



QuickBooks® Retail Software Solutions and ProAdvisor® Help Make Guitar Store a Hit



BUSINESS CHALLENGE

After getting the green light to become the first independent reseller of a national brand, Carvin Sacramento sought a retail solution that would allow them room to grow while providing the ease of use to quickly get the store up and running. In addition, they wanted to find a point of sale expert whom they could trust to help them implement their retail system.



SOLUTION

- QuickBooks Point of Sale (POS) software and POS hardware for ringing up sales and managing inventory
- QuickBooks: Premier Retail Edition for managing financial data and easily working with their accountant
- QuickBooks POS Merchant Service for processing credit and debit cards
- Certified QuickBooks POS ProAdvisor to help them deploy the system



BENEFITS

- POS Data Import Tool makes it easy to update inventory levels
- Seamless integration between POS and financial software keeps the business running smoothly
- Sales and Customer Reports make it easier to stay on top of popular items and target marketing efforts at specific shoppers
- Automatic inventory re-order levels help keep popular items in stock
- Easy upgrade path to QuickBooks Point of Sale: Pro Multi-Store



“Part of the reason why we wanted to have a product like QuickBooks is because we really want to be able to step away from day-to-day concerns and achieve some bigger goals. We wanted a solution that we could rely on, something that was so incredibly simple that even I could do it as a sales guy... I can tell you that the software has been far easier than even I expected.”

Paul West
Co-Founder, Carvin Sacramento
Sacramento, California

Big Plans

With the twin goals of launching a unique business and achieving long-term financial independence, Paul and Laura West left the corporate world to become the first independent resellers of Carvin guitars and audio equipment. To help assure their success, the Wests turned to QuickBooks Retail Software Solutions and to Steve Green, a Certified QuickBooks ProAdvisor, for help. When they contacted Steve, they had three requirements. They wanted to implement QuickBooks in a way that could scale with a growing business. They needed a retail package that, in Paul’s words, would be a “complete, seamless, no headaches solution.” And most importantly, their retail solution had to be up and running in less than a week.

QuickBooks, an Easy Choice

Paul first got the green light for his venture in the spring of last year when Carvin Corporation, a sixty-year old company that sells direct to musicians, heard his pitch and liked it. With Paul still working full time as a national sales manager, his wife Laura turned her attention to finding a

retail solution on which to build their company. She had good experiences using QuickBooks Online Edition with a church group she belongs to, so she was considering QuickBooks for this new business venture. She also considered solutions from other vendors, including Microsoft. She asked retailers and accounting professionals about their experiences and recommendations and performed extensive research on the web. After a while, one theme became clear. “It just kept coming back to QuickBooks,” she said.

When Steve came on, he was pleased to find that Carvin Sacramento had selected just the retail solution he would have recommended: QuickBooks Point of Sale (POS): Pro software and POS hardware for ringing up sales and managing inventory, QuickBooks: Premier Retail Edition for managing financial data, and QuickBooks POS Merchant Service for processing credit and debit cards.

Enter the Certified QuickBooks ProAdvisor

With less than a week to fully implement and learn the QuickBooks retail solution, there was a


QuickBooks

RETAILER PROFILE

- Carvin Sacramento
- Launched Dec. 10, 2005
- Located in Sacramento, California
- Four employees
- The first independent reseller of Carvin guitars and pro audio equipment
- Implemented their QuickBooks Retail Software Solution in less than a week

PROADVISOR PROFILE

- Steve Green
- Works with full-service accounting firm Campbell, Benn & Taylor
- Located in Sacramento, California
- Certified QuickBooks ProAdvisor, Certified QuickBooks POS ProAdvisor
- Accounting technology consultant for retail and service businesses and for third-party SDK developers
- Has seen the POS side of his practice grow dramatically

real sense of urgency at Carvin Sacramento. Reflecting on those hectic days, Laura said, “We had this great fear of how do we get all of this working right?” Laura sought out retail experts with QuickBooks POS experience.

Certified in QuickBooks POS since version 1.0, Steve Green was on the Wests’ short list of consultants. Always one to consider her options, Laura also interviewed one other retail specialist, but Steve’s long experience with QuickBooks POS, his willingness to work around their schedules, and his good-natured character won them over. In Paul’s words, “He’s just a pleasant personality. He lightens the mood wherever he goes.”

The first problem that Steve had to solve was that Carvin Sacramento’s computer system wasn’t up yet, but they already had inventory that they wanted to track. Steve’s solution was simple and practical. “He stepped right up to the plate,” Laura explained. “He walked me through using an Excel spreadsheet to enter our data.” Once POS was installed, she would then be able to import the inventory using the built-in data import tool.

