



Welcome to the First Edition of QuickBooks E-News for Manufacturers & Wholesalers!

We have created this new e-newsletter to help manufacturing and wholesale businesses like yours get the most out of QuickBooks. Each newsletter will include articles from QuickBooks experts — CPAs, QuickBooks product managers, and QuickBooks ProAdvisors® — offering advice and tips on QuickBooks features that are useful for manufacturing and wholesale businesses.

Also, be sure to check out our new [community site](#). In addition to being able to post specific how to questions, you'll be able to connect with other businesses like yours and experts. You'll also find a number of articles, tutorials, tips, and white papers that can help you get the most out of QuickBooks and run your business more effectively.

I hope you find this new e-newsletter helpful. If you have suggestions for future topics, [send them to us](#). And thanks for being a QuickBooks customer!



Kooper Frame
Senior Marketing Manager
QuickBooks Premier Manufacturing & Wholesale Edition

Creating Price Levels

Perhaps you offer discounts to your most loyal customers. Or perhaps you mark up prices for walk-in retail customers. No matter the circumstance, for manufacturing or wholesaling businesses, pricing matters. Unfortunately, many companies still rely on printed or hand-written pricing sheets — causing mistakes and killing efficiency.

QuickBooks has a solution: price levels. By creating price levels in QuickBooks, then assigning them to customers or jobs, you will dramatically save time and boost accuracy. Take advantage of this valuable business feature:

- [When to use price levels: Examples](#)
- [How to use price levels](#)
- [Create price levels](#)

Using Sales Orders

Looking for a better way to process customer orders? QuickBooks Premier Manufacturing & Wholesale Edition has a solution: sales orders. Sales orders let you take customer orders quickly and accurately, then turn them into work orders, purchase orders, and eventually invoices.

It's a time-saving way to track a customer's order through the entire fulfillment process. Learn how sales orders will benefit your business:

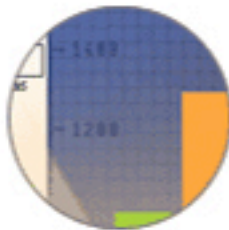
- [Sales orders explained](#)
- [Sales order terms](#)
- [Create a sales order](#)
- [Turn a sales order into an invoice](#)



Fundamentals

Give Your Forms a Makeover

If you have some summer downtime, why not give your business forms a refresh? Download a free template from the more than 100 available in the QuickBooks Template Gallery.* The pre-designed report and form templates can be used immediately, or you can alter them to fit your custom business needs.



- [Browse the Template Gallery online.](#)

Or visit the Gallery in QuickBooks. To do that:

1. From the Lists menu, choose Templates.
2. Display the Templates button menu and choose Download Templates. You'll be taken to the QuickBooks Template Gallery.

* **Note:** Templates require Pro, Premier, or Enterprise Solutions Editions.

Quick Tips: Expert Answers & Software Shortcuts

Customer Discounts Now and Later

You may need to give a discount for a preferred customer, the quantity ordered, a discontinued product, payment received before delivery, or other reasons. Wholesalers refer to this type of discount as a *trade discount* (for example, 40% off retail). This is an immediate "guaranteed see-it-now" discount amount displayed on the invoice.

If you offer credit terms on your accounts receivable, you may offer a discount for timely customer payment at a later date. Businesses refer to this discount as a *sales discount* or *cash discount*.

You may offer some customers both the "now" discount and the "later" discount.

Q: How do I calculate a "guaranteed see-it-now" trade discount on a customer invoice?

A: [Set up a subtotal and your discount percentage on the item list.](#)

Q: How do I offer a "may see-it-later" sales/trade discount for timely payment of a customer invoice?

A: [Set up your terms, including the discount percentage and discount date, on the terms list.](#)

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New in QuickBooks

One-Click Microsoft® Word Letters

QuickBooks 2005 includes letter templates that you can use to quickly generate personalized letters in Microsoft Word® using QuickBooks data.

- [Find out more about this new feature](#)

* Word or Excel integration requires Microsoft Word or Excel: 2000, 2002, or 2003, sold separately.

Quick Response

Get Expert Answers to Your Payroll Tax Questions

Get answers to your payroll questions from Mary Jo Houser, president of Well-Balanced Accounting, at our first "Ask the Expert" forum at the QuickBooks community site. Mary Jo will answer your questions about paying payroll taxes and staying in compliance with payroll tax agencies.

To submit a question or simply read Mary Jo's answers, [go to the Payroll message board](#) and look for the "Ask the Expert" discussion from now until July 1.

Featured Products

Help Improve Your Customer Service

QuickBooks Customer Manager is hands-down the easiest way to give your customers great service to keep them coming back. It puts all the information you need at your fingertips, and synchronizes information between your key applications.

- [Find out more.](#)
- [Watch the videos.](#)
- [Get a free trial.](#)

Get eBay Data into QuickBooks Automatically

Stop wasting time entering your eBay sales into QuickBooks one by one. You can now import eBay sales and fees, with related PayPal information, into QuickBooks by using eBay's new seller tool: Accounting Assistant.

- [Learn more.](#)

Business Bits

12 Traits of Successful Small Business Owners

We asked some Certified QuickBooks ProAdvisors®, who work with a lot of small businesses, to tell us what traits their most successful customers have in common.

- [Find out which traits you share — and which you'd be wise to adopt.](#)

QuickLinks

Shortcuts to other resources:

- [QuickBooks E-News Preference Center](#)
- [QuickBooks Technical Support](#)
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