

ASA Research

What's New in QuickBooks 2014?



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QUICKBOOKS FOR CPAs

COURSE INFORMATION

| | |
|-------------------------------|---|
| Learning Objectives | To increase the productivity of accountants using QuickBooks 2014 |
| Course Level | Intermediate material & advanced material |
| Pre-Requisites | Basic familiarity with QuickBooks |
| Advanced Preparation | None |
| Presentation Method | Lecture with follow up materials |
| Recommended CPE Credit | 2 hours |
| Handouts | Checklists, manual |
| Instructors | J. Carlton Collins, CPA |



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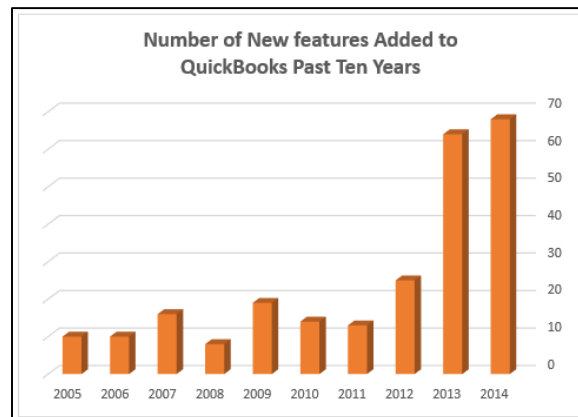


**QuickBooks
What's New
"2014 thru 2005"**

How Intuit Updates QuickBooks Each Year

Beginning with QuickBooks 2012, Intuit has started adding more features to their product each year compared to prior years; obviously in an attempt to better support their growing customer base who are asking for more in-depth capabilities. Listed below are the number of new features added to QuickBooks the past 10 years: (These new features are listed further below.)

2014 - 68
2013 - 64
2012 - 25
2011 - 13
2010 - 14
2009 - 19
2008 - 8
2007 - 16
2006 - 10
2005 - 10



Historical Restraint - Intuit knows that most companies ask for more features, but historically they have restrain themselves from adding too many new features in order to keep the product simple. If you really want a product with a thousand more features, then go out there and buy Sage MAS 200, Microsoft Dynamics GP, or SAP Business One. Those products each have several thousand more features than QuickBooks. But if you look at the results, those products which are among the top accounting software products in the world aren't doing nearly as well as QuickBooks. When it is all said and done, companies really want inexpensive, simple solutions - and that is exactly what QuickBooks offers. If Intuit started piling on too many features (which they easily could), they might ruin what they have.

Handful of Features - For this reason, for many years Intuit has barely updated their product each year. Historically, they come out with 10 to 15 new features a year just so the marketing department has something new to tout in order to encourage you to upgrade. But if you look closely, typically half of those new features touted were already in QuickBooks the previous year. Look closer still and you will find only 2 or 3 new features each year that are really worth getting excited about. The reality is that historically QuickBooks has improved a tiny bit each year, but only by the smallest of margins.



Airplane Analogy - Look at it this way. If you wanted to learn to fly an airplane today, you could march down to your local community airport and your instructor would let you take the wheel of a little Cessna 172 airplane on your very first flight. There are only a few gizmos and gadgets you would need to learn to make that happen. Within a few weeks you'd be flying high for little cost. Now assume that you wanted to learn to fly a 777 jumbo jet. There are mega gizmos and gadgets located all over the cockpit – even on the ceiling and walls. It might take you three years to learn how to fly that jumbo jet because of the complexity. In this analogy, QuickBooks is the small Cessna aircraft and SAP is the jumbo jet. One is cheap and simple to operate, the other is expensive and complicated to operate. American companies across the country have shunned the jumbo jet in favor of the cheaper and easier to use two-seater plane – why would Intuit destroy that by heaping on a massive amount of new features each year?

Committed to Quality - Please don't mistake me as saying that Intuit is not committed to quality – they are extremely committed to eliminating bugs from the system, it's just the add-on features that they have previously resisted, and rightfully so.

