


# Tech Valley QuickBooks PowerUsers



Meetup: <http://www.meetup.com/Tech-Valley-QuickBooks>

LinkedIn: [http://www.linkedin.com/groups?gid=2593659&trk=myg\\_ugrp\\_ovr](http://www.linkedin.com/groups?gid=2593659&trk=myg_ugrp_ovr)

Facebook: <http://www.facebook.com/home.php?#!/group.php?gid=167111413799>



# Being in two places at once...

## 7 options for remote access and sharing of QuickBooks

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# Options for Remote Access

- Remote access to your desktop PC
- Reaching out to a client's PC
- Online hosted virtual desktops
- SaaS Web2.0 apps
- Portals for exchanging files
- Online banking & check processing
- Paperless Office document storage

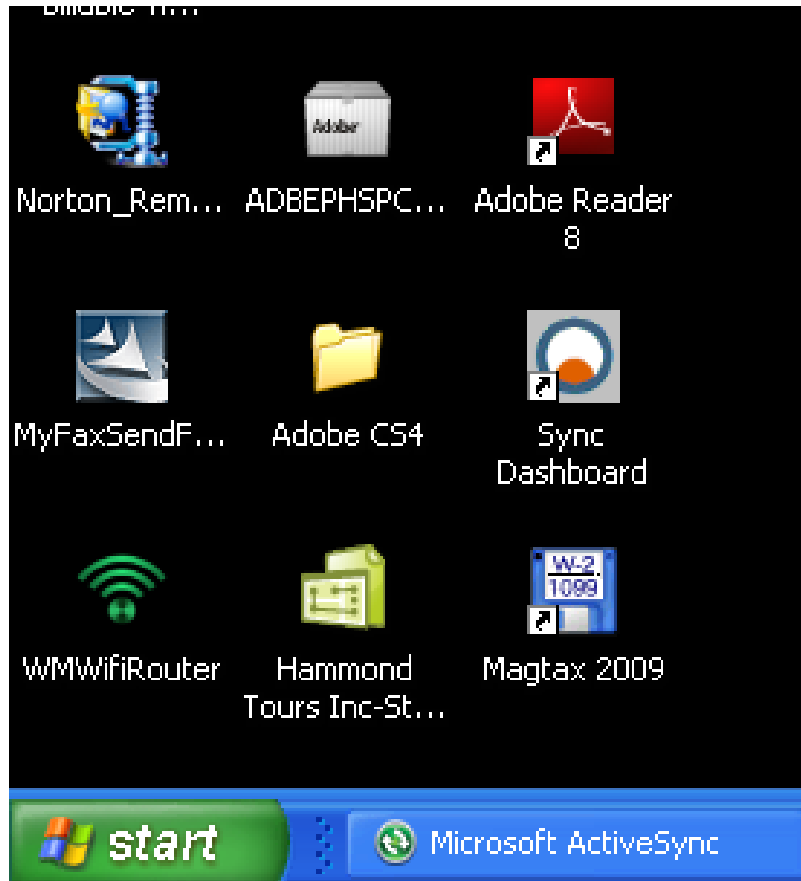
# Meeting software

GoToMeeting, WebEx, DimDim, FuzeMeeting

- Easy to share the screen of the PC you are at
- May have option to ‘switch presenters’ to view your client/colleague’s screen for remote support
- Does not provide remote access to an unattended machine

# Controlling your PC remotely

GoToMyPC, LogMeIn, Remote Desktop



Benefits: easy and inexpensive

Drawbacks: PC must be always on; only one user at a time; if the PC crashes you may be out of business

