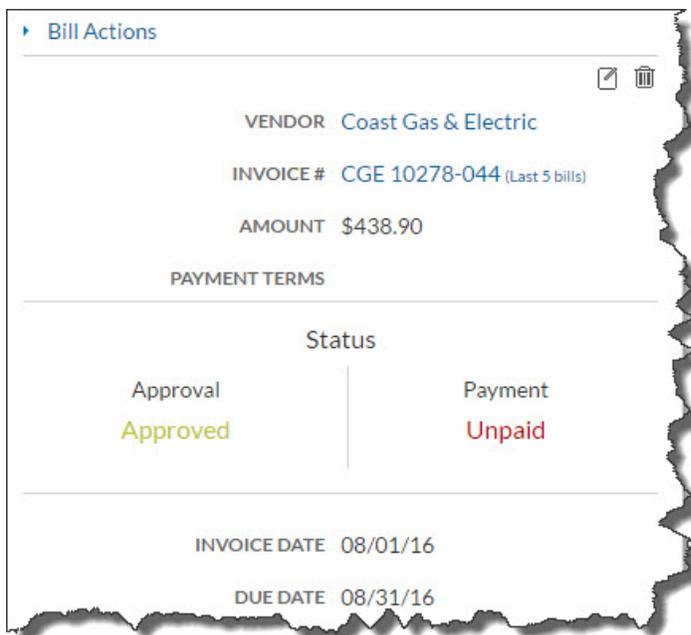
*Not finding quite everything you need in QuickBooks Online? Here are some handy add-on apps available.*

QuickBooks Online may work for you just fine as is. After all, it was designed to meet the needs of the millions of small businesses that want to manage and track their income and expenses, create records and transactions, and run reports to gauge their financial health.

QuickBooks Online was also designed to grow along with your business. But there’s no need for Intuit to add internal features to do so. In fact, that would make it too expensive and unwieldy for many companies.

Instead, Intuit has partnered with other small business websites to provides add-ons—applications that extend the usefulness of QuickBooks Online in one or more areas, like accounts receivable and payable, inventory, and expense-tracking. They integrate easily to share data and do the extra work you need. Here are some of them to consider.

#### Bill.com



*Bill.com automates your accounts receivable and payable processes. It supports electronic billing and payment, as well as multiple approval levels.*

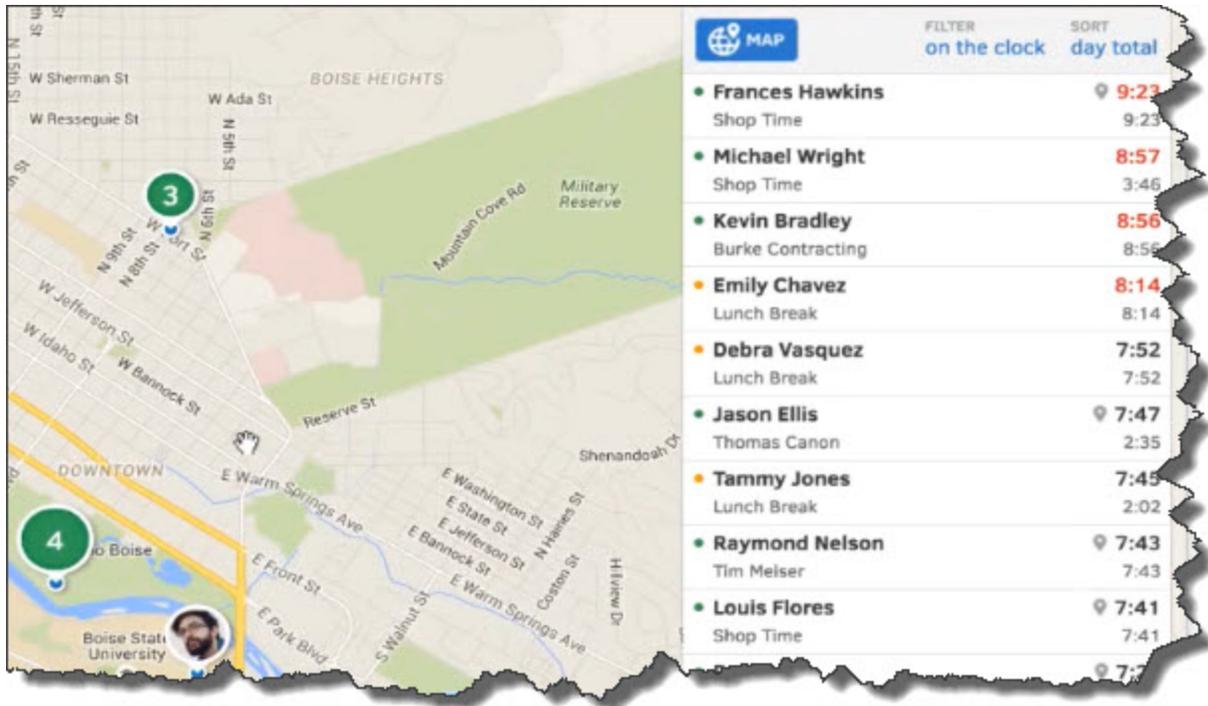
You can certainly enter and pay bills using QuickBooks Online. And you can send invoices to customers and receive payments. But adding a connection to [Bill.com](#) gives you more advanced options for accounts receivable and payable. Simply send your bills to Bill.com by scanning, emailing, faxing, or taking a picture with your smartphone. The site's automation tools turn them into digital records and route them through your specified approvers. Once approved, they're paid electronically or by paper check. Invoices are just as easy to process; customers can pay by using PayPal, credit card, or ACH. Bill.com's mobile app makes it possible to keep up with invoices and bills while you're out of the office.

