

Turbocharge QuickBooks

Get more done every day with a
custom app

4

proven ways to eliminate
daily frustrations and
time-wasting tasks



FileMaker[®]
An Apple Subsidiary

What's The Key To Making QuickBooks Great?

QuickBooks is one of the most popular accounting software packages in the nation.

It's great at what it does, but if it's not working with the systems that run the rest of your company, you're left with **productivity-draining** tasks and inefficient processes.

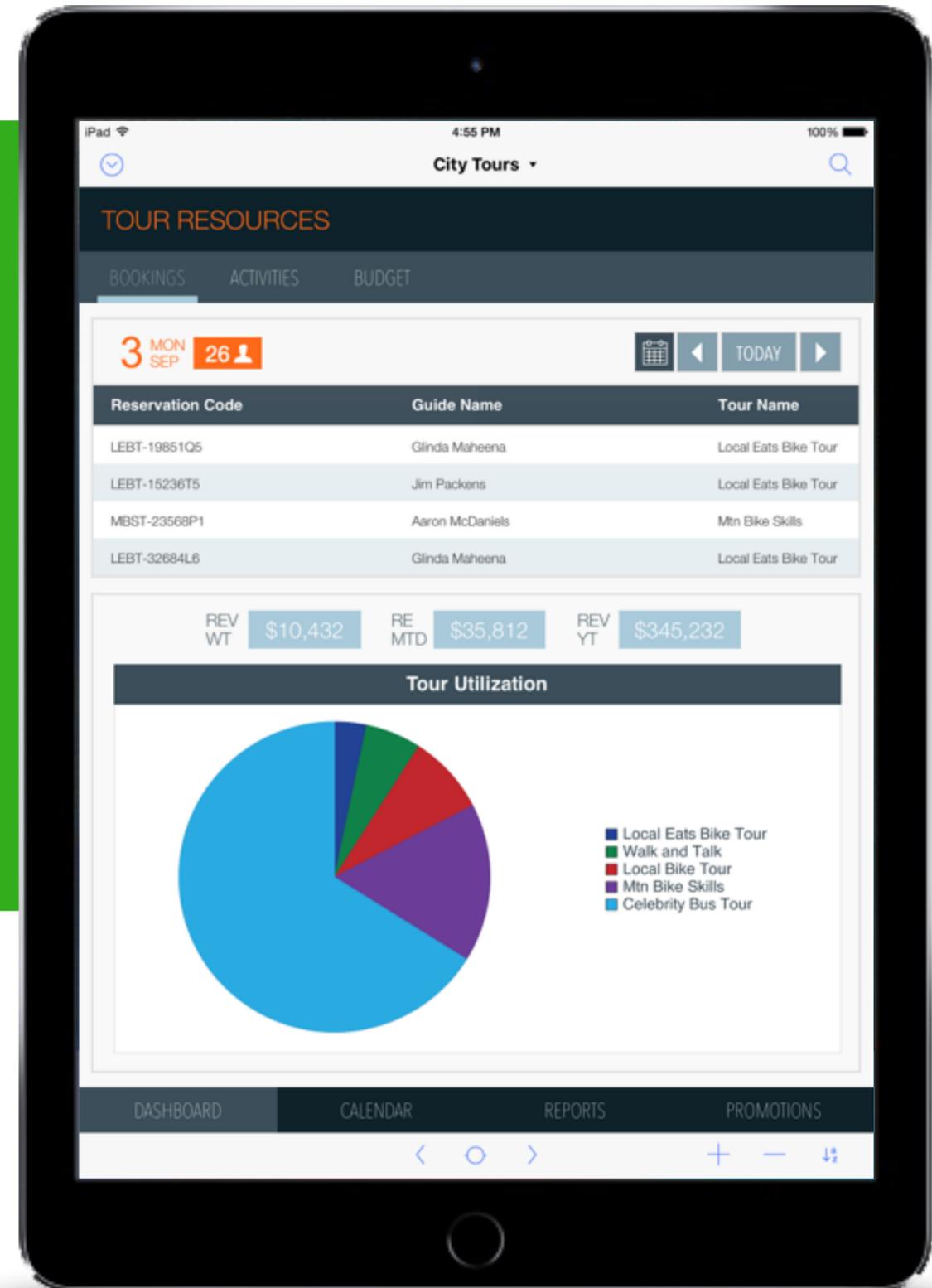
WHAT'S DRAINING YOUR PROFITS?

