

QuickBooks Pro Plus, Premier Plus, Accountant, Enterprise 2022 New & Enhanced Features

OVERVIEW

The new features for QuickBooks Pro Plus, Premier Plus and Accountant 2022 are outlined in this document along with instructions on how to access those features. These updates are also available in QuickBooks Enterprise; a separate Quick Reference Guide covers Enterprise-exclusive new and enhanced features.

- Enhanced Computing Power (64-bit)
- Pay Vendor Bills Online
- Upload Bills
- Attach Documents to Transactions
- Customize and Email Bill Payment Stubs
- Choose from Multiple Email Contacts
- E-commerce Integration
NOTE: Details for this feature are included in a separate Quick Reference Guide.
- Payment Links for Payment Users
- Simplified Activations for Assisted Payroll Users
NOTE: This feature available in any supported version of QBDT.
- Next Day Funding for Payment Users
- Instant Deposit for Payments Users (based on eligibility)
- Next Day Direct Deposit for Assisted Payroll users
NOTE: This feature available in any supported version of QBDT.

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 2022.

Feature: Enhanced Computing Power (64-bit)	
Countries	United States, Canada
Purpose	Accomplish all your accounting tasks faster with a quicker, more reliable QuickBooks.
Benefits	<ul style="list-style-type: none"> • Get peace of mind by using a QuickBooks that meets modern operating system standards. • Maintain seamless third-party integrations by utilizing developer preferred infrastructure.



Feature: Pay Vendor Bills Online

Countries	United States
Purpose	Schedule and pay bills faster within QuickBooks. Use the funding source you want and in the digital or physical form your vendors want.
Benefits	<ul style="list-style-type: none"> • Save time by scheduling and paying bills in QuickBooks, which then automatically marks the bill paid, and notifies you once the money is sent. • Gain financial flexibility by paying vendors from a card or bank transfer, then having the money sent via physical check or bank transfer. • Keep your vendors happy by customizing their payment method preferences for future payments.

How to Access

Follow the steps below to schedule an online payment from the QuickBooks Desktop 2022 pop up menu.

1. Click **Schedule Online Payment** from the QuickBooks Desktop 2022 menu.
2. Click **Explore**.
3. Select **Bills** to schedule from the list.
4. Select **Schedule Online Payment**.
5. Click **Pay Selected Bills**.
6. Click **Continue**.
7. Select how you would like to pay: **Bank Account, Credit Card, or Debit Card**.
8. Click **Continue**.
9. Select your **Bank** from the options provided (Ex. Bank of America).
10. Enter **Your Credentials** and click **Submit**.
11. Select how you would like the recipient to receive the payment: **Bank Transfer (ACH) or Paper Check**.
12. If Bank Transfer selected, enter recipients **bank details** and click **Save bank details**.
NOTE: If paper check is selected, go to step 13.
13. Select **date** you would like payment deducted on calendar.
14. Click **Continue**.
15. Review details and click **Confirm and schedule payment**.
16. Payment is now scheduled. Click **I'm done here**.
17. Enter **Name** of check recipient.
18. Click **Save and continue**.
19. Enter the **Address** of the recipient.
20. Click **Save and add delivery method**.
21. Follow steps 10-12 above.

Follow these steps to schedule an online payment from the QuickBooks Desktop 2022 main screen.

1. Select **Pay Bills** from QuickBooks menu.
2. Select **Bills** to schedule from list.
3. Select **Schedule Online Payment** from Payment menu in lower left.
4. Click **Pay Selected Bills** in lower right.
5. Click **Continue**.
6. Follow steps 9-20 above.

Feature: Upload Bills

Countries	United States
Purpose	Save time by having QuickBooks automate bill entries from the QuickBooks Desktop mobile app or an email address. Just photograph, import and review.
Benefits	<ul style="list-style-type: none"> • Save time by having your vendor send email invoices directly to QuickBooks, which then automatically drafts bill transactions for your review. • Stay organized by attaching files to build transactions for simplified audit trails. • Automatically upload or edit multiple bill transactions at once.

