

# Automating your QuickBooks Workflow

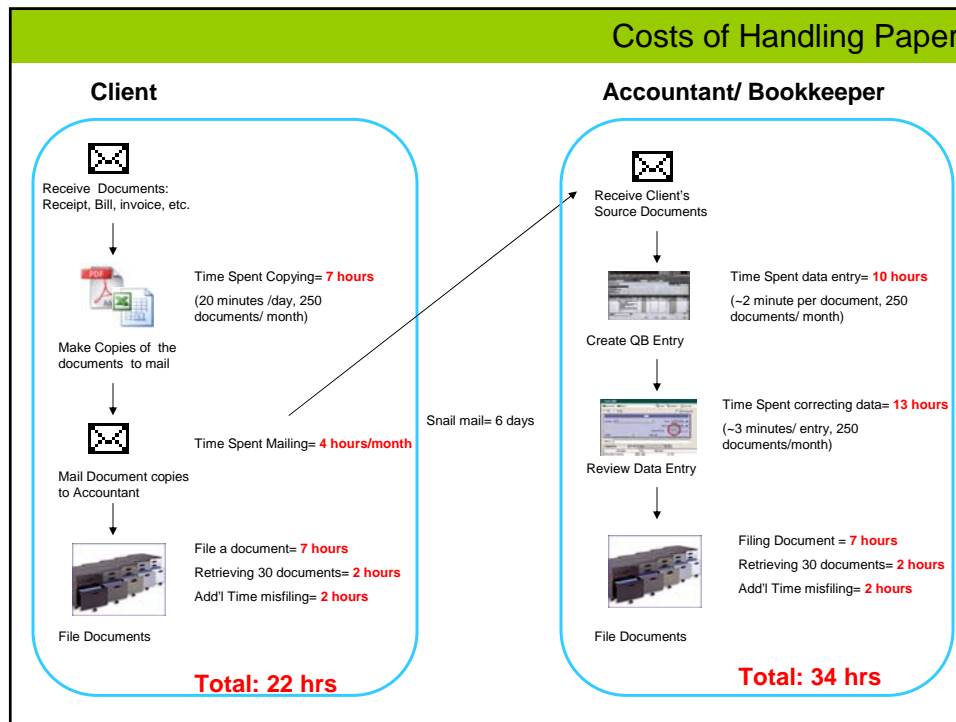
Featuring QuickBooks Hosting and SourceLink



By:  
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## Agenda

1. Costs of Handling Paper
2. Overview: Workflow Automation
3. How it Works
4. Automating Workflow
5. Automating Document Management
6. Benefits: Workflow Automation
7. Questions and Answers



### Overview: Workflow Automation


Personable Inc provides QuickBooks automation with 2 important elements QuickBooks Hosting and SourceLink.

**QuickBooks hosting service** provides users with

- Instant virtual network
- Access to the newest version of QB
- Backed by the latest technology
- Security of customer data

**SourceLink** provides QuickBooks users with the leading document management solution that gives users ease with scanning and attaching important source documents directly to individual transactions in QuickBooks


**Together**, QuickBooks users have the ability to access and retrieve documents needed for daily accounting activity.



### How it Works: Workflow Automation

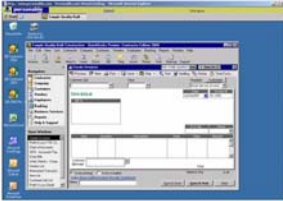
**Access and Use:**

- Remote Access
- Full Featured QuickBooks
- Reliability
- Security
- Multi User login



From **ANY** Location with internet connection

Accountants      Bookkeepers      Others







“... We find that our staff and our customers feel very comfortable accessing the Personable server. The process is seamless and convenient... We love it and our clients love it.” – Andy Kennedy, Senior Accountant