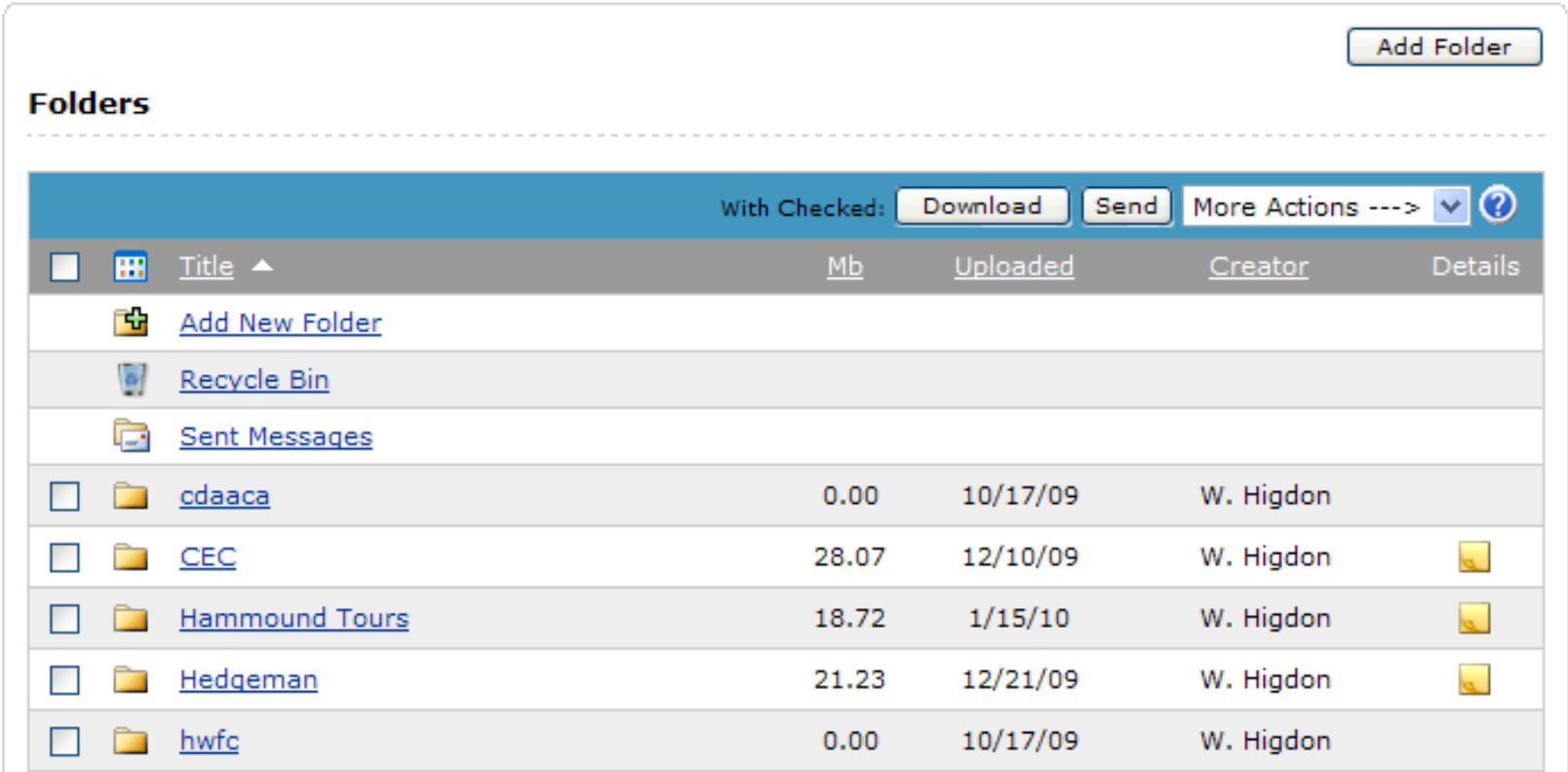
# Remote Tech support

LogMeIn Reach, GoToAssist

- Easy, quick connection to remote PC
- Remote Control
- File Transfer from PC to PC
- File Share by sending a link
- Remote to Local Printing
- Desktop Sharing for one-on-one meetings

# Portals for file exchange

ShareFile.com, DropBox.com, filesanywhere.com



The screenshot shows a file management interface with a header bar containing an "Add Folder" button. Below the header is a table of folders. The table has columns for "Title", "Mb", "Uploaded", "Creator", and "Details". The folders listed are "Add New Folder", "Recycle Bin", "Sent Messages", "cdaaca", "CEC", "Hammond Tours", "Hedgeman", and "hwfc". The folders "cdaaca", "CEC", "Hammond Tours", "Hedgeman", and "hwfc" have checkboxes in the "Details" column.