How to Access

To upload a bill from the QuickBooks Desktop mobile app:

1. Select **Bill** in the QuickBooks Desktop mobile app.
2. Enter your **Intuit Credentials**.
3. Click **Sign In**.
4. Select your **Company**.
5. Click **Continue**.
6. Position document so all corners are in view.
7. Click **Camera Icon** to photograph document.
8. Click **Use this photo**.
NOTE: You can also crop the photo before submitting.
9. Enter **Name** and **Description** for the photographed document.
10. Click **Upload**.
11. Click **OK** or **Upload New Document** in pop up screen.

To match an uploaded bill in QuickBooks Desktop:

1. Select **Upload & Review Bills** from the ribbon menu under **Vendor** tab.
2. Select **Import Bill Data** from drop down menu next to imported bill.
3. Click **Camera Icon** to snap photo of bill.
4. Click **Save & Close** to finish or **Save & Add** to match another new bill.

Feature: Attach Documents to Transactions

Countries	United States
Purpose	Attach documents to transactions faster by directly uploading them via the QuickBooks Desktop mobile app.
Benefits	<ul style="list-style-type: none"> • Simplify attaching documents to your QuickBooks transactions. Say goodbye to archaic scanning and emailing processes. • Save time by directly attaching multiple documents to transactions at once. • Stay organized by eliminating the need to store physical documents.

How to Access

To attach documents using QuickBooks Desktop app:

1. Select **Document** from the QuickBooks Desktop app.
2. Click **Snap Document**.
3. Click **Continue** to sign in to your Intuit account.
4. Enter your **credentials** for your Intuit account.
5. Click **Sign In**.
6. Select your company and click **Continue**.
7. Position document so all corners are in view and.
8. Click **Camera Icon** to photograph document.
9. Click **Use this photo**.
NOTE: You can also crop the photo before submitting.
10. Enter **Name** and **Description** for the photographed document.
11. Click **Upload**.
12. Click **OK** or **Upload New Document** in pop up screen.

Option One:

1. From QuickBooks Desktop click **Create Invoices**.
2. Click **Attach File** in task bar above.
3. Upload the document.
4. Click **Done**.

Option Two:

1. Select **Company** in the menu bar.
2. Select **Documents** in the drop down menu.
3. Select **Doc Center** from the drop down menu.
4. Upload the document.
5. Click **Done**.

Feature: Customize and Email Bill Payment Stubs

Countries	United States
Purpose	Maintain professional and consistent communications by emailing customizable bill payment stubs to your vendors.
Benefits	<ul style="list-style-type: none"> • Save time by immediately emailing bill payment stubs to one or multiple vendors at once. • Easily edit your logo, formatting, balance paid to date and other required billing information, all within QuickBooks.

How to Access

Option 1: Email Bill Payment stubs from payment screen.

1. From the home screen of QuickBooks Desktop, select **Vendor**.
2. Select **Vendor Center**.
3. Choose a **Vendor**.
4. Choose an existing bill payment by double clicking on the **Transaction**.
5. Click on **Main tab** on the top of the Vendor Payment screen
6. Click **Email**.
7. Select **Bill Payment Stubs**.
8. Enter **Relevant Information** to customize the bill payment stub in Body section.
9. Click **Send**.

Option 2: Email Bill Payment stub after making vendor payment

1. From the main menu, select **Vendor**.
2. Select **Pay Bills**.
3. Choose the **Bill** you want to pay.
4. Enter the **Payment Information**.
5. Click on **Pay Selected Bills**.

NOTE: Payment Summary Window will open with the payment information
6. Click on **Bill Payment Stub** drop-down menu.
7. Click **Email Now**

NOTE: Window will open with the Vendor Bill details and payment stubs would be attached to the email.
8. Click **Send Now**.

Feature: Choose from Multiple Email Contacts

Countries	United States
Purpose	Send emails more quickly by choosing the right recipients from a list of customer or vendor contacts.
Benefits	Reduce miscommunication resulting from manual entry of email addresses.

How to Access

1. Select **Pay Bills** in the **Vendors** tab.
2. Select the **Bill** you want to customize from the list.
3. Select **Check, Credit Card, or Online Payment** from the drop down menu at the bottom.
4. Click **Pay Selected Bills**.
5. Click **Bill Payment Stub** menu.
6. Select **Print, Email Now** or **Email Later**.
7. Enter the **Email Addresses** in the To section or select from the drop down menu.
8. Click **Print, Email Now** or **Email Later**.

