

# Make The Right Decisions

## About QuickBooks Desktop Enterprise 2018

*Avoid Common Buying Mistakes: Understanding the 7 Critical Situations When QuickBooks Enterprise is a Good Fit for Your Business*



Presented by **Scott Gregory**

Certified QuickBooks Enterprise Advisor, Intuit Premier Reseller, CPA



## My goal for this guide is very simple...

### Get you the facts and eliminate the fiction about QuickBooks Enterprise 2018 – quickly and accurately.

I want to make sure that you get the straight scoop on the “when and why” QuickBooks Desktop Enterprise 2018 Software is a good fit for businesses like yours and help you avoid the tidal wave of misinformation out there.

The insights below have been compiled based on years of field experience as well as phone and e-mail questions asked of me by hundreds of businesses over the last decade.

Tap into my field-tested expertise and use these insights to make an educated decision about moving into QuickBooks Desktop Enterprise 2018 Software!

So, jump in and learn more about the seven critical situations where QuickBooks Desktop Enterprise 2018 Software makes sense and see where your business fits into the picture...

#### Scott Gregory

QuickBooks Expert

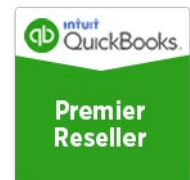


▶ ABOUT SCOTT

#### Contact Scott Today About QuickBooks

For the fastest response, email Scott at:  
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## CRITICAL SITUATION #1: Your Current QuickBooks File Is Getting Too Big For Itself

### Do any of the symptoms listed below apply to your daily use of QuickBooks?

- It takes forever to run reports.
- QuickBooks crashes or stops responding intermittently for no apparent reason.
- You've got years and years of history in your QuickBooks file.
- Trying to get a backup of your QuickBooks data is nearly impossible.

If you said “yes” to one or more of the above, chances are good your QuickBooks data file is either getting close to the “danger zone” or is already there.

For most QuickBooks Pro and Premier data files, this “danger zone” starts when the file reaches about 175-200 MB (megabytes) in size.



You won't find this “danger zone” information printed in any of the Intuit documentation. Your QuickBooks won't even pop up and alert you that your file may be getting too big. It's up to you to know this and take proactive steps.

It's easy to see just how big your current QuickBooks file is. Simply tap the F2 key on your keyboard while QuickBooks is open, and the following window appears:

Product Information	
Product	QuickBooks Accountant Desktop 2015 Release R6P
License number	REGISTRED
Product number	113-644 R6_139
User Licenses	1
Installed	09/27/2014
<b>USAGE INFORMATION</b>	
Date First Used	12/15/2012
Number of Uses	1756
Audit Trail	Enabled since 11/16/2008 12:11:08
<b>FILE INFORMATION</b>	
Location	C:\Users\Scott\Documents\QuickBooks Data Files\Bottom Line Accounting Solutions, LLC.QBW
File Size	61376 K
Page Size	4096
Total Transactions	9080
Total Targets	30590
Total Links	6991
Dictionary Entries	11
DB File Fragments	13
<b>VERSIONS USED ON FILE</b>	
V17.0D R6	06/30/2007
RB	09/22/2007
V17.0D R8	10/29/2007
V17.0D R10	01/13/2008
V17.0D R11	06/21/2008
V18.0D R6	11/16/2008
<b>SERVICES INFORMATION</b>	
AuthID	54335465
Company Realm ID	54335465
Online Billing Token	6643705
Shopping Source Token	
<b>INTEGRATED APPLICATION INFORMATION</b>	
# of apps	9
Last accessed	10/16/2015 17:43:27
<b>CONDENSE INFORMATION</b>	
Last run	None
Last as of date	None
Last payroll deleted	None
Last inventory deleted	None
<b>List Information</b>	
Total Accounts:	76
Total Names:	1,314
Customers:	998
Vendors:	238
Employees:	0

Note the arrow pointing to the File Size area. **Your file is getting too big if this value is 175,000 or greater!** Even if your value is less than 175,000, your QuickBooks file may exhibit some of the symptoms above - a warning sign that action may be needed.

