



**Solution Resources, Inc.
QuickBooks Online Advanced**

**Full financial visibility to run and
grow your construction business**

Who is this solution for?



Specialty construction businesses with 10-100 employees



A company with more revenue than your typical small business



Businesses needing a strong financial hub that integrates with modular, customized industry tools



Teams that need to enter and access data both in the office and in the field



Those having more than five users using QuickBooks Online

If you're a growing construction business looking for management and financial data in a central, unified picture, QuickBooks Online Advanced is built to be your foundation.

QuickBooks Online Advanced is designed to give mid-sized businesses the power to build a custom financial and construction management solution that grows as the business grows.

If you can envision it, Solution Resources can help you make it happen from start to finish, customizing your Financial Management Solution to address your Company's financial challenges. We do this by working with Intuit and the QuickBooks software and the hundreds of valuable apps to develop a system that is not only easy to use, but designed to grow as you grow.

We partner with our clients providing insight given our lifetime of experience in the industry. We engage with the right channels and customize based on each individual company's needs.

Who are our clients? Mid-market businesses that need accounting, payroll, time tracking, vendor matters and customer relations all in one system. Available with accurate information in real time and accessible from anywhere. The companies that need to strategize, optimize, track, analyze and plan for the future. And when they win, we win. As a team.

Let's break ground together: A solution built for construction

Scheduling, time tracking, job progress, and financial data in one immediate view



**Gain a central view
of financial operations**



**Use features built for
construction**



**Scale as you
grow**

**Simplify administrative tasks, save time,
increase accuracy and insight**

Solution Resources, Inc. enhances QuickBooks for construction

Full financial visibility to run and grow your construction business.



Our Operating Values



At Solution Resources, we believe that we are stronger together by championing our clients and working with them and Intuit to achieve the best Financial Management System for them. We show integrity without compromise and have courage to be bold and fearless in our thinking and actions. We succeed by thinking out of the box.

Core capabilities and benefits



□ At Solution Resources, with our expertise gained through hands on internal experience actually working in the industry and complemented by 25 years of auditing companies in the industry, we are uniquely qualified to help our clients in their Financial Management journey by strategizing, optimizing, reporting, analyzing and envisioning the necessary steps to help clients transition to the next step.... The Future.

□ We help you customize your set-up to

- ✓ Create centralized project management and financial data to save time and reduce errors.
- ✓ Build efficiency into your business by bringing scheduling, time tracking, job costing and job progress with control over billables and immediately view to streamline administrative tasks, save time and increase accuracy and insight.
- ✓ See data from the field just as quickly as you see data from the office, which means you have a full financial and operational picture on hand anytime, making it easier to make smarter decisions faster.

"QBO is a must for small businesses!

Very user friendly software, and has been easy to implement and build as our business has grown. I don't have an accounting background but have been able to navigate it without too much difficulty.

The Solution Resources team is phenomenal. "

MV, Pinnacle Construction.

The unique benefits Solution Resources brings to the table



Being able to do everything on a single QuickBooks platform has allowed Solution Resources the ability to access the books and records at any time or as requested. We are then able to highlight areas of operations the clients need to focus on to improve their system or bottom line. We review our clients' financials for needed corrections, investigations and suggest modifications of procedures in operations or internal control. These suggestions directly inside of QuickBooks. We teach, we don't do so the result long-term is reliable internal reporting.



