

Intuit® Academy

What's New in QuickBooks® 2017

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EVENTS

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Laura is the author of the [QuickBooks In Depth](#), an 888+ page reference and training guide. She is also the author of [QuickBooks Solutions Guide](#), [QuickBooks Live Lessons: For All QuickBooks Users](#), 11+ hours of self-paced video instruction and co-author of [QuickBooks on Demand](#) all offered by QUE Publishing.

For over 25 years, Laura has worked with companies of all sizes and from many varied industries. Her focus has been on helping growing businesses become more successful by automating their internal accounting processes and improving their overall business financial reporting.

Additionally, Laura is a guest speaker for Intuit, providing national training for thousands of consultants and accounting professionals. She is also a respected author for Intuit, writing technical presentations, materials and documenting competing software.

Laura earned her accounting degree from Florida Atlantic University. She enjoys photography, art and camping with her sisters and their families. When Laura is not writing, she enjoys reading a good book or two!

More information can be found by visiting her website: <http://www.quick-training.com/>



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INTRODUCTION: ABOUT THIS COURSE

In this guide, you will find a summary of each of the new and improved features in the just released QuickBooks Desktop 2017. Learn how these features can save you and your client's data entry time, improving the overall experience with QuickBooks. Your clients will find it easier to work with QuickBooks in 2017 with many end-user focused features and improvements. Learning about these features will help you recommend the right software solution for your clients.

WHAT WE WILL COVER IN THIS GUIDE

This guide details the new and improved features of Intuit QuickBooks Desktop 2017 including Pro, Premier, Accountant and Enterprise.

This guide is divided into the following sections:

- What's New and Improved for QuickBooks Desktop 2017
- QuickBooks ProAdvisor Program
- Using QuickBooks Accountant ToolBox

LEARNING OBJECTIVES

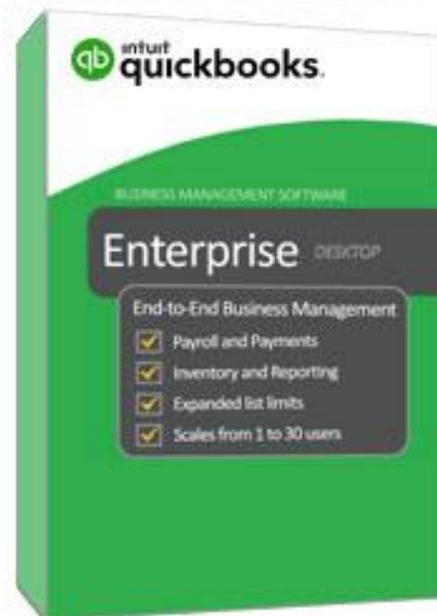
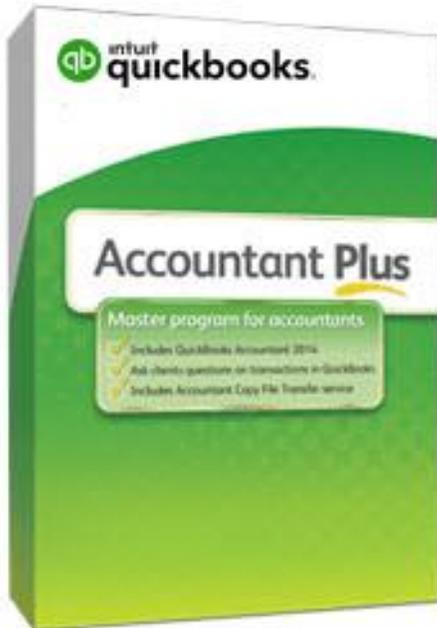
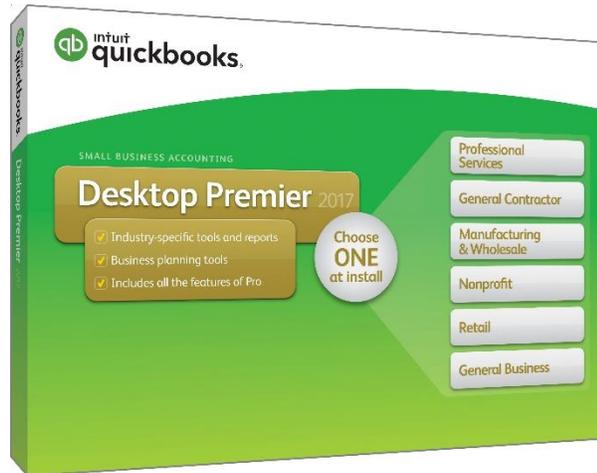
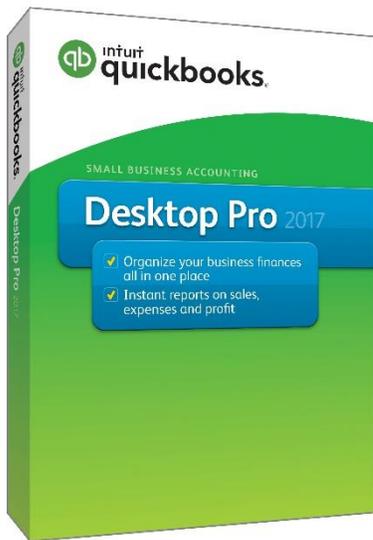
After attending this course, you will be able to:

- Identify new and improved features that will help you and your clients work more efficiently using QuickBooks Desktop 2017
- Recognize the value of the QuickBooks ProAdvisor Program
- List the steps to using the Accountant ToolBox at your client's site

INTUIT QUICKBOOKS DESKTOP 2017: OVERVIEW

Designed to improve efficiency with data entry and improve access to critical information.

Businesses that use QuickBooks love to work with software that is easy to use and provides a variety of dashboard tools helping the business owner make informed management decisions. With QuickBooks Desktop 2017, small businesses can complete their financial and accounting responsibilities with a minimum amount of effort so they can focus on growing their business.



WHAT'S NEW AND IMPROVED FOR QUICKBOOKS 2017

QuickBooks Accountant Desktop 2017 adds even more tools and improvements to empower you and your clients to work more efficiently. These features include:

NEW! SCHEDULED REPORTS

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017. **Note:** Scheduled Reports does not function in a multi-user or hosted mode, or if multiple versions of QuickBooks Desktop 2017 are installed on the same computer.

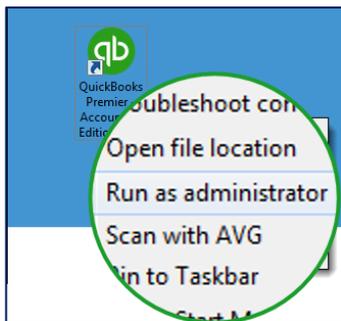
How to access it: From the menu bar select, **Reports, Scheduled Reports, Schedule Setup**. The report schedule can later be modified from the menu bar by selecting, **Reports, Scheduled Reports, Scheduled Report Center**. Individual email preference must be completed from the menu bar by selecting, **Edit, Preferences, Send Forms** and completing the required information

What this feature does: Get timely insight with automated Scheduled Reports. With the Scheduled Reports feature, your client can schedule automatic email delivery of reports to you or others that need to stay informed. Accountants can also schedule reports for automated delivery to their clients.



Note: Scheduled Reports does not function in a multi-user or hosted mode, or if multiple versions of QuickBooks Desktop 2017 are installed on the same computer.

Scheduled Reports uses Microsoft's Task Scheduler to complete the automated sending of the reports.



Note: The initial setup of a Scheduled Report requires the user to run QuickBooks with Windows Administrative Rights.

Additionally, only the QuickBooks Admin user can create, edit, inactivate or delete a Scheduled Report setup.

Scheduled Reports can only be setup when QuickBooks is in Single-User mode.

To Run QuickBooks as the Windows Administrator, right click on the QuickBooks icon with a windows mouse and select **Run as administrator**. This is only required initially when a Scheduled Report is setup.

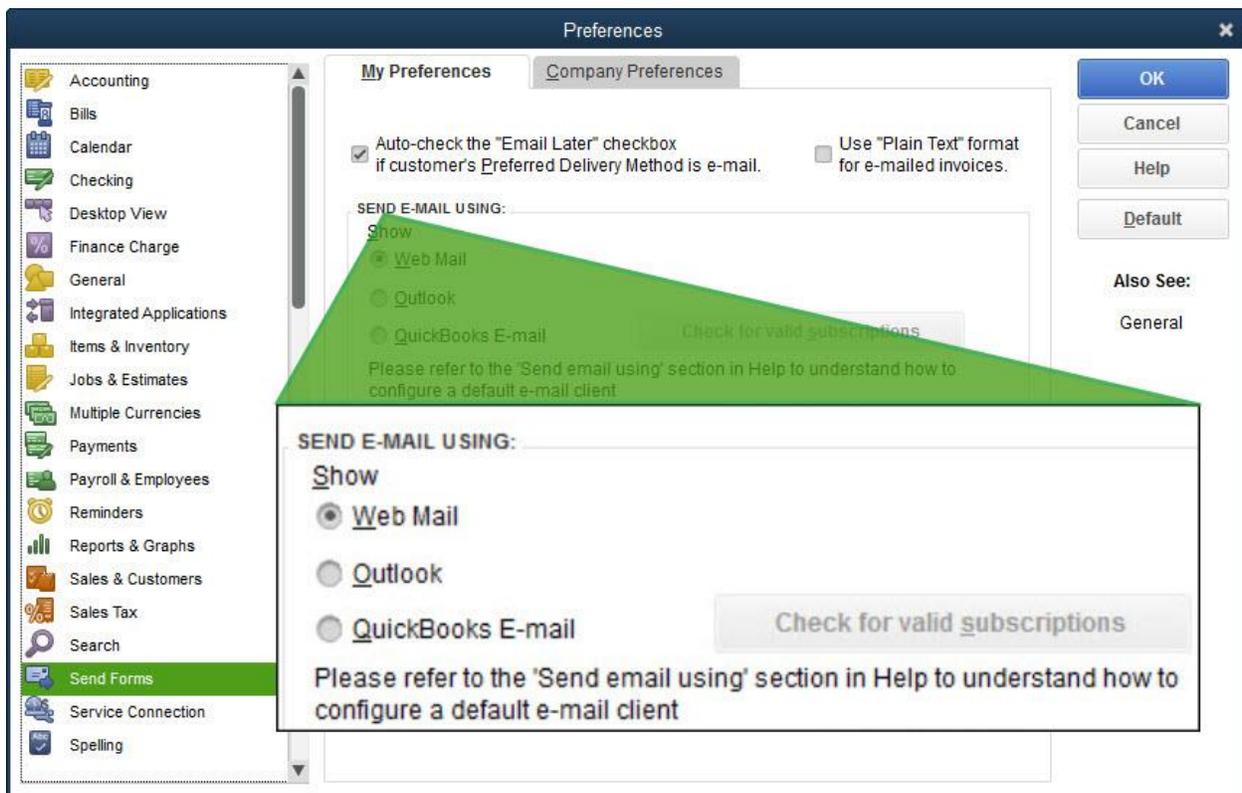
There are a couple of preferences that need to be set appropriately for this feature to work: First, make sure the **My Preferences for Keep QuickBooks running** for quick startups is *not selected*.



