qb Plugged IN

A Resource Center for Business Owners in Need of Solutions

Leaders Know: Efficiency

Is Not By Coincidence

In This Issue:

- Smart Advisors, Lean Managers and Automation That Saves Companies
- Provoking Thoughts of Opportunity
- AI and Your Industry — Meet; Watson, Lucy, Daisy, Chime and the Restless Bandit

Editor's Note

Welcome to QBPluggedin. Our publication is a resource for business owners in search of solutions. The stories come from a network of advisors, consultants and technology partners who continue to work together to provide creative solutions for companies like yours.

Many of the stories contained within, share a common theme where inefficiencies were not always apparent. With limited time, sometimes we blindly operate from a mind-set of "If it Ain't Broke—Don't Fix It".

In today's world, efficiency will continue to evolve, whether we choose to participate or not. With artificial intelligence accelerating contributions to the cause, you will want to pay attention, if you do not want to become obsolete in your own trade or industry.

As you will see, our network of technologists work hard for your advancement. It pays to get to know them, their enthusiasm to make you more successful is undeniable and evident. In the following articles, challenges were overcome, cash flows improved, profit margins and brand recognition prevail, thanks to the practice of efficiency.

Saluting Creative Ambition,

Dawn Scranton, CQA

dawn@aqbt.org

The Sweeter Apple

If you're an apple connoisseur, we would like to share with you, the story of Diana Crawford, CPA and her client, BFA Technologies Inc, a boutique IT consultancy headquartered in Atlanta, GA with a second office in Ft Lauderdale, FL.

Diana has been a CPA for 25 years, has provided QuickBooks training and consulting for many of those years and is also a member of the Intuit Trainer Network, when she is not bouncing between visiting her two children at college or fishing in the Atlantic.

BFA Technologies is an Apple Authorized Partner and Member of the Apple Consultants Network (ACN) who wanted to take a bite out of inefficiency that was worming it's way through a 15 year old service-based business. While these seven senior consultants are focused on the aspects of IT with regard to Apple products and technologies, time and service can be picked from three alternatives; (1) Monthly Managed Services (complete outsourced IT)
(2) Project-Based or
(3) On-site at an Hourly Rate

BFA Technologies Inc is a group of IT consultants that are a hard-working bunch, with every senior consultant visiting several clients a day. Based on this model, BFA Technologies quickly noticed the sour challenges of time-tracking and the impact it had on their accounting. If you compound the effects of all seven serving up to four clients daily, this could yield as much as 28 time-entries per day. And since this crew was meeting their clients in the field, they had paper-based logs that had to be escorted to the office, compiled, transcribed and finally entered into a lone accounting system.

Ripe for Change

Diana Crawford, CPA and Authorized Intuit Consultant to BFA Technologies, had a sweeter idea.
Ms. Crawford quickly identified with the IT family's need for an efficient, intuitive and easy to use time-tracking solution. Her recommendation, Quickbooks Online would not only address that, but it would also allow each Sr Consultant to clearly list their activities for each client; unlike most other accounting systems. And the candy on this apple, was that invoices could easily be created from these time-related activities and sent to the client without any stickiness.

And so, ever since BFA Technologies moved to QuickBooks Online, the scenario looks like this:

- BFA Sr Consultant Arrives at client site to perform work
- Action items are created in QuickBooks Online Time Activities
- Time Activities are easily Copied to an Invoice
- Client Pays the invoice and is emailed a "Paid" copy of the Invoice

Again, all of this is done individually by the consultants. It is done on their computer or even on the client's computer. Most importantly, it is done immediately on-site, at the client's office. The consultants of BFA Technologies update their Accounts Receivable, before they walk out their client's door.

A Shiny Future

QuickBooks Online, turned out to be just the fertilizer this firm needed. Over time, BFA Technologies has leveraged the QuickBooks Online ecosystem to expand other comprehensive solutions, such as a ticketing system from Freshdesk which ties into QuickBooks Online.

You can find Diana of Crawford, Merritt and Company / Certified Public Accountants, by visiting her web-site at: www.cmccpas.com.

Be sure to mention Promo Code: QBPluggedin

Fleetmatics

REVEAL+

Vehicle Tracking Device: We Make Mobile Fleet Management Easier

Our solution was created with the sole purpose of making it easier to manage a fleet at the enterprise level. Take a look at our features to see how we do it.

EXPLORE FEATURES

WHAT MAKES FLEETMATICS DIFFERENT

ENTERPRISE GROUPING

Organize vehicle and driver data into groups that match the structure of your business, to get simple answers to your company's complex questions.

MORE

INTELLIGENT REPORTING

Set up a consistent report package once, and the reporting delivers ongoing value through the organization, ensuring the right access, permissions and roll-ups.

MORE

DRIVER-FOCUSED DATA

Manage your drivers first with reports that differentiate between drivers and vehicles...really.

MORE

BACK OFFICE INTEGRATION

Put telematics data into the context of your business by integrating it with your back office management tools.

MORE

AUTOMATIC GEOFENCING

Learn what you don't know about where your drivers are going and stopping.

MORE

NATIVE MOBILE APP

View all of your fleet data anywhere, anytime with our enterprise-class mobile app.

MORE

SAFETY

Easily track and manage behaviors that affect the safety & security of your employees and assets.

MORE

COMPLIANCE

Simply manage your drivers' hours of service.

MORE

Sage and QuickBooks Shake Hands Everyday for this Lawyer

If you are in a service-oriented businesses or law firm, time-billing is critical. All of your staff is aware that delaying preparation and submission of invoices, only delays payment. Add the complexity of trust accounting and the requirements of tracking retainers and it is no wonder that you may groan like Frankenstein, when asked about your billing procedures and practices.