Before

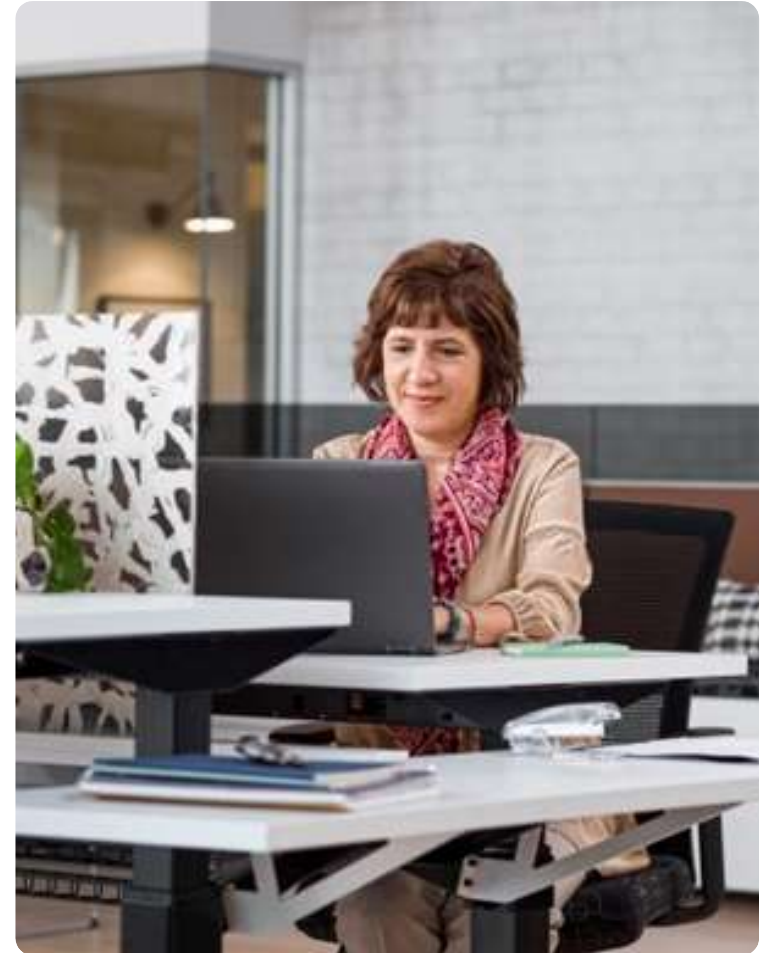


After



Key benefits of QuickBooks Online Advanced

- Hit the ground running with the **same intuitive user interface** beloved in QuickBooks Online
- Access your data **anytime, anywhere** in the secure cloud and from mobile devices
- Make better business decisions with **deeper insights** and more intuitive reports
- Add custom **fields** to filter, report and display the key data fields that matter to your business
- Spend less time creating and editing invoices and payments **with batch transactions**
- Stay organized with artificial intelligence that **automatically categorizes your expenses**
- **Authorize up to 25 users** from the start
- Reduce errors and increase efficiency across departments **with automated workflows with multi-condition approvals**
- Quickly put the right information in the right hands with **custom user roles**
- Your data is **automatically backed up**. Restore previous backups from different time periods



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Key benefits and enhancements for QuickBooks Online Advanced

- **Increased efficiency while performing financial tasks**

A centralized hub of the composite organization's financial and accounting management.

QuickBooks makes routine financial tasks needed to run the business 30% more efficient on average.

Enhanced features include organized dashboards, batch transaction import and export

- **A more customized solution with integrations**

QuickBooks Online has a library of 750+ apps that help you add industry-specific functionality and answer specific business needs.

- **Impressive reporting capabilities**

These capabilities allow the organization to quickly generate detailed and customized reports to enable better business decisions and drive success.



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QuickBooks Online Advanced + Solution Resources

Gain a central view of financial operations

Centralize your systems



Between email and spreadsheets, information can get lost, and data duplicated. QuickBooks Online Advanced + Solution Resources sync with your systems, so you can track labor, billables, and margins by job—and keep your data secure, central, and up-to-date.

Save time



With synced systems and reduced errors, QuickBooks Online Advanced + Solution Resources lessen paperwork and save you time. So whether it's meeting with a client, or making it home for dinner, you're able to spend your time where it matters most.

QuickBooks Online Advanced + Solution Resources

Use features built for construction

Access specific construction features



With features designed specifically for contractors, such as tracking finances and expenses by job, QuickBooks Online Advanced + Solution Resources help unify your business and financial operations with synced project management and profitability analysis.

Gain transparency



Real-time reporting tracks cash flow and profitability by showing which jobs are on track and which ones need attention—so you can make sure you're on time and on budget. QuickBooks Online Advanced + Solution Resources give you all the information you need in order to feel confident in your decision-making.

