


QuickBooks

Point of Sale

Wine country accounting firm uncorks retail market

AT A GLANCE



A QuickBooks® ProAdvisor® in northern California always had a head for numbers, and QuickBooks helped her pour that talent into a thriving five-person business doing accounting and consulting.



QuickBooks POS provides a flexible offering to local retailers, who often refer one another to her for further projects. And she grows the relationship beyond a one-shot install with regular follow-ups to keep the retailer's system humming.



With four ProAdvisors in one firm, the program effortlessly provides a steady flow of new clients, on the average of one a week. She highly recommends it to anyone consulting on QuickBooks.

ACCOUNTANT PROFILE

Renee Mengali

- Founder: Mengali Accountancy Healdsburg, CA
- Firm specializes in handling outsourced accounting services, providing accounting solutions for businesses throughout Northern California.
- Provides complete payroll services, cash management, financial reporting, and government reporting requirements.
- Uses QuickBooks for all but one of 35 ongoing clients, and in all her consulting.
- "Intuit has given me the tools and the support necessary to provide a high level of service to my clients," she says. "And the better service I provide, the more likely those clients will tell other people about me."



"I definitely think QuickBooks POS has helped me attract new clients."

"It's a huge opportunity for ProAdvisors to grow their business, and provide a service that brings immediate results to their clients."

Renee Mengali
Mengali Accountancy

Renee Mengali has a head for numbers. And 10 years into her career as a Controller and QuickBooks ProAdvisor, she saw an opportunity to pour that talent into a thriving business.

"I saw that getting a full-time controller was not in the budget for most small businesses, but there were key times when they really needed professional advice," she says. "There's a substantial difference in the knowledge, skills, and abilities between a CPA and a company's in-house accounting staff."

To fill that gap, Renee formed Mengali Accountancy in 2003 in the wine country of Sonoma, California. Four years later, she's rented a bigger office, added more staff, and seen her revenues double over 2005.

Renee gives a lot of credit to the QuickBooks family. In fact, she uses QuickBooks for all but one of 35 ongoing clients, and in all her consulting.

"Intuit has given me the tools and the support necessary to provide a high level of service to

my clients," she says. "And the better service I provide, the more likely those clients will tell other people about me."

Business is bubbling with Point of Sale

For instance, Renee has done well with QuickBooks Point of Sale (POS).

After she wowed one high-profile retail store with a successful install, she enjoyed numerous referrals for further projects. This grew her network even more, since retailers talk constantly with many people, including one another.

"When a retailer goes through a POS installation using a QuickBooks ProAdvisor, they are ecstatic," says Renee. "They think the software is amazing, they have a great experience, and they become a promoter of POS, and of you as a ProAdvisor."

She's now done seven POS projects, each one as smooth as a glass of good pinot noir.

"Typically the customer wants us to help from A to Z: acquire the software, acquire the hardware, set it all up, get it working, and provide training," she says.



Point of Sale

Once the system is in, clients love the flawless integration with QuickBooks and the instant sales reports.

“To have a handle on your sales in real-time is invaluable,” says Renee, “so the new dashboard is a key feature that helps a retailer keep their fingers on the pulse of their business.”

“The Retailers find POS surprisingly easy to use.” Renee says that one hour of training is plenty to get any cashier productive with the system.

But Renee doesn't leave it at that. She follows up each install with a regular check-up on the retailer's operations.

“This gets me back in the door, and I typically get additional engagements at that point,” she says. “This creates a new revenue stream for me, and makes sure the client's numbers are always accurate.”

Wine Country Computers

One client Renee recently set up with POS is Wine Country Computers in Healdsburg. After 10 years building and networking PCs for local schools and businesses, the company faced a big decision last summer: Should it move into a prime storefront and expand big-time into retail?

“The retail thing was a big step and more overhead. I wasn't really sure I wanted it,” says owner Lockie Gillies.

QuickBooks POS helped make the decision easier. Since Lockie has used QuickBooks in his business since day one, he says picking the POS system from the same family was a simple choice.

“Now the inventory is correct, we count out every night correct, and we get reports every day,” he says, “You can't ask for more than that.”



Lockie Gillies, Wine Country Computers

The new system also saves many steps in the shop's daily operations.

“I remember we used to have to write down everything and type it into QuickBooks, and now it's just a click of a button,” says office manager Colleen Anderson. “It probably cuts out 25 percent of my workload.”

For example, processing a credit card charge is much faster. Swiping the card through the POS system posts the transaction right into QuickBooks,

saving at least three steps on every sale. For service jobs, the sales person just clicks on a line item such as “tune-up” or “software install” and the system posts everything properly and generates a neat receipt for the customer.

“It's the perfect marriage for Wine Country Computers,” says Renee, “because they still need to manage inventory items like custom-built computers with QuickBooks, but handle over-the-counter retail with POS. This system gives them the flexibility to do both.”

In fact, the POS system has worked out so well that Lockie is teaming up with Renee to offer a joint package for retailers, where he installs the hardware and network, while she does the software setup and training.

ProAdvisors get steady flow of business

With ample potential for further growth, Renee has a lot to celebrate. And she toasts the ProAdvisor program as a key ingredient in her success.

She has been a Certified QuickBooks POS ProAdvisor for two years. In fact, there are now four ProAdvisors in her firm. The program generates a steady flow of new business, averaging one new referral every week.

Renee appreciates how the ProAdvisor program delivers results with little effort on her part, leaving her free to focus on what she enjoys most: helping clients understand what their numbers are really saying.

FOR MORE INFORMATION

For more information about QuickBooks Point of Sale, other QuickBooks Products, or the ProAdvisor Program visit our Web site at www.accountant.intuit.com.

For more information about Renee Mengali and Mengali Accountancy, please visit www.mengali.com, and for more information about Wine Country Computers, please visit www.winecomputers.com.

See it in Action

To see more information about QuickBooks Point of Sale products, or to try out an interactive trial, please visit www.quickbookspos.com and click **Test Drive Now**.

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