But that doesn't scare Caren Schwartz. She owns and plays the violin that tames this beast. Lawyers call on her, to play the tune that improves the process and soothes their pains. Caren, who has held the duration of this field of expertise for more than 20+ years, is no ordinary QuickBooks Advisor either, she also maintains a Certification on Sage Timeslips.

Ms Schwartz understands that while QuickBooks (Desktop Edition) can meet your accounting needs, it doesn't always meet time and billing needs. If you want partial payments allocated in specific ways, or multiple bill layouts and the ability to show trust activity on your invoices, you are probably looking at a separate billing program.

The Laboratory

For example, let's look at Lustgarten & Roberts. Although Sage Timeslips met their billing requirements and QuickBooks met their Financial requirements, the two apps would present the challenge and inefficiency of entering everything twice. Since Sage Timeslips and QuickBooks were installed separately they ran as segregated silo's. The law firm's clients and cases (jobs) would have to be entered in Sage Timeslips for invoicing and then again in QuickBooks for financial tracking; Payments received would also have to be entered in both Timeslips and QuickBooks; and billable client costs would have to be entered in both, to ensure billing to the client (in Timeslips) and paying the bill (in QuickBooks).

Ms Schwartz was called in to connect the two using the special link (connector) created by Sage. As you could imagine, this was the strike of lightening that required precise hands-on channeling and expertise. For everyone knows, that magic only happens, if the two currents of data are flowing in the right direction and into the right data fields that will deliver optimal efficiency and tracking capabilities. This was not a task to be taken haphazardly.

The Soothing Sounds of the Violin

Caren went to work connecting the dots, and with her help, Lustgarten & Roberts defined processes and procedures that could flow with unpreceded quality and efficiency. Once the hand-shake between Sage and QuickBooks was made, the law firm could enter new clients and case matters, in either program rather than both. Vendor bills get entered and paid for as billable costs in QuickBooks, tagged by client or case matter and are simultaneously shared with Sage Timeslips for customer billing (invoices for time and expenses). Customer Payments are entered into Timeslips and with a few clicks the transaction are synchronized with QuickBooks, all at lightning speed, without re-keying a single data-field or transaction. Of course, refunds and retainer transactions are also shared with QuickBooks too.