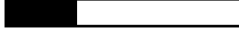
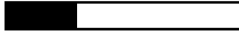

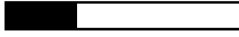

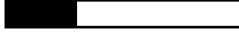
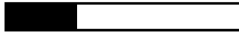
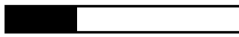


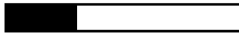

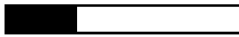
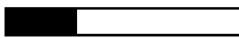

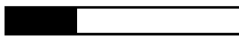





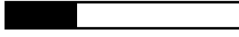
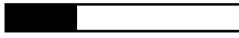
New Features – Presented below is a list of each significant new feature added or improved over the past 6 years. I've inserted a rating next to each new feature or improvement that shows in my opinion how excited I am about that new or feature or improvement. This information is presented in summary form, but you can see lengthier discussions of each of these features including screen shots, on my web site: www.QuickBooksAdvisor.INFO.

New in QuickBooks 2014: Carlton's Ten Star Rating



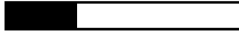
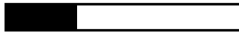
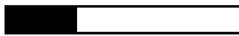
QuickBooks 2014 Pro, Premier and Enterprise:

1. Global Access Bar added containing three tools
2. **Client Collaborator Added**
3. Maintenance Alerts Added
4. **Reminders and "To Do's" Numbered Indicator Added**
5. New color (from grey to dark blue)
6. Customize the Account Balances View



- 7. Removed the “My Apps” tab 
- 8. Removed the “Do Today” tab 
- 9. Copy and paste detail lines in transaction forms 
- 10. New report icons relevant to on-screen transactions 
- 11. **Search tool now supports AutoComplete** 
- 12. The Company menu has been changed to My Company 
- 13. The Company menu has been redesigned 
- 14. The left Navigation Bar’s “My Apps” has been moved 
- 15. **The Customer Center displays a new tab for Sent Email** 
- 16. Email Customer Payment Receipts 
- 17. Web Mail Improvements 
- 18. **Assign Sales Reps to Jobs** 
- 19. New Job Status Filter 
- 20. Bank Feed Improvements 
- 21. **“Income Tracker” replaces the “Collection Center”** 
- 22. Bill Payment Stub now shows when bill has been paid with credits 
- 23. **The Process Bounced Checks feature is back** 
- 24. **Fit Reports to “X” Pages High** 
- 25. **QuickBooks opens faster and windows open faster** 
- 26. **You can toggle between QuickBooks editions faster** 
- 27. **Find function now includes ability to search within results** 
- 28. Sort Billable Time & Costs by clicking column heading (QB Prem.) 
- 29. New Login requirement to obtain product keys 


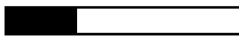


QuickBooks Accountant Only:

- 30. Reclassify Transactions Tool allows batch changes 
- 31. **Batch Enter Transaction allows Bills, Invoices & Credits** 
- 32. Send Journal Entries to QuickBooks Mac 2014 
- 33. **QB Professional Bookkeeper has been discontinued** 
- 34. New Client Collaborator offers new communications with clients 

QuickBooks Accountants Plus Only:

- 35. **QB Accountant Plus available on a subscription basis** 
- 36. Automatic updates for QB Accountant Plus 
- 37. QB Accountant Plus includes Accts Copy File Transfer service 

QuickBooks Enterprise Only:

- 38. **New Sales Rep Column (QBE only)** 
- 39. New Job Report - Job WIP (QBE only) 
- 40. **Specify a maximum quantity on hand (QBE)** 
- 41. **Build nested assemblies (QBE)** 

- 42. New “Where-used” query has been added (QBE)
- 43. **Assembly Cost and Price Rollups (QBE)**
- 44. New Job Cost Report Committed Cost by Jobs (QBE)
- 45. More Customization for Checks, Bills & Credit Card Charges
- 46. Edit certain item fields without clicking the edit button (QBE)
- 47. **Markup and Margin Pricing via subscription of \$399/Year (QBE)**
- 48. **Quantity Break Pricing (QBE)**



ProAdvisor Program:

- 49. iPhone app allows you to receive “ProAdvisor Alerts”
- 50. **“Find-A-ProAdvisor” search algorithm was changed**
- 51. **ProAdvisor member website is better organized**
- 52. QB Mobile Companion no longer part of ProAdvisor
- 53. Intuit Data Protect no longer part of ProAdvisor
- 54. **No Enterprise Price Rules unless Enterprise certified**
- 55. The new Client Collaborator is included in ProAdvisor
- 56. The Payroll Center has been rearranged, tabbed for more room
- 57. **QB Plus allows you to rent QB Pro or Premier for a monthly fee**
- 58. **QuickBooks Plus Supports Multiple Users (3 in Pro, 5 in Premier)**



QuickBooks Mac 2014:

- 59. QB Mac “Guide Me” Enhancements
- 60. QB Mac Setup checklist
- 61. QB Mac Launch Page
- 62. QB Mac Income Tracker
- 63. QB Mac Centers Enhancements
- 64. QB Mac Sales Reps
- 65. QB Mac Sales Tax Rounding
- 66. QB Mac Find within Reports
- 67. QB Mac Left Navigation Bar
- 68. QB Mac Import Journal Entries



New in QuickBooks 2013:

Carlton’s Ten Star Rating

Major New Features:

- 1. **Batch Transaction Entry (Write up)**
- 2. **Splits, Excel, Customize, checks, deposits, credit card transactions**
- 1. **Paste 1,000+ transactions from Excel**
- 2. **Email journal entries that clients can import**
- 3. **New left pane menu for improved navigation**



4. Reclassify hundreds of transactions in batch
5. Create new QB company from existing company
6. More contact info fields for customers and vendors
7. Customize up to 8 contact fields
8. New ribbon layout on customer forms shows more info
9. New tabs show "transactions", "contacts", "to dos" and "notes"
10. Shop for apps right from QuickBooks
11. MAC Edition - Added attached documents
12. MAC Edition – Added batched invoicing
13. QBE – Bin location tracking
14. QBE – Barcode scanning
15. QBE - A New button creates Purchase Orders automatically
16. QBE – Assign default classes to items for quicker data entry
17. QBE - Supports more Accounts, Classes, To Do's, etc.



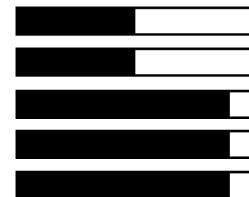
New Navigation Features:

18. New Sidebar Menu
19. Ability to minimize the Sidebar
20. No Panel on right (by default)
21. Panel on right now appears on bottom of sidebar
22. No icons at the top (by default)
23. Ability to add back the icon bar and close sidebar menu
24. Up arrow minimizes the ribbon
25. Larger fonts
26. Hyperlink based menus, which better supports the cloud
27. Closing with the X no longer asks are you sure? (FIXED IT)
28. Color schemes gone (FIXED IT)



Customers:

29. Banded rows on invoices and other screens
30. Invoice provides Delete, Print, Receive, Payment, etc. options
31. Customers now have multiple contacts; each with many fields
32. Customer screen tracks To Do Notes and Historical Comments
33. Default setting to mark all time & expenses items as billable
(Set this up in Preferences under Time.)










Bills:

34. You can now print bills (for sharing purposes perhaps)
35. Preference payments option for online payments.
36. Preference payments option for receiving credit card payments
(You must use the Intuit payment network, ie transaction fees)
37. Sales by Item Detail Report now shows name and description

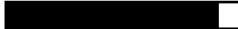







(Like the FS)




(Set Preference under Reports and Graphs)

- 38. **Drop down list for adding columns to reports is now alphabetized** 
- 39. **You can now copy and paste into the search box** 
- 40. **JE screen in Accountants Edition has new option to Send JEs**
(Recipient clicks email to import JE)
(JE's can add accounts, items, customers, etc) 
- 41. DUP is added to duplicate accounts, customer, vendors, names 
- 42. Statement Writer now works on 64 bit computers too 
- 43. Writing off multiple invoices now adjusts the sales taxes too 
- 44. New Professional bookkeeper 2013 Edition. (Released in 2012)
(Update multiple companies at once, see bank recs quickly, etc.) 

