

Qvinci for Accountants Solution Roadmap

This document contains accounting best practices pertaining to the standardization and automation of styled reporting, consolidation of financial data, business intelligence and workflow management provisioned through a secure portal.



The Challenge

In today's competitive market, improving billable realization while increasing staff utilization and providing clients with actionable data through consultative services are initiatives for all accounting firms. Unfortunately, most firms are unaware a cloud solution exists that facilitates the automation of laborious manual tasks associated with styled reporting, data consolidation, business intelligence and workflow management, allowing them to cost-efficiently scale their business. Through engagement with large and mid-size accounting firms' leadership, many commonalities surfaced.

From the abridged list below, click the boxes to place a check mark in the areas that apply to your firm.

- We have an initiative to improve our realization rate while increasing staff utilization.
- We didn't realize that report standardization and automation is possible including its meaningful impact on a firm's efficiency, scalability and profitability.
- Each office does their own thing in terms of reporting.
- We do not have any documented QA standards for creating and publishing financial reports across our ecosystem.
- We have a concept or an objective regarding client portals as well as improving client value because everyone else is talking about it but we don't have well-defined plans of what it includes nor how to implement a viable solution.
- We do not have enough qualified technologists on staff to implement and manage business intelligence solutions.
- We are not technology project people and have limited best practices for rolling out technology solutions across our ecosystem.

Firm leadership faces a daunting task in terms of identifying, developing and implementing solutions for the challenges above. This is further compounded now that firms of all size have implemented Qvinci based on the realization that they couldn't afford NOT to.

"Qvinci is scalable, easy to use, cost effective and deploys quickly. By automating the collection, reporting and benchmarking of data, Qvinci helps us improve productivity so we can spend more time adding exceptional value to our clients. On one recent client consolidation, it saved me days' worth of work."

Shane Bender
President

The balance of this document focuses on the best practices other firms have adopted from discovery to implementation and beyond, and how our patented solution effectively addresses their challenges. Thank you for taking the time to gain a greater understanding of the power Qvinci delivers to the accounting profession.

Sincerely,

John F. Logan

John F. Logan
EVP, Sales and Marketing
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The Solution

Founded in 2007, Qvinci Software is the leader in providing automated cloud-based financial data consolidation, reporting, business intelligence and workflow management solutions to accounting firms that use QuickBooks®, Xero®, MYOB® or Excel®. We are the #1 rated reporting app in the Intuit App Store and are ProAdvisor recommended.

By automating the gathering, syncing and mapping of financial data from disparate sources, Qvinci delivers the multi-period reporting and actionable data needed to proficiently monitor and compare the performance of single and multi-unit organizations.

"The ability to customize financial reporting for our clients is key for our business. This financial reporting tool allows for consolidation with multi-location companies."

Kelly Johnson
BDO
Partner and National Practice Leader

Solution Overview

Watch the three overview videos and discover how Qvinci's solution helps others in your industry:

- Increase billing realization
- Improve staff utilization
- Automate actionable client reporting and data consolidation
- Empower their accountants to be viewed by clients as business consultants

Also, feel free to visit our [website](#) for more in-depth insights.

Daily, we help accounting firms cost-effectively scale growth while providing clients with actionable financial reporting.

"Consolidating data from multiple entities and publishing standardized styled reports saves significant time. Dynamic mapping to a standard Chart of Accounts is a game changer."

Michelle Long
Founder
Advanced ProAdvisor

Capabilities Overview

The balance of the document will provide insight into our ability to provide equal value to your firm.