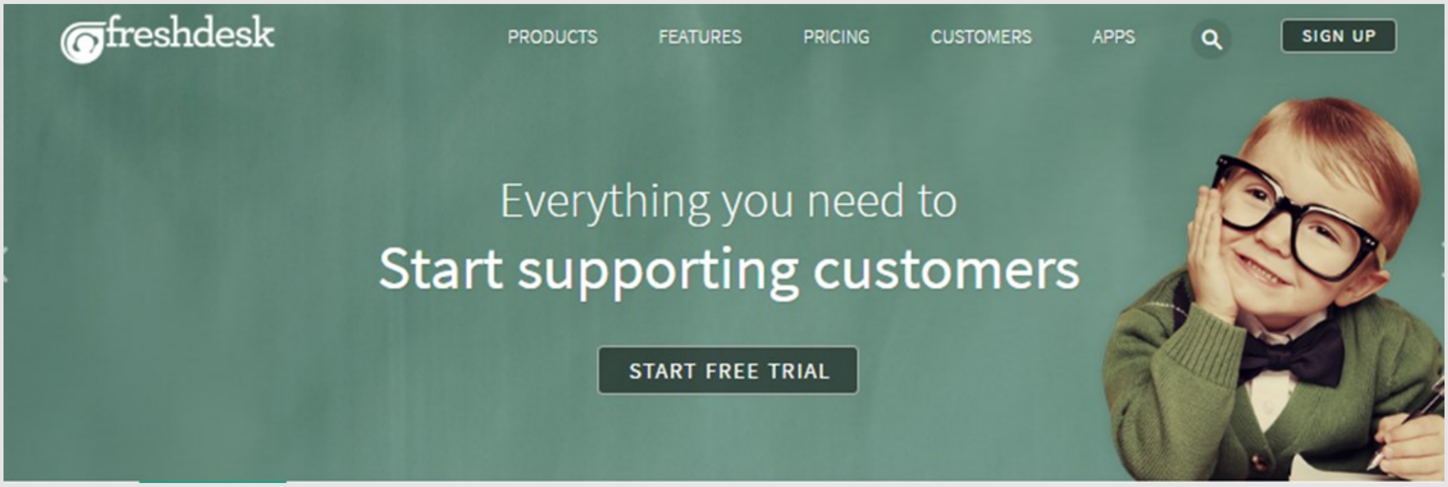
Taming The Monster

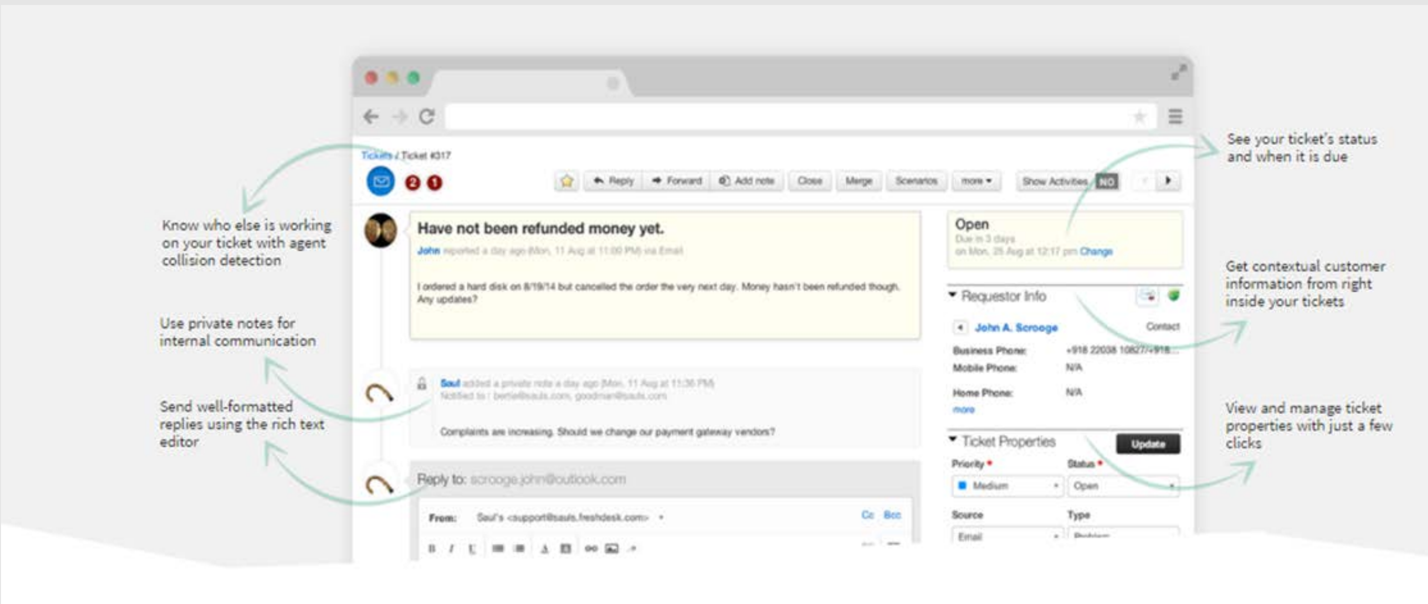
As any good accountant has probably already told you, segregation of duties is essential. You don't want one employee handling all transactions from beginning to end, without double checks and balances. Having both Sage Timeslips and QuickBooks connected and sharing updates, enforces this concept.

As Lustgarden and Roberts puts it "Integrating the two systems made the transition to new application as smooth as possible. All the double-entry is now a thing of the past. The checkbook is much easier to reconcile and there is accountability for the cash that comes in. When our systems were separate, it was too easy for any staff to pocket cash without anyone knowing."

Ms. Schwartz has dedicated her time to reclaiming lost time and expenses. She is a Certified Consultant in Timeslips, Sage 50 (Peachtree), Amicus Attorney, BillQuick, Time Matters/Billing Matters and PCLaw. Visit her company web-site: Time & Cents Consultants LLC, at: http://www.timeandcents.com.

Be sure to mention promo code: QBPluggedIn.





Getting things done faster

Canned Responses

Stop wasting time writing the same replies again and again. Ensure quick consistent responses to common questions by creating pre-formatted replies.

Suggested Solutions

Freshdesk automatically provides you with smart suggestions of possible solutions right next to the ticket, based on keywords in the ticket's description.

Bulk Actions

Need to assign multiple tickets to the same agent? With bulk actions, things like categorizing, assigning or deleting a hundred tickets just take a few clicks.

Keyboard Shortcuts

Freshdesk has a long list of useful keyboard shortcuts to help you navigate through your helpdesk, perform quick actions, and expedite dozens of common tasks.

Merge Tickets

Ever have a customer report the same issue multiple times via different channels, causing confusion? No problem. Merge all of the related tickets together, and resolve it in one go.

Scenario Automations

Scenario automations let you perform a series of tasks on a ticket. Mark a ticket as high priority, set its status as pending and assign it to the dev team with just a single click.

Maximizing Business Efficiency

ef·fi·cien·cy

[ih-**fish**-*uh* n-see] *noun*

1. The state of quality of being efficient, or able to accomplish something with the least waste of time and effort; competency in performance.
2. accomplishment of or ability to accomplish a job with a minimum expenditure of time and effort

Think about how you currently do business. Are there tasks that you do over and over again, that you could automate with technology? Here are some ideas to get you started...

Take A Technical Inventory

Take a stroll through your company, make note of the applications being used by staff. Intentionally look-out for redundancy or opportunities to streamline old or ineffective procedures. Look for ways to help employees collaborate rather than duplicate.

Use Team and Task Management or Collaboration Tools

For example, ToDoist is a list and task management app that lets you share task lists with your team and also assign items to specific team members with their set due dates. The program is integrated with Outlook, Google, Dropbox and many other apps, so you can quickly share and attach files relevant to the tasks.

Set-up AutoReseponders;