Make sure preference to “Keep QuickBooks running for quick startups” is not selected

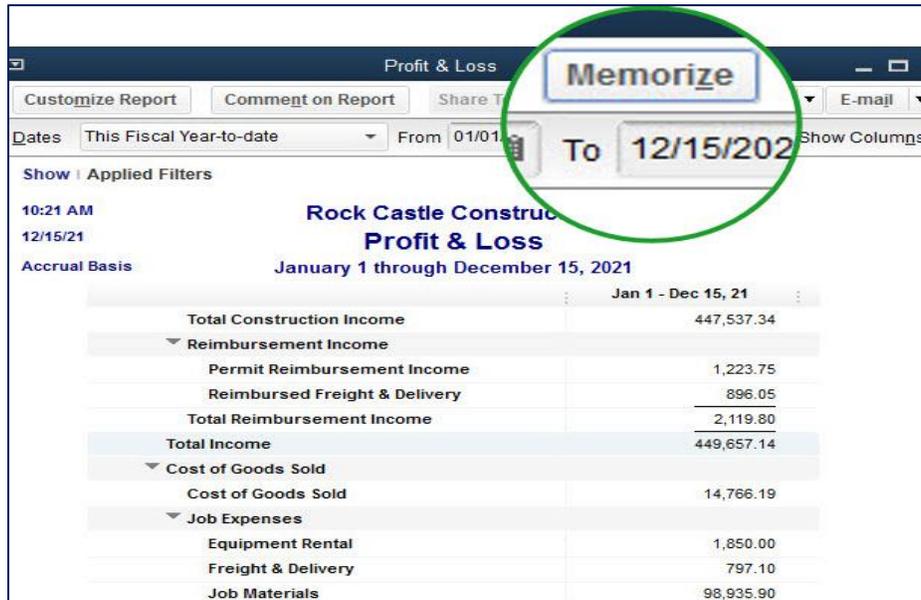
Secondly, the Send Forms preference will need to be completed. Scheduled Reports works with **Web Mail** or **Outlook**. But will not work with the QuickBooks E-Mail option.

Note: If Outlook is selected it will need to be running at the time selected for sending the scheduled report(s).



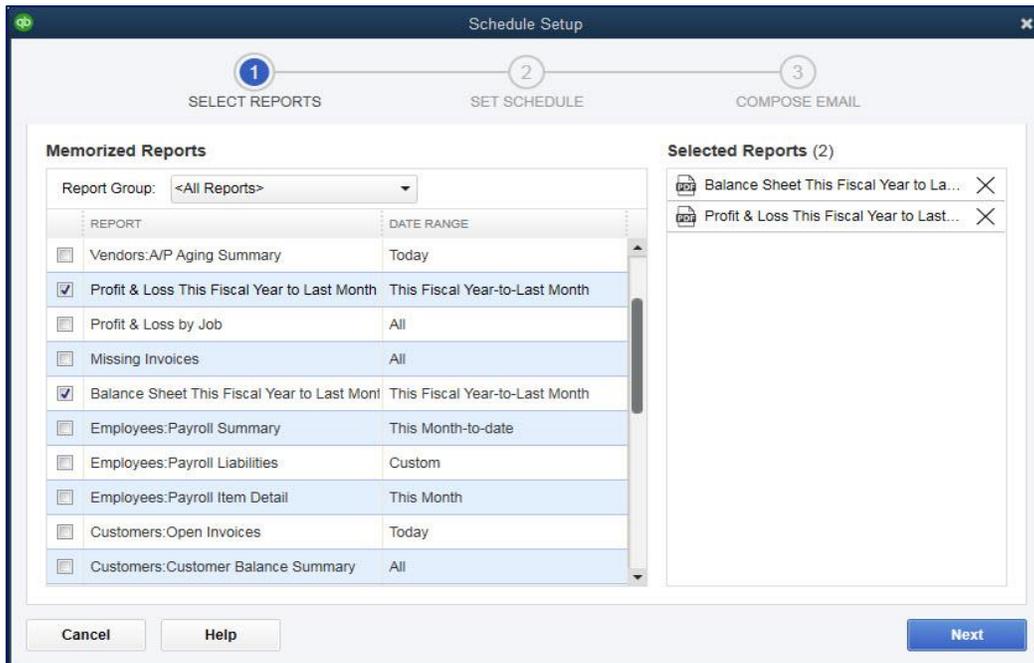
Scheduled Reports will work with Web Mail or Outlook E-mail settings

To schedule a report, it must first be memorized. To memorize a report, customize as needed and then select the **Memorize** button at the top of a displayed report window. The memorized report(s) can now be included in the Schedule Setup.



Scheduled Reports must first be memorized

After you are logged into the file with Windows Administrative rights and as the QuickBooks Admin user and you have completed the aforementioned preferences you are ready to schedule your report(s). The selected reports will be attached as individual, password protected PDF's to a single email.



Memorized Reports can be selected on the Schedule Setup window

After choosing the reports to include in the Report Schedule, you will need to select the schedule time for delivery of the reports. Schedule Reports offers a variety of pre-defined frequencies including:

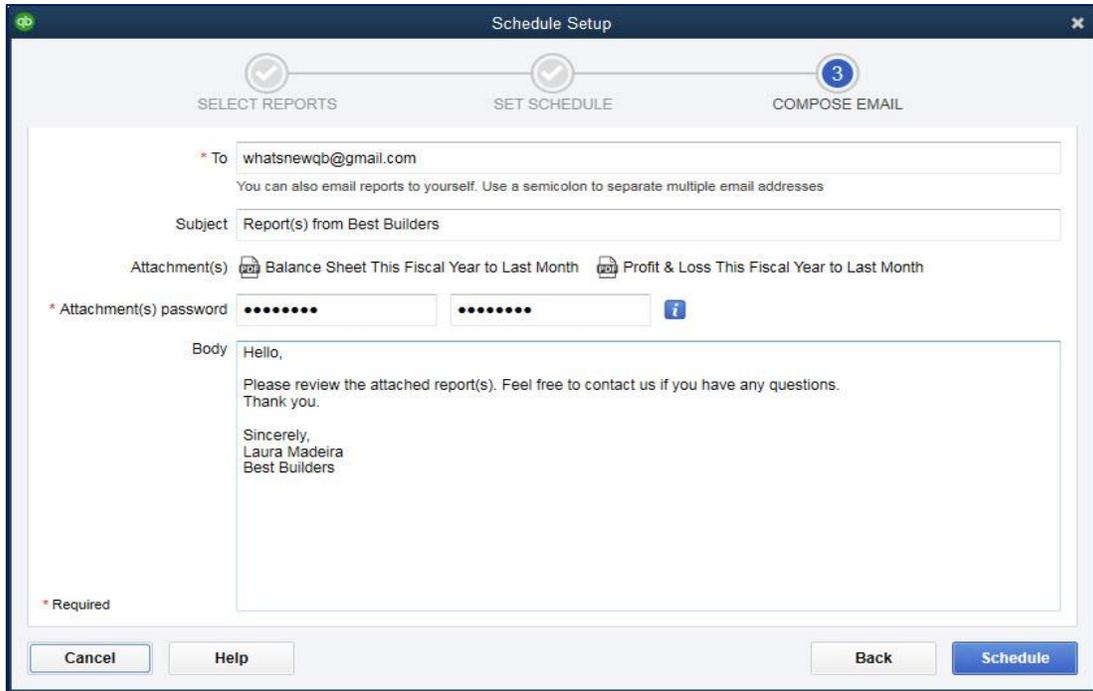
- Daily
- Weekly
- Every Two Weeks
- Monthly
- Quarterly

Reports can be sent on the hour, either a.m. or p.m. times using Microsoft's Task Scheduler.

Define a scheduled time for the automated delivery of the reports

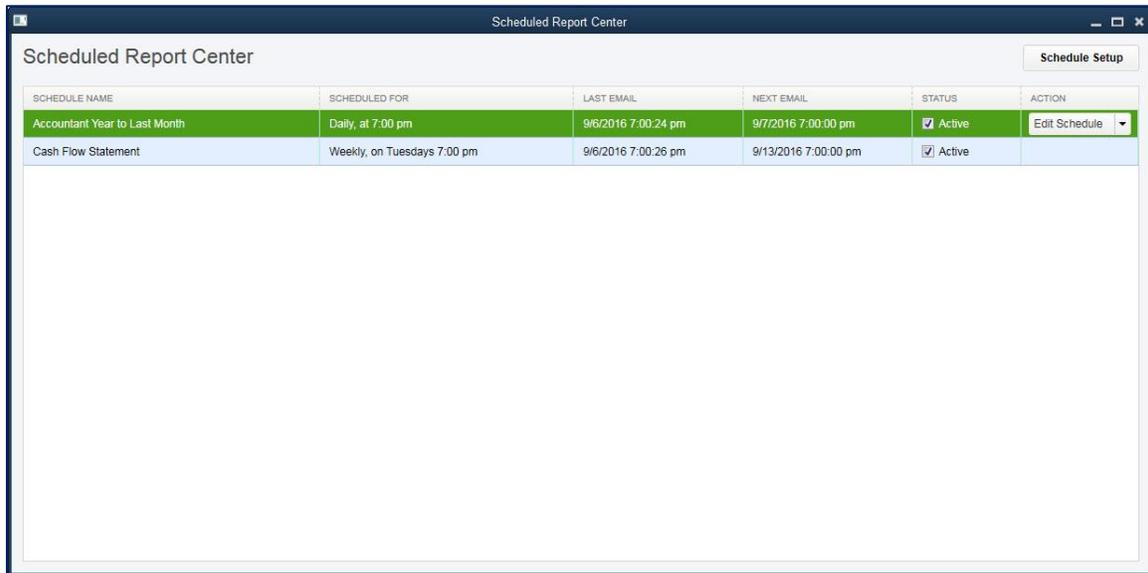
The last step in creating a schedule is to compose the email that will accompany the reports. In this last step you complete the following:

- Type the email(s) for distribution, separating them with a semi-colon
- Optionally edit the default email Subject line content
- Required – assign a password that will be required to open and view the attachments
- Optionally edit the default email Body content



Assign a required password (does not need to be complex) needed to open the attachments