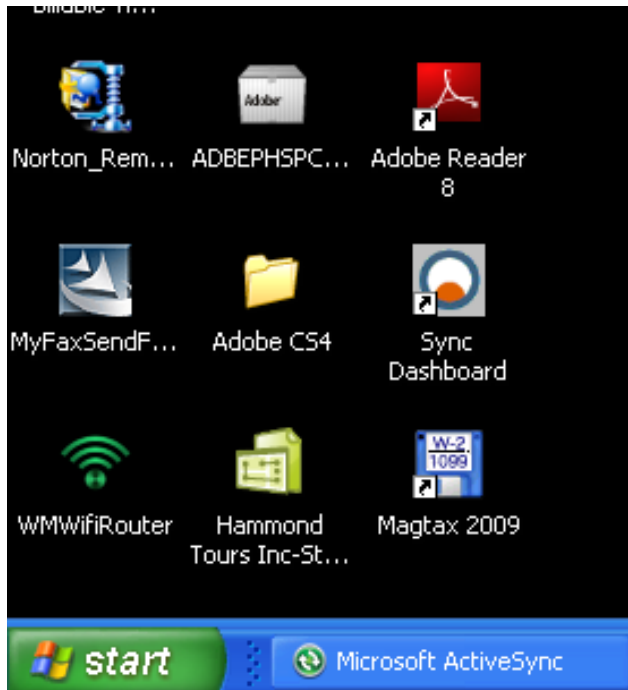
With Checked:					
Download Send More Actions ---> ?					
<input type="checkbox"/>	Title ▲	Mb	Uploaded	Creator	Details
<input type="checkbox"/>	<a href="#">Add New Folder</a>				
<input type="checkbox"/>	<a href="#">Recycle Bin</a>				
<input type="checkbox"/>	<a href="#">Sent Messages</a>				
<input type="checkbox"/>	<a href="#">cdaaca</a>	0.00	10/17/09	W. Higdon	
<input type="checkbox"/>	<a href="#">CEC</a>	28.07	12/10/09	W. Higdon	
<input type="checkbox"/>	<a href="#">Hammond Tours</a>	18.72	1/15/10	W. Higdon	
<input type="checkbox"/>	<a href="#">Hedgeman</a>	21.23	12/21/09	W. Higdon	
<input type="checkbox"/>	<a href="#">hwfc</a>	0.00	10/17/09	W. Higdon	

Look for the option of a local drive (mapped) for drag-n-drop easy uploads & downloads



# ASP Hosting

cpaasp.com, Right Networks



- Your desktop in The Cloud
- No PC or Server needed
- Option to 'rent' Microsoft Office and QuickBooks

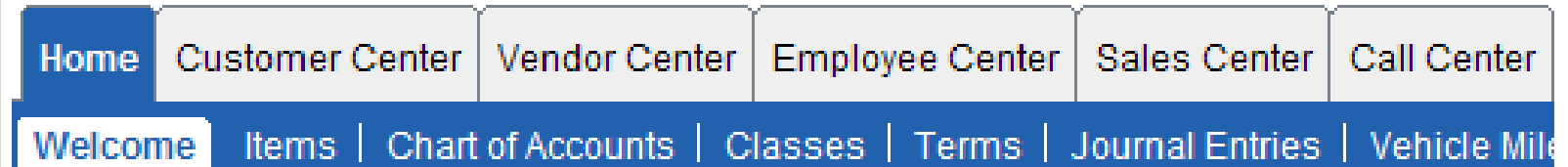
# QuickBooks Online Edition

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- SaaS (Software as a Service) aka Web2.0
  - No PC or Server needed
  - Anytime, Anywhere Access
  - Monthly fee – less expensive than ASP
  - It is a completely different accounting program...similar to QB but different
  - Lacks some features like inventory and payroll
  - In summary: a good option for a simple business
- 