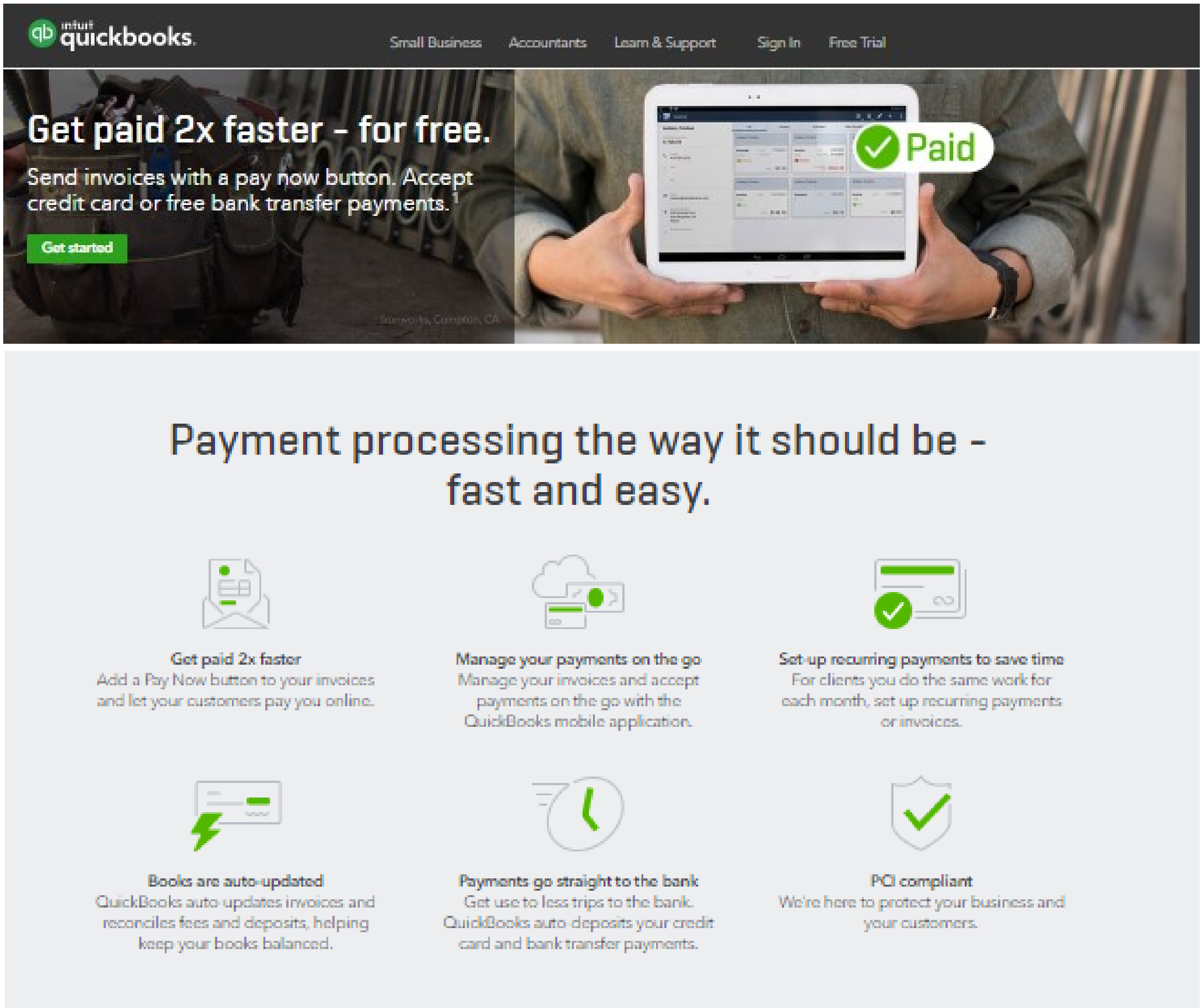
Internet businesses often generate newsletters to people interested in their products or services. It doesn't make sense to write a new email to welcome each person as they subscribe to your mailing list - so you would write your welcome email, and then use a newsletter service, like Aweber to automatically send the letter when someone new subscribes to your newsletter. Autoresponders can also be used for delivering things like progressive learning or segmented tips and tricks, not just advertising messages.

Explore New Business Technologies

Leaders frequently brag about time they spend on personal education and current events, including advances in business technology. In fact 94% of small business owners use at least one social media platform for business and 85% use cloud storage. Are you maximizing your use of the tools offered by Dropbox or your social media dashboards? Is your knowledge and use of Client Relationship Management Tools, current?

Artificial Intelligence and IoT

Are you watching and noticing how this new technology will impact your business? Accountants, for example are seeing how algorithms smartly code new transactions based on how you coded historical activity from the same vendor. The Internet of Things (IoT) technology is being used in homes and will shortly become part of your commercial space, are you and your business ready?


intuit quickbooks
Small Business
Accountants
Learn & Support
Sign In
Free Trial
Get paid 2x faster – for free.
Send invoices with a pay now button. Accept credit card or free bank transfer payments.[1]
Get started
Paid
Payment processing the way it should be – fast and easy.
Get paid 2x faster
Add a Pay Now button to your invoices and let your customers pay you online.
Manage your payments on the go
Manage your invoices and accept payments on the go with the QuickBooks mobile application.
Set-up recurring payments to save time
For clients you do the same work for each month, set up recurring payments or invoices.
Books are auto-updated
QuickBooks auto-updates invoices and reconciles fees and deposits, helping keep your books balanced.
Payments go straight to the bank
Get use to less trips to the bank. QuickBooks auto-deposits your credit card and bank transfer payments.
PCI compliant
We're here to protect your business and your customers.


receipt bank
English
ACCOUNTANTS & BOOKKEEPERS
SMALL & MEDIUM BUSINESSES
SOLE TRADERS UK
MORE
LOGIN
The Future of Small Business Productivity
Receipt Bank helps small to medium-sized businesses, sole traders, and individuals save valuable hours by pulling information from receipts and invoices quickly, accurately, and efficiently.
The Old Way
Piles of receipts & invoices build up over the last month.
Spend 4 hours manually typing expenses into a spreadsheet.
Wastes valuable time and money on repetition, extra staff & human error.
The Receipt Bank Way
Take 10 minutes to send photos or documents to be processed by our software.
No duplication or lost info as all data is saved securely to the cloud.
Publish to your cloud accounting package and save time and money on automation.

Countertop Company Turned Right Side Up

We all want better margins, after all isn't that why we are in business? Join Cobble Creek Countertops LLC on their journey towards reaching their financial targets.

But first, let us introduce you to Hal Rosen, CPA. He is a CPA with 40 years of experience. After three years with an international CPA Firm he spent 11 years starting and running businesses, including raising venture capital for a new startup. As CEO of the start-up Hal directed the business to world-wide sales and profitability. Then, after selling the company, Mr. Rosen re-entered CPA Public Practice to help small to medium sized businesses. Hal has been an active proponent of businesses using QuickBooks since the early 1990's and has been named an Insightful Accountant Top 100 ProAdvisor for 2015 and 2016.