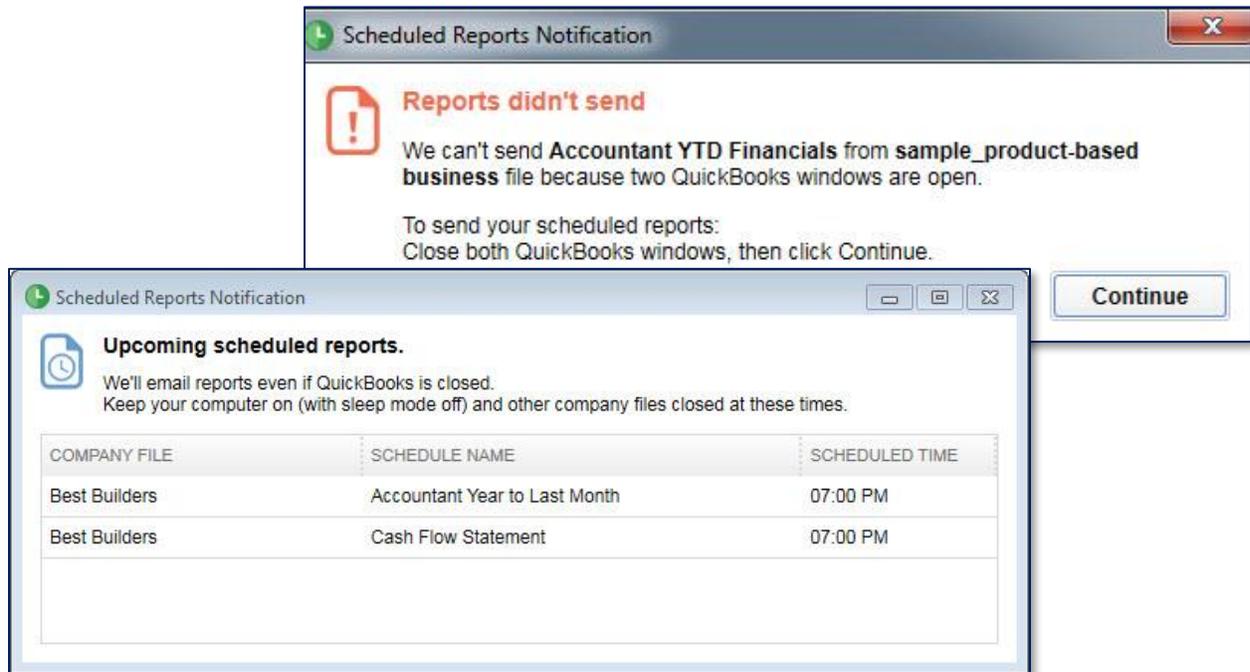
After the Report Schedule is setup, the Admin user for the QuickBooks file can view the Schedules, Modify the Schedules, Delete the Schedule or Inactivate a Schedule from the Schedule Report Center.



Admin user in QuickBooks can view, modify, inactivate and delete a Schedule Setup

QuickBooks will also provide notifications of Upcoming scheduled reports if that option was selected in the Set Schedule window.

If for some reason the scheduled reports do not send successfully, a message will display with the reason and a recommendation for successfully completing the process.



Schedule Reports provides notifications of success or failure of the automated send

A few technical details about working with Scheduled Reports:

- Original setup of a Report Schedule must be done by launching QuickBooks with the “Run as Administrator” windows option, or with User Account Controls set to “Never Notify”.
- Preference must *not be selected to Keep QuickBooks running for quick startups*.
- Automated reports will be sent even if QuickBooks is closed. Computer where QuickBooks is stored must have sleep mode in power settings disabled.
- If you are using Outlook as your email delivery option, Outlook must be running to permit the report(s) to be sent at the scheduled time.

The following are not supported scenarios for Scheduled Reports:

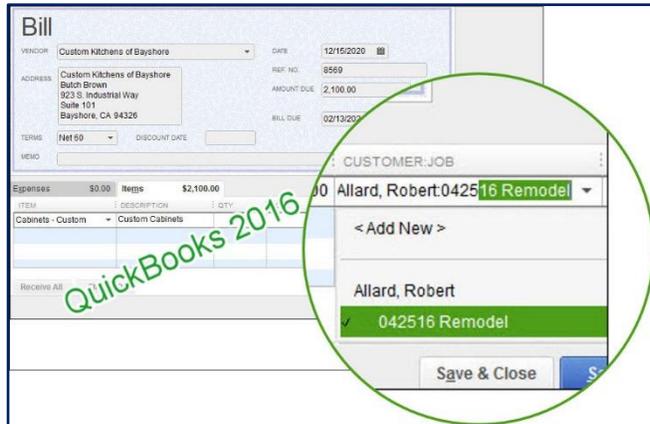
- The company file is open in multi-user mode at the time of the scheduled report. QuickBooks must either be closed or launched in single-user mode to send the scheduled report(s).
- If multiple QuickBooks files are used, the reports will only be sent if the scheduled time aligns with the currently open QuickBooks file.
- Using QuickBooks as your email delivery option. Please change your preference to either webmail or Outlook.
- Multiple editions of the same version of QuickBooks 2017 installed on the same computer. For example, if you have QuickBooks Pro 2017 and QuickBooks Enterprise 2017 installed.
- Scheduled Reports is not supported for QuickBooks in a hosted environment with roaming profiles.

NEW! SMART SEARCH

Available with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

Accessible: When adding a customer or job to a transaction.

What this feature does: In QuickBooks 2017, the Smart Search is extended to look for a match in the first few characters of any part of the list name. That is looking for a match in the first word, second word, and third word and so on.



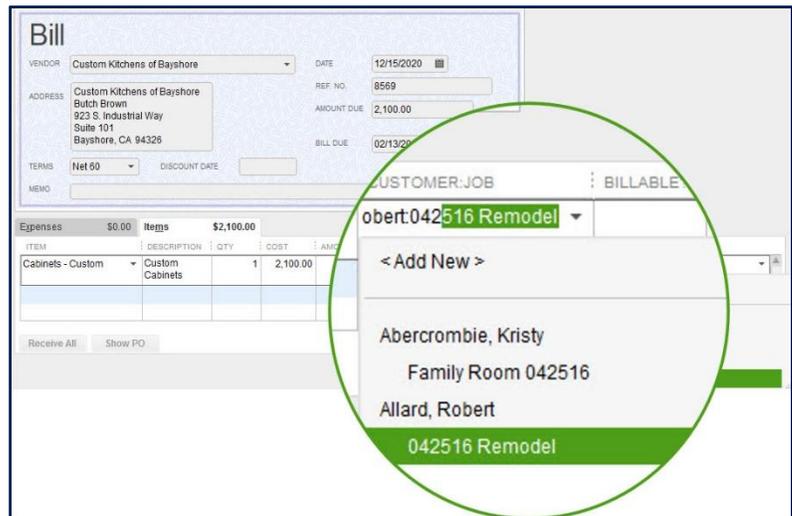
Previous versions of QuickBooks, when you would search for a name, and typed a few characters, the resulting display would only be those list names where the first few characters of the *first word* of the full name would match.

In this image, I have typed 0425 and one list match was displayed, the one where the first word in the name had the same characters.

Now, in QuickBooks 2017, when characters are typed, the resulting display will find all listings where the first few characters of any of the words in a list name match.

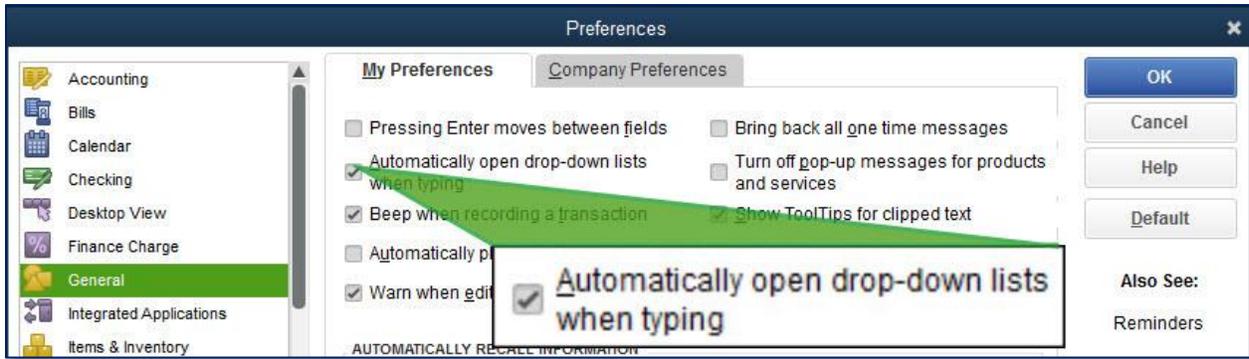
In this example, 042 was typed and two listings displayed. One with the same characters in the third word of a name, the other with matching characters in the first word of the name.

Contractor's often using naming conventions that include the job start date



Smart Search will find matches to the first few characters in any word in the list

For this feature to work make sure you and your client have the My Preference, General Preference to **Automatically open drop-down lists** when typing with the checkbox selected. This preference is not checked when starting new in QuickBooks so it will need to be reviewed for each individual user.



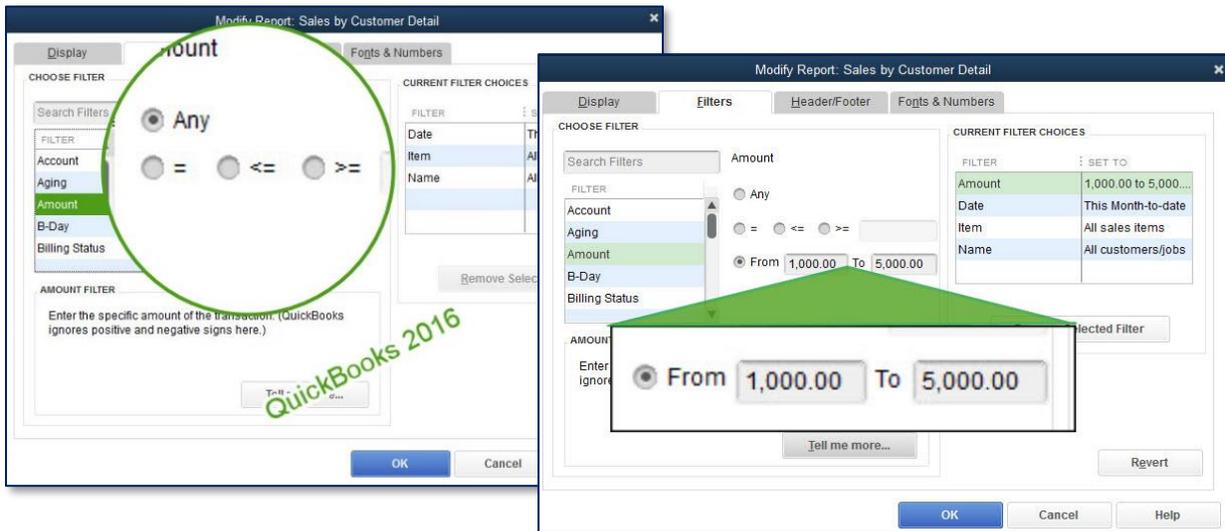
Smart Search will only work when this preference is selected

NEW! IN BETWEEN AMOUNT SEARCH

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: From any displayed report, select **Customize Report**, and from the **Filters Tab**, select **Amount** on the left. A search option is offered for an amount range. You can also access this from the menu bar by selecting, **Edit, Find** or **Edit, Search**.