After their computer system was on its feet, Steve deployed QuickBooks POS and QuickBooks: Premier Retail Edition, set the software up to meet their business needs, and made sure financial exchange between POS and Premier Retail Edition was working correctly. He then gave Laura an overview of how to use the software, assigned training homework, and pointed her to POS’s built-in tutorials. The Wests felt a great sense of relief. “That was such a big help I can’t even explain,” said Laura.

QuickBooks’ Ease of Use Helps Make Grand Opening a Success

Carvin Corporation’s marketing help combined with the lure of a free concert by Craig Chaquico, formerly the lead guitarist of Jefferson Starship, promised to draw a large crowd of customers to Carvin Sacramento’s grand opening. The afternoon before the big day, the sign was up, the guitars were on the walls, and QuickBooks Retail Software Solutions was ready to start processing payments. The only thing remaining was to train the new sales associates. Laura found QuickBooks POS so easy to learn that, after only a few days of using the program herself, she was able to quickly teach her sales associates how to use it to process payments. When asked about the experience of training new users to ring up sales, Laura said, “It’s so simple that it just wasn’t an issue.”

The next day, there was a line out the front door. According to Paul, there were so many people that they had to admit customers in waves of 20. “It was standing room only. It was a total madhouse,” he said. Despite the crush of customers, the Wests happily report that the grand opening went off without a hitch. Further demonstrating Steve’s expertise and the user-friendly design of QuickBooks, Carvin Sacramento’s flawless grand opening occurred on the very first day the company was open for business. “There was no test run,” Paul explained. “Our soft opening was our grand opening.”

Building Efficiencies into the Business

Since their opening, the Wests have found themselves relying more and more on QuickBooks to help them gain insights into their business and make better decisions. As Laura explained, “I love the reports. I use them all the time to find out how the business is doing and to help keep track of inventory.” Paul, who concentrates on sales, finds that the customer history and sales reports provided by POS help him be a more effective sales manager.

Always happy to find ways to save time, the Wests have discovered that QuickBooks Retail Software Solutions offers a number of helpful features. They are setting up inventory re-order levels so that POS will automatically generate purchase orders for popular items. They also plan to use the database of customers they’re building to send out targeted direct mail. In addition, QuickBooks helps Laura save time by making it easy for her to work with the accountant Carvin Sacramento hired for their accounting, bookkeeping and tax needs. “When I told our accountant that we have QuickBooks, she was thrilled,” Laura said. QuickBooks makes it so easy to exchange financial data via email that they rarely have to meet face-to-face. As Laura explained, with file exchange working


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so smoothly, “there’s just no reason for my accountant to come here.”

The Wests have found that their retail solution has met all their needs and has exceeded their expectations for trouble-free operation. When asked what one thing QuickBooks should never change, Paul responded, “Seamless integration.” With QuickBooks Premier, POS software, POS hardware, and QuickBooks POS Merchant Service all having to work together, Paul originally had some concerns about reliability. But after three months of using the system every day, Paul is convinced. “It just works,” he said. This has allowed the Wests to spend time running their business instead of worrying about their accounting software.

Accounting Professional Leverages POS to Achieve Practice Growth

For Steve Green, helping a retailer get on their feet and position themselves for success is why he’s a QuickBooks POS consultant. Five years ago, he recognized the opportunity to use POS as a way to grow his practice. Today, POS is his largest niche. And the clients keep calling. Certified in both QuickBooks financial software and POS, his profile gets great visibility on the Certified QuickBooks ProAdvisor Referral Database. While some accounting professionals support only a small number of POS clients, Steve’s dedication and persistence has helped him build a practice around serving retailers. With so much success, it’s not surprising that he also encourages others to get into POS consulting. “There are enough people using POS to justify

that you build a piece of your practice around this,” he said.

Room to Grow

With the help of QuickBooks Retail Software Solutions, Carvin Sacramento has achieved better-than-expected sales. “We had an excellent first month and we’ve been over our estimates for the second and third months being in business. Things are really looking up,” Paul said.

Just as importantly, QuickBooks Retail Software Solutions gives Carvin Sacramento room to grow. The Wests’ long-term plan includes expanding to another location. When they do, QuickBooks POS’s modular design will enable them to upgrade to QuickBooks POS: Pro Multi-Store and link their second store for another successful opening day.



“QuickBooks POS is a huge and fast growing piece of my practice. I can’t believe the amount of growth that’s occurred in the last six months.”

**Steve Green, Certified QuickBooks ProAdvisor
Campbell, Benn & Taylor
Sacramento, California**

FOR MORE INFORMATION

For more information about QuickBooks, visit our Web site at accountant.intuit.com, or call 888-666-7917. To view other case studies, visit accountant.intuit.com/casestudy.

Test Drive

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