Measuring with One Eye Shut

Hal began consulting with Cobble Creek Countertops LLC in July 2016. They were motivated to double their profitability. The initial focus used suggestions taught by author Dawn Fotopulos in her book *Accounting for the Numberphobic*. The goal was to increase Gross Margin (GM) to over 30%.

Some of the challenges they faced included: 1) a Chart of Accounts that mixed Cost of Goods Sold (COGS) with Expenses, 2) Invoices being entered when the order was accepted and a 50% deposit was required, even though the final installation was often 60 days later, 3) COGS were distorted because WIP (work in process) was not calculated each month, 4) customers were allowed to supply their own stone without an overhead and handling charge being added, resulting in too small of a Gross Margin, 5) the customer's quotes were based on ONE trip for installation, but some customers intentionally stretched the installation into 3-5 trips with no additional charge, and 6) Accounts Receivable aging was much too high and resulted in a cash flow problem for the growing business.

Everything in its Right Place

Step 1 - Hal began his work by adjusting the Chart of Accounts and putting all COGS together to get a better idea of Gross Margin. He collaboratively reviewed the components and practices of bidding jobs to help the team at Cobble Creek properly assess and implement a surcharge on all jobs where the customer supplied their own stone, as well as add extra charges for multiple installation trips. In review of the Gross Margins and its components, Cobble Creek became more attuned to watching the parts that would help them reach their goals. Since each job is a custom build, it was impossible to perform a detailed analysis by part numbers; however, together Mr. Rosen and Cobble Creek reviewed the bidding software to ensure that a final price allowed the Countertop Company to meet their 30% Gross Margin target.

Step 2 - Accounting procedures were changed. Customer Deposits were properly treated as such and are held in an account designated as "Other Current Liabilities". Final invoices are created the day before the installation, rather than recording unearned revenue 60 days prior. Customer Deposits are also subtracted from final invoices, relieving the Customer Deposit account of the liability.

Step 3 – The Countertop company began computing month-end adjustments for Work-in Progress to update Inventory and COGS. An emphasis has been placed on collecting at the time of installation and calls are regularly being made to collect old accounts, improving cash flow. Hal also introduced the use of Fundbox (www.fundbox.com), a QuickBooks App that allows fast approval for borrowing funds based on receivables.

Step 4 – Work on the QuickBooks file took place at the place of business, at the owner's home and at our CPA office. Backups were often not properly restored and work was lost, resulting in duplication of efforts and lost data. We solved this challenge by moving our client to QuickBooks On-line so that backups are no longer needed, and we can all access the file at any time we have internet access.

You can find Mr. Hal Rosen, CPA, Owner at: Rosen, Fitzgerald, Baggaley, Meurer CPAs PLLC by visiting his web-site at: www.RFBMCPA.com or calling him at: 801-288-1222.

Be sure to mention Promo Code: QBPluggedin

FISHBOWL WAREHOUSE FEATURE SHEET

ADVANCED WAREHOUSE MANAGEMENT FOR DISTRIBUTION, E-COMMERCE AND RETAIL

Fishbowl Warehouse® (FBW) has dozens of advanced features to help your business manage warehouse processes and inventory more smoothly while eliminating inefficiency and saving money. Below is a list of many of the features included with FBW:

FISHBOWL WAREHOUSE FEATURES

Key: ● = Integration, + = Add On Product

Bold italic orange = new or updated features

Accounting solution integrations ●	Custom shipping terms	Merchant service integrations ●	Scheduled backups
Address validation	Custom tracking	***MO to PO conversion***	Scheduled reports
Adjust Prices wizard	***Customer balance check***	Mobile warehousing +	Serialized tracking
Auto commit and pick inventory	Customer pricing rules	Multi-currency	Shipping solution integrations ●
Auto export to QuickBooks (QB) ●	Customer purchase history	Multi-location part tracking	***Shopping cart integrations*** ● +
Auto purchase order	Cycle counting	Multiple ship-to addresses	SO to PO conversion
Auto refresh	Drop shipping	Order picking	Standard and configurable kitting
Auto reorder points	Duplicate orders	Outsource processing	Tiered pricing rules
Auto update (Client side)	Duplicate parts	Part monitoring	***Time & labor plugin*** +
Auto-directed, best picking path	***E-commerce platform integrations*** ● +	Pick, pack, and ship lists	Training videos and help section
Barcode (scan, track, print)	E-mailing	Point of sale integrations ● +	Transfer orders
Calendar module	EDI integrations ●	Product pricing rules	Unit of measure conversions
Cloud storage and file sharing ● +	Expiration date tracking	Product substitution	Unlimited custom fields
Configurable dashboard	***Forecasting*** +	Product/kit configurator	Unlimited location groups
Configurable SOs and POs	Grouped order picking	Purchase orders	Unlimited parts/locations/users
Configurable tax rates	Hosting services +	***QB integration (Pro, Premier, Enterprise,***	User access rights
Consignment tracking	Landed cost management	***and QB Online)*** ●	Variable discounting
Cost-plus pricing	***Lead times***	QB Jobs (import, export, create) ●	Variable pricing
Credit card processing integrations ●	LIFO, FIFO picking, pick to clean	Real-time inventory data	Vendor cost rules
Credit card recall	LIFO, FIFO, average & standard costing	Receiving	***Vendor part numbers***
CRM integrations ● +	Lot number tracking	Reconcile purchase orders	Volume discount suggestions
CSV imports/exports	***Magento shopping cart plugin*** +	Reports (industry-specific and custom) +	***Xero online accounting integration*** ●
Custom payment terms	Management of purchasing and	Revision level tracking	
Custom settings	vendor relationships	RMA tracking	

Canadian and Australian versions of Fishbowl Manufacturing are also available. See the feature lists for additional Fishbowl products on the next page.