QuickBooks Online Advanced + Solution Resources, Inc

Scale as you grow

Improve scalability



You don't believe in a one size fits all approach, and neither do we. QuickBooks Online Advanced + Solution Resources offers multiple subscription packages and add-on features to create a customized solution that scales with your business.

Access anywhere



When you need to manage your business outside of the office, we've got you covered. With a cloud-based platform and robust security, access your information and send invoices and estimates on-the-go with plans, contracts, and photos.

QuickBooks Online Advanced + Solution Resources

Combined functionality built for construction

Solution Resources

- **Take advantage our industry knowledge to help you get your financial reporting accurate and relevant.**
- **Customize your reports, your apps and your workflows to achieve a Financial Management Solution that leads to success.**

QuickBooks Online Advanced

- Track labor, billables, and profit, even by job
- Manage costs and highlight your profitability on each job—and across jobs—with real-time reporting
- Follow up on a late invoice, run payroll, and see instant notifications of payments and deposits from your mobile or tablet
- Real-time reporting that shows cash flow projections, income and expenses
- Customization and 650+ app integrations
- Automatically keep track of subcontractor payments, and be ready to issue 1099s

Join over

300,000

**construction companies
that run their business
with QuickBooks Online¹**

¹Industry identification based on self-reported US subscribers and DNB small business data as of August 2021

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A deeper look at QuickBooks Online Advanced