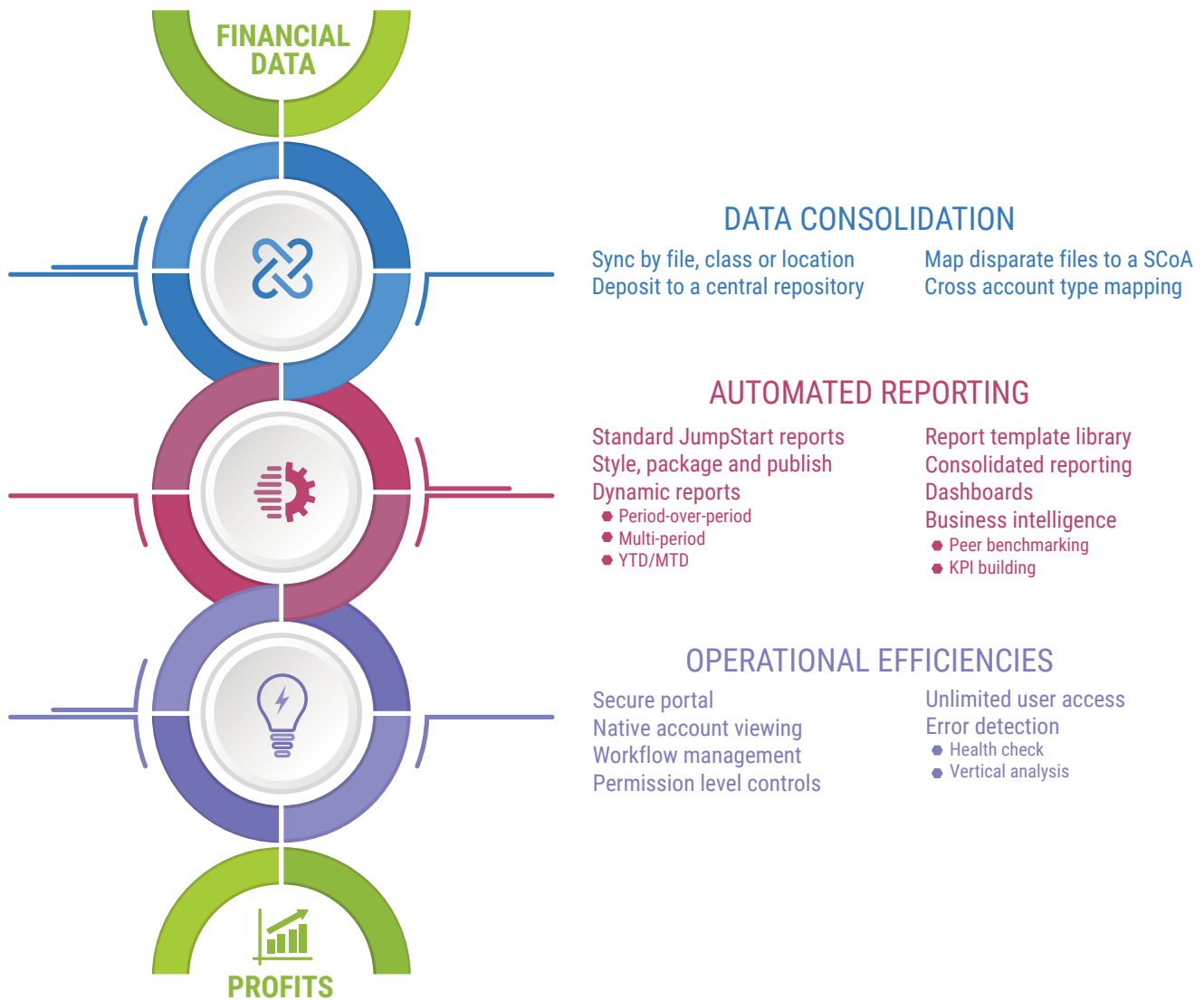
Capabilities Demo

Qvinci for QuickBooks®

Qvinci's patented technology delivers ERP-like functionality to the accounting platforms used by firms ranging from the Top 100 to solo practitioners. Our solution provides accountants with the improved visibility, business intelligence and actionable data clients require, resulting in:

- ↑ Increased profits via improved billing realization and scalability
- ↑ Improved operational efficiencies through automated data consolidation and client reporting
- ↑ Enhanced value-added consultative services by providing clients with dynamic reporting

The illustration below outlines a *partial list* of the Qvinci for Accountants solution capabilities.



The Discovery Process

Our objective throughout this process is to gain a clear understanding of your strategic initiatives, share relevant best practices and provide recommendations that resolve your challenges. Below is a list of questions we would like you to discuss internally, then answer and submit at your earliest convenience. Our subject matter experts will digest the insights you shared and make contact to schedule a call to discuss the information.