-  Duplicate data entry?
-  Errors made during rekeying?
-  Outdated inventory amounts?
-  Incomplete customer data?

Start Streamlining Your Business

By integrating QuickBooks with a custom app, you'll begin erasing daily frustrations and streamline your organization for profitable growth!

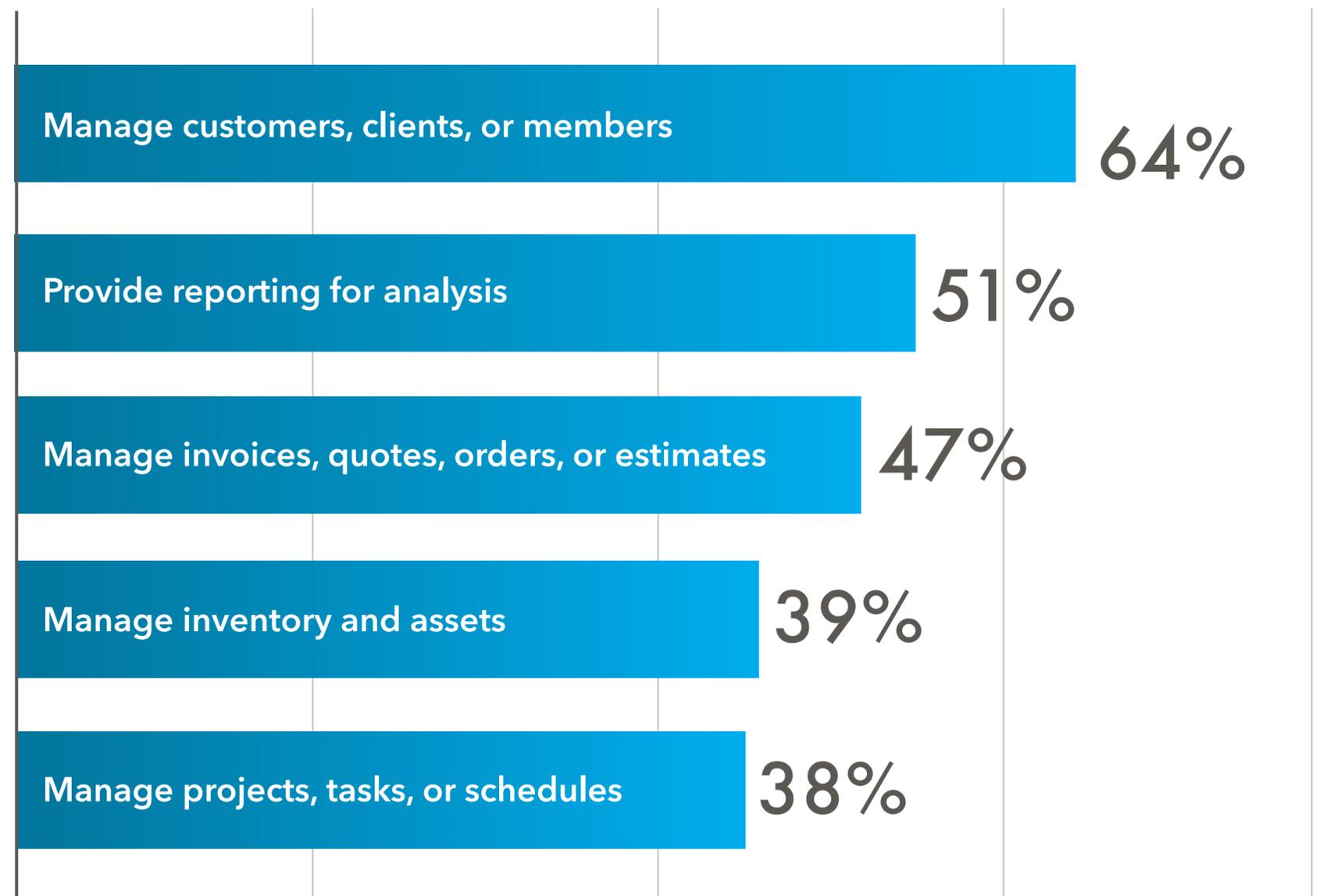
A custom app is built **specifically for your needs** to manage the information that runs the rest of the business—from sales and service to marketing and manufacturing.



