QuickBooks Point of Sale

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Accountable Financial Services Group, Inc.

AFSG

ACCOUNTABLE FINANCIAL
SERVICES GROUP

Key QBO/QBDT & QBPOS Integration Benefits

- Ease of use
- No manual transfer of data
- No double entries

- Reliable numbers
- Fast syncing between programs
- Easy inventory entry

About AFSG

Lauryn Charles' accounting firm doesn't just help small businesses with financials, but also assesses their IT and software needs. Lauryn consults clients on important business decisions with a background in IT, and finds that the QuickBooks Point of Sale software has helped many merchants succeed.

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Choosing the right Point of Sale for clients

Lauryn helps clients choose the best software for the individual business. It began with one client who wanted her opinion on their inventory system, but she quickly realized that by helping them with their software or IT needs, she was better able to set up a fully integrated system that saved both of them time and money. "Accounting is the backbone of a small business, or any business for that matter. One big issue I find from clients is that they haven't done the right research on the tools available to make their business work. I consider QuickBooks to be the infrastructure to a business. Making the right decisions from day one saves so much time and money down the road." She often finds that her clients with large inventory need a robust point of sale to handle their volume. Lauryn shared, "A lot of other systems are more tedious and their capabilities just aren't the same. The hardware you provide, along with the software and integration with Quick-Books accounting, is usually a perfect fit for a good size retail operation or somebody who has a lot of inventory."

Seamless Syncing

While providing financial services, Lauryn has found that she saves countless hours from the seamless integration. Most business owners or accountants have to transfer data from the point of sale to their accounting program, or process inventory in a tedious way. By integrating Quick-Books Point of Sale and QuickBooks accounting programs, both Lauryn and business owners save hours. "The way that the QuickBooks POS integrates with QuickBooks financial software is just such a seamless process that it makes our job as accountants so much easier. It's wonderful, I love it. I can't say enough." Besides seamless syncing and reducing room for error, the QuickBooks integration syndicates all actions in one screen, so accountants don't miss a step. Lauryn elaborated, "With QuickBooks, you can really do everything on one screen. You can go to a purchase order and create new inventory and just do it all at one time. It's so much easier."
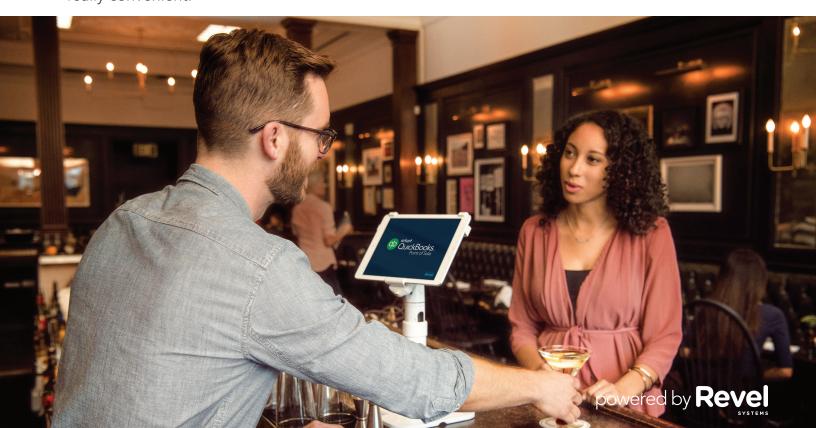
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Reliable numbers

Accountants usually have to log in to the client's point of sale software, pull several reports to get the information they need, manually vet each report, and finally, enter those numbers into an accounting program. Lauryn shared, "Sales tax is a big problem. Figuring out how much clients owe and what their taxable sales are has been a huge problem because their reports are always a mess on other programs." With the QuickBooks Point of Sale and QuickBooks accounting integration, Lauryn saves time and can rely on the direct communication between software. "One of the best functionalities of QuickBooks POS is how it syncs and the after receipt of the data we see in the client's accounting software. So, we as accountants have reliable numbers from their Point of Sale program. We depend on revenue, cost of goods sold, inventory, accounts receivable, accounts payable and sales tax - we get all of that from the Point of Sale. The integration makes it so much easier. If I could put all my retail clients on QuickBooks Point of Sale, I would."

Easy Inventory and Barcode Entry

Lauryn originally helped clients with software because of inventory problems. Clients came to her seeking help in setting up their systems and making them sustainable with their Point of Sale solutions. She found that not only do all the financials sync together to make it an easy process, but the simple task of inputting your inventory using barcodes is also a breeze. She stated, "Inventory entry is really easy. If you're a business and you use barcodes, having QuickBooks POS automatically create your barcodes is great - and having the option to use standard manufacturer barcodes makes it really easy, so clients don't have to make up their own. The labeling process is really convenient."

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Recommending QBPOS for other Accountants' Clients

Lauryn recommends QuickBooks Point of Sale for her clients and other business owners because it saves all parties time and money. She explained, "The reason to use QuickBooks POS or recommend it for your clients is that at the end of the day, it is saving you - the accountant - time, and you are improving the accuracy and business processes for your clients. We always want to do the right thing by our clients for their business, and that's what QuickBooks Point of Sale can do."

Lauryn Charles
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Owner