Estimated completion time: 30 minutes

<p>1. Describe your current data consolidation process.</p> <input type="text"/>	<p>2. Describe your current reporting process.</p> <input type="text"/>
<p>What do you like?</p> <input type="text"/>	<p>What do you like?</p> <input type="text"/>
<p>What do you dislike?</p> <input type="text"/>	<p>What do you dislike?</p> <input type="text"/>
<p>In a perfect world, what would you want?</p> <input type="text"/>	<p>In a perfect world, what would you want?</p> <input type="text"/>
<p>3. Describe your current business intelligence deliverables. (Peer benchmarking, KPI building)</p> <input type="text"/>	<p>4. What mediums are used by your firm's accountants and staff when working on client files in terms of workflow processes, plus sharing client financial data and file notes?</p> <input type="text"/>
<p>What do you like?</p> <input type="text"/>	
<p>What do you dislike?</p> <input type="text"/>	
<p>In a perfect world, what would you want?</p> <input type="text"/>	
<p>5. What would the financial impact be if the four areas above were automated?</p> <input type="text"/>	<p>6. What is the priority level being placed on:</p> <p>Reducing non-billable hours/increasing collectable hours? <input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low</p> <p>Utilizing standardized report templates/compilations? <input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low</p> <p>Increasing client data security? <input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low</p> <p>Collaborating on client files via a secure portal? <input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low</p>
<p>7. What are the top three tasks that account for the most non-billable hours?</p> <input type="text"/>	<p>8. What accounting platform(s) does your firm support?</p> <input type="text"/>
<p>9. What are your firm's demographics regarding number of:</p> <p>Accountants? <input type="text"/></p> <p>Clients? <input type="text"/></p> <p>Client files? <input type="text"/></p>	<p>10. What percentage of your client-base is:</p> <p>Single location? <input type="text"/></p> <p>Multi-location / class? <input type="text"/></p>

Getting Started

If required, a 30-day paid Proof of Concept (POC) can be used to showcase the benefits derived from financial data consolidation and automated reporting. To ensure maximum value derived from your POC, Qvinci will build your standard templates, enabling you to immediately report for client entities.

Stage 1: Creating Standardized and Styled Report Templates

Most firms desire the ability to standardize the look of their reports as a component of their branding initiative. To address this requirement, Qvinci will build/publish (at a negotiated price) your specific standard report templates and/or JumpStart templates to your report library. These templates are comprised of the most common reports a client may need and are designed to provide the Client Champion(s) with a suite of ready-to-use options. The Client Champion will learn how to clone, update or customize these templates so that they best fit the needs of your firm.

The Qvinci JumpStart package includes over 40 reports. Some of the most commonly used include:

Profit & Loss

- This Calendar Year to Date; Monthly Frequency + Year Totals; % of Income
- This Calendar Year to Last Month; Monthly Frequency + Year Totals; % of Income
- Last Month vs Prior Month; Variances
- Last Month vs Same Period Prior Year; Current Year to Last Month vs Same Period Prior Year; Variances
- This Calendar Year to Last Month; by Entity + Totals; % of Income

Balance Sheet

- This Calendar Year to Date; Monthly Frequency
- This Calendar Year to Last Month; Monthly Frequency
- Last Month vs Prior Month; Variances

Cash Flow

- This Calendar Year to Date; Monthly Frequency
- Last Month vs Prior Month; Variances

NOTE:

Please email us your standard report package so we can determine what additional reports may need to be created for both your POC and future solution rollout.

Stage 2: Creating Custom Report Templates

Post-adoption, most Qvinci customers request that we build any specific custom reports and templates they require (at a negotiated price) that further facilitates their ability to fully utilize our solution. Alternatively, Client Champions may elect to build custom report templates themselves, however, this is only advised for advanced users.

Report Examples

Example 1: Profit & Loss with % of Income

A popular template is the Profit & Loss with % of Income. This report may be presented in a number of different ways but a monthly-delineated option is often required. The % of Income may be toggled off at any time or shown in one report versus another depending upon user preference.