Custom apps are most commonly built to solve these problems:

The Best Thing About a Custom App?

It's tailored to see the unique needs of your business.



SOURCE: State of the Custom Apps Report 2016

QuickBooks + FileMaker

Imagine a day without these frustrations!



Connect your systems for success and mobility

Increase the productivity of your team and help your business increase efficiency in 4 easy ways:

1

Eliminate duplicate data entry between systems.

2

Centralize knowledge about customers, items, inventory, invoices and payments –while protecting QuickBooks financial data.

3

Implement a process that works the way your existing business flows and without forcing you to conform to a new approach.

4

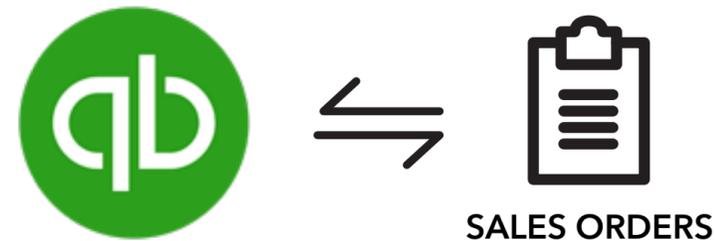
Give secure access to data anytime, anywhere from iPad, iPhone, Windows, Mac, and the web.

Imagine a world where you only enter data once

One of the most common sources of **duplicate data entry is caused when a brand-new customer places a sales order.** The customer information is in a stand alone sales system but then needs to be reentered into QuickBooks to keep track of the invoice and accounting details.

1

Eliminate duplicate data entry between systems



Prevent this time-wasting, error-prone chore: get QuickBooks talking to your sales system.

For example, your staff can enter the new prospect information and invoice details into their FileMaker custom app for sales orders, and then simply “push” the customer details and invoice into QuickBooks automatically with the click of a button.

No duplicate data entry. No errors during rekeying. No inconsistent formatting.

Help your team do even more

2

Provide one central place to get additional knowledge

By creating a custom app that is linked to QuickBooks, you'll be well on your way to giving your finance and accounting staff access to what they need while at the same time allowing your extended staff to securely access select QuickBooks data that will help them do their jobs even better.

All this and more is now possible:



The sales team can see CRM details alongside select QuickBooks data for each client, such as recent orders and revenue generated to date, to build even stronger relationships.



The manufacturing group can be instantly notified of payments made by delinquent customers so orders placed "on hold" can be immediately released for processing.



The warehouse staff can access and update inventory amounts at anytime right from the floor via their iPads, consolidate the data in FileMaker, and send it to QuickBooks with the push of a button.

Go with the flow

A FileMaker custom app is built to satisfy your specific needs and work the way your existing business does. It's flexible to grow and change as your needs do overtime and can be modified at your pace—and with just the improvements you want.

And with a variety of QuickBooks integration options, you will see productivity soar and inefficient processes eliminated once and for all.