INTEGRATIONS

Better automation through integration Fishbowl integrates with all of these popular slolutions and many more to help you automate your business processes across the board. Check out all of Fishbowl's integrated solutions by visiting *www.fishbowlinventory.com/fishbowl-integrated-solutions*.

FISHBOWL PROVIDES THE #1 REQUESTED MANUFACTURING & WAREHOUSE MANAGEMENT SOLUTIONS FOR QUICKBOOKS!

Cutting Edge Web Designer is Brightening His Financial Cloud

Starting a business can be a great adventure but also a sobering reality. You start your business to do something you are passionate about and then quickly become immersed in all the responsibilities and obligations that come with owning your business; managing your employees, selling your product or service, paying bills, trying to decode the latest notice you just received in the mail. Gavin Baker of Baker Labs, is not a stranger nor alone in this struggle.

Two Roads, a bookkeeping business based in Knoxville, Tennessee was founded in 2011. As business owner's themselves, they were fed up with the pain, anxiety and whole ordeal of hourly accountants and their forever ticking clocks of phone calls, meetings and emails. They formulated a fixed-cost pricing plan and more than five years later, their company is still delivering accurate and on-time financials across the country from highly skilled and personable bookkeepers at monthly fixed rates.

Brain Drain

When Two Roads met Gavin Baker, the owner of Baker Labs, he was fulfilling many roles, as business owners do. Mr Baker manages operations, provides guidance and ongoing training to his team as they deliver their client strategies. He is the chief sales representative, responsible for landing new business and maintains all the client relationships with his company. Not to mention he is a devoted husband and father.

His company, Baker Labs specializes in inbound and digital marketing for their clients. They bring together website design and maintenance, social media, and driving traffic to your website through search engine optimization. And, like most entrepreneurs, Mr Baker was working long hours but still could not find time in the day to get an accurate picture of where his company was financially.

Gavin also wanted to be freed up, to get back to his passion doing what he is best at and the tasks that generate the most revenue for Baker Labs. He called on Two Roads for help. In addition to the typical bookkeeping and financial tasks of bank account and credit card reconciliations, Accounts payable was a cumbersome task that was taking much of Gavin's time away.

Brighter Days Ahead

Two Roads set out to provide Gavin with an easy solution that lifted his burden, organized the bills, and made sure they were paid in a timely manner. Bill.com was part of the solution that everyone needed. As bills and invoices come in, Gavin simply emails a picture of the bill to the Two Roads team. Each week Two Roads presents the bills that need to be paid. Once approved Bill.com can submit electronic payments directly to the vendors or mail them a paper check. This became the process that would increase efficiency and improve accuracy for both parties.

On a monthly basis, Mr Baker's dedicated bookkeeper (at Two Roads) reconciles his bank accounts and credit cards, pay his bills, and provides him with a simple profit and loss statement as well as a balance sheet. Gavin is now free to indulge his creative passions. Baker Lab's financials created by Two Roads, enable him to understand and review, his company's financial position, make the necessary pivots and leverage growth.

By removing cumbersome tasks from Gavin's plate, he can re-focus on his business. Landing more business, growing and developing his team, and spending time planning strategies and visions for Baker Labs. Thanks for the monthly financials, Gavin no longer runs his business solely by checking his bank account balance. Most importantly he is able to go home each night to his family fully present with the peace of mind that his financials are done and are completed correctly. Working in the cloud allows Two Roads to deliver real time data, accessible from anywhere. Gavin always has a true picture of where he stands.

The Two Roads team also use Karbon, a practice management solution that helps them serve their partners with excellence. By managing communication with partners and the team, they can execute monthly work and special projects. Karbon enables Two Roads to provide quick response times and resolve Baker Lab's questions and special projects with ease. Two Roads wins when their partner wins.

Learn more about the Two Roads Company and their offerings by visiting: www.tworoadsco.com or call them at: 865-212-0063. Be sure to mention Promo Code: QBPluggedin.

Four Ways Artificial Intelligence Is Used Today

Lucy— Is A Market Research Companion, Powered by IBM Watson
"Lucy is a combination of our own stuff and some amazing services from IBM's Watson to create this unique solution that brings together all the owned and licensed content, structured and unstructured, to our customers," Scott Litman, managing partner at Equals 3, said. "You can ask her, 'How much did BMW spend month by month?' Lucy knows. 'What was the daily web traffic for Ford.com?' Lucy knows. I can ask her for keyword research and she knows." The initial license for Lucy costs $50,000 for a year and allows for five users to operate within one brand or marketing category.

Daisy Intelligence—Decision Making Assistance
Daisy Intelligence can determine what deals a retailer should offer, or what the featured product should be during the current ad campaign. Gary Saarenvirta, CEO of Daisy Intelligence claims Daisy could double retailers' profit-margins if used regularly. In insurance, Daisy operates to detect fraud and provide underwriting recommendations. By identifying suspicious claims, or those that are vastly different than the average claim of its type, the machine signals a human to investigate further.

Chime—For Realtors
The idea behind Chime was to "bring the real estate industry into the next generation," Matt Murphy, co-founder of the company, said. Between scouring the web for information while developing the leads and then triggering automated ad campaigns to make first contact with prospective buyers or sellers, Chime attempts to help agents take the first steps toward cultivating a promising lead.

Restless Bandit
"It will make recruiters more efficient," Steve Goodman, co-founder and CEO of Restless Bandit, said. "They won't have to weed through the 80 percent of candidates that are clearly not a good fit. It will also increase quality [of the candidates] because the only candidates we reach out to are at least minimally qualified."