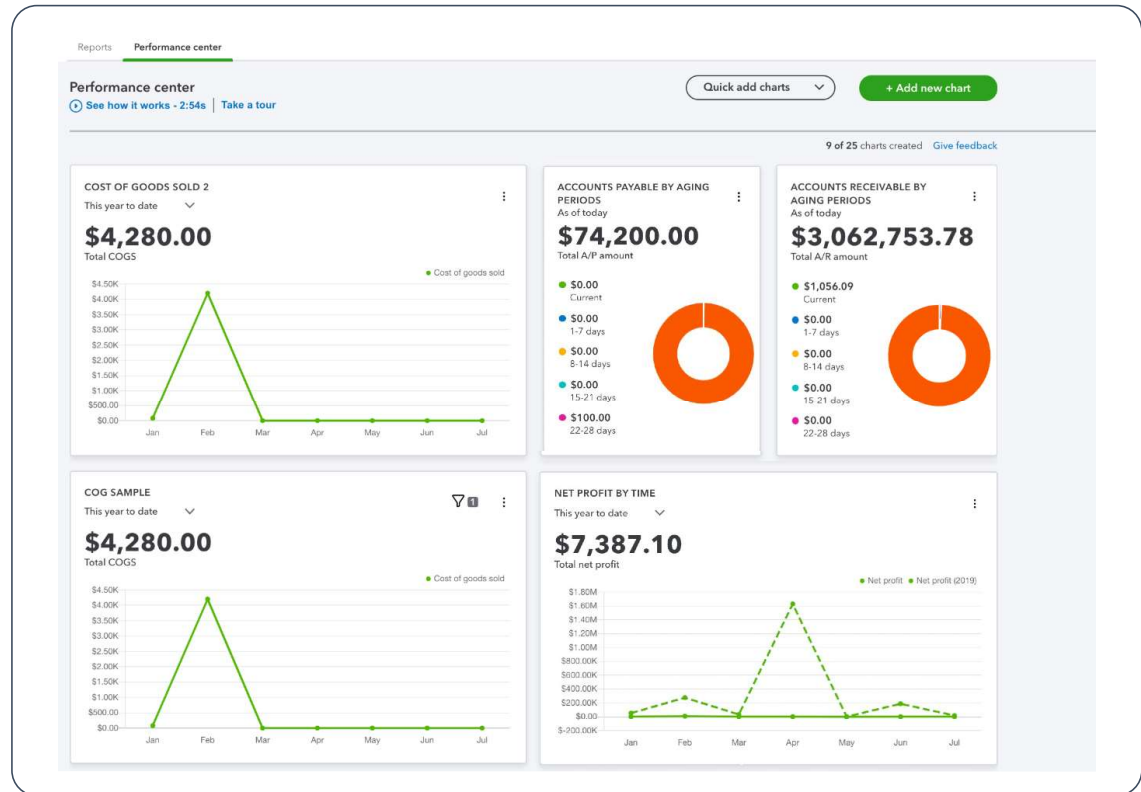
**Work smarter
with deep insights**



Performance Center: Business insights mission control

View your business metrics in one central place

- Automate and customize performance dashboards
- Understand key business metrics with automatically generated dashboards across **accounts payable**, **accounts receivable**, **cost of goods sold**, **gross profit**, **net profit**, **revenue stream**, **quick ratio** and **current ratio**
- **Custom chart builder** enables you to track business KPIs that you care about the most, right from within Performance Center of QuickBooks Online (Exclusive to Advanced users)
- **Benchmark** against past period or same period last year



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Custom fields: Track details unique to your business

- Make better business decisions with **deeper insights** from customizing, tracking, and reporting on four custom data fields:¹
 - Text
 - Numbers
 - Dates
 - Dropdown lists
- Increase efficiency by quickly **searching, sorting, and filtering** information that's relevant to your business and customers
- Add the customer and transaction details **you want to track**
- Get **more control** as you choose the information you want your customers or vendors to see

The image shows a screenshot of an invoice form titled "Invoice #1012". The form is divided into several sections: Customer, Billing address, Terms, Invoice date, Due date, Shipping to, and a table for service lines. A sidebar on the right, titled "Customize what you see here", allows users to manage custom fields. The sidebar is divided into "Fields" and "Optional Columns". The "Fields" section includes checkboxes for "Shipping", "Total discount", "Deposit", and "Custom transaction numbers". The "Optional Columns" section includes checkboxes for "Date", "Show Product/Service column", and "SKU". A green box highlights the "Custom Fields" section of the sidebar, which lists four custom fields: "Sales Rep", "Purchase Order", "Birthday", and "CustRep". Each field has a link to edit it and a status indicating whether it is shown to the customer. The "Sales Rep" and "Purchase Order" fields are marked "Shown to customer", while "Birthday" and "CustRep" are marked "Not shown to customer".

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION
1			
2			

¹Up to 48 unique active custom fields available only in Sales forms, Purchase Orders, and Customer Info. If a unique custom field is duplicated in any of the aforementioned templates, the number of customizable fields will decrease

Custom roles: Grant unique user access permissions

- Configure user roles dozens of different ways to **manage access to sensitive data** that fits your business
- Preset roles include:
 - Expense manager
 - Sales manager
 - Payroll manager
 - Inventory manager
- Administrators can **give users selective access** to work in one or more of the following areas:
 - Sales transactions
 - Expense transactions
 - Sales reports
 - Expense reports
 - Bank deposits
 - Sales access to invoices
 - Sales access to estimates

The screenshot shows a web interface titled "Add a new role" with a close button (X) in the top right corner. The interface is organized into several sections, each with a category name and a list of permissions, each preceded by an unchecked checkbox:

- Sales**
 - All sales transactions, customers, and products and services
Includes limited access to sales tax and currencies. [Get all the details](#)
 - Invoices
 - Estimates
- Expenses**
 - All expense transactions, vendors, and products and services
Includes limited access to sales tax and currencies. [Get all the details](#)
 - Checks
 - Bills
- Lists**
 - Products and services list
- Banking**
 - Banking Management
 - Bank deposits
- Workers**
 - Payroll, employees and contractors, workers'comp and benefits.
- Reports**
 - Sales and customer reports
 - Expense and vendor reports
- Account Management**
 - Edit company info
 - Access subscription

A green "Next" button is located at the bottom right of the form.