3

Implement a system
that works the way
your business does



CUSTOM APPS

- Are designed by you and built around your existing processes
- Don't force you to conform to a new approach
- Have just what you want and nothing you don't
- Can grow and change as your needs do
- Work across multiple platforms and mobile devices
- Seamlessly integrate with your existing systems—like QuickBooks

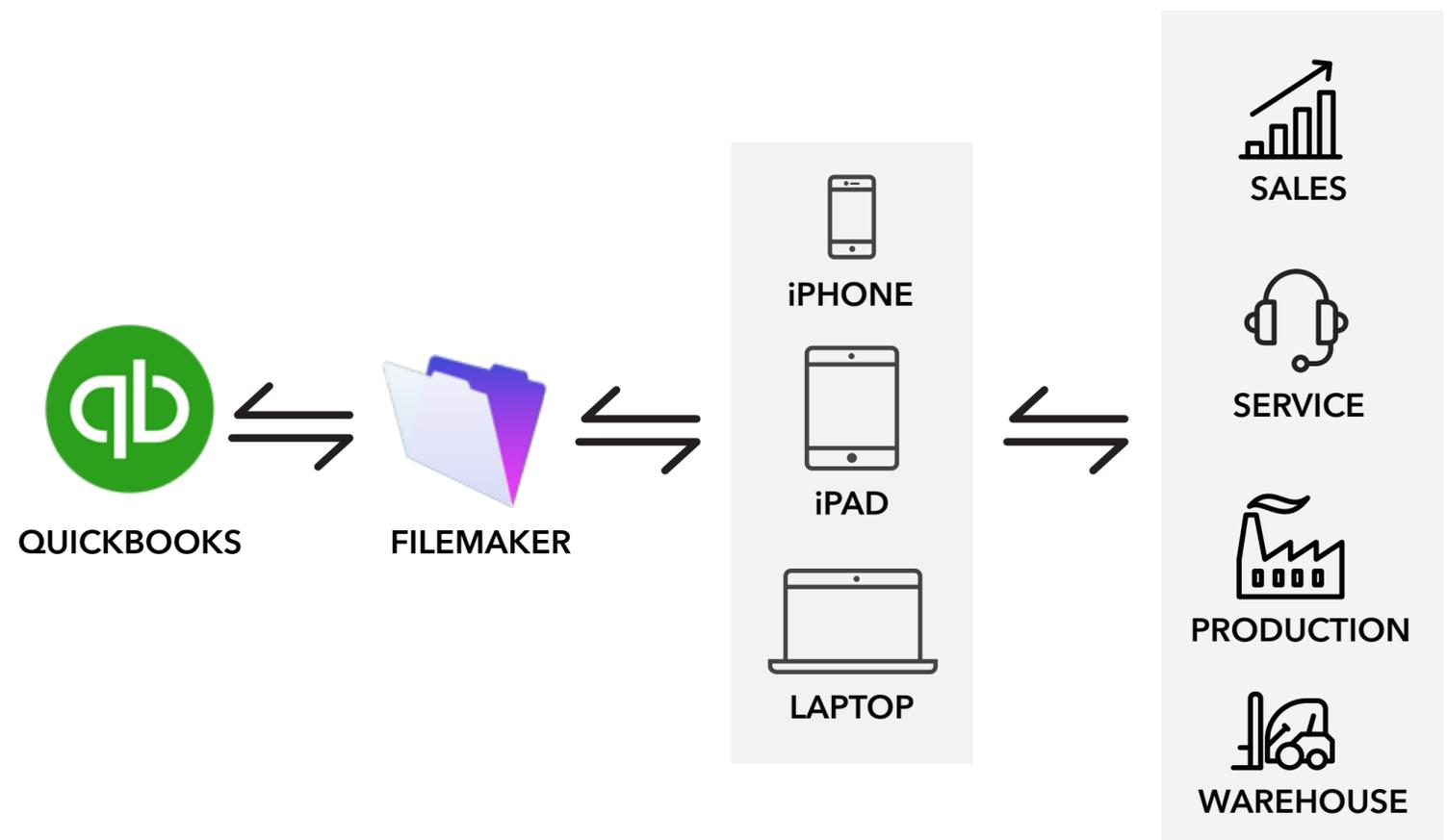
Secure sharing made easy

Information stored in your FileMaker custom apps can be accessed via iPhones, iPads, Macs, PCs and the web.

And with QuickBooks integration, your team can get secure access to select QuickBooks information from within FileMaker—eliminating the need to provide QuickBooks logins to anyone outside accounting.