One Swift and Mobile Property Manager

Meet Bob. He is a Property Manager in a world of real estate where renting is red-hot. He obsessed over the values of a property management solution, but there were only three buildings and the hammer was beating on his cash flow. Bob needed the ability to email receipts, accept credit cards and automatically debit his tenants checking accounts. He wanted a smart solution that was as nimble and mobile as he was - So, he called Alicia.

Let us quickly introduce - Alicia Katz Pollock of Royalwise.com. She is a QuickBooks Online Guru who has been training Business Owners on computers for over nine years. Mrs Pollock is an Author, holds multiple certifications from Microsoft, Apple, QuickBooks and more and has a Master's Degree in Teaching. Suffice to say, Alicia is no stranger to modern technology. And when she isn't buried in technicalities, she is playing bass in her family band, "The Pollkatz".

But, let's get back to this property manager and how Alicia was able to transform his operations and unleash his cash flow in Hillsboro, Oregon. So while he was singing the phrase "Show me the Money"! - Alicia introduced him to QuickBooks Online.

Off to the Bank We Shall Go…Every month, 300 tenants would bring their checks down to the front desk, where the payments were entered into a spreadsheet. Unfortunately, without sufficient details of the individuals, the payment dates nor the total amount deposited in the bank each day. In short, Bob had no way of tracking what was really happening.

Alicia solved Bob's dilemma by setting up a new QuickBooks Online (QBO) file. Every apartment became a Customer ("Tenant"). Each building became its own Class, so he could divide income and expenses between the three buildings.

Alicia setup QuickBooks Online with Recurring Transactions that would email Invoices to tenants five days before the end of the month. This enabled Bob to manage his cash expectations. As tenants came down to the front office, they were able to pay the invoice on the actual date. At a glance, Bob could see (from his mobile devices) who - if anyone, was delinquent. Bob began knocking on doors and using his bank's smartphone app to deposit checks. Having them show up on the bank statement individually and deposited the same day, eliminated delays from waiting on staff to escort payments to the bank.

Next, Ms. Pollock implemented Intuit's Merchant Services, adding a Pay Now button to each invoice. Tenants can now pay online using a credit card or ACH bank account and even to opt-in to automatic future payments. QuickBooks matches the payment to the invoice, marks it as paid, and *Whoosh!* deposits the money in the bank for him. Oh yeah, these tenants were so automated, that the front desk had no tenant management to do at all.

However, this property manager requests didn't stop there. Since there were three buildings, it was important to him to divide the utility and landscaping bills accordingly. Alicia created a unique classification for each building and Bob could now break down the expenses into their proportionate shares: Bldg. 1 (50%), Bldg. 2 (40%) and Bldg. 3 (10%).

The QuickBooks Banking Rules would be trained to do the same, automatically allocating expenses 50%/40%/10% right into their proper buckets. As a result, Bob has no manual data entry and still gets job cost reports for all three properties.

Bob now runs his monthly P&L by Class, giving him total revenue and expenses for each property. He drills down even further to review which units are turning a profit versus which are expensive to maintain. His front desk now operates without confusion and the employees are delighted with this new fool-proof tenant management system, where tenants can pay conveniently. Bob no longer micromanages his expenses.

Bob was so motivated by Alicia's results, that he gave his staff full access to her QuickBooks education classes, books, and videos. Hands-on training that shows employees how to process daily tasks. This multi-faceted approach ensured that each staff member could learn in a comfortable environment, focused on the specific techniques they would need for their role. Be sure to visit Alicia's full program offerings at www.RoyalWise.com

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Find the Right Card for You

GREAT FOR

- Shopping
- U.S. Supermarkets
- U.S. Gas Stations

Amex EveryDay® Credit Card

- Travel
- U.S. Restaurants
- U.S. Supermarkets
- U.S. Gas Stations

Premier Rewards Gold Card from American Express

- Travel
- Hotels
- Airport Lounge Access‡
- No Foreign Transaction Fees¤‡

Platinum Card® from American Express

United Problem Solvers™

There are a lot of benefits for your small business when you have a relationship with your locally-owned and operated The UPS Store. Not only do we provide excellent customer service, but we also provide the necessary tools to help your small business thrive.

How Can The UPS Store Help You?

- Starting a small business
- Market your small business
- Small Business Blog
- Printing services

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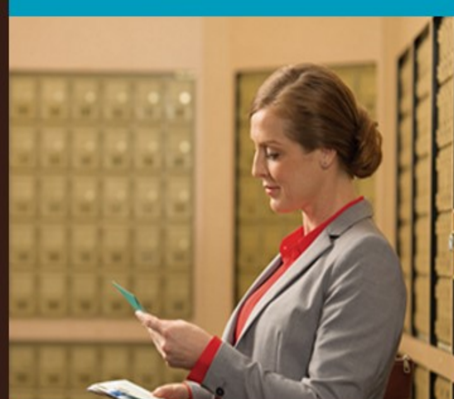

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Around the World in Manufacturing

The inquisition started in Las Vegas. Michael called Seth to tell his story of three manufacturing companies that he owned, all of which had operations based in China. Seth listened intently.

Seth David, opened Nerd Enterprises in 2003. In his spare time, when he is not working, he is usually working, he says jokingly. However, he enjoys hiking too, in his neighborhood of Southern California. So, if he invites you to lunch, put on your hiking boots, because you'll likely be burning 1,000 calories rather than consuming them and catching a beautiful view, during your conversation with him.

When It is Dark on one side, It is Shining on the other

Michael begins to explain; the accountants in China are using proprietary software that is not working very well. The companies and their accountants needed and wanted a better solution, one that would generate Consolidated Financial Statements, share a Standardized Chart of Accounts and of course, keep track of over 1,000 assembly items. In fact, by the time a compilation was done (in excel) there were approx. 21,000 lines of assemblies and kits, after including their components. A structure that would provide a viable way to manage the inventory of these three companies was vital. And let's not forget the need for training. Overall it looked like a daunting task that could easily take over 100 man hours to complete. Mr David would have to put on his thinking cap.