### How it Works: Workflow Automation

**Easy and Cost Effective**

1. Scan Documents    2. Connect to Internet    3. Save on Server    4. Log-on

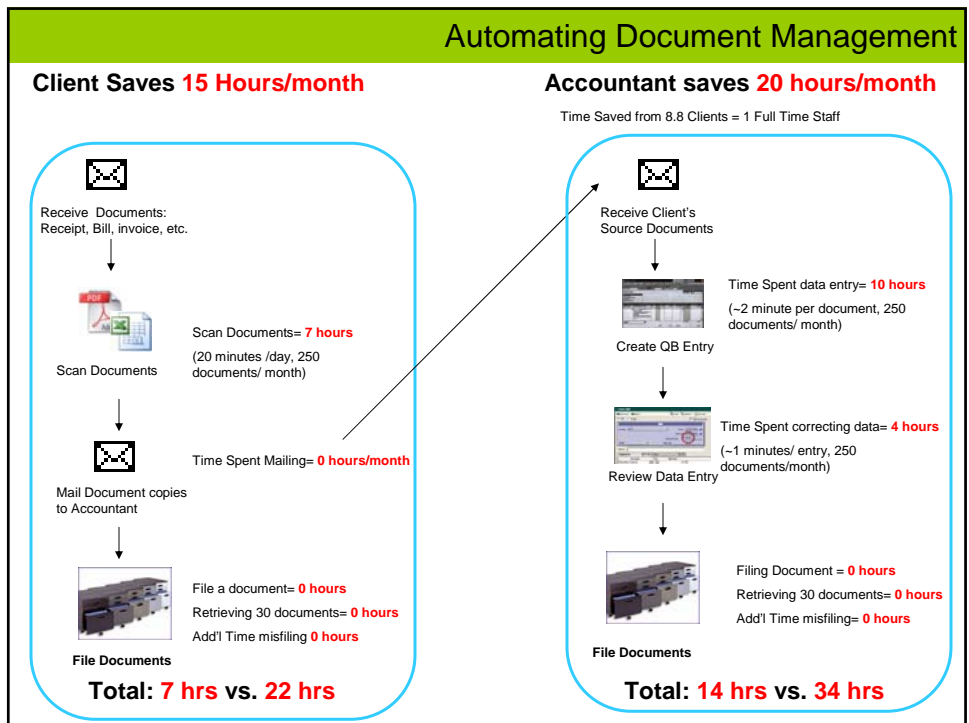
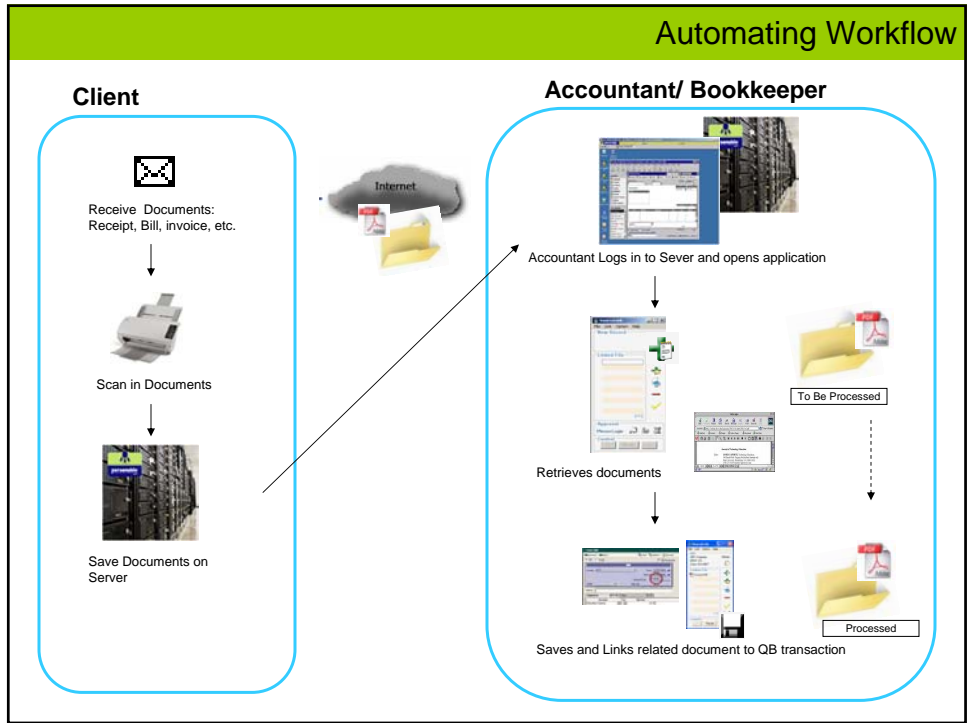


**Reduce or Eliminate:**

- Storage space
- Time
- Double Entry
- Operating Costs

“... The easy access from any location makes it very attractive to my clients and it makes it **EASY** for me to support them from anywhere in the world...”

– Robert Weir, Owner, Robert A. Weir CPAs

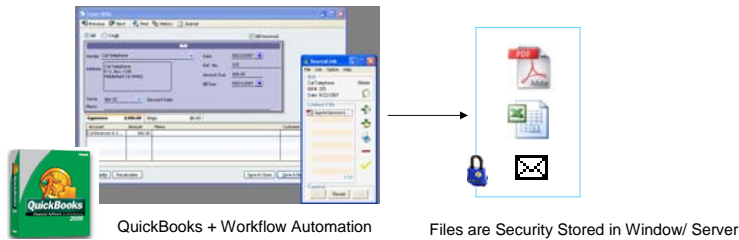


Benefits: Workflow Automation

**Enhances CPA to client relationship and customer service**

- eliminates redundant workflow
- responds to regulatory mandates

When clients, co-workers or any 3<sup>rd</sup> party require a document, simply use SourceLink to retrieve documents in seconds! All documents are immediately filed, organized and secure.



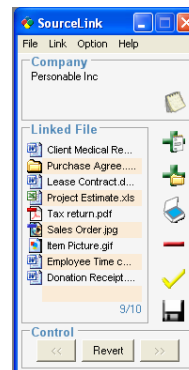
***"SourceLink can also make your business tasks more manageable and efficient in just a short amount of time!" – Kathryn Conk, Accountant, Ocean Futures Society***

Benefits: Workflow Automation

**Applicable to ALL industries**

- Medical
- Real Estate
- Property Management
- Contractors
- Accounting/ Tax
- Retail
- Manufactures
- IT
- Non-Profit
- And More!

Attach various file types to **26** different QuickBooks records.



- Richard, interior designer/architect, prevents loss of files and retrieves/emails files in 20 seconds.
- Ibrahim, CFO, accesses to past files in simple clicks of the mouse and does not slow down other programs
- Shola, Controller, expedites the process of resolving client cases and can easily track of records

Questions and Answers

If you have additional questions, please feel free to contact us at  
800.688.4281.

Thank you for you time