A new online service competing with QuickBooks offers free starter accounts: <http://www.workingpoint.com/>

# Method Integration



- Your QuickBooks data on the web
- Syncs directly with QB over the web
- Industry-specific features : CRM, Field Services, Warehouse, Timesheets, Professional Services
- Custom fields...a custom database...create your own business application

# Method – Data entry screen

Address Info	Additional Info	Transactions	Activities
Vendor Name	<input type="text"/>		
Company Name	<input type="text"/>		Contact <input type="text"/>
Mr./Ms./...	<input type="text"/>		Phone <input type="text"/>
First Name	<input type="text"/> M.I. <input type="text"/>		Fax <input type="text"/>
Last Name	<input type="text"/>		Alt. Phone <input type="text"/>
Name and Address			Alt. Contact <input type="text"/>
<input type="text"/>			Email <input type="text"/>
<input type="text"/>			Print on Check as <input type="text"/>
<input type="text"/>			<a href="#">Add</a>
City	<input type="text"/>	State / Prov. <input type="text"/>	
Zip / Postal	<input type="text"/>	Country <input type="text"/>	
<input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; New"/>			

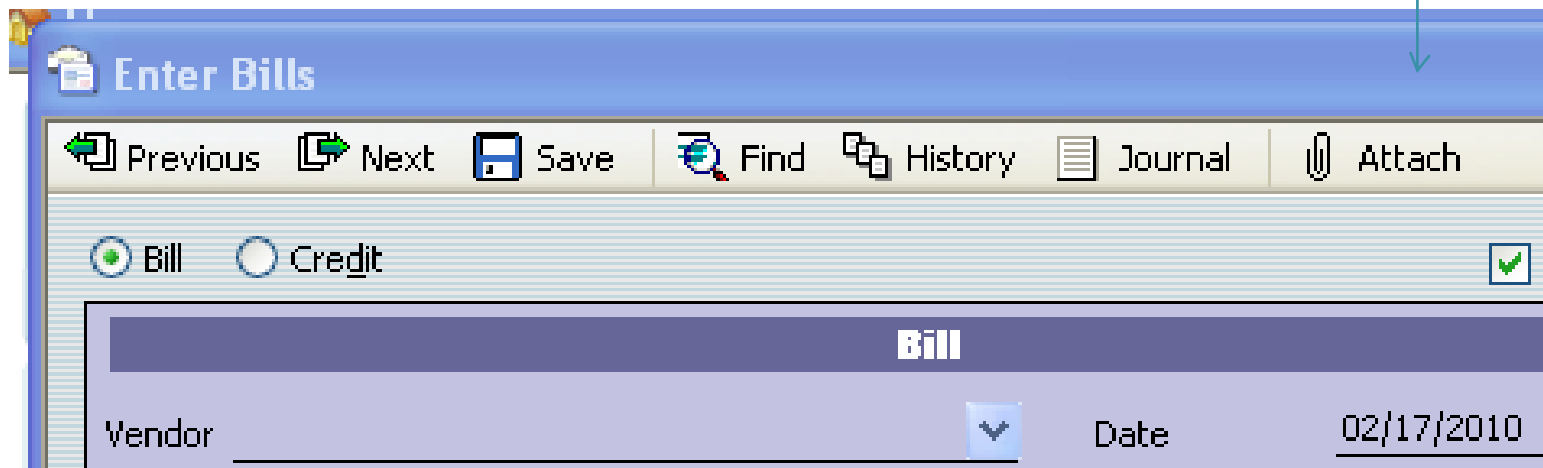
# Other Web Apps

- For customer data: QuickBooks Customer Manager, and many other CRM programs
- For employee time: QuickBooks TimeTracker, Pendulum, GetMyTime and others
- For expense reports: ExpenseWare, ExpenseWatch, and many more
- For inventory: web stores, PDG Commerce, or Netfira
- Appointment scheduling: Setster, Netfira
- For custom data: Intuit's Quickbase

