

Company Information:

Company: CertifiedQB
Contact: Karen Siewert, ksiewert@certifiedqb.com
Website: www.certifiedqb.com
Hours & Time Zone: 9:00-5:00 EST
Established: 1997 **ProAdvisor Certification:** (4 years)
How long have you been providing QuickBooks®
Integration services: 3years (QuickBooks® Point of Sale)

An Interview With

Karen Siewert
CertifiedQB

"HindSite Software increases company profits by reducing payroll expenses, eliminating duplication of data entry, & allowing invoices to be generated on site. HindSite eliminates hours of clerical entry and substantially reduces your bookkeepers time."

Karen Siewert, CQA

At a Glance:

- *Integrated scheduling for the PDA, & Microsoft Outlook*
- ***All** Customer work order history and any office notes are sent to the PDA and available for review onsite.*
- *Accuracy in time tracking & billing.*
- *Increased billable hours and services.*
- *Documents mileage and provides a system for vehicle maintenance.*

Business Challenge:

The goal of any business is to maximize profits. Eliminating duplication of data entry and paperwork reduces lost time and lost revenues for a service based business.

- Keeping accurate time records to bill, and not giving away time is a challenge when you are a one person operation constantly on the run.
- A delay in billing your client means waiting longer to be paid.
- Scheduling on Microsoft Outlook doesn't provide integrated notes for billing, previous engagement experience, and outstanding balance information.
- Documenting mileage is another challenge. Mileage is usually on another piece of paper, or spreadsheet which needs to be entered into another program.
- Legible written invoices & estimates with data that is readily available for the technician in the field, without duplicating these entries in the office, is always a challenge.

Finding a Solution:

Spreadsheets, paper logs, and disjointed applications serve many service based businesses. These solutions need to be consolidated to provide the documentation for billing, and account for one's time.

Prior to using HindSite, I entered my time into QuickBooks®, my mileage to the QuickBooks® mileage tracker when I remembered, and billed using QuickBooks®. I scheduled in Microsoft Outlook, tracked mileage

infrequently, & sometimes estimated my time with clients, which gave away billable hours. I brought customers files to my appointments, information that is now kept on the PDA with HindSite.

- HindSite saves complete work order history and security notes to the PDA for you to view on site.
- All incomplete work orders are tracked, so your clients get the attention they need.
- HindSite documents payroll time, and increments time for billing solutions.
- HindSite is subscription software which can provide additional revenue for the advisor selling and supporting the software.
- HindSite allows you to provide written estimates and invoices on site.
- HindSite eliminates duplication of written information and illegible hand writing.
- Flexibility exists to add unscheduled services and work orders at the PDA level, but is tracked in the office once the PDA is synced.
- Inventory used is documented, allowing for easy reordering with a distributor via email within the system.
- Vehicle maintenance is important. HindSite tracks vehicle maintenance schedules and documents mileage on the PDA interface. This information is not available or integrated in QuickBooks.
- Services scheduled for a block of time can be compared with actual time for analysis.
- Portable printers, which provide immediate billing, come in a variety of sizes (a small printer can be the size of a PDA).
- PDA's and printers are available as refurbished equipment, which saves in startup costs.

The return on my investment was made within two months, in additional billing and getting paid on site.

Add-On Specifics - Installation, Setup & Support:

HindSite pulls customers, employees, services and inventory directly from QuickBooks® and syncs back to QuickBooks® for new clients entered into HindSite. Installation can take less than one day to customize for a small service based business with little-to-no inventory. A setup time of up to several days for customized easy access and integration may be required for companies with extensive inventories, complicated service structure fees, and a fleet of vehicles.

The PDA and scheduler offer color coding for services and required information. The PDA displays items that have not been addressed in green, and those completed in red. HindSite schedules different services in different colors. Services requiring more time than others are noted in the setup and provide guidance for a scheduling individual.

Sharing data is simple and fast. HindSite allows for more client data and customizable fields than QuickBooks. One PDA subscription can be utilized by a crew manager to document employees' time for cost savings and accuracy.

HindSite technical support is phenomenal. When HindSite didn't do something that a prospective client wanted they customized the software for this particular application to be able to close the deal. When there was a need for technical support, HindSite addressed the issue immediately, even after hours when I was able to get them walking out the door!

Results:

I market both HindSite and my QuickBooks® savvy by using these products. By using HindSite, I demonstrate technical knowledge to my customers and that I am not just your average QuickBooks® consultant.

- I have eliminated the duplication of data entry.
- Organized my scheduling.
- I am getting paid faster.



"Walk the walk and talk the talk" – Consulting with Integrated Software

- I have postponed hiring additional employees because of this product.

I know first hand this product saves administrative hours for bookkeepers, office managers, and business owners which are NON BILLABLE! I "walk the walk and talk the talk" using HindSite & QuickBooks®.

Closing –

I recommend HindSite to other advisors and clients daily.

- HindSite saves time with scheduling, billing, vehicle documentation and maintenance.
- HindSite will allow you to postpone the need to hire as you grow your business and/or reduce the hours of a current bookkeeper.
- HindSite increases your firm's billable hours and revenue.
- Consulting with Add-on / Integrated software allows a higher fee structure.
- HindSite provides an additional revenue stream for client referrals that subscribe to the product.

The use of HindSite demonstrates how "Intuit®" you really are to your clients.

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