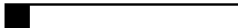


Enterprise:

- 45. **Set default class for each item or name**
(Turn on under Preferences accounting, then option shows up.) 
- 46. **Groups expanded to 50 items (previously limited to 20.)** 
- 47. **Up to 10,000 classes, customer types.** 
- 48. **Up to 100,000 chart of account numbers.** 
- 49. **New inventory reorder report- checks items that need reordering** 
- 50. **Auto PO feature using the preferred vendor** 

Enterprise with Advanced Inventory:





- 51. **Bin & Shelf tracking** 
(To add this, transfer everything in your distribution center to your distribution center, and add the bin and shelf as you do)
- 52. **Stock status report by SITE report – See where items are located.** 
- 53. **Bar code scanning** 
(Preferences, Advance Inventory Settings, Barcode tab, enable)
(Works with USB or Bluetooth scanner)
(EAN13 and code 128 barcodes are supported, but not UPC barcodes)
(Reading is limited to just 30 characters)
(If you have already recorded the barcode in another QB field, a new tool can copy that data to the new barcode field so you don't have to reenter it.)

ProAdvisor:




- 54. **Only 1 QB Enterprise user license (not 5)** 
- 55. **Now QuickBooks for Mac included in ProAdvisor** 
- 56. **New pay per month plan - \$20 per month** 

QuickBooks for Mac:

- 57. **Batch Invoicing** 




















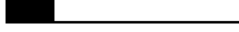
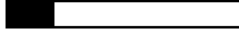
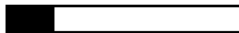
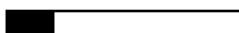
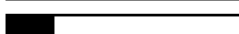
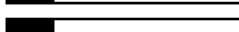
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| 58. Attach documents |  |
| 59. Bank rec improvements |  |
| 60. Import multiple lists |  |
| 61. Intuit payment network integration |  |

QuickBooks Online:

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| 62. Income list with money bar |  |
| 63. Improved downloaded transactions work flow |  |
| 64. Sales tax processing improvements |  |

New in QuickBooks 2012:







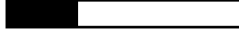
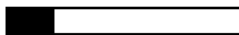
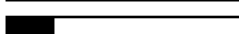
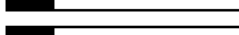
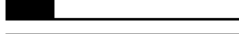
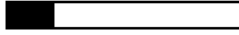
Carlton's Ten Star Rating

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|--|---|
| 1. QuickBooks Statement Writer now Included (Acct's Editions) |  |
| 2. Period copy – Create data file based on desired dates |  |
| 3. Starter copy – Copy your QB data to create a new company |  |
| 4. Reclassify hundreds of transactions in a single window |  |
| 5. Inventory Center supports Images |  |
| 6. Enhanced Inventory Receiving (Bill & Receipt now separate) |  |
| 7. Fix incorrectly recorded sales tax payments |  |
| 8. Condense Improvements – reduces file size further |  |
| 9. View and then fix inventory discrepancies from one screen |  |
| 10. More price levels (from 99 to 750) |  |
| 11. Match unapplied vendor and customer payments window |  |
| 12. Clean up un-deposited funds account from one screen |  |
| 13. Write off uncollectible invoices to an account you choose |  |
| 14. Improved Accountant Center – new reconcile widget |  |
| 15. identify added, changed, deleted, or merged list items |  |
| 16. View changes to account balances from the previous close |  |
| 17. File Manager improvements – auto identifies file version |  |
| 18. Improved Accountants Copy (credits now save to client copy) |  |
| 19. Acct's edition opens all versions (this is not new) |  |
| 20. Open two files simultaneously (this was added in 2011) |  |
| 21. Depreciation calculations added to QuickBooks |  |
| 22. Working Trail Balance screen (this is not new) |  |
| 23. Multi-currency (This is not new) |  |
| 24. Edit the "No Company Open" Window |  |
| 25. Improved Statement Writer (several design tools) |  |

New in QuickBooks 2011:

Carlton's Ten Star Rating









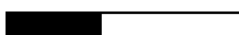
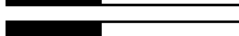
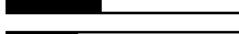
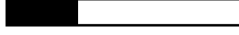
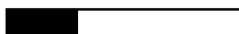
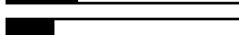
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| 1. Work in two companies at the same time - Accts' Edition only |  |
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| 2. New QuickBooks Search – Search all of QB, Works off a keyword |  |
| 3. Batch Invoicing - Invoice multiple customers at once |  |
| 4. Send e-mail via Outlook, Yahoo, Hotmail, or Gmail – Nice |  |
| 5. Assign Classes to Balance Sheet Accounts - Not all accounts |  |
| 6. Free 1 hour phone session with Intuit QuickBooks expert |  |
| 7. New Vendor Field - Track vendors' remittance address |  |
| 8. Manage Passwords - Accts' Edition only |  |
| 9. Batch Upgrade - Upgrade client files at once - Accts' Edition only |  |
| 10. Customer Snapshot - See key customer info at a glance – not new |  |
| 11. Mark paid invoices with Paid Date stamp – Yawn |  |
| 12. Use Client Data Review in Multi-user Mode - Accts' Edition only |  |
| 13. Collections Center – Just another view of data you already have |  |

Movies - <http://proadvisor.intuit.com/product/whatsnew/?segment=pap-member>







New in QuickBooks 2010:

Carlton's Ten Star Rating

- | | |
|--|---|
| 1. Paperless Support - Attach scanned documents to transactions |  |
| 2. Intuit Check Solution - Scan and deposit your checks |  |
| 3. More Custom Fields – Added to QuickBooks Enterprise Only |  |
| 4. Job/Lot/Serial Numbers – Added to QuickBooks Enterprise Only |  |
| 5. Batch - Batch entry and edit for item and account information |  |
| 6. New Tool - Mass comparison and reclass. of expense accounts |  |
| 7. Intuit Statement Writer – Now supports Word-based letters |  |
| 8. New Client Review Screen - Helps CPAs troubleshoot inventory |  |
| 9. Role Base Security – Added to QuickBooks Enterprise Only |  |
| 10. Re-Designed Report Center – Better organized, easier to read |  |
| 11. Forms - New professionally designed invoices & statements |  |
| 12. New Tool - Write-offs of an entire customer's balance at once |  |
| 13. Restrict Data Input – Added to QuickBooks Enterprise Only |  |
| 14. Setup Improvements - New installation options |  |

New in QuickBooks 2009:

Carlton's Ten Star Rating

- | | |
|--|---|
| 1. Larger Numbers - Supports 11 digits, up from 8 digits |  |
| 2. Client Review Data Center – Helps CPAs review and fix errors. |  |
| 3. Lists - You can now duplicate a transaction or list item |  |
| 4. Company Snapshot - New dashboard screen |  |
| 5. Point of Sale Improvements – Touch screen, up to 20 POSs |  |
| 6. Intuit Statement Writer - Sold separately, create reports in Excel |  |

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|--|--|
| 7. Multi-Currency – Supports realized and unrealized Gains & Losses | |
| 8. QuickBooks Live Community – Chat with other QuickBooks users | |
| 9. Time Tracker – Now tracks both billable and non-billable time | |
| 10. Improved Bank Reconciliation – Sort columns | |
| 11. Multiple-User Enhancements - To QuickBooks Enterprise | |
| 12. Online Banking – Automatic mapping & new wizard | |
| 13. Improved Accountant's Copy – Better import, mapping to 1099. | |
| 14. Free Business Web Site – Still no integration to QuickBooks | |
| 15. History – Easier to enter after-the-fact payroll data | |
| 16. Adobe – New invoice, sales order & estimate templates | |
| 17. Conversion – Updated tools for Peachtree & MOA files | |
| 18. Vista - Microsoft Vista Logo Certified | |
| 19. Stronger Encryption - 2048-bit key replaces 1024-bit key | |

New in QuickBooks 2008:

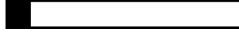
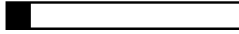
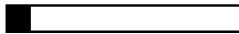
Carlton's Ten Star Rating

- | | |
|--|--|
| 1. E-Mail through Outlook – Contact lists, sent folder | |
| 2. New Excel Template – Import Excel data into QuickBooks | |
| 3. Improved Help – See screen and help window at same time | |
| 4. Merchant Service – New ability to validate credit card funds | |
| 5. Time Tracker – Track billable hours from Outlook | |
| 6. Share Records with CPA – Dividing date, track CPA's changes | |
| 7. New Time & Expense Screen – See both on one screen | |
| 8. New Premier 3 User Edition – Really just a new price point | |

