QuickBooks Pro, Premier & Accountant

2020 New & Enhanced Features

OVERVIEW

The new features for QuickBooks Pro, Premier and Accountant 2020 are outlined in this document along with instructions on how to access those features. The new and enhanced features are:

- Combine Multiple Emails
- Automated Payment Reminders
- Horizontal Collapse Columns
- Customer Purchase Order (PO) Number in Emails
- Company File Search
- Smart Help
- Easy Upgrade

FEATURES, BENEFITS & ACCESS INSTRUCTIONS

Refer to the following tables on the features, benefits, and how to access them within Pro, Premier, and Accountant versions. The *How to Access* section assumes the company is opened in QuickBooks Desktop 2020.

Feature: Combine Multiple Emails	
Countries	United States, Canada, United Kingdom
Purpose	Simplify customer payment processing by consolidating multiple invoices into just one email.
Benefits	• Save time by quickly and easily sending multiple invoices to a customer. • Reduce the risk of customer overlooking invoice emails.
How to Access	
1. Select **Email Later** checkbox when writing an email in QuickBooks. 2. Click **Save & Close.** 3. Select **File** from the QuickBooks menu at the top of the screen. 4. Select **Send Forms.** A list of unsent email drafts will appear. 5. Click **Combine forms to a recipient in one email.** 6. Select emails to send client. 7. Click **Send Now.**	

Feature: Automated Payment Reminders

Countries	United States, Canada, United Kingdom
Purpose	Easily set reminders for customers when their invoices are due.
Benefits	• Get paid faster by automatically reminding customers when payments are due. • Save time by reducing the need to follow up with late paying customers. • Flexibility to customize reminders for specific customers

How to Access

1. Select **Customers** from the QuickBooks menu at the top of the screen.
2. Select **Send Payment Reminders**.
3. Select **Schedule Payment Reminders**.
4. Click **Get Started**.
5. Click **Add New** from *Select mailing list* drop-down menu.
6. Enter **Name** for mailing list (Ex. Late Payers).
7. Click **Next**.
8. Select customers to include in mailing list.
9. Click **Save**.
10. Click **Add Reminder**.
11. Complete **Add Reminder** form.
12. Click **OK**.
13. Click **Save**.

Feature: Horizontal Collapse Columns

Countries	United States, Canada, United Kingdom
Purpose	Hide columns to see simple, easy to read totals in reports with jobs and classes.
Benefits	• Improved navigation of customer summary details means less time scrolling through exports or lenghty reports. • Save time by quickly and easily showing only the customer details you need.

How to Access

1. Select **Reports** from the QuickBooks menu at the top of the screen.
2. Open report with jobs and/or classes.
3. Click downward arrow next to the job/class name to collapse the column.

NOTE: Clicking the **Collapse Columns** button from the menu at the top of the screen will collapse all jobs/classes columns and just show total amounts per customer.

Feature: Customer PO Number in Emails

Countries	United States, Canada, United Kingdom
Purpose	Easily add customer PO numbers to email subject lines in QuickBooks.
Benefits	• Facilitate quicker payments by enabling customers to easily search for invoice emails by PO numbers. • Save time by automating the addition of PO numbers to invoice emails.

How to Access

1. Select **Edit** from the QuickBooks menu at the top of the screen.
2. Select **Preferences**.
3. Select **Send Forms** from left menu options.
4. Click **Company Preferences** tab.
5. Click **Add Template**. Input template name.
6. Select **Customer - PO Number** from **Insert Field** drop-down.
7. Click **Save**.
8. Customer PO Number will be automatically added to email subject line when using template to email customer.

Feature: Company File Search

Countries	United States
Purpose	Easily find and open comany files with the addition of a file search option.
Benefits	Easily search for QuickBooks files so customers spend less time opening their books.

How to Access

1. Click **Find a Company File** on the **No Company Open** window after installing/upgrading QuickBooks.
2. Type file name into search box.
3. Select file.
4. Click **Open**.

![quickbooks logo](intuit quickbooks)

Feature: Smart Help

Countries	United States
Purpose	Press F1 for enhanced help content and search experience, or access to live experts through messaging and call back options.
Benefits	Provides customers the flexibility of to access help via searchable content within QuickBooks or by messaging or scheduling a call back with an expert.

How to Access

To access help content/articles:
1. Click **F1** for FAQ window to appear.
2. Write question or key word in the search box.

To contact an expert:
1. Click **F1** for FAQ window to appear.
2. Click **Contact Us.**
3. Select **Get a call back** or **Prefer to chat with us.**
4. Input contact information and await expert response.

Feature: Easy Upgrade

Countries	United States
Purpose	Reduces the number of actions the customer must take to complete their product upgrade.
Benefits	Customers are able to save time when upgrading their existing QuickBooks Desktop product to the newest version available.

How to Access

1. Select **Help** from the QuickBooks menu at the top of the screen.
2. Select **Upgrade QuickBooks Desktop**.

If customer has already purchased a newer version of QuickBooks:
1. Click **Upgrade Now.**
2. Select **QuickBooks Desktop (Pro/Premier/Accountant) 2020**
3. Click **Upgrade Now.**
4. Click **Let's Go.**

If customer has not already purchased a newer version of QuickBooks:
1. Click **Buy Now.**
2. Select **QuickBooks Desktop (Pro/Premier/Accountant) 2020.**
3. Fill out payment information page.
4. Click **Let's Go.**