



QuickBooks® ProAdvisor Program Changes That Matter Most to Accounting Professionals From Intuit ProLine™

“What’s New and Improved” Overview

accountant.intuit.com



Hello, and welcome to the changes that matter most to accounting professionals for 2010!

We're excited to have you on board and look forward to helping you grow your practice and be more productive.

There are many changes that will make a difference to you in 2010. First, there are a number of changes to the Pro Advisor program that you may want to know about - if you aren't already a member, here are some of the benefits of Program membership:

- **QuickBooks Software** — QuickBooks Premier Accountant 2010; QuickBooks Enterprise Solution Accountant 10.0; and a 1 year subscription to QuickBooks Online Plus are included as part of your membership.
- **Program Overview** — discover the program benefits, such as discounts, certification and more (For complete details on benefits visit the member resources page at <http://proadvisor.intuit.com/content/program/index.jsp>).
- **QuickBooks Tips & Tricks** — work more efficiently and effectively with tips for Premier Accountant.
- **Software discounts** — competitive pricing on the Intuit products that you need for you and your clients.

There are also many changes for QuickBooks software and other Intuit products that we think you should know about.

Executive Summary of Changes for QuickBooks 2010

Designed to save you time and help increase accuracy, QuickBooks 2010 can help you work more closely with your clients and get better results. Take a look at all the ways we're helping you build your practice AND help your clients save time and increase profitability.

For accounting professionals to help you work more efficiently with clients

Expanded Client Data Review — clean up client files in less time, with less hassle

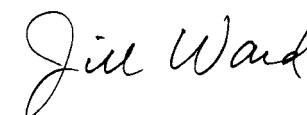
Improved Intuit Statement Writer — (sold separately from Premier Accountant) create professional financial statements with time-saving improvements

For your clients to better understand the bottom line and to work smarter

QuickBooks Pro, Premier and Enterprise Solutions — Electronically “paperclip” documents to QuickBooks transactions with New QuickBooks Document Management and enter large amounts of data with a simple copy and paste, plus much more

We're very excited to share these changes with you! Please read on for details of what has changed.

Sincerely,



Jill Ward

Vice President and General Manager
Intuit Accounting Professionals Division

QuickBooks ProAdvisor Program

94% of Certified ProAdvisors say the ProAdvisor Program helps them to better service their clients. With exciting new tools and enhancements, the Program can help you provide even better service and generate more leads.

New! Intuit Online Payroll for Accounting Professionals (formerly Paycycle)

Join thousands of accountants who have already built a profitable payroll practice! Check out the ProAdvisor web site for more details at <http://proadvisor.intuit.com/content/program/index.jsp>.

Coming Soon! Enhanced QuickBooks ProAdvisor Certification Experience

Certification can help you grow your practice with a listing on the Find-A-ProAdvisor website, where 40,000 business owners search for local QuickBooks experts every month.

- Learn by doing through simulations instead of simply reading through materials
- Spend just 1-2 hours a day and get certified in less than 2 weeks with the Certification Study Guide
- Easy to read and take on the go course materials with bigger font and printable content
- Update your certification for QuickBooks 2010 in just 4 hours with an update course (must have QuickBooks 2008 and 2009 certification to qualify)

Improved! New ways to get more leads on the Find-a-ProAdvisor Website

Create a first impression that makes the phone ring. Improve your ranking in the Find-a-ProAdvisor search results and increase the leads coming your way.¹

- Add client ratings to your profile (Certified ProAdvisors with user ratings *get on average, more than 5X more clicks than non-rated Certified ProAdvisors*²)
- Include a picture on your profile - Certified ProAdvisors with a photo on their site *get on average, more than 250% more clicks than those without* a photo³

New! You asked, we listened: Significantly deeper ProAdvisor discounts⁴

Prices on QuickBooks Pro and Premier just got better for your clients. Visit the member web site discount pages for more details

New for the A La Carte Menu! Two great options for your firm⁵

Intuit QuickBooks Assisted Payroll for your firm. Get many of the benefits of outsourced payroll at a fraction of the cost. Easily manage your firm's payroll and avoid payroll tax penalties-Guaranteed⁶

- \$99 for a 1 year subscription compared to the regular starting price of \$720 per year

Intuit QuickBooks Premier Accountant 2010 3 User for your firm. Get easy multi-user access to the same QuickBooks file. Easy multi-user setup that allows 3 people to simultaneously access the same QuickBooks file.