Online backup and restore: Rest easy knowing your data is backed up

- Continuously and **automatically back up**¹ your QuickBooks Online company changes and data
- Easily **restore a specific version** of your QuickBooks Online company based on any historical date and time
- View a log of all your QuickBooks Online company **version histories with a count of how many changes were made**

The screenshot displays the QuickBooks Online interface. On the left is a dark sidebar with the 'intuit quickbooks' logo at the top. Below the logo, the 'Online Back-up & Restore' section is highlighted. The sidebar also includes 'Main' (Home, Backup, Restore, Copy, Local Backup) and 'Manage' (Companies, User) sections. The main content area is titled 'Backup - View' and shows a table of backup records for 'Lightner Stationers'. The table has columns for Company, Backup Type (Full), Status (with a checkmark), Started At (9/2/2020 4:07 PM), Finished At (---), Notes (-), and Initiator (Manual). A 'Help' tooltip is visible over the table, stating 'To review what can be backed up by Online Back-up and Restore...'. In the bottom right corner, a modal window titled 'Connecting Online Back-up and Restore to Lightner Stationers' is open. It contains a 'Let's connect Online Back-up and Restore' section with a 'Connect' button and a 'No, thanks' button. Below this, there is a privacy notice and a 'Disconnect' link.

¹QuickBooks Online uses technical and administrative security measures such as, but not limited to, firewalls, encryption techniques, and authentication procedures, among others, to work to maintain the security of your online session and information.

Advanced grows with you, without limits

Get room to grow down the road with up to 25 users, unlimited chart of accounts, and unlimited classes and locations.

	QuickBooks Online Advanced	Other Online solutions
Up to 25 users plus 3 free accountant users	✓ Included in your single cost subscription	✗ Lower user cap and/or per-user add-on fee
Unlimited chart of accounts	Included in your single cost subscription	Capped and/or per-user add-on fee
Unlimited classes and locations	Included in your single cost subscription	Capped and/or per-user add-on fee



Complete the tasks that matter, faster

Batch transactions: Create and edit hundreds of invoices, expenses, checks, or bills at once

- Two ways to **create invoices faster**:
 - Create invoices 37% faster via multiple invoice creation¹
 - Import hundreds of invoices at once from a .CSV file outside QuickBooks
- **Reduce repetitive tasks** by editing multiple transactions at once
- **Duplicate and edit** the same transactions to multiple customers
- Send up to **hundreds of transactions** with just a few clicks
- **Make online payments**² right from the batch experience

Batch Transactions

Select transaction type: Invoices (dropdown) | Action: Create (dropdown) | TOTAL: \$0.00

Get paid faster with online payments
Finish setting up online payments. And let your customers pay you even faster
[Finish setup](#)