## Help – My File Is Too Big! What Are My Options Now?

Fortunately, I've prepared another guide that provides detailed insights about what your options are if you find this to be the case.

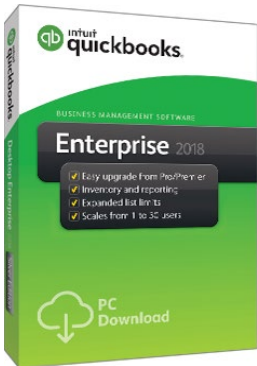
### FREE Guide!

DANGER, DANGER! Your QuickBooks May Implode!

▶ DOWNLOAD NOW!

### Here is a summary of your options:

1. Continue to work in your current file until it simply collapses or corrupts itself. Not a good plan in my book. At that time, you'll have to [enlist the services of a data repair team](#) to try and heal your QuickBooks (no guarantees!). (NOTE: [QuickBooksUsers.com](#) provides excellent service if you do have trouble with your QuickBooks data file).
2. Start a brand new QuickBooks data file. Sure, the file size goes way down when you start over, but there are several other things you need to consider before selecting this option. My guide outlines exactly what those considerations are.
3. Upgrade to QuickBooks Enterprise.



### QuickBooks Enterprise Advantage

QuickBooks Enterprise can deal with a much larger size data file than either Pro or Premier. As mentioned earlier, Pro and Premier enter the “danger zone” at the 175,000 (175 MB/megabyte) mark.

QuickBooks Enterprise doesn't enter the “danger zone” until it reaches 6-8 times that size. That is a huge difference in capacity and ability to store your critical business information.



**I know you're concerned about losing your current QuickBooks data if you upgrade. Don't be! See my additional notes in the bonus section below on this very topic.**

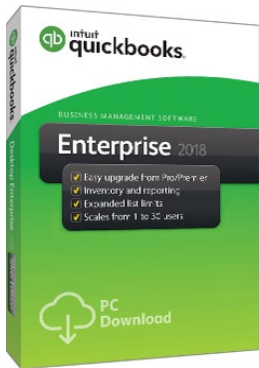


## CRITICAL SITUATION #2: You Need More Users Working In QuickBooks At The Same Time

Here are the facts on an extremely confusing issue when it comes to QuickBooks...

- If you are using QuickBooks Pro, you can only have a maximum of 3 people working in QuickBooks at one time.
- If you are using QuickBooks Premier, you can only have a maximum of 5 people working in QuickBooks at one time.

**QUICK TIP:** Not sure what version of QuickBooks you have? Tap the F2 key on your keyboard and look for the very first line of information. That tells you exactly what you have (i.e. QuickBooks Premier Contractor 2016, QuickBooks Pro 2017, etc.)



### QuickBooks Enterprise Advantage

QuickBooks Enterprise allows you to have up to 30 people using QuickBooks at one time. You can start with the 1 user package and then add users in single user increments as your business grows.

Adding additional users is simple – all you need to do is install QuickBooks on their computer and connect them with the data file on your network. It's that easy.

### VERY SPECIAL BONUS!

Get a side-by-side view of the key differences between the Pro, Premier and Enterprise versions of QuickBooks!

**FREE Guide!**

Key Differences Between QuickBooks Pro, Premier And Enterprise

**▶ DOWNLOAD NOW!**



## CRITICAL SITUATION #3: You Need To Track More Customers Or Inventory Items Than Pro Or Premier Will Allow

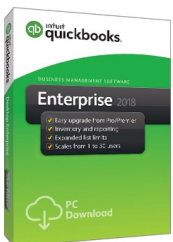
There is also another limit within QuickBooks that you need to know about in addition to the limit mentioned in Critical Situation #1 above.

That is the limit for the number of customers and/or inventory items you can store in the software. QuickBooks Pro and Premier will max out at 14,500 entries. Keep in mind that even if you have customers or inventory items that are not currently being used, they still count toward this limit. This is another situation where QuickBooks may creep up and bite you.