- Check out the ProAdvisor web site for more details at <http://proadvisor.intuit.com/content/program/index.jsp>.

New! Certified ProAdvisor Store

Show the world you're a QuickBooks expert. Buy items featuring the Certified ProAdvisor logo to help you better market your services.

New! ProAdvisor Private Community Forum

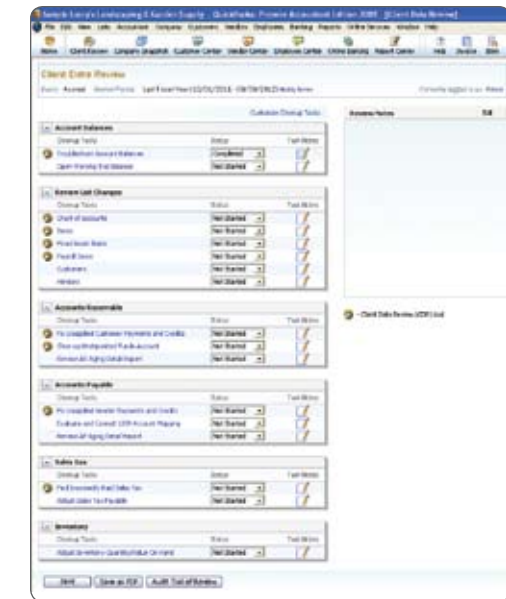
Learn from your ProAdvisor colleagues. Engage with your peers in a ProAdvisor-only forum to share ideas on topics including how to grow your practice, be more productive and better serve your clients, as well as QuickBooks technical issues.

QuickBooks Premier Accountant QuickBooks Enterprise Solutions Accountant

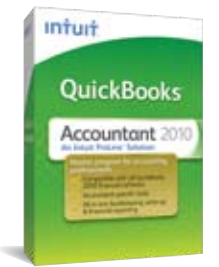
Expanded! Client Data Review

It's like spell check for your client's QuickBooks files. Cleaning up errors in your clients' files just got easier with the expanded Client Data Review (CDR) feature in Premier Accountant 2010. On one screen you have the tools to instantly zero in on mistakes and slash the time you spend weeding through transactions and reports.

- Reclassify hundreds of transactions, or write off multiple invoices, statement charges, and financial charges from a single window
- Identify items with negative inventory in two clicks, then fix them directly in Client Data Review
- Identify and make adjustments to incorrectly set up items, including "one-sided items"
- Automatically fix incorrectly recorded Sales Tax Liability payments
- From Premier Accountant 2010, you can use Accountant's Copy to fix and send back client files from QuickBooks Pro and Premier 2009



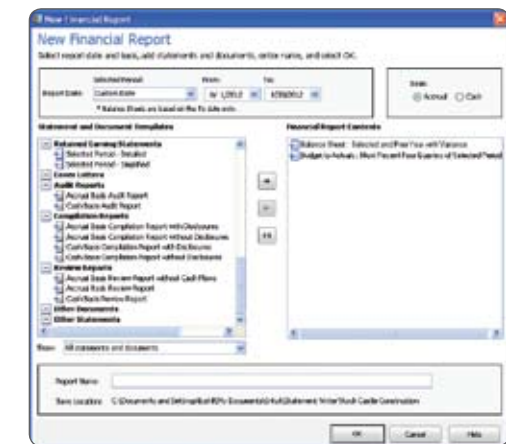
Client Data Review Main Menu



Improved! Intuit Statement Writer⁷ (sold separately from Premier Accountant)

Streamline creation of robust financial statements. Intuit Statement Writer 2010 links your QuickBooks files with Microsoft Excel[®] so you can build and update professional statements directly in QuickBooks.