4

Give secure access to data anytime, anywhere





“So many businesses I work with have come to accept the shortcomings of multiple systems and workarounds. People need to understand that there are better ways of doing business: custom apps built on the FileMaker Platform that eliminate workarounds, and easy-to-implement connectors to QuickBooks that let customer data flow seamlessly across systems. Change is daunting but achievable and worth it.”

- Joe Woodard, CEO
Woodard Events, LLC

Read About **Real Customers** That Are Living The Dream

The following stories are from real customers who use both QuickBooks and FileMaker to run their successful businesses.

Many of them have partnered with professional consultants and are using specialized software to connect FileMaker and QuickBooks, such as **fmQBO from Geist Interactive** or **FM Books Connector from Productive Computing**.

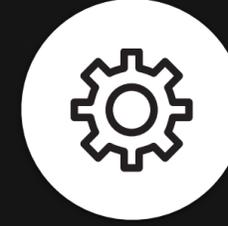
These are just samples of the thousands of organizations who have streamlined their businesses by integrating FileMaker and QuickBooks.

Be sure to [download the free software resources](#) mentioned at the end of this eBook to get started today!





Hoop Group saves **20 hours** per week and improves accuracy of their registration process.



"The QuickBooks integration Recruiting Pro developed for us has freed up time for our operations staff to focus directly on our events instead of data entry. It's like adding a part time staff member to our team."

*– Matt Pooley,
Vice President,
Hoop Group*

PROBLEM: Hoop Group is the worldwide leader in basketball instruction, impacting the lives of more than 1 million young men and women since 1963. They process hundreds of thousands of registration records annually, which required manually entering duplicate data into both the registration and QuickBooks systems.

SOLUTION: Hoop Group partnered with Recruiting Pro Software to create a FileMaker custom app integrated with QuickBooks using FM Books Connector software from Productive Computing. Now, they can manage athletes, classes, payments and more from within FileMaker and push data automatically to QuickBooks keeping everything up-to-date.

RESULT: Hoop Group now saves over 20 hours of staff time per week by eliminating double data entry. Plus, they've eliminated transcription errors from the re-keying of data between systems.



Zimmer Equipment gets **2 for 1 productivity** and significant reductions in data entry errors.



PROBLEM: Zimmer Equipment is a trucking firm that manages hundreds of complex client agreements, fluctuating energy surcharges, and variable driver/route scheduling. This made invoice generation difficult and time consuming.



SOLUTION: Zimmer Equipment partnered with DocuWrx to create a FileMaker custom app that integrates with QuickBooks Online using fmQBO software from geist interactive. Now they can manage client information, store agreements, calculate shipping costs and more in FileMaker so invoices are automatically aggregated for each client, including up-to-date fuel surcharges. Invoices are then pushed to Quickbooks.



RESULT: One person now handles the work of two. Plus, due to automatic invoice generation and QuickBooks integration, data entry errors are eliminated.

“DocuWrx assisted my company with a transition from Peachtree to QuickBooks Online in January 2016. The use of FileMaker with QuickBooks has proven overall to be effective and easy to manage.”

– Selena Kelly,
Zimmer Equipment, Inc.



TowBoatUS San Diego improves payment processing and **customer satisfaction**.



"While we're at sea, it's hard to keep track of new service requests coming in by phone and getting invoice details back to the main office. Now everything goes in and out through our iPads - keeping everything up to date and our office completely paperless."

– Robert Butler, Owner, TowBoatUS San Diego

PROBLEM: TowBoatUS San Diego is the most-established boat towing company in San Diego. Their experienced staff and fleet of eight boats provide a variety of services to thousands of boats each year, but while at sea, it's difficult to keep track of new service requests coming in and getting invoice details back to the main office in a timely manner.

SOLUTION: TowBoatUS San Diego partnered with Productive Computing to create a FileMaker Pro custom app, that uses FM Books Connector software to instantly push invoices and items from FileMaker Pro to QuickBooks - ensuring the main office stays up-to-date while completely eliminating paper forms and manually re-entry of data.

