

QuickBooks Online, Vs. Pro/Premier vs. Enterprise Questionnaire

Access

- How many people need to access your accounting system?
- If you had total control of what your employees have access to in your accounting system, would you give more people access to it?
- Will this be from the same location or remote?
- Do all users have Windows-PC's? Or are there mac users?
- If you were going to use a phone or tablet to perform an accounting-related function, what would you need it to do?
- Do you use other apps right now for your business?
- Does your accountant collaborate with you? If so, how?
If not, how would you like for your accountant to collaborate?

Job Costing and Custom Reports

- Do you want to track profitability by job? If so, at the summary job-level? Or item-level based on your estimate?
- Do you need to display any special information in your estimates or invoices?
- Do you need to track change orders?
- Do you need a report with all your active jobs and their status?
- Do you use the percentage of completion method or completed contract method?
- Do you need to track employee (payroll) costs at the job-level?

Inventory

- Do you track customer backorders?
- Do you receive partial shipments from vendors
- Do you have multiple inventory locations? Or even bin numbers within your single location?
- Do you need to track inventory valuation as FIFO*?
- Do you need to track Lot numbers or Serial Numbers?
- Do you want to use Bar Codes?
- Are you receiving orders through e-commerce?
- Do any of your suppliers or customers require EDI?

Manufacturing & Assemblies

- Do you assemble final products from raw materials?
- Do you track WIP for partially assembled product or materials in process?
- Do you track multiple units of measure?
- Do you sometimes need to change the components of a Bill of Materials “on the fly”?

Other

- What type of financial information (besides P&L and Balance Sheet) would you like to be able to see?
- Do you have any custom management reports you are using currently?
- Do manage or want to manage your payroll internally? Or prefer to outsource?
- Do you have different departments/locations you would like to track individual financial statements for?
- Do you have multiple entities or company files that you would like to consolidate?

Resources

- **Feature Comparison Matrix:** <http://bit.ly/QBOvsQBES>
- **QBO vs QBO PRO/PREM vs. QBES Comparison video:** <https://www.youtube.com/watch?v=7M5xk7NP64k>