- Create up to 16 statements in one workbook and batch print your statements and documents
- Build financial statements on a per-class or per-job basis, or as a combination of classes
- Access over 50 statement and document templates online
- Set ANY date range for statements, including 4-week months or 13-week quarters
- Send consolidated reports to clients in .pdf format⁹
- Create Microsoft Word-based letters, cover pages and documents in your report, and bring QuickBooks financial data into your documents



Intuit Statement Writer

Plus, with Premier Accountant, you get all of the new and improved features in Pro and Premier.

QuickBooks Pro and Premier QuickBooks Enterprise Solutions



New! QuickBooks Document Management¹⁰

Electronically “paperclip” your documents to QuickBooks transactions to stay organized and save time. Organize receipts, contracts, statements and more by attaching electronic or scanned files to any customer, vendor, employee, account, or transaction

- Store receipts, statements and more online (in the internet cloud) for easy sharing
- Easily attach documents to any customer, vendor, employee, account or transaction
- Scan dozens of documents at one time – simply insert blank pages in between and QuickBooks creates individual files¹¹
- Keep important documents at your fingertips and backed-up online
- Streamline collecting and matching documents from clients to specific transactions



Document management lets you organize all of your business documents in one place

New! Add/Edit Multiple List Entries¹²

Entering large amounts of List data is now as simple as copy & pasting. Quickly enter or edit multiple Items, Customers, and Vendors so you can make changes faster and more efficiently than ever.

- Enter Items, Customers, or Vendors data using an improved table format
- Copy and paste lists from Microsoft Excel into QuickBooks lists
- Edit one list entry then easily copy the changes to many

Improved! Company Snapshot

Get an instant view into the bottom line with more at-a-glance reports featuring easy-to-read graphs. See data from multiple years side-by-side for a quick comparison.

- Customize which snapshots appear using simple drag and drop functionality
- Select from 5 new reports: Year-over-year expense comparison, Year-over-year Income and Expense Comparison, Income Breakdown, Expense Breakdown, and Top Customers
- Drill down on the data behind the graphs with just a click



Get instant insight into your bottom line with Company Snapshot

Improved! Report Center

Spend less time hunting for the right report. Find the right report quickly and easily by previewing a full-size sample report before running it. No more looking at tiny thumbnails.

- Use the search box to find reports using plain English
- View recently-run reports – QuickBooks even remembers your custom settings
- Get a shortcut to reports you use most by creating “favorites”

Improved! Installation Enhancements

Get up and running quickly and easily. Installing QuickBooks 2010 is easier than ever for both new users and upgrades with our installation improvements.

- Simplify installation choices with a New Installation Manager
- Choose from Express and Custom installation options
- Reduces installation steps for upgraders by copying existing configuration

Improved! Clean Up Company Data

Reduce the size of your QuickBooks file. Maximize efficiency with the Clean Up Company Data wizard and condense older transactional data into summary roll-forward numbers

Improved! Custom Fields (Enterprise Solutions Only)

Get more fields...more flexibility...more control. Manage more information with more custom fields in QuickBooks Enterprise Solutions 10.0.