What this feature does: Now you can search between values to find a transaction without having to



New From amount range in filters, modify, find and search windows

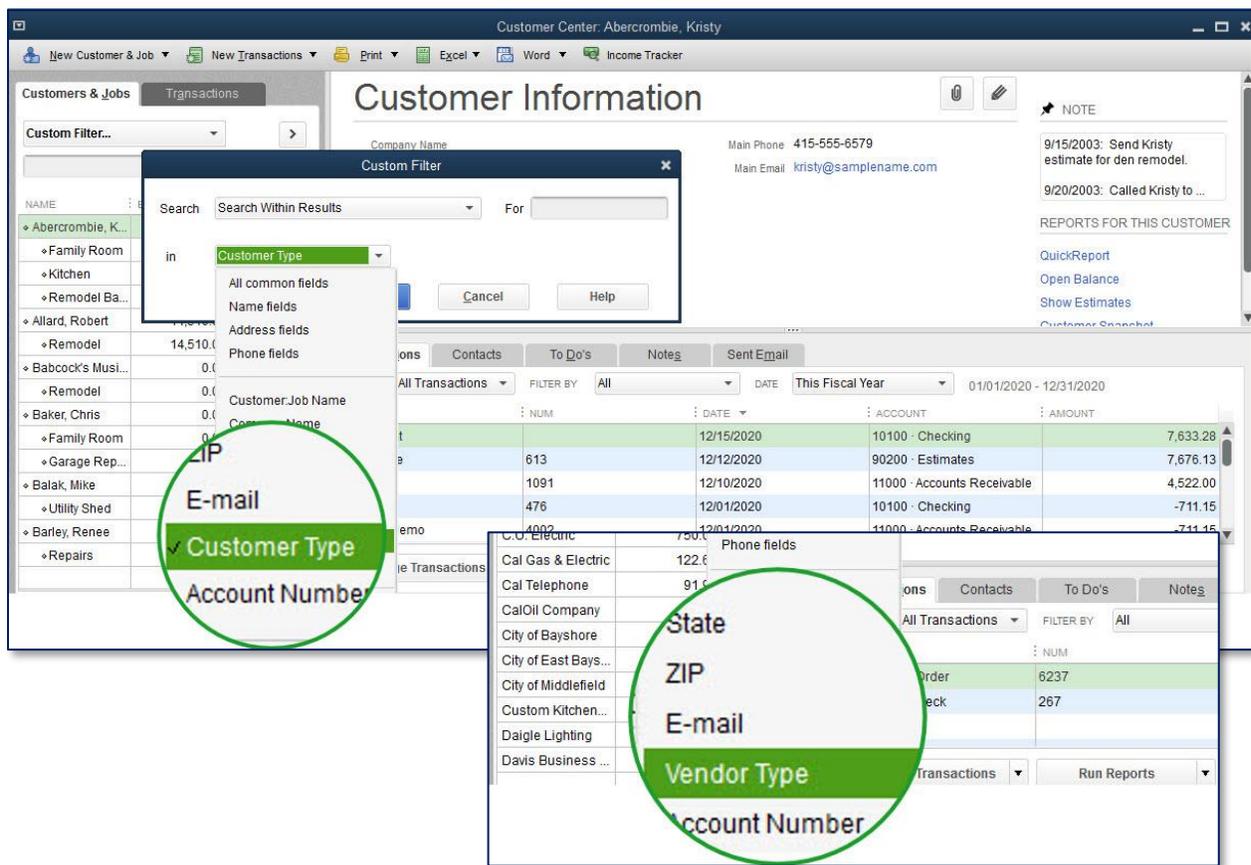
NEW! VENDOR AND CUSTOMER TYPE FILTER

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: From the Customer or Vendor Center.

What this feature does: Efficiently filter the Customer or Vendor Center displayed list by Type, with new filter option included.

How does this feature help you or your client work more efficiently? We have had a field where we could define a type for customers and vendors. We could filter reports for the type assigned, that was about all we could do with that field. In QuickBooks 2017 the displayed list in the Centers can be filtered for the type assigned. This filter options can be useful for any QuickBooks user that would like to see the list for a specific type, and then manage the filtered information that displays.



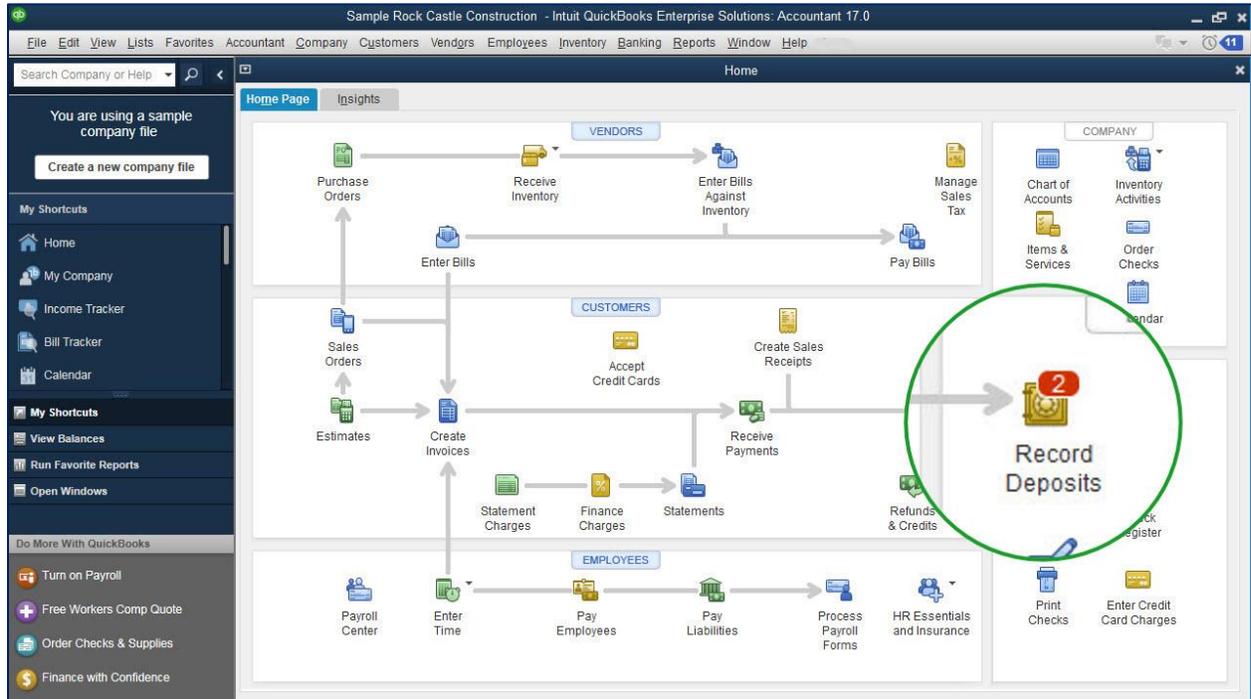
Filter displayed data in Centers by Customer or Vendor Type Assigned

NEW! VISUAL REMINDER TO RECORD MAKE DEPOSITS

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: Displayed on the **Home Page** when there is an Undeposited Funds balance.

What this feature does: QuickBooks users are now notified with a badge on the Make Deposits on the Home Page when there are funds recorded as received for customer invoices but not yet recorded as deposited to the bank account. This feature is a visibility improvement and does not change the workflow in QuickBooks for recording payments and making deposits.



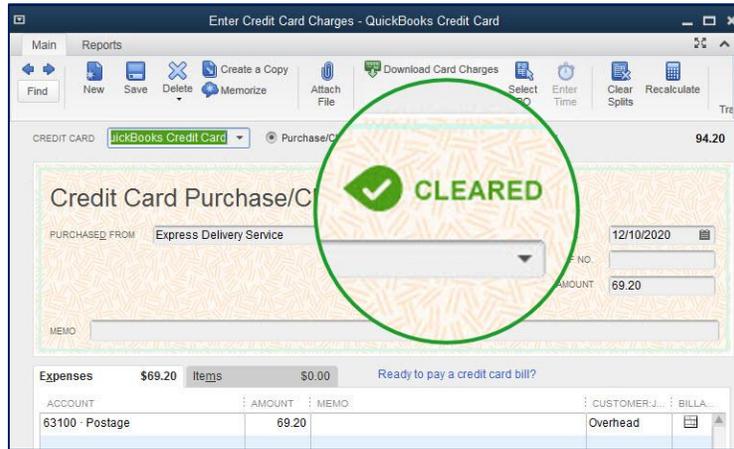
New badge to remind users to Record Deposits to bank accounts

NEW! CREDIT CARD CLEARED STATUS

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: From the menu bar select, **Banking, Enter Credit Card Charges**.

What this feature does: View easy to read credit card charge status resulting from reconciliation of credit card statement in QuickBooks.



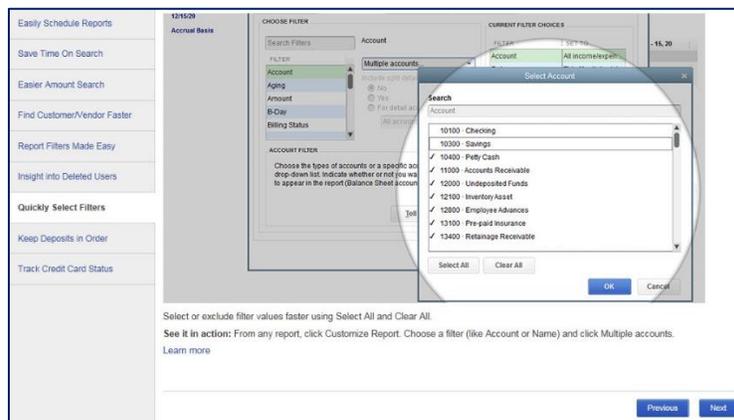
Cleared status displays on credit card charge and credit transactions

NEW! FEATURE TOUR

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: Opens automatically with the install of QuickBooks 2017. Can also be opened on demand from the menu bar by selecting, **Help, New Features, New Feature Tour**.

What this feature does: Want a quick way to see the new features in QuickBooks? Easy to share with your clients by instructing them to view the Feature Tour.



Direct your clients to the new Feature Tour

IMPROVED! REPORT FILTERS VIEW AND MODIFICATION

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: Select the **Show Applied Filters** located in the top left corner of any displayed report. Optionally select **Hide Applied Filters** to remove them from view.

What this feature does: On a displayed report, users can select Show or Hide the Applied Filters. Users can easily modify the filters, by clicking the filter description on the displayed report to open the Modify Report with the selected filter active. It is also easy to remove a selected filter by clicking the X next to the filter.

If the report is printed when Show Filters is selected, the filters will print on last page added to the report. If Hide Filters is selected, the filters will not be included in the printed report.