Feature: Payment Links for Payment Users

Countries	United States
Purpose	Quickly and easily collect payments for items that do not require an invoice by sending a payment link.
Benefits	<ul style="list-style-type: none"> • Collect an advance deposit before starting work by sharing a payment link; then, send an invoice later if needed. • Eliminate the pre-work of creating an invoice by simply sending a payment link to customers. • Send only one payment link for the total amount owed to multiple invoices instead of sending separate invoices to the same customer.

How to Access

1. Select **Payment Links** in the QuickBooks Desktop homepage.
2. Enter the **Amount** and the recipients **Name** and **Email address**, and any additional **Notes**.
3. Select the method(s) of payment such as **Credit Card** or **Bank Transfer**.
4. Click **Send Payment Link**.
5. Click **Done** on confirmation pop-up screen.

Feature: Simplified Activations for Assisted Payroll Users

Countries	United States
Purpose	Set up your Assisted Payroll product and run your first payroll faster with a streamline and well guided activation process.
Benefits	<ul style="list-style-type: none"> • Confidently and quickly complete Assisted Payroll setup independently with in-product guidance. • Always know where you stand in the process within product nudges that direct you to the next step - from starting setup to running your first payroll. • Get support from US-based onboarding experts, ready to assist you if you have questions.

How to Access

1. Select the **Employees** tab on QuickBooks Desktop menu.
2. Select **Payroll** in the drop down menu.
3. Select **Activate Assisted Payroll** in the pop-out menu.
4. Click **Get Started**.
5. Enter your **Service Key** and **Federal EIN**.
6. Click **Add**.
7. Click **OK** on the confirmation pop-up window.
8. Click **Connect Bank Account** on next window.
9. Click **Continue** to create or sign on to your Intuit Account.
10. Enter your **Intuit Credentials**.
11. Click **Sign In**.
12. Click **Get Started** to connect your Bank Account.
13. Select **Business, Principle Officer, or Bank Account**.
NOTE: You will need to enter relevant information for all three categories.
14. Enter the **Address** and other required information.
15. Click **Next**.
16. Select the **Industry Category** and **Industry** from the drop-down menu.
17. Click **Next**.
18. Enter the **Address** and required information for the Principle Officer.
19. Click **Next**.
20. Select **Add New Bank Account Information**
21. Click **Next**.
22. Select your **Bank** from the option in the pop-up screen.
NOTE: If choosing to enter Enter Bank Manually skip to step 19.
23. Enter your **Bank Login** information.
24. Click **Sign In**.

25. Enter your **Bank Routing** and **Account Numbers**.
26. Click **Save**.
27. Click **Next** or repeat steps 16-19 to enter a new bank account.
28. Click **Accept and Submit**.
29. Enter your **Social Security Number**.
30. Click **Submit**.
31. Click **Continue** in verification pop-up window.
32. Call the number listed **(800) 365-9626** to continue Assisted Payroll Process.

Feature: Next Day Funding for Payment Users

Countries	United States
Purpose	Receive money from credit card payments in your bank account the day after they are processed.
Benefits	<ul style="list-style-type: none"> • Get credit card payments deposited the next day. • Applies to credit card payments including swiped, invoiced, or keyed. • See your money the next day even on recurring credit card transactions.

Feature: Instant Deposit for Payment Users

Countries	United States
Purpose	Get your money instantly when customers pay you. Even late nights, weekends, and holidays.
Benefits	<ul style="list-style-type: none"> • See the deposit in your account in minutes. • No long-term commitment. You get to choose when you need the deposit instantly, for example if you need to make payroll or to pay a supplier. • Get up to \$5,000 per day with 24/7 funding availability - Late at night, holidays, and weekend (regardless of your bank's business hours).

Feature: Next Day Direct Deposit for Assisted Payroll Users

Countries	United States
Purpose	Get an extra day to run payroll and keep funds in your bank account longer with next-day direct deposit.
Benefits	<ul style="list-style-type: none"> • Gain more flexibility to deal with issues outside of your control, like late time card submissions. • Have more time to secure funding and manage cash flow. • Pay employees faster, as long as you process direct deposit payroll anytime before 5:00 PM PST the day before payday.