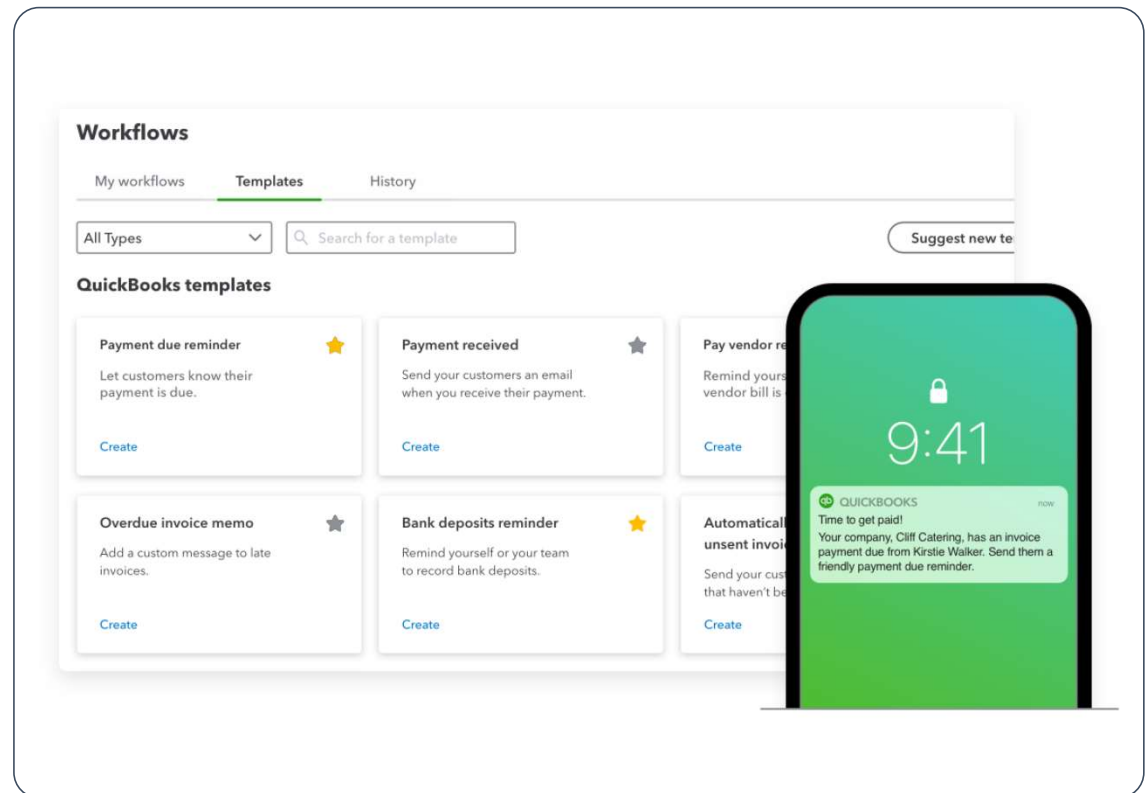
	Invoice	Email	Terms	Invoice Date	Due Date	Location	Location Of Sale
1							
2							
3							
4							
5							
6							
7							
8							
9							
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12							
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¹Based off of internal tests comparing QuickBooks Online regular invoice workflow with QuickBooks Online Advanced multiple invoice workflow. QuickBooks Online Advanced supports the upload of 1,000 transaction lines for invoices at one time. Number of invoices imported depends on number of transaction lines in the .CSV file. Customer received payment for participating in the tests.

²One-click payment enabled: QuickBooks Payments account and setup are required. Subject to eligibility criteria, credit, and application approval.

Workflows: Reduce errors and increase efficiency with logic and automation

- Automate essential **tasks and reminders** to focus on what matters
- Build in **logic** to trigger automation
- **Reduce errors** and increase efficiency as you scale
- Strengthen cash flow with **past-due invoice reminders**



Advanced gives you more powerful tools to help run your business



Reporting and insights



Automated logic



Custom user roles



Batch transactions



Automated approval and reminders



Enhanced custom fields



Task manager



Online backup and restore



Mobile access



Simultaneous user access



3 accountant seats



Unlimited chart of accounts, classes, and locations

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How does QuickBooks Online Advanced help you do your job?



How Advanced helps accountants do their jobs

Batch transactions

Streamline your transaction workflow by reducing time to create and edit batch invoices by 37%¹

Enhanced custom fields

Track the unique details for each business you serve and run custom reports quickly

Custom chart builder

Create customized business performance dashboards, so your clients know how their business is growing

Custom user roles

Delegate the right tasks with the right information and manage access to sensitive data

Workflow automation

Reduce errors and increase efficiency with workflow and reminder automation

Projects with true job costing

Help your clients understand every project's profitability

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How Advanced helps CEOs and CFOs do their jobs

Up to 25 users

Delegate more work to more of your team

Custom chart builder

Create customized business performance dashboards, so your clients know how their business is growing at all times

Custom user roles

Delegate the right tasks with the right information and manage access to sensitive data

Batch transactions

Streamline your transaction workflow by cutting down the time to create batch invoices by 37%¹

Workflow automation

Reduce errors and increase efficiency with workflow and reminder automation

Projects with true job costing

Help your clients understand every project's profitability

¹Based off of internal tests comparing QuickBooks Online regular invoice workflow with QuickBooks Online Advanced multiple invoice workflow. QuickBooks Online Advanced supports the upload of 1,000 transaction lines for invoices at one time. Number of invoices imported depends on number of transaction lines in the .CSV file. Customer received payment for participating in the tests.

Next step?



Call us to discuss how QuickBooks Online Advanced can help you work smarter with deeper insight..



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Thank you