Here's how to tell just how many of these names are already in your QuickBooks file – just tap the F2 key and view the right hand side of the screen as shown at the arrow:

Product Information	
Product	QuickBooks Accountant Desktop 2015 Release R6P
License number	REGISTERED
Product number	113-644 R6_139
User Licenses	1
Installed	09/27/2014
<b>SERVICES INFORMATION</b>	
AuthID	54335465
Company Realm ID	54335465
Online Billing Token	6643705
Shopping Source Token	
<b>INTEGRATED APPLICATION INFORMATION</b>	
# of apps	9
Last accessed	10/16/2015 17:43:27
<b>CONDENSE INFORMATION</b>	
Last run	None
Last as of date	None
Last payroll deleted	None
Last inventory deleted	None
<b>FILE INFORMATION</b>	
Location	C:\Users\Scott\Documents\QuickBooks Data Files\Bottom Line Accounting Solutions, LLC.QBW
<b>Usage Information</b>	
Date First Used	12/15/2012
Number of Uses	1756
Audit Trail	Enabled since 11/16/2008 12:11:08
<b>File Size and Versions</b>	
File Size	61376 K
Page Size	4096
Total Transactions	9080
Total Targets	30590
Total Links	6991
Dictionary Entries	11
DB File Fragments	13
<b>Versions Used on File</b>	
	V17.0D R6 06/30/2007
	RB 09/22/2007
	V17.0D R8 10/29/2007
	V17.0D R10 01/13/2008
	V17.0D R11 06/21/2008
	V18.0D R6 11/16/2008
<b>List Information</b>	
Total Accounts	76
Total Names	1,314
Customers	998
Vendors	238
Employees	0

As you can see by the graphic above, this particular QuickBooks file has some room to grow and would not be a good candidate for an upgrade to Enterprise. Your file may not be so lucky.



### QuickBooks Enterprise Advantage

Unlike its little brothers Pro and Premier, QuickBooks Enterprise will easily handle customer and inventory lists in the tens of thousands of items. You can have up to 100,000 customers in Enterprise and 100,000 inventory items as well.



**The marketing materials for Enterprise will say that it can hold an unlimited number of inventory items. Don't believe it. Field experience shows otherwise. There are other good options available to you if you need to manage more than 100,000 customers or inventory items. Contact me for details.**



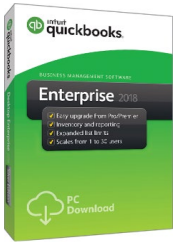
## CRITICAL SITUATION #4: You Need Better User Security In Your QuickBooks

It's true – the security and permissions in the Pro and Premier versions of QuickBooks are pretty basic at best. Sure, you can completely block staff out of certain areas within QuickBooks. But what if you want them to see certain areas, but not be able to change or delete anything in those areas? What happens if you need a more granular approach to setting permissions and security for your team?



The Audit Trail report is available in all editions of QuickBooks. Click Reports (in the menu bar) > Accountant and Taxes > Audit Trail Report. This report will provide some feedback as to who is doing what in QuickBooks every day, but may not be getting you what you need.

QuickBooks Pro and Premier provide you with nine broad-based ways to limit access to QuickBooks data. That may be all your business needs. However, many businesses need more.



### QuickBooks Enterprise Advantage

QuickBooks Enterprise provides well over one hundred specific ways to provide better user security and access permissions. QuickBooks Enterprise takes advantage of a great feature called “Roles” in the area of user security. There are a number of pre-defined roles built-in, such as sales, accountant, purchasing and more.

These “pre-built” roles take advantage of the power in Enterprise to combine access to areas and activities within QuickBooks in addition to setting access levels within those areas.

Here is a sample screen shot of the role and related permissions for the “Sales” role in Enterprise:



Note the much more refined access levels contained in Enterprise:

- None
- Full
- Partial (view, create, modify, delete or print and view balance (where applicable))

### BONUS!

You can create your own custom roles and permissions within QuickBooks Enterprise. Or you can copy an existing one and tweak it or build it from scratch. Your choice.

### DOUBLE BONUS!

QuickBooks Enterprise also has a “View-Only” role. I like to call this one the “look but don’t touch” mode. And I’m guessing you already know who would get this access in your company.