Profit & Loss by Class

Customize Report | Comment on Report | Share Template | Memorize | Print | E-mail | Excel | Hide Header | Collapse | Refresh

Dates: This Fiscal Year | From: 01/01/2020 | To: 12/31/2020 | Show Columns: Class | Sort By: Default

Hide | Applied Filters: Account: All income/expense accounts × Class: Multiple classes... × Date: This Fiscal Year ×

3:13 PM
12/15/20
Accrual Basis

Rock Castle Construction
Profit & Loss by Class
January through December 2020

	New Construction	Remodel	TOTAL
Hide Applied Filters: Account: All income/expense accounts × Class: Multiple classes... × Date: This Fiscal Year ×			
▼ 40100 - Construction Income			
40110 - Design Income	3,152.74	33,576.51	36,729.25
40130 - Labor Income	52,696.44	155,528.98	208,225.42
40140 - Materials Income	68,401.16	51,519.51	119,920.67
40150 - Subcontracted Labor Income	58,492.30	24,218.05	82,710.35
40199 - Less Discounts given	0.00	-48.35	-48.35
40100 - Construction Income - Other	0.00	0.00	0.00
Total 40100 - Construction Income	182,742.64	264,794.70	447,537.34

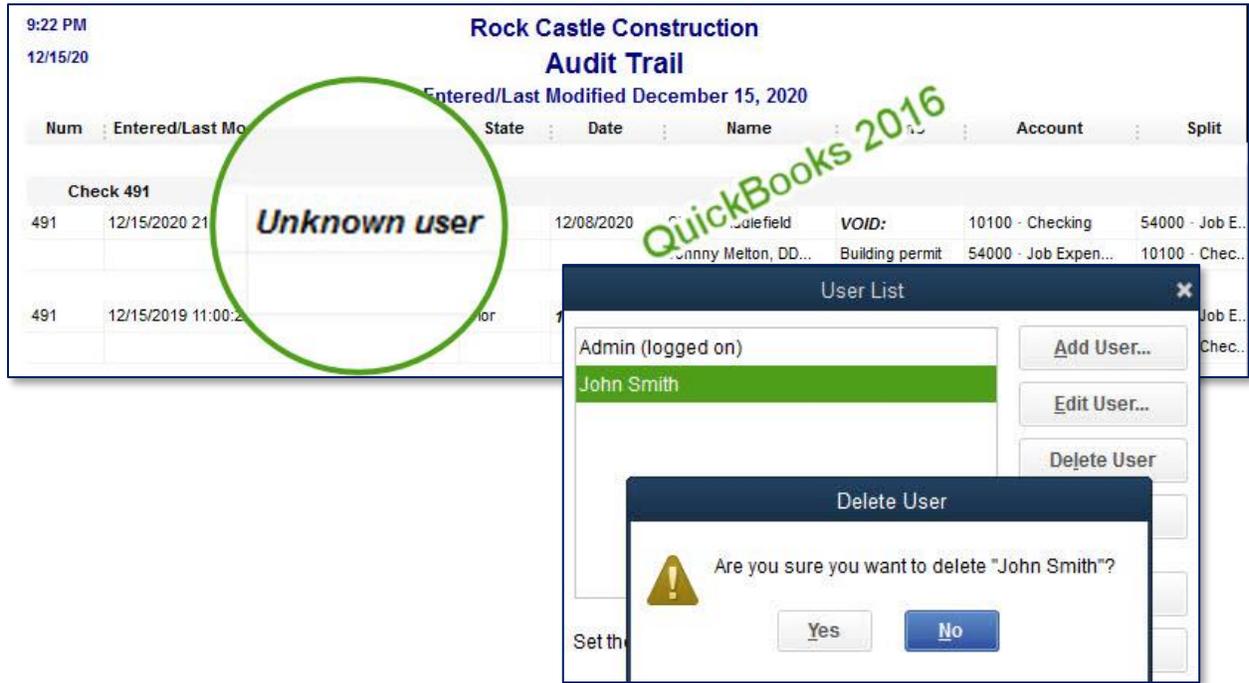
Show or Hide filters on a displayed or printed report

IMPROVED! DELETED USERS ON AUDIT TRAIL

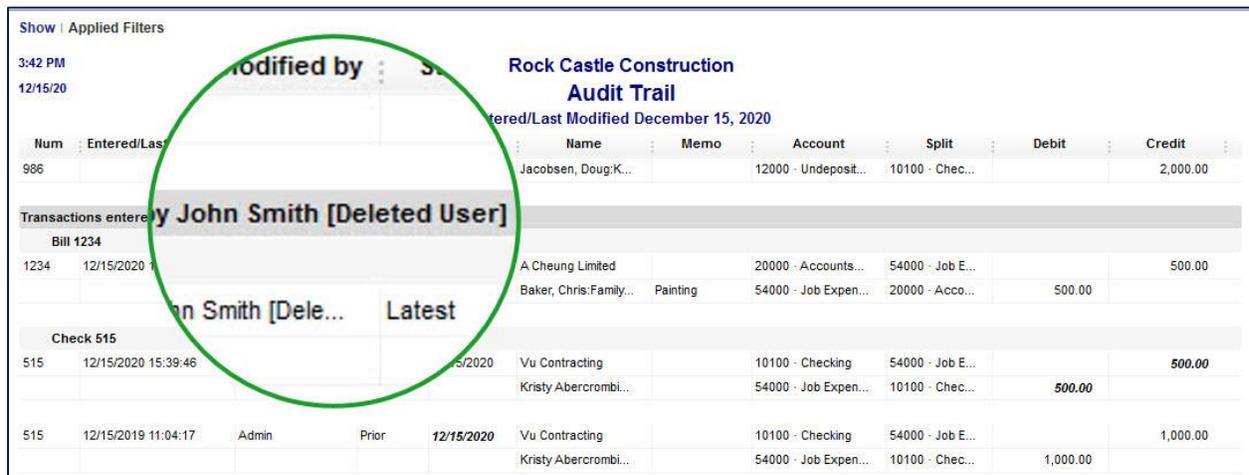
Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: From the menu bar select, **Reports, Accountant & Taxes, Audit Trail**.

What this feature does: Improvement is for instances where a User Name was deleted by the Admin User. The Audit Trail will now retain user names association with transaction changes for deleted users.



Earlier versions of QuickBooks would report "Unknown user" for deleted users



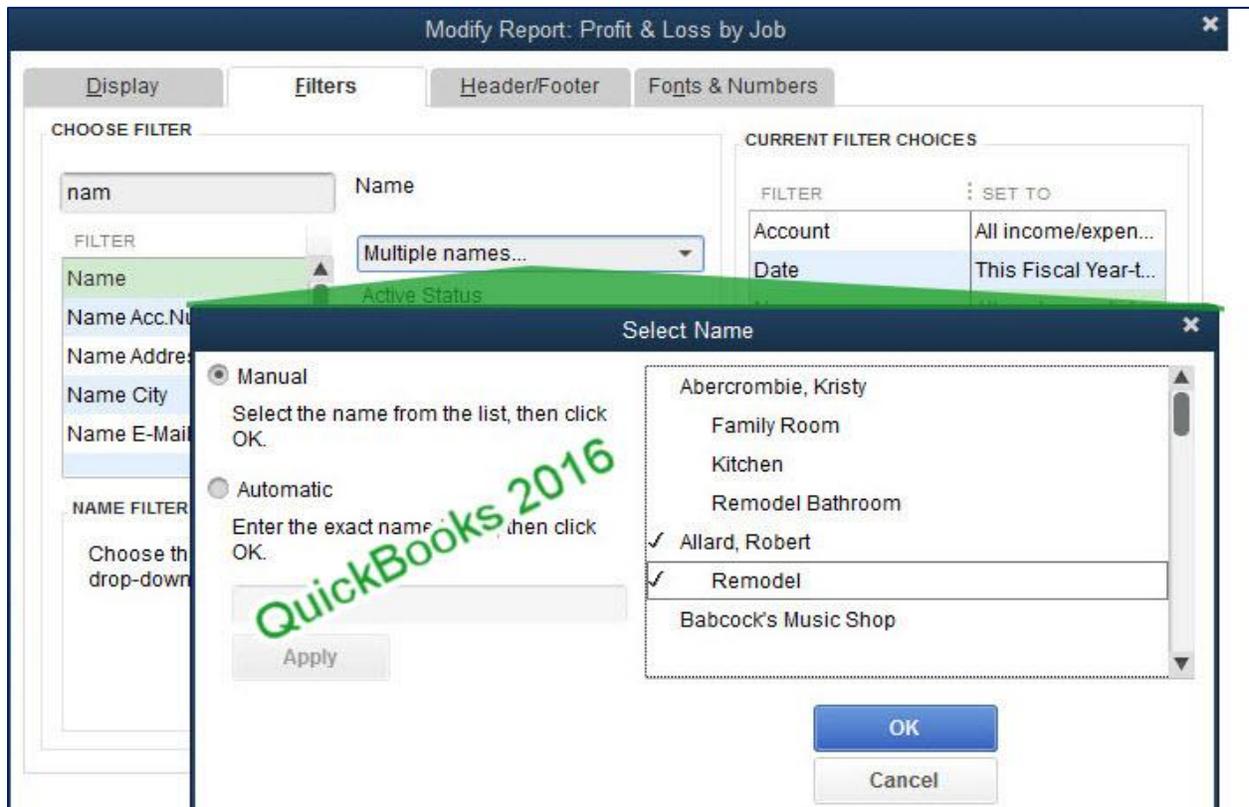
QuickBooks 2017 retains deleted user names with transaction activity

IMPROVED! QUICKLY SELECT FILTERS

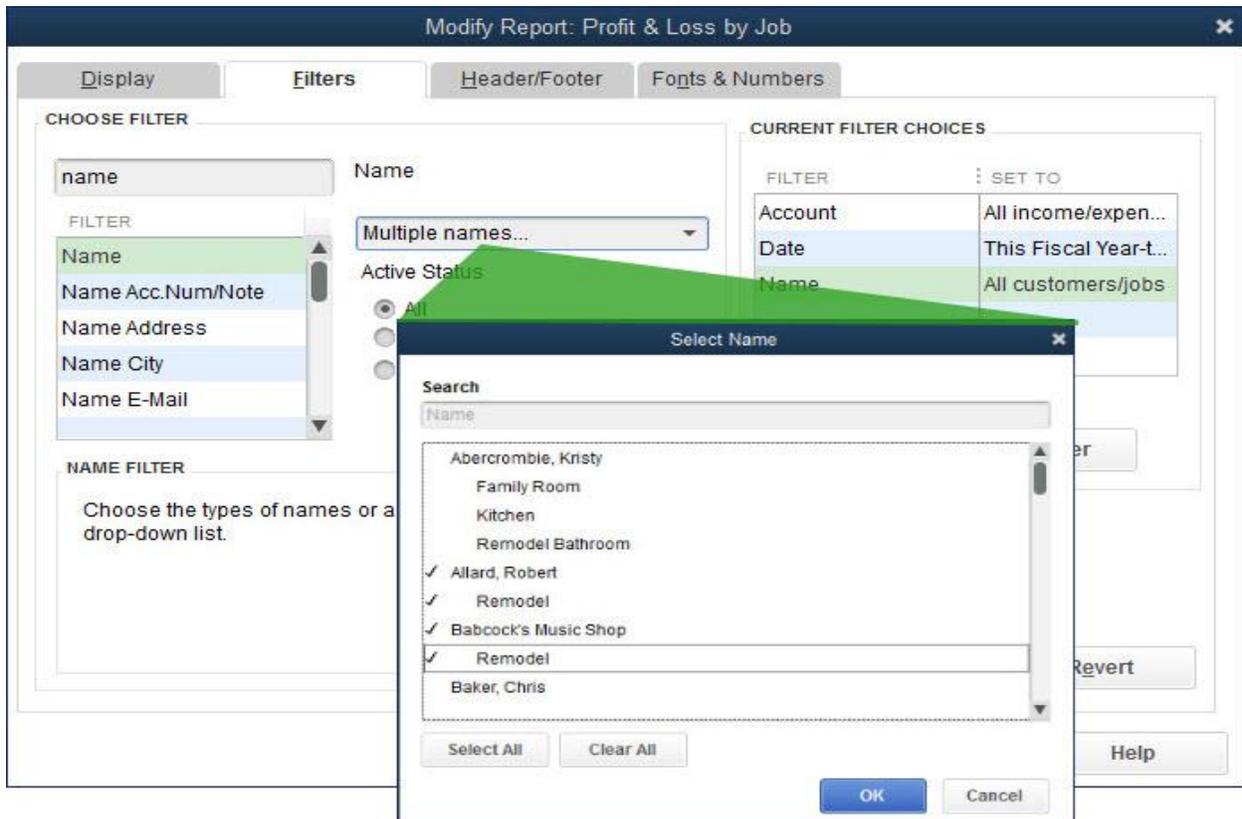
Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: From any displayed report, click **Customize Report**, then select the **Filters** tab. From the selected filter, choose **Multiple....** at the top of the drop-down menu choices.

