

QuickBooks System Optimization

VIP SOLUTIONS CASE STUDY

VIP

BACKGROUND

Our QuickBooks-based client needed support selecting and implementing a system to automate manual processes that were decreasing efficiency.

After performing discovery and system selection, we determined the organization did not have the internal controls or staff to support an ERP implementation. Upon our recommendation, we helped our client fully utilize and optimize their QuickBooks system to prepare their organization for a full ERP implementation.

OBJECTIVES



Perform discovery to understand functional needs for new system



Document current-state process flow



Align chart of accounts to go-forward reporting and QuickBooks modules to future-state processes

SOLUTIONS



Mapped and loaded chart of accounts and integrated lists



Integrated purchase orders and sales orders into QuickBooks

**Oil & Gas
INDUSTRY**

**95
EMPLOYEES**

**\$25.8M
ANNUAL
REVENUE**

**Determined future software need and
OPTIMIZED QUICKBOOKS SYSTEM
to meet existing needs of the organization**