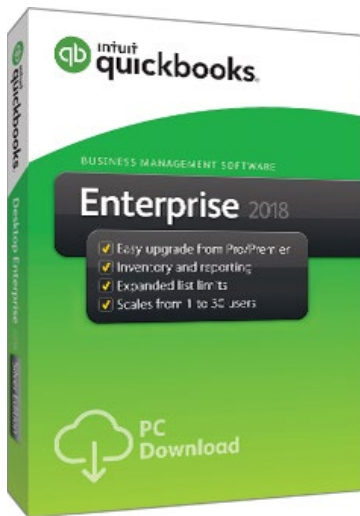


## CRITICAL SITUATION #5: Your Team Needs Remote Access To QuickBooks Information

What if you have team members that aren't at the same physical location you are, but they still need to access QuickBooks?

Or what if you travel a lot and aren't always in the office to log in to QuickBooks?

If your business is using either QuickBooks Pro or Premier, you can always use excellent tools like [QBox](#) for remote access. However, depending on the setup of your network, you may be limited to just one person having access. Things can get complicated very quickly when trying to use this approach.



### QuickBooks Enterprise Advantage

Remote access doesn't have to be complicated if you use QuickBooks Enterprise in conjunction with your server (or consider having it hosted for anytime/anywhere access).

Very likely, your server has the ability to do what is called "Remote Desktop" or "Terminal Services". The beauty of this is that it makes it very easy to connect multiple people working remotely into your QuickBooks.

There are no extra fees incurred within QuickBooks Enterprise to allow for this remote access. You may have to get your IT people on the case for a short visit to get everything set up for you, but that is one visit that will have a large return on investment.



**If you try to use this "Terminal Services" approach with either QuickBooks Pro or Premier, it is not supported by the Intuit tech support group. Should you have a problem, they will not help you.**

However, "Terminal Services" is fully supported by the QuickBooks Enterprise support team, so you will be able to get your questions answered by them.





## CRITICAL SITUATION #6: You Need Better Inventory Functionality Than Found In QuickBooks Pro Or Premier

Does your business need any of the following functionality when it comes to tracking your inventory?

- Multi-location/Multi-Warehouse
- Lot number tracking
- Serial number tracking

If so, you won't find it in the Pro or Premier versions of QuickBooks. And that includes the Manufacturing edition too!

In fact, you won't even find any of that functionality in the core modules of QuickBooks Enterprise. However, you will find it in the Advanced Inventory module that can easily be plugged into Enterprise (requires Platinum subscription to Enterprise).

The Advanced Inventory module extends the base inventory tools found in QuickBooks and adds additional features and functionality. This module can only plug into the Enterprise version – it cannot plug into the Pro or Premier versions of QuickBooks.



**There are several other advanced inventory packages made by third-party vendors that are also available to tie-into QuickBooks. If you need help taking a closer look at your options in this area, please contact me. I have experience running a \$4 million inventory, so I understand your issues and concerns very well.**

**Contact Scott For Insight On Advanced Inventory Packages**

For the fastest response, email Scott at: [Scott@BetterBottomLine.com](mailto:Scott@BetterBottomLine.com)

▶ CONTACT SCOTT



## CRITICAL SITUATION #7: Support And Upgrade Costs From Your Current Software Package Are Wreaking Havoc With Your Checkbook

Is your business currently saddled with the hefty support and/or upgrade costs from any of the packages below?

- Sage software products
- Business Works
- Microsoft Great Plains/Dynamics
- Macola
- SBT
- Accpac



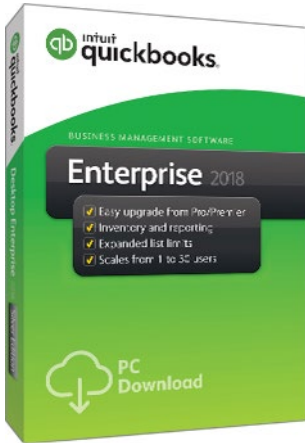
If you are evaluating ways to lower your software costs, QuickBooks Enterprise can certainly be a viable alternative in many cases. In fact, the favorable pricing structure is a key reason many businesses move from the packages listed above into Enterprise.

Naturally, a complete needs analysis would need to be done in order to make sure you were not being penny-wise and pound-foolish by making a move to QuickBooks Enterprise. It is essential that you map out the key requirements of your software needs and compare them against the capabilities of QuickBooks Enterprise.