RESULT: Now boat captains are able to receive an order on their iPad, edit and update the order at-sea while assisting other boaters, and send their orders back to the main office for invoicing. Paper forms are completely eliminated, customers in distress are assisted faster and the payment process is significantly expedited.



The Pivot Group saves **10 hours** per month while significantly minimizing errors.



"As we are political consulting firm, the bulk of our work centers around 3-4 months in the election season. In that timeframe, we create about 300 client invoices per month averaging \$5 million in revenue per month. Similarly, we process around 600 vendor invoices per month. The transfer between FileMaker and QuickBooks has not only helped reduced cost, but it has also significantly reduced errors."

– *Woody Jang, Accountant,
The Pivot Group*



PROBLEM: The Pivot Group is a successful political consulting and direct mail company that deals with hundreds of client and vendor invoices each month, along with tracking the movement of client projects through their system. Before implementing a process that automatically sends invoices to QuickBooks, Pivot was saving individual invoices as pdfs and emailing them to their accounting firm, where a bookkeeper re-entered all the data.



SOLUTION: The Pivot Group partnered with Adelman Databases to integrate their custom FileMaker app with QuickBooks using the FM Books Connector software. Now Client and Vendor invoices are automatically sent to QuickBooks. New Clients and Vendors created in the database are sent to QuickBooks, eliminating the need for the accounting firm to hand enter invoices and recreate Client and Vendor accounts in QuickBooks.



RESULT: The Pivot Group has reduced its time to get invoices into QuickBooks by 10 hours a month. The reduced time comes from eliminating the need to email pdfs and eliminating the hand entry into QuickBooks by the accounting firm.

WILD CARD

Wild Card Media, LLC **reduces duplicate entry** and streamlines accounting processes.



"The work completed by Wizard Consulting Group to integrate our FileMaker instance with QuickBooks has completely eliminated the need for dual entry through automated integration. In addition, this process enabled Wild Card to maintain our job cost reporting while improving the financial reporting capabilities."

– Darrell Cross, COO,
Wild Card Media, LLC

PROBLEM: Wild Card Media is an advertising and digital media company dealing with duplicate entry into QuickBooks plus the inability to easily produce proper general ledger and accounting reports.

SOLUTION: Wild Card Media partnered with Wizard Consulting Group to tailor a custom integration based on their specific requirements. Now QuickBooks and FileMaker are completely in sync with regard to Customers, Vendors, Purchase Orders, Customer Invoices, Vendor Invoices and more.

RESULT: Wild Card Media now saves executive staff time, has more accurate QuickBooks entries, and can more easily generate financial statements and accounting reports.



Stigler Printing saves **15 hours** per month by automating and integrating.



"Thanks to this integration, hours of re-entering data are now done with just a button click."

– *Linus Williams Jr., CEO, Stigler Printing*

PROBLEM: Stigler Printing is a successful printing company that deals with hundreds of printing projects, customers and invoices each month, along with tracking the movement of projects through their system. Before automating the invoicing, Stigler was saving individual invoices as pdfs and emailing them to a bookkeeper who re-entered all the data.

SOLUTION: Stigler Printing partnered with Adatasol, a Platinum FileMaker Business Alliance member, to integrate their custom FileMaker app with QuickBooks using the FM Books Connector synchronization software. Now client and vendor invoices are automatically sent to QuickBooks. New clients and vendors created in the database are sent to QuickBooks, eliminating the need for their bookkeeper to hand enter invoices and recreate client and vendor accounts in QuickBooks.

RESULT: Stigler Printing has reduced its time to get critical information into QuickBooks by 15 hours a month—it now requires just a single click of a button to keep everything in sync.

Independent Support Services **saves hours** every week automating multi-step processes.



“FileMaker and Harmonic Data have been instrumental in allowing our agency to grow by creating efficiencies in our business practices and information integration. This has given us a competitive edge in our industry and made us the example of how our services can be most effectively delivered.”

– Alan Kulchinsky, Executive Director,
Independent Support Services, Inc.