What this feature does: Easily view and select multiple report filters. In previous year's versions of QuickBooks desktop, users had to carefully scroll through a list to pick the individual filtered elements. Now, in QuickBooks 2017 when selecting multiple items in a filter for a report, the list is displayed clearly, and a Select All or Clear All option is provided.



Selecting multiple list items in prior versions looked like this



Selecting multiple list items offers a new Select Name window

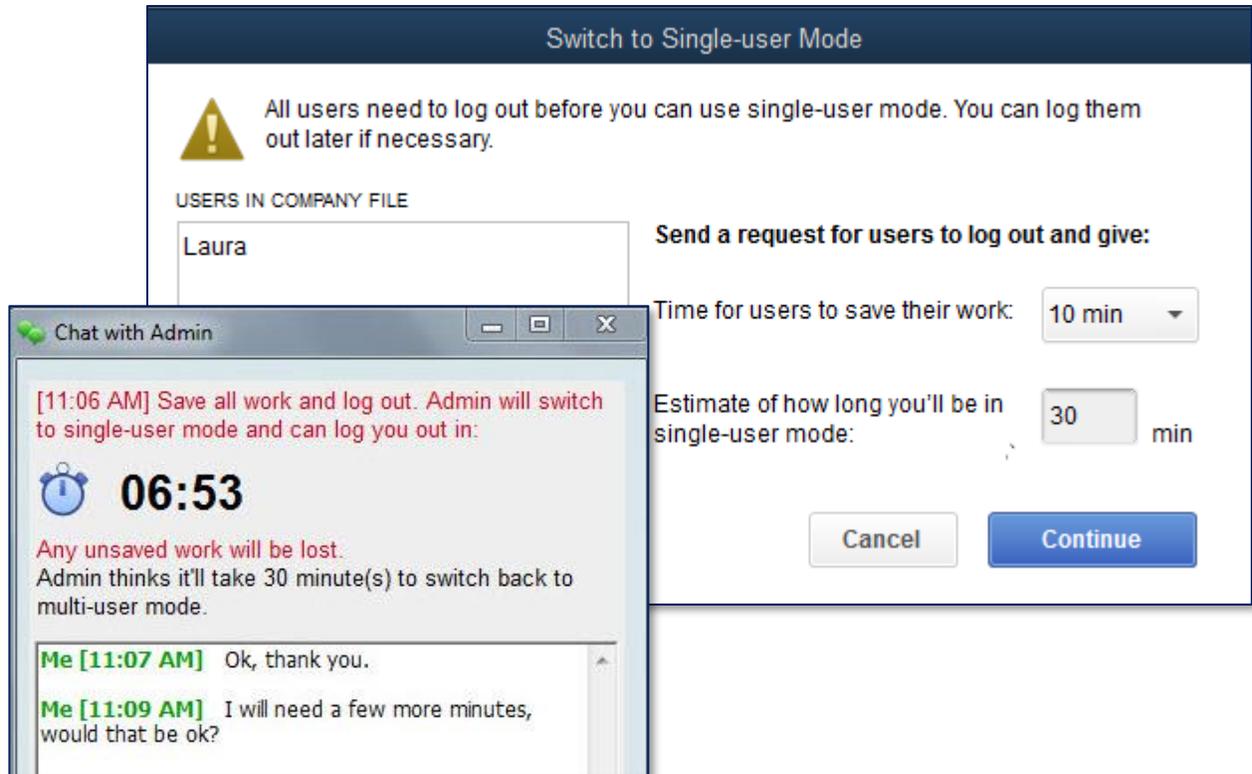
IMPROVED! MULTI-USER MODE IN QUICKBOOKS ENTERPRISE

Included with: QuickBooks Enterprise 2017.

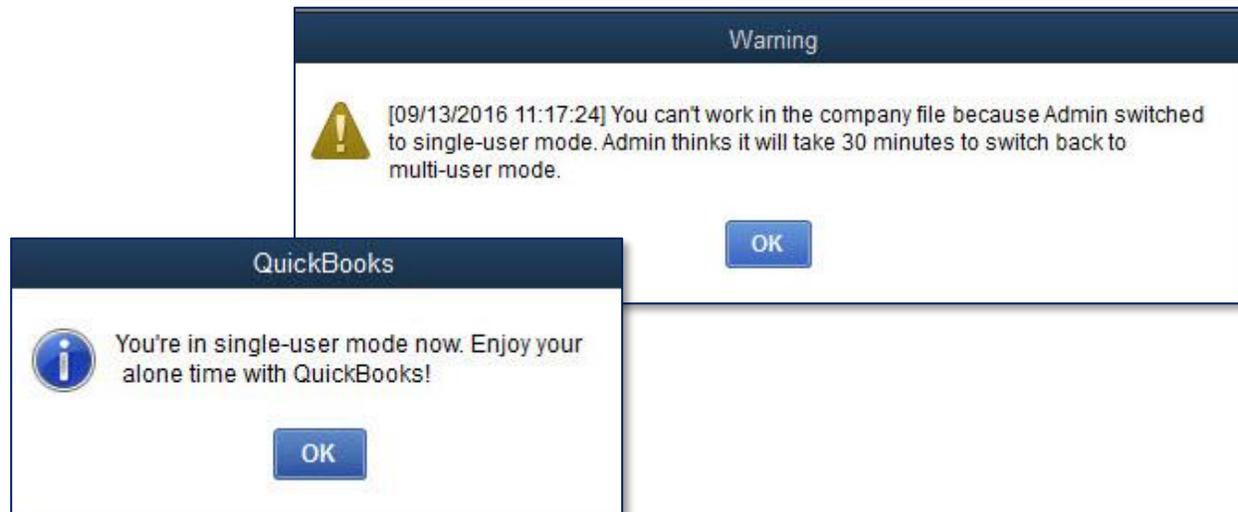
How to access it: When working in Multi-user mode

What this feature does: Two improvements were made when working in Multi-user mode in QuickBooks Enterprise:

First, the Admin user can communicate efficiently with the end-user on timing for logging out of the file. A timer will display on the end-users computer. Also, that Admin user can force users out of the company file. This solves for the case when an employee left QuickBooks running when they left their office.



The Admin user can notify logged users to log out for a specified length of time



User is notified that they cannot work in the file while the Admin has Single-user access

IMPROVED! COMPANY FILE NAME ON DEPOSIT SUMMARY

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

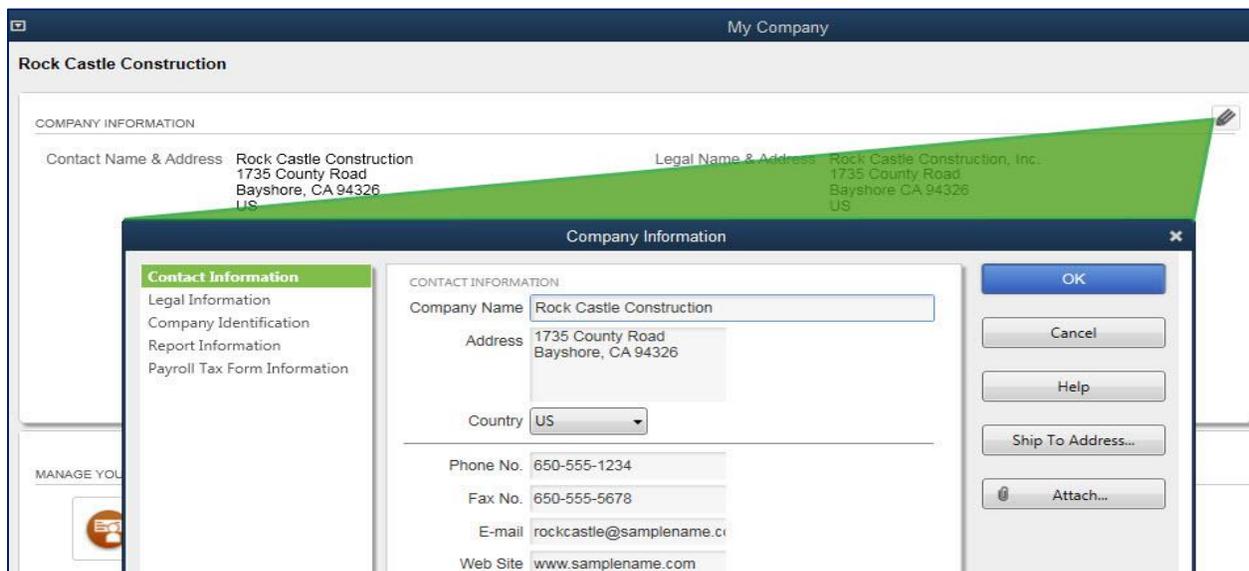
How to access it: From the **Make Deposits** window, select **Print, Deposit Summary**. The company name is from the My Company information. Accessible from the menu bar selecting, **Company, My Company**. When opened, click the pencil icon to modify the Company Name.

What this feature does: The Deposit Summary report, printed from a displayed Make Deposits window, now includes the Company Name.

Chk No.	PmtMethod	Rcd From	Memo	Amount
986	Cash	Roche, Diarmuid	Garage repairs	440.00
	Check	Jacobsen, Doug	Kitchen	2,000.00
Less Cash Back:				
Deposit Total:				2,440.00

Company file name now included on Deposit Summary reports

To add or modify the company name, from the menu bar, select **Company, My Company** and select the pencil icon in the top right.



