BULK CLEANUP FOR QUICKBOOKS ONLINE

Clean up client books in hours, not weeks, with an undo for every change

BulkAuto is a Windows app for bookkeepers and accountants. It finds what's wrong in a QuickBooks Online company and fixes hundreds of records at once, safely: every change is previewed, confirmed, backed up and can be undone with one click.

In one minute

FIND

Health scan

A read-only checkup lists what needs fixing, and saves a client-ready PDF.

FIX

22 bulk tools

Reclassify, deposit, apply credits, write off, remove duplicates, import and more.

PROVE

History and undo

Every run is logged, can be undone, and exports a change log for the client.

The problem: QuickBooks fixes mistakes one at a time

Every firm knows the new client whose books are a mess. Bank feeds create duplicates. Expenses land in "Ask My Accountant." Customer payments sit in Undeposited Funds for months, so income is counted twice. Credits go unapplied, old estimates and purchase orders stay open, and years of unbilled time clutter every report.

QuickBooks Online can fix each of these, but only one record at a time. A cleanup that touches a few hundred transactions turns into days of clicking: slow to bill, easy to get wrong, and hard to explain to the client afterwards.

> **Example from our demo company** (an Intuit test company built to look like a busy small business): one scan found **201 uncategorized expense lines**, **$173,988 in payments never deposited** and **65 groups of duplicate transactions**. With BulkAuto, 74 of those payments were deposited in seconds, 67 duplicates were removed after a typed confirmation, and 2,000+ old time entries were cleared in about a minute and a half.

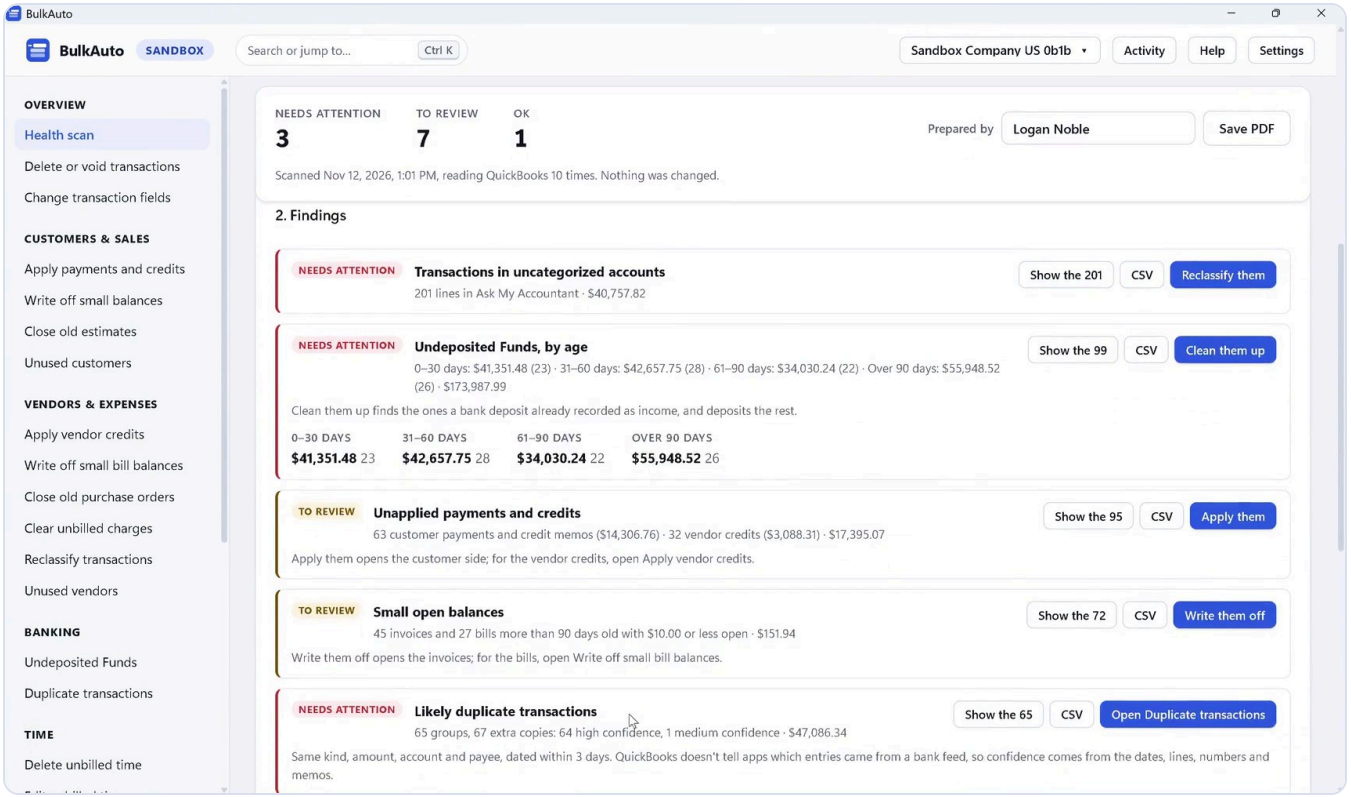
Who it's for

- **Bookkeeping and CPA firms** taking on new clients, doing catch-up work, or closing the year across many companies.
- **Outsourced accounting teams** that need consistent, documented cleanups they can hand back to the client.
- **Firms moving clients' data** in from spreadsheets or other systems, with a practice run before anything is saved.

How BulkAuto works: find, fix, prove

A cleanup in BulkAuto follows the same three steps every time, so it's quick to learn and easy to repeat for each client.