Keep in mind that if the core modules of Enterprise don't quite fit your needs, a number of plug-ins for QuickBooks Enterprise may be able to. In many cases, the total cost of both Enterprise and the business specific plug-in solution are still thousands (tens of thousands in some cases) of dollars less than what you are currently using.



## Make Sure You Order QuickBooks Enterprise 2018 From Scott Gregory, QuickBooks Expert...



### Here is why you'll want to order from me if and when you're ready to move ahead:

- Rest assured that you will be getting the lowest authorized price available on your purchase.
- Get a free upgrade to QB Enterprise 2019 with paid subscription renewal.
- Get full access directly to the QB Enterprise support desk for a full year.
- Your purchase comes with a full 60-day money back guarantee.

### EVEN BETTER!

- Get an extra 20% off any consulting that may be needed.
- You'll be working with the reseller of QB voted #1 in Customer Service!
- You'll be supporting an independent small business owner, just like you.

### BONUS TIP #1

#### Is It Hard To Move From An Older Version Of QuickBooks Into QuickBooks Enterprise?

Here is great news for you...

Moving your existing data that may be housed in QuickBooks Pro or Premier is an easy and stress-free process.

You can do it yourself if you feel comfortable around computers, or I can connect you with an IT firm for additional help if the thought of "installation directories" and "custom settings" is enough to make you lose sleep at night.

### BONUS TIP #2

#### Is There A Big Learning Curve For QuickBooks Enterprise?

More great news...

You will find the exact same screens and options for day-to-day work in Enterprise, just like you have in Pro or Premier today.

You add a customer, create an invoice, enter and pay bills exactly the same way in all versions.

So, there is NO learning curve for QuickBooks Enterprise. Once it is installed, you resume your normal work routine.



## How Much Does QuickBooks Enterprise Cost?

**Ok, here is what you need to know...**

QuickBooks Enterprise is only available as an annual subscription. You can't purchase it the "old way" (pay for it once and use it many years) any longer. You have the choice to pay for this subscription on a monthly basis or one annual payment -- it's up to you.

Visit my web site for the current pricing and promotions on QuickBooks Enterprise. I will ensure you get the absolute lowest authorized price!

### **Need A Deeper Look For Your Specific Situation? Get Connected With Scott And Get Your Questions Answered!**

Have additional questions about making the move to Enterprise?

Let's discuss them in more depth so you can evaluate your options based on accurate, reliable information and explanation of the world of QuickBooks Enterprise.

**Visit Scott's Website For Current Pricing  
And Promotions On Enterprise**

**▶ VISIT WEBSITE**

*“Scott Gregory continues to amaze me. Every single client out of the dozens who have purchased Enterprise Solutions from Scott and worked with him have given him a 100% Net Promoter Score. This is very unusual in our industry. It is considered World Class.” – MARIE ARCHULETA, Channel Sales Manager for Intuit*



## About Scott Gregory

**Certified QuickBooks Enterprise Advisor and Intuit Premier Reseller**

Scott has been helping businesses “get it right” with their QuickBooks and business finances for over thirty years.

During that time, he has assisted well over 1,200 businesses with services such as: QuickBooks training, coaching sessions, demonstrating how to use QuickBooks for inventory tracking, and how to be more profitable and improve cash flow.

Prior to starting his own practice, Scott served as the CFO for a \$15 million manufacturing firm for more than ten years. During his tenure as CFO, Scott was responsible for: \$4 million in inventory, \$4 million in accounts receivable, inventory control, purchasing, information technology and banking relationships.

He is a member of the Certified QuickBooks ProAdvisor program, a CPA, and certified in integrated resource management (CIRM) by APICS. Scott has taught hundreds of business owners, bookkeepers, and CPAs how to use QuickBooks effectively and efficiently through local community colleges and via webinars.

Thousands of QuickBooks users rely on [Scott’s QuickBooks Blog](#) for insight, tips and tricks each and every month.



## Contact Scott Today!

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🌐 [www.BetterBottomLine.com](http://www.BetterBottomLine.com)



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