Sunrises for Everyone

Seth was determined to work smart and maneuver a trip to Vegas, while saving Michael money. So, he reached deep into his technical toolbox and bucket of sweat, err, we mean experience.

Out of the toolbox, QuickBooks Enterprise proved to be promising. But, not without some Excel master skills, manipulation and a secret weapon – *Transaction Pro Importer*. The application comes complete with a learning curve. You have to know how to use it. You also have to understand where things are going in the QuickBooks file, especially if your importing something as complex as assembly items.

Michael had already committed to a budget of $ 5,000.00, it was worth it to him. By hiring Seth, Michael was able to focus on what he does best – running his business. Seth was learning about value-pricing, as he was really excited to do the work and his eye on the prize was to squeeze in a trip to Vegas at no additional costs, to deliver a full day of training and have some old-fashioned fun.

Seth went to work, prepping the Excel files, he laid out a template complete with instructions for Michael's crew. Shortly thereafter, when Mr David received the excel files back, there was minimal cleaning up to do, thanks to his thorough, clear and easy to follow instructions. Then, within just two short hours, there were three brand-new QuickBooks Enterprise Company files.

Like magic - Michael receives his ultimate solution, complete with a standardized chart of accounts, over 1,000 assembly items in each and the ability to run Consolidated Financial Statements. Seth packed his bags to meet everyone in Vegas, to deliver training that would ultimately be executed on the other side of the world - literally.

The next time you catch yourself staring at a project that requires special customization, reach out to Seth. He is the Chief Nerd at www.nerdenterprises.com providing a variety of technical consulting and training services, including: Accounting and Productivity Software, Digital Content & Video Lead Generation. Or you can call him directly at: (866) 945-8070.

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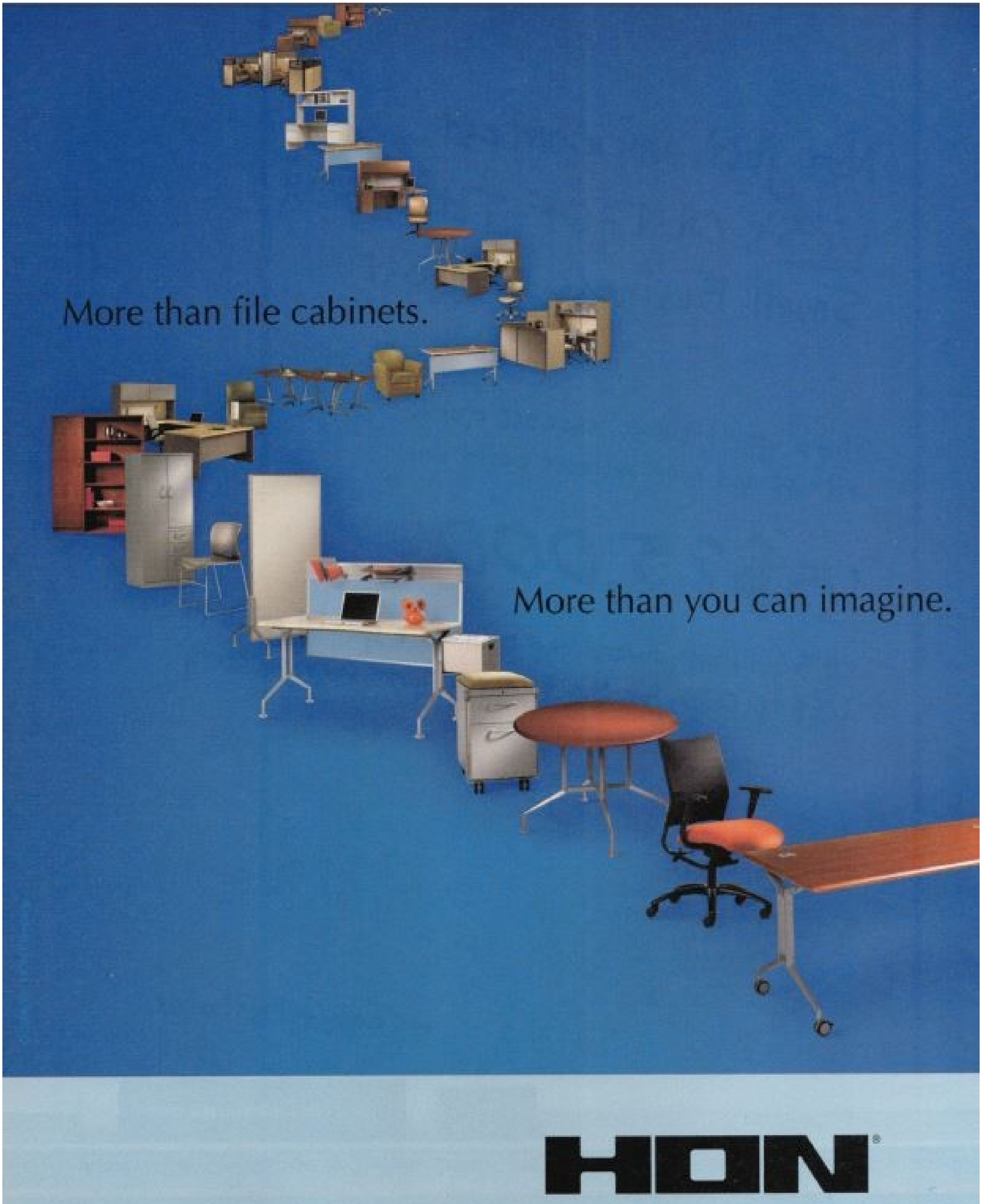
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