2/28/2017

Gallery Client
Profit & Loss by Month
This Fiscal YTD

	Jan 2017	Jan 2017 [VA]	Feb 2017	Feb 2017 [VA]
Ordinary Income/Expense				
Income				
Engine Diagnostic	398.01	0.43%	2,255.37	1.80%
Oil Change Income	256.49	0.28%	1,715.85	1.37%
Engine Service - Other	9,286.83	9.98%	14,858.93	11.86%
Rebuilt Engine Sales	7,960.14	8.55%	14,151.36	11.29%
Ford Car Sales	29,187.18	31.36%	42,807.86	34.16%
Ford Truck Sales	45,991.92	49.41%	49,529.76	39.52%
Total Income	\$ 93,080.57	100.00%	\$ 125,319.14	100.00%
Cost of Goods Sold				
Engine Sales COGS	4,422.30	4.75%	7,960.14	6.35%
Ford COGS	64,565.58	69.37%	64,565.58	51.52%
Total COGS	\$ 68,987.88	74.12%	\$ 72,525.72	57.87%
Gross Profit	\$ 24,092.69	25.88%	\$ 52,793.42	42.13%
Expense				
Janitorial Expense	1,768.92	1.90%	2,122.70	1.69%
Landscaping	884.46	0.95%	1,273.62	1.02%
Insurance Expense	7,960.14	8.55%	7,960.14	6.35%
68100 Telephone Expense	442.23	0.48%	619.12	0.49%
Internet & Cable	884.46	0.95%	884.46	0.71%
Utilities	3,537.84	3.80%	3,758.95	3.00%
TV Advertising	2,653.38	2.85%	2,246.53	1.79%
Total Expense	\$ 18,131.43	19.48%	\$ 18,865.53	15.05%
Net Ordinary Income	\$ 5,961.26	6.40%	\$ 33,927.89	27.07%
Other Income/Expense				
Other Income				
Warranty Sales	-2,299.60	-2.47%	-1,592.03	-1.27%
Total Other Income	\$ (2,299.60)	-2.47%	\$ (1,592.03)	-1.27%
Other Expense				
Association Dues	884.46	0.95%	1,105.58	0.88%
Total Other Expense	\$ 884.46	0.95%	\$ 1,105.58	0.88%
Net Other Income	\$ (3,184.06)	-3.42%	\$ (2,697.60)	-2.15%
Net Income	\$ 2,777.20	2.98%	\$ 31,230.28	24.92%

Report Examples

Example 2: Profit & Loss by Entity

Templates may be created that deliver side-by-side and consolidated views of entities for clients who have more than one entity. Multi-entity clients may harness Qvinci's patented technology to create a Standard Chart of Accounts (SCoA) and map the incoming, disparate CoAs into the standard. Gone are the days of trying to maintain standard CoAs across multiple accounting files and manually performing consolidations. Instantly view side-by-side comparisons and consolidations in Qvinci. Additional toggles allow for % of income, benchmarking % and other variables to be quickly enabled on a comparison report.

2/28/2017			
Gallery Client			
Profit & Loss by Entity			
This Fiscal YTD			
	Austin, TX	Dallas, TX	Total
Ordinary Income/Expense			
Income			
Engine Diagnostic	1,725.00	1,326.39	3,051.39
Oil Change Income	1,260.00	968.84	2,228.84
Engine Service - Other	18,900.00	14,532.59	33,432.59
Rebuilt Engine Sales	17,000.00	13,071.64	30,071.64
Ford Car Sales	57,200.00	43,982.22	101,182.22
Ford Truck Sales	80,000.00	61,513.60	141,513.60
Total Income	\$ 176,085.00	\$ 135,395.28	\$ 311,480.28
Cost of Goods Sold			
Engine Sales COGS	9,500.00	7,304.74	16,804.74
Ford COGS	109,500.00	84,196.74	193,696.74
Total COGS	\$ 119,000.00	\$ 91,501.48	\$ 210,501.48
Gross Profit	\$ 57,085.00	\$ 43,893.80	\$ 100,978.80
Expense			
Janitorial Expense	3,200.00	2,460.54	5,660.54
Landscaping	1,720.00	1,322.54	3,042.54
Insurance Expense	13,500.00	10,380.42	23,880.42
68100 Telephone Expense	850.00	653.58	1,503.58
Internet & Cable	1,500.00	1,153.38	2,653.38
Utilities	6,125.00	4,709.64	10,834.64
TV Advertising	4,270.00	3,283.29	7,553.29
Total Expense	\$ 31,165.00	\$ 23,963.39	\$ 55,128.39
Net Ordinary Income	\$ 25,920.00	\$ 19,930.41	\$ 45,850.41
Other Income/Expense			
Other Income			
Warranty Sales	-2,900.00	-1,691.62	-4,591.62
Total Other Income	\$ (2,900.00)	\$ (1,691.62)	\$ (4,591.62)
Other Expense			
Association Dues	1,625.00	1,249.49	2,874.49
Total Other Expense	\$ 1,625.00	\$ 1,249.49	\$ 2,874.49
Net Other Income	\$ (4,525.00)	\$ (2,941.12)	\$ (7,466.12)
Net Income	\$ 21,395.00	\$ 16,989.29	\$ 38,384.29