- Track more information with two to three times more custom fields for customers, vendors, employees and items¹³
- Set custom fields to accept certain formats (e.g. date, phone number, select from list, numeric) to improve the accuracy of data
- Use advanced filtering and sorting to run reports on the custom field information

Improved! Forms Customization¹⁴

Make all your QuickBooks forms look like they came from YOUR company. Promote your business by presenting a consistent, professional look across all your QuickBooks invoices and forms

- Easier and faster to add your logo, select fonts and colors, and customize the shading and borders of data grids – changes are applied globally
- Select from new, free professional designs to make your invoices and other forms stand out from the competition
- Connect to a community of professional designers who can create or enhance a custom logo for your business¹⁵

New! Favorites Menu¹⁶

Create shortcuts and get there faster. Get one-click access to your everyday tasks using the Favorites Menu

- Add shortcuts directly to specific functions
- Personalize favorites for each user
- Access the Favorites Menu from anywhere in the QuickBooks

Improved! Online Banking

Get the best of both worlds-- choose between the previous Online Banking experience from QuickBooks 2008 (register view) or the re-designed Online Banking Center (side-by-side view)¹⁷



Our new interface for Report Center allows you to search for the report visually

QuickBooks Online^{18,19} Simple Start Free QuickBooks Online Basic, QuickBooks Online Plus

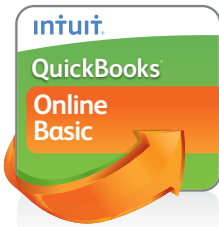
QuickBooks Online helps you stay on top of your business no matter where you are – from work, home or on the road. Enjoy the added convenience of having customer support and product updates included with your subscription. And, rest easy knowing your financial data is automatically backed-up and secure.



New! QuickBooks Simple Start Online Free

Get your clients started tracking and managing their finances with a free online service.

- Create invoices and track money
- Access finances from anywhere, anytime via the web
- Keeps data backed-up and secure—automatically



New! QuickBooks Online for iPhone & Blackberry (all versions)

Make your business truly mobile—manage data anywhere right from an iPhone or Blackberry.

- Create and email invoices
- Track customer information
- View account balances



New! Company Snapshot (QuickBooks Online Plus only)

Stay on top of your business with the Company Snapshot. Get a real-time overview all on one screen.

- See which customers owe money
- View income and expense graphs
- Know which bills need to be paid

New! Works on Safari for Mac and Firefox for windows (all versions)

Welcome Mac users! Now you can use Safari to access QuickBooks Online. Plus PC users can choose between Firefox or Internet Explorer.

QuickBooks for Mac

(Scheduled for October 2009 release*)

New! Accept Credit Cards in QuickBooks for Mac

Get paid faster by processing credit card transactions directly through QuickBooks for Mac with Intuit® Merchant Service for QuickBooks for Mac.²⁰

- No additional software or terminal to buy
- Store all your transaction information in one place
- Improve accuracy and save time on data entry

Improved! Company Snapshot

Get an instant view into your bottom line with more at-a-glance reports featuring easy-to-read graphs. Customize the Company Snapshot to create a personalized overview of your business and see what's most important to you.

- Select from new reports including: Year-over-year expense comparison, Year-over-year Income and Expense Comparison, Income Breakdown, Expense Breakdown, Top Customers
- Drill down on the data behind the graphs with just a click
- Filter charts and graphs to include the information you want
- Add and remove snapshots with simple drag and drop functionality

New! My Time Time-Tracking Software

Track billable time, instantly generate timesheets, and import timesheet data directly into QuickBooks 2010 for Mac with free My Time²¹ time tracking software.

Improved! New User Setup Assistant

Get up and running faster with the improved New User Setup experience. Go from installing QuickBooks for Mac to creating your first invoice faster than ever before. It takes only a few screens to create your company file.

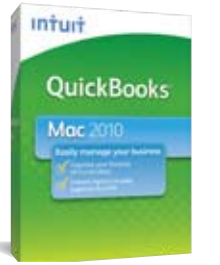
New! Guide Me and Live Community

Let the new Guide Me feature help you get familiar with everyday tasks (like creating invoices) until you're ready to start working on your own. While you're learning, Live Community²² connects you with other QuickBooks for Mac users and experts to get the answers you need.