1. **Find the problems.** The Health scan reads the books and lists what needs attention, from uncategorized expenses to old open balances. It changes nothing. Each finding has a button that opens the tool that fixes it, with the problem already selected.
2. **Fix them in bulk.** Filter down to exactly the records you mean, check the preview, type a short confirmation, and BulkAuto makes the changes in QuickBooks, hundreds at a time.
3. **Prove what changed.** History lists every run. Open one to see each record before and after, undo it with one click, or export a change log (PDF or spreadsheet) for the client or their CPA.



The Health scan on the demo company: each finding shows its size and a button that opens the fix.

What it can fix

Twenty-two tools, grouped the way the books are. Each one previews, confirms and backs up before it changes anything.

Tool	What it does
OVERVIEW	
Health scan	Read-only checkup of the books, with a client-ready PDF report.
Delete or void transactions	Removes or voids any kind of transaction in bulk: test entries, botched imports, old junk.
Change transaction fields	Changes one detail (memo, date, number, terms, class or location) on many transactions at once.
CUSTOMERS AND SALES	
Apply payments and credits	Puts leftover payments and unused credit memos against the same customer's open invoices.
Write off small balances	Clears pennies-short invoice balances with a documented write-off for each.
Close old estimates	Closes stale quotes so they stop showing as open. Nothing posts to the books.
Unused customers	Makes customers with no recent activity inactive.
VENDORS AND EXPENSES	
Apply vendor credits	Uses supplier credits to pay down that supplier's open bills. No money moves.
Write off small bill balances	Clears tiny leftover bill balances with a write-off for each.
Close old purchase orders	Closes filled or abandoned purchase orders. Nothing posts to the books.
Clear unbilled charges	Takes old billable expenses off the unbilled list; the expenses stay.
Reclassify transactions	Moves expense lines to the right category, class or location in bulk.
Unused vendors	Makes vendors with no recent activity inactive.
BANKING	
Undeposited Funds	Joins waiting payments to bank deposits that already recorded them, so income isn't counted twice, and deposits the rest.
Duplicate transactions	Finds entries made twice, shows each pair side by side, and removes the extra copy, always keeping one.
TIME	
Delete unbilled time	Removes old unbilled time entries. Billed time is never touched.
Edit unbilled time	Changes service, rate, billable setting or class on many time entries at once.
LISTS, IMPORT AND EXPORT	
Unused products and accounts	Makes products, services and accounts nobody uses inactive.
Recurring templates	Finds and pauses or deletes repeating transactions that should have stopped.
Edit lists in bulk	Adds or updates customers, vendors, products and other lists from a spreadsheet.
Upload and export	Imports transactions from spreadsheets after a practice run, and exports any kind back out.
Attach files	Attaches receipts and PDFs to the right transactions in bulk.

Built so you can trust it with client books

Bulk changes are only useful if they're safe. Every tool that changes anything follows the same five steps:

Step	What it means for you
1. Preview	You see exactly which records will change, and how, before anything happens.
2. Typed confirmation	You type a short phrase, such as DELETE 12, so nothing runs by accident.
3. Backup first	A full copy of every record is saved on your computer before it's changed.
4. History with undo	Every run is logged and can be put back from its backup with one click.
5. Closed periods protected	Anything dated before the company's QuickBooks closing date is left alone.

Read-only tools, like the Health scan, make no changes at all.

How it works with QuickBooks Online

- **Connected with Intuit's permission.** You sign in on Intuit's own page and approve access. BulkAuto never sees your Intuit password.
- **Official connection.** BulkAuto uses QuickBooks' official API for apps, the same way every app in the QuickBooks App Store does.
- **Changes appear right away.** Every fix lands in QuickBooks and its reports immediately, as if made by hand, and shows in QuickBooks' own audit log.
- **Many clients, one place.** Connect several client companies and switch between them without signing in again.
- **QuickBooks Online only.** BulkAuto works with QuickBooks Online, not QuickBooks Desktop.

Where client data goes

> **Client data travels only between your computer and Intuit.** Backups and history stay on your computer. BulkAuto Ltd. never receives QuickBooks data: our sign-in service only handles Intuit's sign-in and never sees a record. There are no analytics or tracking, and you can disconnect a company at any time from BulkAuto or from QuickBooks.

A typical new-client cleanup

1. **Connect the client's company** and run the Health scan. Save the PDF: it's your "before" picture and scope of work.
2. **Work down the findings.** Reclassify uncategorized expenses, clear Undeposited Funds, remove duplicates, apply open credits, write off small balances, close old estimates and purchase orders.
3. **Run the Health scan again** to show what's resolved and what's left.
4. **Hand over the change log** from History: a record of every change, with values before and after, for the client or their CPA.

Plans

Priced per bookkeeper, in US dollars, and paid inside the app. Every plan starts with a **5-day free trial** with every feature, and each bookkeeper can use BulkAuto on two computers.

Plan	Monthly	Yearly	Client companies
Standard	$49.99	$490	Up to 3 per bookkeeper
Firm	$99.99	$990	Unlimited

Common questions

What do we need to run it? Windows 10 or 11 and a QuickBooks Online login with access to the client's company.

Can it break a client's books? Every change is previewed, confirmed and backed up first, and closed periods are protected. If something isn't right, History puts it back.

Can we try it first? Yes: the 5-day free trial includes every tool. A walkthrough video shows a full cleanup in about five minutes.

See it in action
Website: getbulkauto.com
Walkthrough video: youtu.be/gFxEzn3pmsI

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