### **Expensify**

Are your employees still paper-clipping receipts to handwritten expense reports? This method is unnecessarily time-consuming – and often inaccurate. [Expensify](#) solves both problems. Your staff can take photos of receipts with their smartphones. Expensify then converts the expense information into coded digital records and submits them for approval based on your company's policies. Credit card purchases can be automatically imported, too. All data is synchronized with QuickBooks Online in real-time and coded to reflect your preference of QBO's expense accounts, customers/jobs, etc. Once you've approved a report, you can have the money deposited in the employee's bank account the next day.

### **TSheets Time Tracking**

[TSheets](#) employee scheduling software automates tasks that QuickBooks Online doesn't do: scheduling and remote time-tracking for your hourly employees. Your staff no longer has to fill in paper timesheets. Instead, they can use their smartphones to track their hours and GPS location points. And while Excel is certainly better for creating schedules than paper, TSheets takes over that task, too. After you've approved timesheets, that information is sent over to QuickBooks, ready for use in your payroll processing.



*Your employees can easily “punch” in and out using their smartphones. TSheets also uses GPS technology so that your staff members’ locations are always known to you.*

### **SOS Inventory**

QuickBooks Online performs some basic inventory management tasks. You can create records for items and use them in transactions, and keep track of the number of items in stock so you know when to reorder (or have a sale). [SOS Inventory](#) goes well beyond those capabilities. You can create sales orders, track cost history and serial numbers, and document work-in-progress (WIP). SOS Inventory supports multiple locations and the entire pick/pack/ship process.

### **Insightly CRM**

You can create thorough customer records in QuickBooks Online and document some of your interaction. But it doesn’t facilitate true Customer Relationship Management (CRM) nor project management. [Insightly CRM](#) does both. It lets you build exceptionally thorough customer profiles so that you can view social streams, email history, and any events, opportunities, or events related to them. Its project management features include the ability to track by pipelines or milestones, define contact roles and custom fields, and generate advanced project reporting.

### **QuickBooks Online Integration Key**

All of these apps can work in standalone settings, but their integration with QuickBooks Online and their mobile capabilities create powerful partnerships that help you serve both your customers and your employees in ways that QuickBooks Online alone can’t.

We're not trying to sell you applications here. Our concern is that you're getting as much out of QuickBooks itself as you can. We can steer you toward add-on solutions if that seems necessary, but we're always happy to work with you on getting to know QuickBooks Online better and matching its capabilities to your company's needs.