Report Examples

Example 3: Balance Sheet Comparison Report

Various Balance Sheet templates may be configured although this multi-period comparison with variance is a popular request. Additional versions may include both month and year comparisons on the same report.

2/28/2017				
Gallery Client				
Balance Sheet				
This Fiscal YTD				
	Feb 2017	Jan 2017	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
Cash in Drawer	-1.77	-1.77	0.00	0.00%
Wells Fargo - Checking	-220,170.15	-220,170.15	0.00	0.00%
Wells Fargo - Savings	176,892.00	176,892.00	0.00	0.00%
Total Checking/Savings	\$ (43,279.92)	\$ (43,279.92)	\$ - .00	0.00%
Accounts Receivable				
Accounts Receivable	13,320,819.25	13,190,487.34	130,331.90	0.99%
Total Accounts Receivable	\$ 13,320,819.25	\$ 13,190,487.34	\$ 130,331.903	0.99%
Other Current Assets				
Inventory Asset	-7,099,848.47	-7,027,322.75	-72,525.72	-1.03%
Undeposited Funds	1,750,848.01	1,750,848.01	0.00	0.00%
Total Other Current Assets	\$ (5,349,000.47)	\$ (5,276,474.75)	\$ (72,525.720)	-1.38%
Total Current Assets	\$ 7,928,538.86	\$ 7,870,732.68	\$ 57,806.183	0.73%
Fixed Assets				
Dealership			0.00	0.00%
Accumulated Depreciation	-44,223.00	-44,223.00	0.00	0.00%
Cost	442,230.00	442,230.00	0.00	0.00%
Total Dealership	398,007.00	398,007.00	0.00	0.00%
Total Fixed Assets	\$ 398,007.00	\$ 398,007.00	\$ - .00	0.00%
TOTAL ASSETS	\$ 8,326,545.86	\$ 8,268,739.68	\$ 57,806.18	0.70%
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable				
Accounts Payable	515,295.80	493,032.67	22,263.13	4.52%
Total Accounts Payable	\$ 515,295.80	\$ 493,032.67	\$ 22,263.13	4.52%
Other Current Liabilities				
Sales Tax Payable	670,340.09	665,327.32	5,012.77	0.75%
Credit Cards				
Bank of America	45,992	45,992	0.00	0.00%
Total Credit Cards	\$ 45,991.92	\$ 45,991.92	\$ - .00	0.00%
Total Other Current Liabilities	\$ 670,340.09	\$ 665,327.32	\$ 5,012.77	0.75%
Total Current Liabilities	\$ 1,231,627.81	\$ 1,204,351.91	\$ 27,275.90	2.27%
Long Term Liabilities				
Loan - Dealership	442,230.00	442,230.00	0.00	0.00%
Total Long Term Liabilities	\$ 442,230.00	\$ 442,230.00	\$ - .00	0.00%
Total Liabilities	\$ 1,673,857.81	\$ 1,646,581.91	\$ 27,275.90	1.66%
Equity				
Net Income	33,307.49	2,777.20	30,530.28	1099.32%
Opening Balance Equity	265.34	265.34	0.00	0.00%
Retained Earnings	6,619,115.23	6,619,115.23	0.00	0.00%
Total Equity	\$ 6,652,688.05	\$ 6,622,157.77	\$ 30,530.28	0.46%
TOTAL LIABILITIES & EQUITY	\$ 8,326,545.86	\$ 8,268,739.68	\$ 57,806.18	0.70%

Report Examples

Example 4: Multi-Period Report with Variance

Multi-period templates are easily configured in Qvinci and can dynamically roll into the next reporting period without user intervention.