To add or edit the Company name

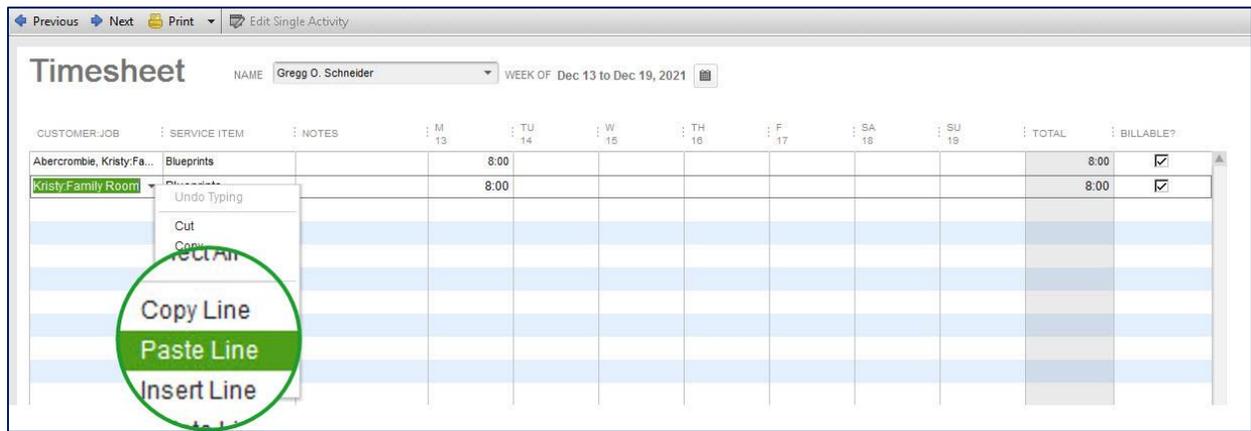
Improved! TIME SHEET LINE COPY AND PASTE

Included with: QuickBooks Pro, Premier, Accountant and Enterprise 2017.

How to access it: From the menu bar by selecting **Employees, Enter Time, Use Weekly Timesheet** or from the Home Page by selecting the **Enter Time, Use Weekly Timesheet** icon.

What this feature does: QuickBooks users can now streamline their entry of time in timesheets by the use of a Copy Line then Paste Line function for individual lines on the Weekly Timesheet.

Previous versions of QuickBooks had these same menu options listed, but they were not able to be used in this window.



Efficiently Copy / Paste Line details in time sheets

QUICKBOOKS PROADVISOR PROGRAM

Included in this course about What's New for QuickBooks Desktop 2017 are details around improvements made to the QuickBooks ProAdvisor Program.

PROADVISOR MEMBERSHIP LEVELS

The ProAdvisor Program has been around for a very, very long time. As the author of this document I can tell you that I have benefited from membership in this program since it was very first introduced. I know that makes me “ancient” for some!

My business would not be where it is today without the many benefits afforded to ProAdvisors. This table represents the more important benefits afforded with each level in the program. This course guide is about What's New for QuickBooks Desktop 2017, so most likely you are either a member of, or interested in the ProAdvisor Deluxe or Premium membership levels.

More details can be found by visiting: <https://quickbooks.intuit.com/accountants/proadvisor/>

Program Benefits	ProAdvisor FREE	ProAdvisor Deluxe \$349/year	ProAdvisor Premium \$549/year
Phone and chat support	✓	✓	✓
QuickBooks Certification	✓	✓	✓
QuickBooks Training (including CPE credits)	✓	✓	✓
Find-a-ProAdvisor Directory Listing to grow your practice	After Certification	After Certification	After Certification
Discounts on QuickBooks products	✓	✓	✓
Exclusive 3rd party app offers: Tsheets, Bill.com, Receipt Bank, HubDoc, Fathom	✓	✓	✓
QuickBooks Online Accountant	✓	✓	✓
QuickBooks Accountant Desktop Plus (a \$499 list price) ²		✓	✓
QuickBooks Desktop Enterprise Accountant			✓
QuickBooks Mac Desktop			✓
QuickBooks Point of Sale Desktop Multi-Store			✓

QuickBooks ProAdvisor Membership Levels

PROADVISOR PROGRAM BENEFITS



Saves Time – Helps me solve client's issues with U.S. based technical support

Grow My Practice – Business owners find me on the Find-a-ProAdvisor website



Make a Difference – Certification and training helps me better serve my clients and differentiates me from others

My business would not be where it is today, truly, without the ease in which the business owner finds me. And lastly, you might think that I just was “handed” what I know. Quite the opposite. I took the time to take the offered courses and certification trainings to better my skills.

Yes, now I am part of group that prepares these courses for accountants but trust me lots of time goes into the learning about the features so that I can teach others.

I cannot imagine not taking advantage of the benefits of the ProAdvisor Program.

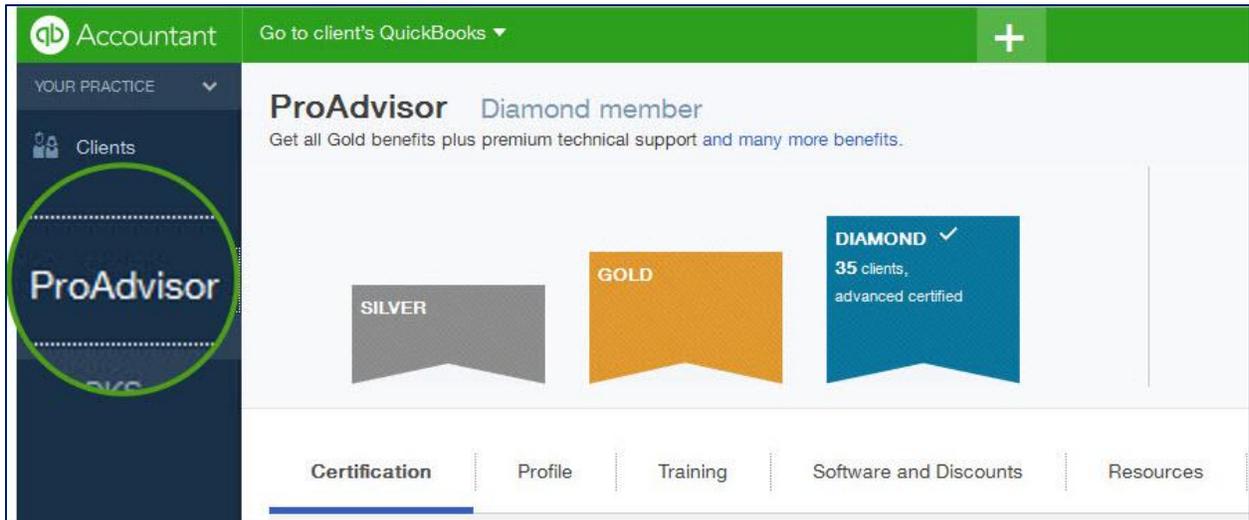
<https://quickbooks.intuit.com/accountants/resources/training-certification/>

PROADVISOR PROGRAM ACCESS

It is as easy as signing up for your FREE QuickBooks Online Accountant access.

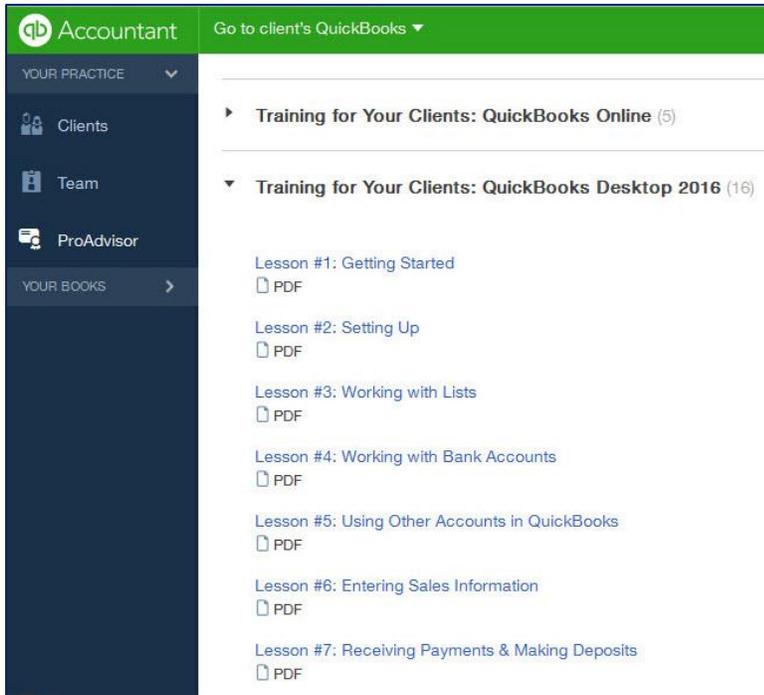
From your QuickBooks Online Accountant access you can choose which membership tier suits your needs for working with clients. Complete the QuickBooks Certifications to advance levels and unlock more member benefits.

<https://quickbooks.intuit.com/accountants/proadvisor/>



QuickBooks Online Accountant offered FREE!

TRAINING AND CERTIFICATION



Access courses offered with your level of ProAdvisor Membership. Because this guide is about QuickBooks Desktop, I have provided a view of just some of the course information you have available.

Make use of the time training, not only to differentiate yourself but many courses also offer CPE credits.

Sampling of training courses offered with your membership

Choose a certification level that best meets the needs of the client's you wish to service. It's your choice to make. And what a difference in can make in differentiating yourself from others!



You decide what Certification tier best meets your needs!

FIND-A-PROADVISOR WEBSITE LISTING

The Find-a-ProAdvisor site has truly been instrumental in our business growth over the years. In fact, I have lived in three different geographical locations in the past several years I have been QuickBooks Certified ProAdvisor. With each move to a new state, if it were not for the Find-a-ProAdvisor site I could not have established myself as easily I did each time.

Listed here is a link to a document that can help guide you in making the best first impression when setting up your profile.

<https://quickbooks.intuit.com/accountants/resources/training-certification/>

The screenshot shows the 'Find a ProAdvisor' search results page on the Intuit QuickBooks website. The search criteria are set to 'Dallas, TX' within a '30 miles' radius. The results are sorted by 'Best match' and show 318 certified accountants found. Three results are visible:

- Laura Madeira** (Advanced): ACS INC - Top 10 ProAdvisors. Certifications: QB, QP, QP, QP. Location: Dallas, TX 75247, 5.95 miles away. 105 reviews.
- Maureen Diem** (Advanced): EMERALD QB CONSULTING, INC.. Certifications: QB, QP, QP, QP. Location: Garland, TX 75044, 13.30 miles away. 38 reviews.
- Debra Burch** (Advanced): Trilink Collaborate. Certifications: QB, QP, QP, QP. Location: Addison, TX 75001, 12.57 miles away. 26 reviews.

Each result also lists industries served: Agriculture/Farming, Automotive Sales/Repair and 22 more...

Results on the Find-a-ProAdvisor website

ACCOUNTANT TOOLBOX ACCESS



Included in this guide on What's New for QuickBooks Desktop 2017 and your ProAdvisor Program options are some basic instructions on working with your QuickBooks Desktop client's files while at their place of business.

As a member of the QuickBooks Deluxe or QuickBooks Premium level membership, you have the privilege of working with accountant specific tools while at your client's whom use QuickBooks Pro, Premier or Enterprise 2017.