Improved! Looks and works like a Mac

Update your QuickBooks preferences quickly and easily with a Preferences window that sports a familiar Mac OS X look and you can find the setting you're looking for using the built-in search box

- Save time entering dates into QuickBooks forms by clicking in the date field and a pop-up calendar appears to help you quickly select the right date
- Change print settings and preview your job using a familiar, modern Mac interface



QB 2010 for Mac

*Current release date for QuickBooks for Mac is scheduled for October but is subject to change without notice.

Intuit Payment Solutions



New! Intuit Check Solution for QuickBooks²³

Accept checks electronically from the comfort of your desk. Scan (or key enter) checks into QuickBooks and the funds are automatically deposited into your bank account.

- Save time depositing checks and skip trips to the bank
- Scan up to 50 checks per minute²⁴
- Payments are automatically matched to invoices
- Funds are usually available the next business day²⁵

New! Intuit GoPayment²⁶

Get paid on the spot by accepting credit card payments using your mobile phone.

- Process any major credit card.
- No need to purchase additional equipment
- Get authorization in seconds²⁷—no need to write down payment information
- E-mail or text message electronic receipts to clients directly from your phone



Scan checks into QuickBooks and they are automatically matched to invoices

QuickBooks Point of Sale



New! Point of Sale Customer Center

Improve sales with Point of Sale Customer Center. Get the insights and tools to communicate and market more effectively with customers.

- See new customers over time with graphs
- Stay in touch with customers with custom email and mailing lists created with just a few clicks
- Create campaigns for specific customers (e.g., those who have recently purchased or have no recent purchase activity) to help drive sales

Improved! Coupons and Promotions Acceptance

Easily apply coupons to sales and run reports that show how promotions are helping your bottom line. (Pro and Multi-Store only)

- Compare sales before and after with promotion reports
- Track more than 8 manual discount types
- Print coupons on receipts

