



How a ProAdvisor Benefits From Using the **Data Transfer Utility**

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Hours & Time Zone: 7am-7pm eastern
Established: QuickBooks ProAdvisor/Business Administrative Consultant **ProAdvisor Certification:** 2002-2006
How long have you been providing QuickBooks Integration services: Since 2005

An Interview With

Lizz Cuba Enterprises

Why I Use It

This Q2Q Data Transfer Utility is very user friendly. I needed to clean a client file quickly and had read about this software many times. I decided to download and install it and I also watched the videos that are also provided with the instructions. The program was pretty straightforward to load and I began working with the program very quickly. I found it to be very user friendly, and highly recommend this software. I have used it many times and I'm very glad that I found it!

Lizz Cuba

At a Glance:

- *Transferring Data Painlessly*
- *Simple Instructions to Operate*
- *Saves Time and Priceless*
- *Affordable to Purchase*
- *Profitable for the ProAdvisor*

Business Challenge:

I would say the number one client pain point is how to apply Company data (transactions) into QuickBooks Accounting Software. The typical QuickBooks training classes does not teach you a system that will integrate your specific business into their software; it would too complex and detailed for instructors to cover that type of information. Other client problems that I typically encounter are too many years of data in the file, too many bank accounts in one company file, Purchase Orders started and the process has not been completed, or more than one file that has relevant data that has never been merged. There are numerous other problems clients' experience, many resulting in the need for a new data file. The challenge for me is to apply their business procedures and relevant data into a new file quickly, and a file that will provide the business owner with the data they need to successfully run and manage their company.

The **Data Transfer Utility** has saved me countless hours transferring data into a new company file, in the past much of this process was done manually; which is time consuming and leaves room for errors. There also seems to be a high percentage of businesses that do not have their QuickBooks financial data entered correctly, being able to use this software allows me to transfer transactions in an orderly manner to clean up the file so they have accurate data to run reports and make sound business decisions.

Finding a Solution:

A business owner focuses on bringing in the revenue and doing whatever their business is to the best of their ability. In most cases they will neglect the day to day financial data, until he/she runs reports out of QuickBooks and nothing makes sense to them; they realize they have no idea how their business is actually performing. They look at the income, cost of goods, and expenses accounts, and realize something is 'just not right' but are unsure what or how to fix it. Their next step is to desperately look for help, hoping to get a creditable person that can guide, and often train them. I receive a lot of phone calls specifically for 'disaster recovery' within the QuickBooks system.

Since I started using Karl Irvin's software **Q2Q Data Transfer Utility** I have benefited many times over because I am now able to transfer good data from one QuickBooks file into a new file and start the clean-up process for the client. The client benefits in many ways; they get their file back in a timely manner, it makes sense to them now, and with a clean file I can train them on proper procedures. It is important to consider the total of transactions needed to be transferred, as sometimes there isn't enough good data to transfer to a new file.

Add-On Specifics - Installation, Setup & Support:

I have found the **Q2Q Data Transfer Utility** to be very user friendly. I had looked at the overview of the program on their site www.q2q.us/dtuoverview.htm several times, and decided to download and install it to check it out further. I also watched the videos provided; they are clear, concise, and provided me step-by-step instructions. Various versions of the utility will work with QuickBooks 2002 to 2006 (Pro version or higher) and Enterprise Solutions 2 to 6. The software also requires that you have either Microsoft Access 2000-2003 or the Microsoft Access 2000 Runtime engine... which can be downloaded from their site at **no cost**. They also provide free email support for 60 days from date of purchase.

Results:

This software can be used to help preserve some transactions in a disastrous file. Two people can be working on the same file, on two different systems and the **Data Transfer Utility** will allow them to merge their work into the main company file. This can be a very profitable tool for ProAdvisors and CPAs working with the QuickBooks who want to offer more than the typical type of support/training available.

Closing –

I feel the **Data Transfer Utility** would be very valuable to other ProAdvisors and CPAs who work with QuickBooks and provide consulting services. It is affordable, easy to learn and use, and allows you to expand your service offerings easily.