Accessing Your Accountant ToolBox: Access the Accountant ToolBox in any client's QuickBooks Pro 2017 or Premier 2017. The accounting professional must have an active Deluxe or Premium ProAdvisor Membership. To access the Accountant ToolBox, accountants must log into the file with an External Accountant user permissions. Note: This feature is accessible in all QuickBooks Enterprise 2017 editions, when logged into the file as the Admin or with External Accountant user permissions.

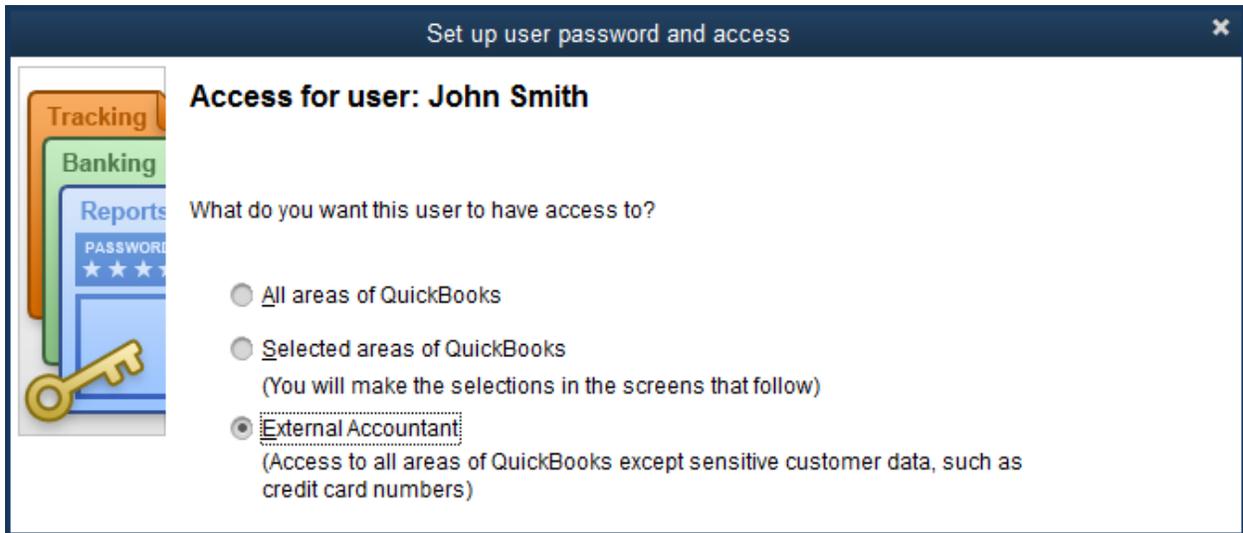
With the Accountant Toolbox, you can unlock access to powerful accountant tools while working with client data.

- For accountants who work on their clients books "on site" (physically, remote in, or hosted)
- Work more efficiently with tasks required to complete a tax return or easily make global changes to transactions
- Unlock the QuickBooks Accountant tools, including write off multiple invoices, batch enter and reclassify transactions, and record incorrectly recorded sales tax payments.

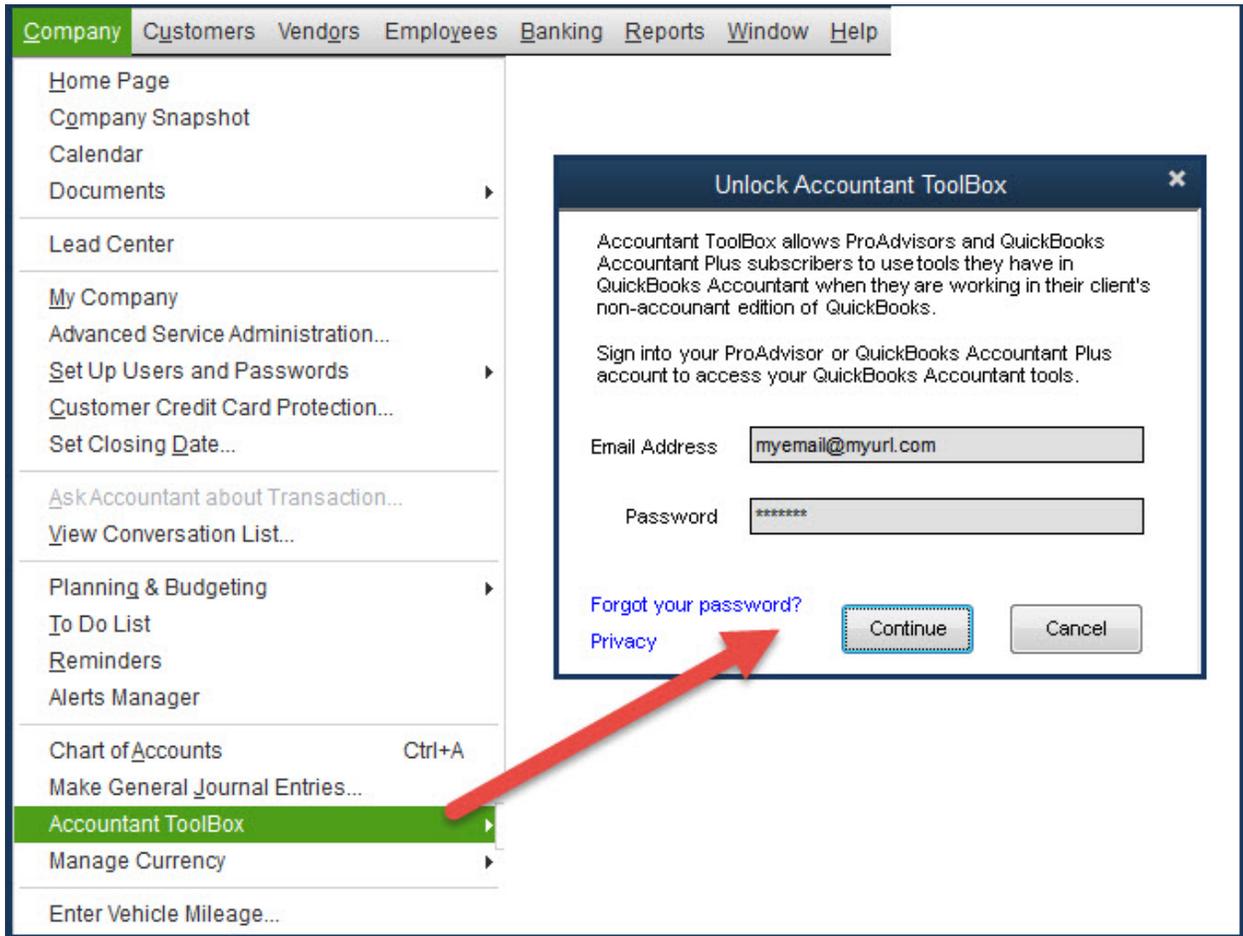
A sampling of the tools available when working at the client site using the Accountant ToolBox include:

- Reclassifying Transactions in Batch
- Troubleshooting Prior Account Balances
- Write off Invoices
- Batch Delete/Void Transactions
- Fix Incorrectly Recorded Sales Tax
- Troubleshoot Inventory

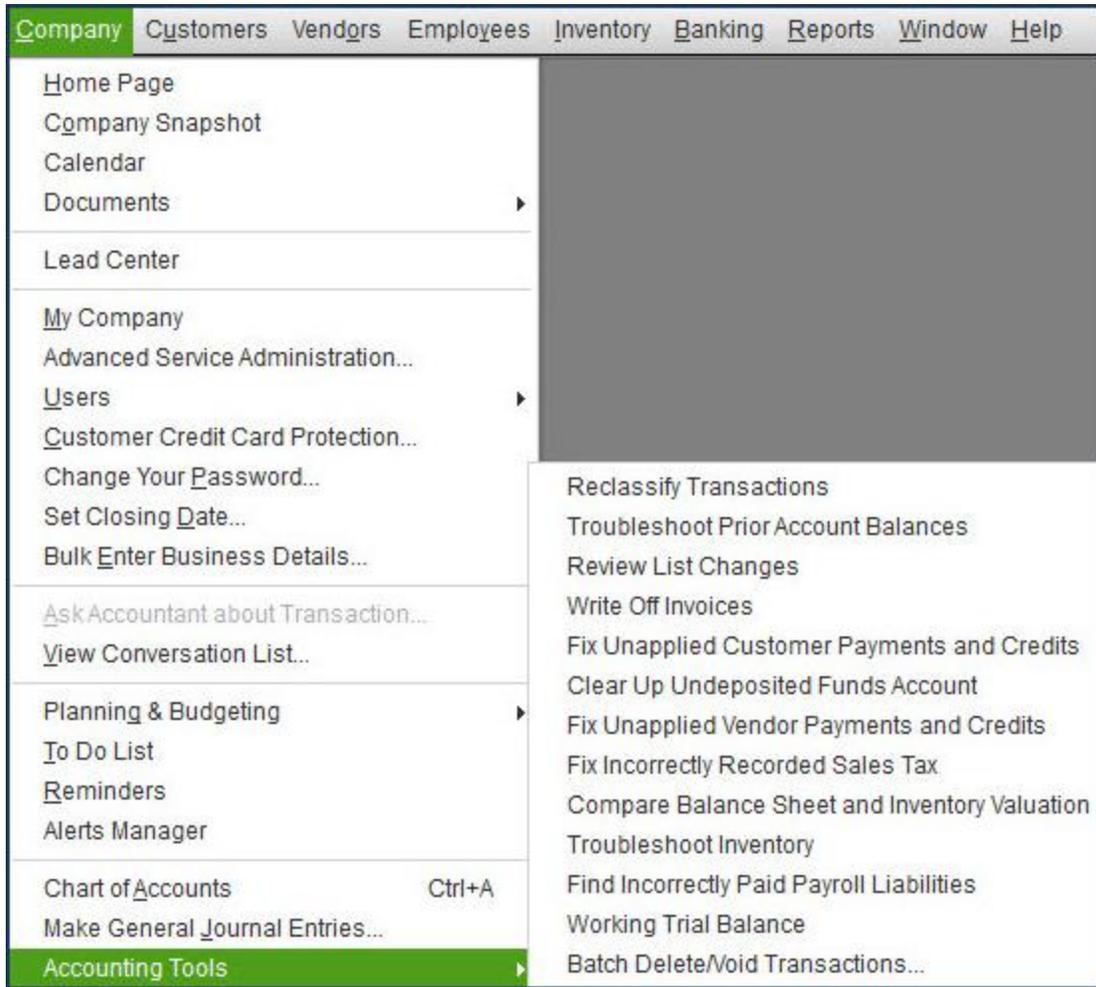
If you would like more detailed information on these tools and more, you can download two free chapters from the author's book. Visit this website: <http://www.quick-training.com/quickbooks-2014-in-depth/>



External Accountant type users are required to login and unlock Accountant ToolBox in a client's file



Tools accessible when logged into your client's file with External Accountant Permissions



Log in with External Accountant permissions to access your Accountant ToolBox