2/28/2017

Gallery Client
Profit & Loss Comparison
Last Month & YTD

	Feb 2017	Feb 2016	\$ Change	% Change	Jan-Feb 2017	Jan-Feb 2016	\$ Change	% Change
Ordinary Income/Expense								
Income								
Engine Diagnostic	2,255.37	398.01	1,857.37	466.67%	2,653.38	796.01	1,857.37	233.33%
Oil Change Income	1,715.85	256.49	1,459.36	568.97%	1,972.35	512.99	1,459.36	284.48%
Engine Service - Other	14,858.93	9,286.83	5,572.10	60.00%	24,145.76	18,573.66	5,572.10	30.00%
Rebuilt Engine Sales	14,151.36	7,960.14	6,191.22	77.78%	22,111.50	15,920.28	6,191.22	38.89%
Ford Car Sales	42,807.86	29,187.18	13,620.68	46.67%	71,995.04	58,374.36	13,620.68	23.33%
Ford Truck Sales	49,529.76	45,991.92	3,537.84	7.69%	95,521.68	91,983.84	3,537.84	3.85%
Total Income	\$ 125,319.14	\$ 93,080.57	\$ 32,238.57	34.63%	\$ 218,399.71	\$ 186,161.14	\$ 32,238.57	17.32%
Cost of Goods Sold								
Engine Sales COGS	7,960.14	4,422.30	3,537.84	80.00%	12,382.44	8,844.60	3,537.84	40.00%
Ford COGS	64,565.58	64,565.58	0.00	0.00%	129,131.16	129,131.16	0.00	0.00%
Total COGS	\$ 72,525.72	\$ 68,987.88	\$ 3,537.84	5.13%	\$ 141,513.60	\$ 137,975.76	\$ 3,537.84	2.56%
Gross Profit	\$ 52,793.42	\$ 24,092.69	\$ 28,700.73	119.13%	\$ 76,886.11	\$ 48,185.38	\$ 28,700.73	59.56%
Expense								
Janitorial Expense	2,122.70	1,768.92	353.78	20.00%	3,891.62	3,537.84	353.78	10.00%
Landscaping	1,273.62	884.46	389.16	44.00%	2,158.08	1,768.92	389.16	22.00%
Insurance Expense	7,960.14	7,960.14	0.00	0.00%	15,920.28	15,920.28	0.00	0.00%
68100 Telephone Expense	619.12	442.23	176.89	40.00%	1,061.35	884.46	176.89	20.00%
Internet & Cable	884.46	884.46	0.00	0.00%	1,768.92	1,768.92	0.00	0.00%
Utilities	3,758.95	3,537.84	221.11	6.25%	7,296.80	7,075.68	221.11	3.13%
TV Advertising	2,246.53	2,653.38	-406.85	-15.33%	4,899.91	5,306.76	-406.85	-7.67%
Total Expense	\$ 18,865.53	\$ 18,131.43	\$ 734.10	4.05%	\$ 36,996.96	\$ 36,262.86	\$ 734.10	2.02%
Net Ordinary Income	\$ 33,927.89	\$ 5,961.26	\$ 27,966.63	469.14%	\$ 39,889.15	\$ 11,922.52	\$ 27,966.63	234.57%
Other Income/Expense								
Other Income								
Warranty Sales	-2,292.03	-300.00	-1,992.03	-664.01%	-4,591.62	-300.00	-4,291.62	-1430.54%
Total Other Income	\$ (2,292.03)	\$ (300.00)	\$ (1,992.03)	-664.01%	\$ (4,591.62)	\$ (300.00)	\$ (4,291.62)	-1430.54%
Other Expense								
Association Dues	1,105.58	884.46	221.12	25.00%	1,990.04	1,768.92	221.12	12.50%
Total Other Expense	\$ 1,105.58	\$ 884.46	\$ 221.12	25.00%	\$ 1,990.04	\$ 1,768.92	\$ 221.12	12.50%
Net Other Income	\$ (3,397.60)	\$ (1,184.46)	\$ (2,213.14)	-186.85%	\$ (6,581.66)	\$ (2,068.92)	\$ (4,512.74)	-218.12%
Net Income	\$ 30,530.28	\$ 4,776.80	\$ 25,753.48	539.14%	\$ 33,307.49	\$ 9,853.60	\$ 23,453.89	238.02%

Onboarding with Excellence

2. Efficiently Executing Your Rollout Strategy

Qvinci's Champions Program facilitates best practices for onboarding, training and adoption. Client Champions are partnered with Qvinci Champions throughout the implementation and training phases as outlined below.