New in QuickBooks 2007:




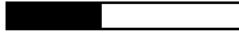
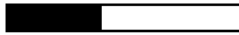

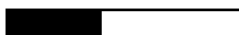

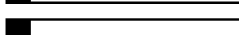
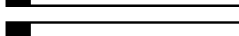
Carlton's Ten Star Rating

- | | |
|---|--|
| 1. Time Tracker – Excellent online fully integrated timesheet | |
| 2. Portable File – Smaller files, Re-indexes file to gain more speed | |
| 3. Unit of Measure Conversions – Typically a higher-end feature | |
| 4. Multi-Parcel Shipping – Via UPS and FedEx | |
| 5. Convert Sales Orders to Purchase Orders – Yeah! | |
| 6. Larger List Limits – Up to 10,000 items, customers or vendors | |
| 7. Better Payroll Data – Key payroll data at a glance for \$7/month | |
| 8. Preview Forms before Printing – I guess this is good | |
| 9. Automatic Vendor Expense Classifications - Did that in 2006 | |
| 10. Google Desktop Searching - Give me a break, not a QB feature | |
| 11. Improved Backup Wizard - Big yawn | |
| 12. Thermal Printing Shipping - Bigger yawn | |
| 13. Google Marketing - Sale pitch for Google Adwords, Come on | |

- | | |
|--|---|
| 14. Improved Accountants Copy – Use Remote Access instead |  |
| 15. “Always On” Audit Trails - Did that in 2006, doesn't hit GL |  |
| 16. New Pro 3 User Edition – Just a new price point |  |









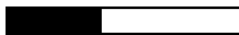
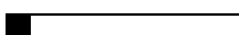
New in QuickBooks 2006:

Carlton's Ten Star Rating

- | | |
|---|---|
| 1. New Set Up Screens – 15 to 30 screens instead of 130 |  |
| 2. New Home Page - Organizes key data on a single screen |  |
| 3. Toggle Editions – Make menus look like any other QB product |  |
| 4. Other New Screens - Customer, vendor, employee, reports |  |
| 5. New Database – Faster, but new problems in multi-user mode |  |
| 6. More Users in QB Enterprise – Up from 10 to 15 users |  |
| 7. Permanent Audit Trail – I wish it hit the GL |  |
| 8. Basic Dropped - QuickBooks Basic Edition has been dropped |  |
| 9. Lower Pricing - By \$100, not a feature |  |
| 10. Goodbye Upgrades - Eliminated upgrade pricing options |  |

New in QuickBooks 2005:

Carlton's Ten Star Rating

- | | |
|---|---|
| 1. Financial Statement Designer – Control indent, add columns |  |
| 2. Working Trial Balance Tool – Uses CPA Work paper formats |  |
| 3. Voided/Deleted Transactions Report – Show voided transactions |  |
| 4. Interactive Tutorials – High quality training videos, voice & pause |  |
| 5. Version Detector – Hover icon to see data file year & edition |  |
| 6. Payroll Enhancements - Do-it-yourself payroll solution |  |
| 7. Enhanced Security - More control over users |  |
| 8. QuickZoom - View retained earnings entries |  |
| 9. Manage Customer Payments Better - streamline AR tasks |  |
| 10. Simple Start Edition – Checkbook caliber version of QuickBooks |  |

See my detailed discussion of these 2008 features at <http://www.QuickBooksAdvisor.com>

Carlton's QuickBooks Wish List

While I do agree and approve of Intuit's strategy to keep QuickBooks as simple as possible, there are critical features that I would like for Intuit to add to QuickBooks as follows:

1. ~~Quantity break pricing.~~
2. Automated e-mail delivery of financial reports based on custom schedule.
3. Dozens more custom user definable fields.

