



S o n y a B r i s t l i n

QuickBooks

BA 536 Customer Relationship Management Software Application Assignment



All-In-One ERP, QMS & CRM Business
Desktop Software

Table of contents

PART 01 About QuickBooks

Part 1: Clearly identifies what QuickBooks software is and what it does.

PART 02 QB's Key Features

Part 2: Identifies QuickBooks Key Features for its users.

PART 03 QB's Data Structure

Part 3: Identifies what data is captured/stored/displayed by QuickBooks.

PART 04 QB Connections

Part 4: Displays other software or web-based connections QuickBooks utilizes.

PART 05 QB Privacy Policies

Part 5: Discussion QuickBooks Privacy Implication & Policies

first part

About QuickBooks

QuickBooks, created by Intuit, is specialized financial software that is user-friendly for individuals familiar with basic principles of accounting. QuickBooks is an accounting software solution for small businesses designed to manage income, expenses, point-of-sale transactions, payroll, accounts payable, accounts receivable, inventory management, tax preparation, and integration with third-party CRM systems, as well as generate financial statements and specialized reports. QuickBooks offers online services, desktop versions and a mobile application for easy customer access from anywhere. QuickBooks Desktop versions are best suited for businesses that need more specialized features, such as job costing, inventory tracking and/or forecasting and best for users that have accountant trained employees. QuickBooks Online offers more features and the added value of on-the-go flexibility from anywhere in the world, real-time collaboration, real-time bank management, and live customer service. The biggest noticeable difference between QuickBooks Online (QBO) and QuickBooks Desktop (QBDT) versions is the pricing structure, the online version is cloud-based and QBDT can be used for as many companies as you'd like, in contrast QBO can only allow you one company per license agreement.

second part

Key QuickBooks Features

- qb Invoice Tracking
- qb Expense Tracking
- qb GST & VAT Tracking
- qb Connect Bank Fees
- qb Capture & Organize Receipts
- qb Inventory Management
- qb Mobile Accounting App
- qb Insights & Reports
- qb Data Security
- qb Data Migration
- qb Multi-currency Support
- qb Data Migration
- qb App Integration
- qb Automating Workflow Processes
- qb Better Control with Roles Permissions
- qb Track Practice Tasks
- qb Free User Support
- qb Expenses Tracker
- qb Tax Prep
- qb Inventory Management
- qb Insights & Reports
- qb Project Profitability
- qb Manage Bills
- qb Track Milage
- qb Cash Flow Management
- qb Financial Reporting
- qb Direct Deposit
- qb Multiple Users
- qb Bookkeeping Services
- qb Estimating Software
- qb Employee Timesheets

(QuickBooks Plans & Pricing, 2024)



third part

QBs Data Structure

QuickBooks takes data security very seriously from multi-factor authentication to anti-fraud technology. QuickBooks safeguards data and customer information by encrypting it. The information is translated in code only QuickBooks can read. “The type of encryption we use is called AES-256 (Advanced Encryption Standard with 256-bit keys) and it ensures the highest level of cryptographic security (Privacy & Security, 2024)” QuickBooks stays up to date with the latest data safety with on-going PCI Compliance the industry standard for payment card data. Intuit is always advancing security features with constant testing and improving cybersecurity practices. Data is safely stored in one spot for account access making it easier for you to control security settings. With QuickBooks fraud prevention technology systems that constantly scans its systems for suspicious activity that immediately blocks unknown users and multi-factor authentication users can feel confident their accounting information is safe.

(QuickBooks Plans & Pricing, 2024)



fourth part

QBs Connections

QuickBooks is an Intuit company in connection with TurboTax, Credit Karma & MailChimp which are all registered trademarks of Intuit. QuickBooks Online software directly integrates with hundreds of software applications ranging from other accounting software, administration, agriculture, construction, education, energy & materials, entertainment, enterprise management, finance, health, hospitality, manufacturing, professional services, public administration, real estate, retail, technology, transportation, utilities, wholesale & distribution and other services rated software. Displayed along the side are a few examples of QuickBooks power to connect apps and incorporate for streamline data access. QuickBooks has partnered with hundreds of industry software giants to assimilate its accounting software for global access.



(QuickBooks Plans & Pricing, 2024)



Method CRM

★★★★★ (1715)

The #1 CRM for QuickBooks users



Capsule CRM

★★★★★ (62)

We make CRM simple yet powerful. Stay organised, sav...



HubSpot

★★★★☆ (137)

Integrated software for marketing, sales, and service,...



Uncat

★★★★★ (243)

Clean up uncategorized transactions with your clients...



Workflow

★★★★★ (11)

Time, Billing, Projects, Collaboration, Connectivity fo...



Houzz Pro

★★★★☆ (111)

Project management & marketing software for...



FinancialCents

★★★★★ (180)

Track client work, collaborate with your staff, and hit...



iEnterprise CRM

★★★★★ (17)

CRM for QuickBooks - Customizable, Intelligent CR...



NEX

★★★★★ (4)

CRM, Sales Process, Order Management, Purchasing,...