The Qvinci Champion's Program

The Qvinci for Accountants Implementation, Training Services and the Qvinci Champions: To ensure optimal client account set-up, rollout, onboarding, implementation, training results, and general customer support of the Qvinci for Accountants Platform, Qvinci shall provide, with the assistance and collaboration of the Client, the Services described below. The obligations set forth below shall be jointly shared and truly collaborative between Qvinci and Client.

A. The Qvinci Customer Support Representative and Account Executive Champions

1. Qvinci shall provide a dedicated account adoption and training team comprised of a Customer Support Representative Champion ("CSR") paired with an Account Executive Champion ("AE").
2. The CSR and AE Champions will be responsible for and empowered (with the requisite authority and reporting responsibility) to accomplish the following: convert Client account rollout, onboarding, training and implementation feedback into actionable data and results; ensure appropriate account rollout, onboarding, implementation and training strategies are developed, deployed, executed and monitored; make necessary adjustments to ensure desired Client results and improve the overall Client experience at every stage.
3. The CSR and AE Champions will:
 - a) Ensure that the Client's experience is meaningful, impactful, and long term; managing and improving the Client's experience at every stage.
 - b) Schedule and lead the Client kick-off meetings with the Firm Client Champion and Local Office Client Champion (see Section B.1. and B.2. below.) to schedule and plan the rollout, onboarding, training and implementation conversations and agree to a granular timeline for execution based on the contracted rollout schedule.
 - c) Collaborate with the Firm Client Champion to craft appropriate messaging for their Local Office Client Champions prior to the start of their rollout, onboarding, implementation, and training process.
 - d) Email the Local Office Client Champions on a weekly basis, asking for status updates on their rollout, onboarding, implementation, and training progress.
 - e) Schedule and lead bi-weekly status call updates with the Firm Client Champion (and the Local Office Champions if needed) on the progress being made per office on the new client files set up in Qvinci and the rollout, onboarding, implementation, and training progress, based upon the information derived from the Local Office Client Champions.
 - f) Host training for Local Office Client Champions.
 - g) Develop, implement and report on Client rollout, onboarding, implementation and training metrics and surveys throughout the account's lifecycle.
 - h) If delays occur, liaise with the Firm Client Champion (and the Local Office Champions if needed) to get the process back on track by communicating with the Firm Client Champion (and the Local Office Champions if needed) and to develop a plan of action and next steps based on the contracted rollout schedule.
 - i) Participate in periodic discussions with the Firm and Local Office Client Champions regarding managing and improving the Client's overall experience at every stage.

B. The Client Champions

1. **Firm Client Champion:**
 - a) Must empower the Local Office Client Champion with the authority to require the accountants and staff to participate in the process enabling the effective and efficient rollout, onboarding, implementation and training in a timely and efficient manner.
 - b) Collaborate in the Client kick-off meetings where along with the CSR and AE Champions

Onboarding with Excellence

3. Client Champion(s) Training Overview

Setup and Basic Report Training

In the first phase of training a Client Champion will learn how to setup the account, add client companies, sync accounting files, setup additional users, and configure as well as map to a Standard Chart of Accounts (if applicable). Additionally, this phase of training encompasses navigation and usability.

The second phase revolves around basic reporting, templating and packaging of deliverables. Client Champions will learn the difference between a report and a template as well as how to configure both in Qvinci. Once sample templates are configured, a walkthrough of packaging multiple assets into a single deliverable will take place. Finally, Client Champions will understand the setup process as well as the beginnings of reporting, templating and packaging.

Custom Reporting Training

In the custom reporting training, Client Champions will further explore how to create dynamic templates in Qvinci's Report Editor by using macros to drive the datasets. During this training, Client Champions will learn best practices for creating custom formatted templates that service many clients as well as how to create specially designed reports for specific clients. At the end of this training Client Champions will have an initial suite of templates in the account, a skillset for expanding their Report Library, and a good understanding for best practices regarding custom reporting and templating.

QuickStart Document

The QuickStart Document serves as a reference guide for Client Champions and provides answers to the most frequently asked questions relating to getting started, account maintenance, reporting and templating as well as other common topics. This document links to the Qvinci Knowledge Base for further insight and guidance.