**MORE AT MARKETPLACE.INTUIT.COM & THE APP STORE WITHIN QUICKBOOKS**

# Adding PDFs to go paperless – smartvault.com , QuickBooks Attach

- QuickBooks Attach



- Web based storage of your PDFs

# SmartVault's Toolbar

The screenshot shows the QuickBooks interface for entering a bill. The window title is "Sample Larry's Landscaping & Garden Supply - QuickBooks: Premier Accountant Edition 2008 - [Enter Bills]". The menu bar includes File, Edit, View, Lists, Accountant, Company, Customers, Vendors, Employees, Banking, Reports, Window, and Help. The toolbar contains icons for Home, Customer Center, Vendor Center, Employee Center, Report Center, Online Banking, Help, Invoice, Item, and Me. Below the toolbar are navigation buttons: Previous, Next, Find, History, and Journal. The main area shows a bill entry form for "Robert Carr Masonry" with a date of 12/13/2007 and an amount due of 196.25. Below the form is a table of items with columns for Item, Description, Q., Cost, Amount, Customer, B..., Class, and PO No. The table contains one row for "Rocks" with a description of "Garden rocks", a quantity of 15, a cost of 9.75, and an amount of 146.25. At the bottom of the window are buttons for "Clear Splits", "Recalculate", "Save & Close", "Save & New", and "Revert". On the right side, a vertical toolbar is circled in red, containing three icons: a paperclip labeled "Attach", a folder labeled "3", and a notepad labeled "Note".

Bill Received

Bill

Vendor: Robert Carr Masonry

Date: 12/13/2007

Address: Robert Carr Masonry  
2780 County Rd  
Bayshore CA 94326

Ref. No.: Invoice 658

Amount Due: 196.25

Bill Due: 01/12/2008

Terms: Net 30

Discount Date: \_\_\_\_\_

Memo: \_\_\_\_\_

Expenses: \$50.00    Items: \$146.25

Item	Description	Q..	Cost	Amount	Customer:...	B...	Class	PO No.
Rocks	Garden rocks	15	9.75	146.25	Stinson, Tracy		Landscaping	10

Select PO    Clear Qtys    Show PO

Clear Splits    Recalculate    Save & Close    Save & New    Revert

Attach

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Note

# SmartVault's InBox

Inbox - SmartVault


## SmartVault InBox

Your SmartVault InBox contains documents that have not been assigned to a QuickBooks entry yet. Click Attach to add new documents using a scanner or by browsing your local computer or network.

### Select Inbox

SmartVault: 25th Hour

Company: 25th Hour

Document Name	Upload Date
 wh travel 12-08.pdf	10/29/2009 6:41 PM

Add

Open

Save

Print

Delete

[Properties](#)      [Modify](#)



# Banking without leaving your office:

## Bill.com

- Pay bills online – by check or EFT
- Online document management (not in QB)
- Work Flow control and payment authorization
- Upload via e-mail, fax, or upload button (no direct scanner connection)
- Enables remote bookkeeping full service with traditional paper checks...give the client a Scanner or Fax...receive an email each time they upload

# Banking without leaving your office:

## **Intuit Check Solutions**

- A service related to Merchant Services
- No more trips to the bank for deposits
- Scan the check, capture the info in QuickBooks
- Securely stores images of the check
- Funds usually available the next business day

# Thank You !

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