Footnotes

- 1 You must be a Certified ProAdvisor to be listed on the Find-a-ProAdvisor Website which receives over 400,000 unique visitors annually.
- 2 Based on data collected between April 2008 and February 2009
- 3 Based on data collected between April 2008 and May 2009
- 4 Limited time offer. Discounts applicable only to QuickBooks Pro and Premier; other Pro Advisor discounts will remain the same. Changes to ProAdvisor discount pricing go into effect 9/28/09. Visit the ProAdvisor Member web site's discount page for details.
- 5 Purchases of Assisted Payroll and Premier Accountant at these prices are meant for your firm only, and are not meant to "pass through" or for sale to clients
- 6 Our "No Penalties" guarantee means your payroll taxes and filings are guaranteed accurate and on time, provided that the data you provide is accurate, on time.
- 7 Works with QuickBooks Premier Accountant 2010 and QuickBooks Enterprise Solutions 10.0 and QuickBooks Enterprise Accountant 10.0 only. Sold Separately when using with QuickBooks Premier Accountant 2010 and is included with the purchase QuickBooks Enterprise Solutions 10.0 and QuickBooks Enterprise Accountant 10.0.
- 8 Works with Microsoft Office 2003 or greater. Does not work with Microsoft Office Student Edition, or Standard Edition.
- 9 With Windows XP or Vista, Adobe Acrobat 5 or greater required; with Windows 7, Adobe Acrobat 9 required.
- 10 Not available in QuickBooks Online.
- 11 Scanner not included. Only TWAIN compliant scanners supported. Maximum 100 MB per file. Total file storage 100MB or about 1000 2 page PDFs. Additional file storage available at an additional cost.
- 12 Add/Edit Multiple List Entries compatible with Microsoft Excel 2002, 2003 and 2007.
- 13 Enterprise Solutions allows you to add up to one million names (e.g. customers, vendors, employees) and up to one million items (e.g. inventory, non-inventory, and service items). Some performance degradation is likely as your lists approach these size thresholds.
- 14 Not available in QuickBooks Online.
- 15 Separate charges apply.
- 16 Not available in QuickBooks Online or QuickBooks Simple Start.
- 17 Online services vary by participating financial institutions and may be subject to application approval, and additional terms, conditions and fees. We authenticate your account with your financial institution, and then use secure data transmissions between your financial institution and Intuit.
- 18 QuickBooks Online Edition requires a computer with Microsoft Windows 2000, XP or Vista, an Internet connection (a high-speed connection is recommended), and at least Microsoft Internet Explorer 6. Availability subject to regular maintenance periods. Terms, condition, pricing, features, and service options subject to change without notice.
- 19 QuickBooks Online Plus allows for up to 20 simultaneous users. Additional fees apply.
- 20 Requires Intuit QuickBooks for Mac (version 2010 or higher) and a merchant account through Intuit Payment Solutions provided by Intuit. Signature debit card is the only debit card that will work with Intuit Merchant Service for QuickBooks for Mac on QuickBooks 2010 for Mac software. Application approval, an Internet connection and at least Safari version 3.0 or higher required. Not compatible with QuickBooks financial software (for the PC), QuickBooks Enterprise Solutions and QuickBooks Online Edition. Transaction fees and discount rates apply. Additional fees may apply for specific occurrences (including chargeback and/or retrieval fees) and will apply when accepting cards other than Visa, MasterCard and Discover® Network, including American Express and Diners Club Cards. Rates are determined by the financial institution and are subject to change without notice. Transactions are subject to Association guidelines. Card swiped rate requires card reader; sold separately. Terms, conditions, features, pricing, service and support options are subject to change without notice.
- 21 My Time can be installed on one machine and will track time for a single user. It does not need to be installed on the same machine as QuickBooks for Mac. Data can be imported into QuickBooks 2010 for Mac or higher. Terms, conditions, pricing, features, service and support are subject to change without notice.
- 22 Internet access required.
- 23 Requires QuickBooks accounting software 2010 (for the PC) or higher, QuickBooks Enterprise Solutions 10, or QuickBooks Online Edition (each sold separately) and a merchant account through Intuit Payment Solutions. Application approval, an Internet connection on a Windows PC and at least Internet Explorer 5.0 required. Not compatible with QuickBooks Pro for Mac. Transaction fees apply. Terms, conditions, features, pricing, service and support options are subject to change without notice.
- 24 Requires one of two scanners: high speed Panini Vision VX-50 Scanner or general purpose Fujitsu ScanSnap s300 Scanner (each sold separately).
- 25 Payments submitted by 1 p.m. PT usually get funds deposited to the merchant's U.S. bank account the next business day. Intuit reserves the right to hold settlement on deposited checks as necessary to manage risk. Deposits held are reviewed with merchants and a decision is made to release funds after reviewing the specific situation. Subsequent deposits then revert to next day funding.
- 26 Requires an Intuit QuickBooks Merchant Service account for GoPayment, provided by Intuit Payment Solutions. Application approval required. Transaction and service fees apply. Usage of GoPayment requires a supported mobile phone and a phone service plan with internet service, sold separately by a phone carrier or other supplier. New phone purchase may be necessary. Additional fees apply when accepting cards other than Visa, MasterCard and Discover Network, including American Express and Diner's Club Cards. Transactions are subject to Association guidelines. Optional Bluetooth card reader required for lowest discount rate available. Card reader and receipt printer are sold separately and are only supported when using the GoPayment downloaded application; they are not supported by the web browser version. Optional Fees & Adjustments download feature is available in QuickBooks financial software 2009 or higher, sold separately. Terms, conditions, features, pricing, service and support options are subject to change without notice. SMS Terms of Use: GoPayment uses Short Message Service (SMS). Standard messaging rates apply. Send "HELP" for help and send "STOP" to cancel to PAYME (72963). QuickBooks not required to use GoPayment.
- 27 Authorization time depends on wireless network connectivity from your wireless provider.



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