CRM

★★★★★ (10)

The most useful CRM for QuickBooks Online



DrivenCRM

★★★★★ (1)

Full Stack CRM For QuickBooks



Acuity Scheduling

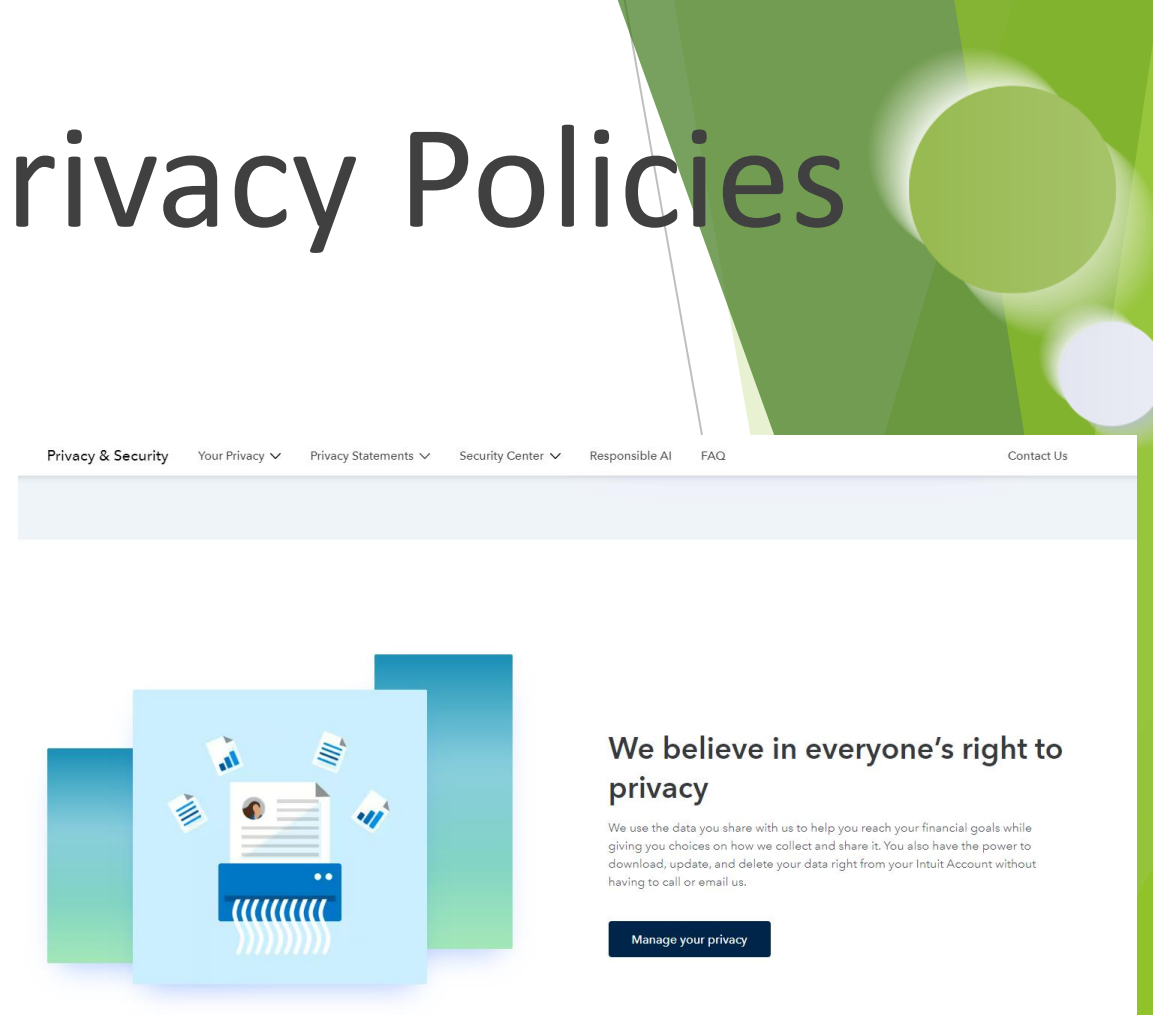
★★★★☆ (216)

Automate client bookings, cancellations, reminders &...

fifth part

QBs Privacy Policies

QuickBooks collects large amounts of data but is dependent on the context of the interactions with Intuit, how your account is configured and the choices you make. Data collected may include but is not limited to contact data and account profile data, identity verification information, communications, feedback and survey data, and related data, marketing data, social and community content, business and financial information, interactions with experts, interactions with chatbots, device and contact data, business connection data and third-party sources, linked third-party services, credit bureaus, risk management, cybersecurity and anti-fraud providers, government agencies, location information, “cookies” and biometric information. Intuit has an entire website dedicated to its [privacy policies](#) for customers around the world. The data collection information is used in various ways but primarily for your account management, upselling QB products, marketing, communication with customers, authenticating identity, provide support, training its artificial intelligence models, whistleblower reporting, compliance, and other security reasons.



QuickBooks Desktop, QuickBooks Online, QuickBooks Online Enterprise Suite and QuickBooks Online Accountant are worth considering for your business needs



In summary QuickBooks offers robust accounting software services with lots of options that connects with a multitude of other online software and apps. QBs sets high standards for accounting software but is also highly priced when comparing other accounting software, with lots of upselling, intense data collection and user accounting knowledge is needed. QuickBooks is one of the best customer relationship management tools on the market today for small businesses.

Websites:

[QuickBooks](#)

[Intuit Privacy & Security](#)

[QuickBooks Online Plans & Pricing](#)

[QuickBooks Online Vs. Desktop: What's The Difference?](#)

[What Is QuickBooks & How Does It Work?](#)

[QuickBooks Online Review 2024: Pros, Cons, Alternatives](#)