4. More account number segments.
5. ~~Ability to attach electronic documents to transactions.~~ (done in 2010 – thank you)
6. ~~Picture support for inventory items.~~
7. Automatic allocation calculations and journal entries based on formulas.
8. An integrated web store solution that exports the inventory data (and pictures) right out of QuickBooks to automatically create an online integrated web store.
9. An audit trail that actually hits the general ledger.
10. The ability to schedule automatic delivery of reports to e-mail recipients.
11. The option to have voided checks hit the current period.
12. Ratio reports, including comparisons to industry averages.
13. Automatically hide unused menu items to keep menus simple.



Bio for J. Carlton Collins, CPA

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J. Carlton Collins, CPA is a Certified Public Accountant with experience in technology, tax, auditing, accounting systems, financial reporting, and bond financing. He is an author, lecturer, and technology & accounting systems consultant. He has published books, articles, and web pages and is the author of the monthly technology Q&A column for the [Journal of Accountancy](#). As a public speaker, Mr. Collins has delivered more than 2,000 lectures in 44 states and 5 countries addressing more than 500,000 CPAs and business professionals. As a consultant, Mr. Collins has assisted 275+ large and small companies with the selection and implementation of accounting systems. Mr. Collins has a Bachelor's degree in Accounting from the University of Georgia, is a 25+ year member of the American Institute of CPAs and the Georgia Society of CPAs, and is also a licensed realtor.

Summary of Selected Positions, Awards & Accomplishments:

1. Honored as one of the CPA Industries Top 25 Thought Leaders by [CPA Technology Advisor Magazine](#)
2. Author of the monthly Technology Q&A column for the [Journal of Accountancy](#).
3. Recipient of the 2012 AICPA Lawler Award for Excellence in professional writing.
4. Recipient of the AICPA's Lifetime Technical Contribution to the CPA Profession Award.
5. Chairman of the Southeast Accounting Show - the South's largest CPA event.
6. Recipient of the Tom Radcliff Outstanding Discussion Leader Award.
7. Named "Top Ten CPA Technologists" by [Accounting Technologies Magazine](#) (multiple years).
8. Named "Top 100 Most Influential CPAs" by [Accounting Technologies Magazine](#) (multiple years).
9. Has personally delivered over 2,000 technology lectures around the world.
10. Recipient of the Outstanding Discussion Leader Award from the Georgia Society of CPAs.
11. Lead author for PPC's Guide to Installing Microcomputer Accounting Systems.
12. Has installed accounting systems for more than 200 companies.
13. Chairperson of the AICPA Technology Conference.
14. Recipient of the ACCPAC Partner of the Year Award.
15. Determined by SAP to be one of the country's "Top Ten Most Influential ERP Systems Consultants".
16. Has delivered keynote and session lectures at dozens of accounting software conferences.
17. Sworn in as a Certified Public Accountant on September 18, 1985.
18. Member of the American Institute of CPAs since 1985.
19. Member of the Georgia Society of CPAs since 1982.

As an auditor, Mr. Collins has audited businesses in the areas of health care, construction, distribution, automobile dealerships, insurance, manufacturing, and general business. Mr. Collins' tax experience includes corporate, individual, partnership, fiduciary, and estate tax planning work. In the area of finance, Mr. Collins has prepared (or assisted in preparing) feasibility studies and financial forecasts for nearly 300 projects seeking more than \$3 billion in startup capital. Mr. Collins is familiar with bond issues, Medicare and Medicaid reimbursement, and conventional financing matters. In 1992, Mr. Collins contributed and demonstrated more than 500 pages of suggested design improvements to the Microsoft Excel development team of programmers - and many of those improvements are found in Excel today.

At the University of Georgia, Mr. Collins was elected President of the Phi Eta Sigma Honor Society, was initiated into the BIFTAD Honor Society, served three years in the Judicial Defender/Advocate program, and was a member of Alpha Tau Omega fraternity. At Glynn Academy High School, Mr. Collins was Senior Class President, Class Valedictorian (1 of 6), and received a principle nomination to Annapolis Naval Academy. Mr. Collins has been married for 27 years and has two children. He devotes his leisure time to family, travel, tennis, fishing, snow skiing, and riding motorcycles (both dirt and street). Mr. Collins is president of his homeowners association, participates in the Gwinnett Clean and Beautiful program, and volunteers for Cooperative Ministries food drive.