PROBLEM:

Independent Support Services is a healthcare company dealing with rapid growth and complex government regulations.

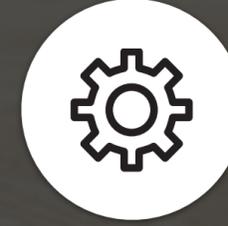
SOLUTION:

Independent Support Services partnered with Harmonic Data Associates to create an agency management system in FileMaker that organizes payables, payroll, receivables and more, as well as EDI HIPAA 837 x12 billing integration with Medicaid. All financials are fully integrated with QuickBooks.

RESULT: Independent Support Services now saves multiple staff person’s worth of hours per week in elimination of duplicate entry, reduction of errors and omissions, verification and validation of rules and business processes, and automation of previous multi-step tasks.



Keller Interiors gets back **20-25 hours** every month.



“Using FileMaker's ability to manipulate large data sets, along with its ability for two-way communication with QuickBooks using Productive Computing's FM Books Connector plug-in, saves immense time and money for business”

– *Leland Long, IT Director,
Keller Interiors*

PROBLEM: Keller Interiors, a successful design firm with 16 locations, has a FileMaker custom app integrated with QuickBooks. However, while getting ready for tax time, they discovered the accounting department was manually classifying all credit card transactions. A process that takes many hours to complete.

SOLUTION: Keller Interiors' in-house developer, Leland Long, used basic FileMaker Pro functionality to add classification data to each transaction. Then, by using FM Books Connector software, he was able to pull all the credit card charges for a specific date range. Then with the click of a submit button in FileMaker, the classified data was sent back to QuickBooks automatically.

RESULT: Keller Interiors completely eliminated manual classification of credit card transactions by the accounting department and was able to process thousands of transactions in a fraction of the time it would have taken otherwise, saving approximately 20-25 hours for that specific statement period.



Five Inc., **eliminates inefficient processes** while keeping everyone informed and up-to-date.



“Bridging the gap between sales, manufacturing and accounting had proven very difficult until we were able to integrate FileMaker with QuickBooks. Now many of our employees can perform tasks, such as purchase order creation and inventory counts, without logging into QuickBooks, which has allowed our company to grow significantly without requiring any new accounting staff.”

– John Nichols, Owner,
Five Inc.

PROBLEM: Five Inc. is a fast-paced trade show graphics business, that uses a FileMaker custom app to manage nearly every aspects of its business, including CRM, quoting, manufacturing, inventory and shipping. QuickBooks Online was chosen to manage the accounting, leading to hours spent re-entering new customers in QuickBooks, rekeying purchase orders, shipping orders to delinquent customers, outdated inventory counts and delays in receiving supplies.

SOLUTION: Five Inc. partnered with Geist Interactive to integrate QuickBooks Online with FileMaker using fmQBO software. Now every employee can create purchase orders instantly on their iPad (instead of routing paper forms through the accounting department), 10 people can now update their inventory counts each Monday (instead of 1 person doing it once a month), and the payment status of each customer invoice is visible in FileMaker, so the entire staff knows if customers are paid up (or not) before new quotes and orders are placed or delivered.

RESULT: Five Inc. has eliminated piles of paper, streamlined its business and has continued to grow its revenue without increasing its accounting department. And because so many people have instant access to details about customers and orders, they are significantly more efficient at everything they do, leading to happy employees, happy owners and happy customers.

Download Resources

Here are free resources to help make your dreams a reality!

1. Get Started

Get started today by downloading a free trial of FileMaker Pro:

Download a free trial
FileMaker Pro

If you're too busy running your business to download software, find a FileMaker Business Alliance Member who can get it done for you.

[Click here](#)

2. Choose

Choose from these QuickBooks connection products designed and delivered by certified FileMaker Business Alliance partners:

If you're using QuickBooks for Windows on your desktop

Download a free trial
FM Books Connector
by Productive Computing

If you're using QuickBooks Online or QuickBooks for Mac

Download a free trial
fmQBO
by Geist Interactive

3. More

Check out even more helpful resources:

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