Accountant QuickStart Documentation Tools and Resources

Getting Started Videos

The Qvinci.com Help Desk has several short videos to introduce different areas of Qvinci.

1. Visit www.Qvinci.com and from the bottom of the page under Support select Knowledgebase in order to migrate to the Webinars & Tutorials section.
2. You can also find the Webinars & Tutorials section from inside your Qvinci dashboard account under Help > Help Topics > Knowledgebase > Qvinci for Accountants.

Champion Training Documentation

Account Access

The Qvinci Admin must provision access to the Champions/Qvinci Leaders. It is most common practice that these Champions/Qvinci Leaders who will provision access for additional users in the account, whether at the Account/firm level, or at the Client level. Upon setup a new user will receive an invitation from Qvinci to "activate account" by setting a password. If a password recovery is necessary visit the Login page at www.Qvinci.com and utilize the Forgot Password workflow. You may also contact Qvinci Support at www.Qvinci.com for assistance.

New Client Setup

The Qvinci Admin and Leaders have the ability to set up new Client Companies in Qvinci. **NOTE:** Most firms will always utilize the Qvinci Enterprise subscription model, which allows for consolidation of multi-entity Clients, but also allows for added functionality such as more robust templating. Therefore, even if a Client is a single-entity operation, the Qvinci Admin or Leader likely should set up the Client under the Enterprise (multi-entity) workflow.

Financial Impact

When it comes to providing automated financial consolidation, reporting and business intelligence solutions to accounting firms, Qvinci for Accountants is the industry leader. Its enhanced functionality and value-added reporting capabilities have made it the go-to cloud solution for accounting firms of all sizes.

This calculator illustrates how Qvinci will improve your realization rate and increase profits as we have done for many others. The green cells are populated with the averages provided by other firms. Please adjust them to reflect your firm's specifics.

ROI When Using Qvinci to Template, Package and Publish Reports		Current Process	Qvinci Process	Pricing Matrix		
				Client Files	Annual Payment	Monthly Payment
				Per File	Discount	Per File
5	How many client files do you have?	750	750	1 - 500	\$215.40	\$19.95
6	Reporting frequency per month (1, 2, 4, 30..)	1	1	501 - 1000	\$204.60	\$18.95
7	Time (mins / client file)	5	0	1001 - 2500	\$193.80	\$17.95
8	Open QB, create and export reports	5	0	2501 - 5000	\$183.00	\$16.95
9	Update and style "all" reports (Cover Page, TOC, P&L, BS, BvA, ...)	5	0	5001 - 10,000	\$172.20	\$15.95
10	Package / print / send all reports	3	3	10,001+	\$161.40	\$14.95
11	Total FTE Time / month (hrs)	825	50			
12	FTE man months needed	4.69	.28			
13	FTE Monthly salary	\$5,000.00	\$5,000.00			
14	FTE overhead	35%	35%			
15	FTE costs	\$31,640.63	\$1,917.61			
17	Software / systems costs / overhead per client file	\$1.00	\$18.95			
18	Total software systems costs / month	\$750.00	\$14,212.50			
20	Total Costs Comparison	\$32,390.63	\$16,130.11	Labor amount saved using Qvinci		
21	Monthly Labor Savings		\$16,260.51			
Revenue Opportunities						
24	Total FTE Time / month (hrs)	825				
25	% Utilization	50%		Percentage of recovered time converted into billable hours		
26	Billing Hours Available	412.50				
27	My billing rate	\$125.00				
28	Monthly Total Potential Net Revenue Increase		\$51,562.50			
30	Monthly Net Financial Increase		\$37,350.00	Incremental Revenue minus Qvinci cost		
32	Annual Net Financial Increases		\$448,200.00			
35	NOTE:					
36	The data, pricing model, and/or costs estimates provided herein is the exclusive property of Qvinci Software, LLC.					

Hopefully this document effectively illustrates why firms of all size have implemented Qvinci based on the realization that they couldn't afford NOT to.

Please contact us at (844) 422-5037 or info@qvinci.com to communicate with one of our Solution Consultants about your specific goals and objectives. Thank you for taking the time to gain a greater understanding of the power Qvinci delivers to the accounting profession.

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