

# SDG Business Solutions, LLC

## QuickBooks® Client Newsletter



December, 2007

Volume 1, Page 1

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### POS Upgrades from SDGBS

License Upgrades (for existing clients only with a prior minimum of 5 hours on-site consulting)

#### Basic

List - \$499.95  
Our Price - \$379.99

#### Pro

List - \$699.95  
Our Price - \$549.99

#### Multi-Store

List - \$899.95  
Our Price - \$699.95

### Contact Us

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## A Personal Message



Hello. My name is Steve Green and I am the owner of SDG Business Solutions, LLC. I wanted to take this opportunity to introduce myself and welcome you to our first newsletter.

It is our intention to publish this document quarterly and include information that will be of value to both QuickBooks Financial and QuickBooks Point of Sale users.

For those of you that may not be aware, Intuit has recently released new versions for both the QuickBooks Financial family of products and QuickBooks Point of Sale. There are some exciting new features in both these product lines. In this issue we will share information with you about our favorite enhancement for each product.

For more information about our firm and the services we provide, please visit our website – <http://www.sdgb.com>

## Special Notice

**Our office will be closed from January 10<sup>th</sup> to January 20<sup>th</sup> of 2008. If you need immediate phone support, you can purchase one-time phone support from Intuit. Their support number is 1-800-348-0254**

## Our Favorite New Feature for QuickBooks 2008: Credit Card Protection (Write up on next page)

QuickBooks Merchant Services also includes these benefits:

- Simple to use and manage – Everything you need is in QuickBooks (optional card swipe available)
- Great rates and no long-term commitment, 24/7 free phone support
- Retains customer card info on-file with no re-keying needed at time of sale
- Paperless billing (email and have your customers click through to pay)
- Get paid faster (collection problems? – accepting credit cards can help)
- Recurring transactions (Weekly, Monthly, Quarterly – It just happens)
- Easy Reconciliation (check for funding status directly within QuickBooks)

Want it or want to learn more? Call or Email ([Sgreen@sdgb.com](mailto:Sgreen@sdgb.com)) us to let us know and we will have our dedicated Intuit representative contact you and walk you through the application process.

New QBPOS Installation Package Examples from SDGBS

Minimum Consulting Package



- QBPOS Pro License
- Cash Drawer
- Bar Code Scanner
- Receipt Printer
- Credit Card Swipe
- 5 Hours of Training
- \$2,048, plus tax

Compare to MSRP for license and hardware only  
 – NO CONSULTING - of \$1849.95, plus tax

Mid-Level Consulting Package



- QBPOS Pro License
- Cash Drawer
- Bar Code Scanner
- Receipt Printer
- Credit Card Swipe
- 15 Hours of Training
- \$2,923, plus tax

Top -Tier Consulting Package



- QBPOS Pro License
- Cash Drawer
- Bar Code Scanner
- Receipt Printer
- Credit Card Swipe
- 30 Hours of Training
- \$3,898 plus tax

### Why We Think This Is So Important?

Anyone that accepts credit cards is required to maintain certain security standards, both inside and outside of QuickBooks. Failing to do so can leave your business liable for fines or other damages if your customers' credit card information is ever compromised. Compliance standards are available for your review by visiting: <https://pcisecuritystandards.org>

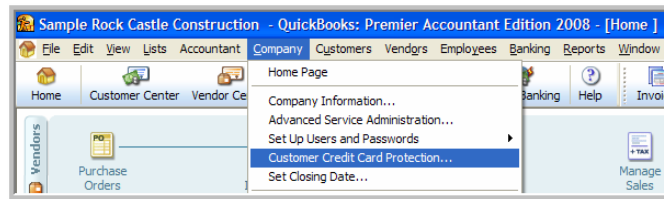


Click on the box shot above to buy at 20% off and get free shipping or visit our website at <http://www.sdgb.com>

### How Credit Card Protection Works Within QuickBooks Financial Software:

It is certainly important to review and understand all of your responsibilities regarding credit card compliance. However, we are pleased that with QuickBooks 2008, Intuit has taken significant steps to assist you with handling compliance; especially for those of you that store credit card information within QuickBooks at the customer record level. To see how this great new feature works, read on.

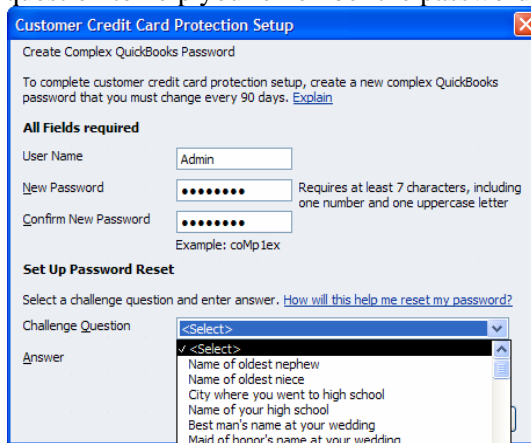
- Turning on the feature – Log in as the Admin user and from the Main Menu, choose **Company>Customer Credit Card Protection**



- Click on the **Enable Protection** button



- You will then be required to create a “strong” password for the Admin user that meets PCI standards. This password will need to be changed every 90 days. You will also need to create a challenge question to help you remember the password



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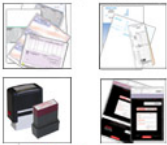
## Time for 1099 and W-2 Forms

*Don't forget to get  
checks, forms and  
supplies for  
QuickBooks  
Financial Software.  
Click on the link  
below to be  
directed to that  
web-site and*



### Guaranteed Lowest Prices Nationwide!

Checks, Deposit Slips, Stamps, Deposit Bags

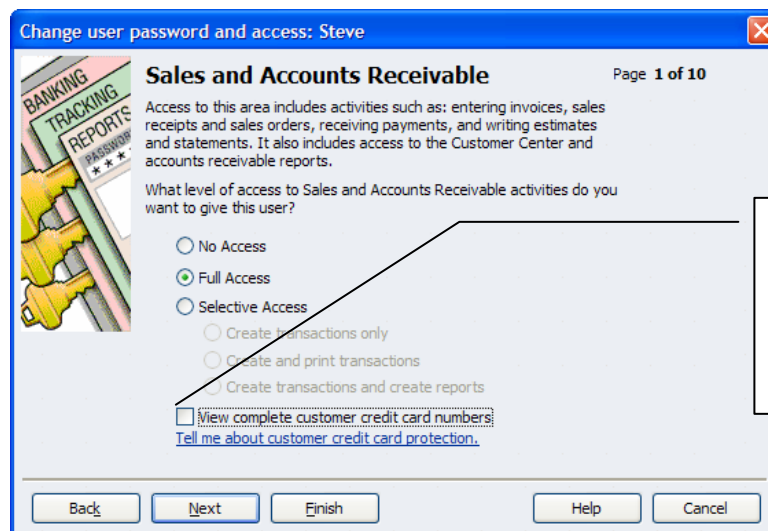


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- Next, you will be instructed on what you should do within QuickBooks to complete the process of setting up the appropriate security options for other users on your system



- If you need to do so, the following steps will guide you through process of removing user access to view complete credit card numbers
  - Log in as admin
  - From the main menu, choose **Company>Set Up Users and Passwords> Set Up Users**
  - Enter the admin password in the window that appears and click on **OK**
  - Select the user you want to modify and click the **Edit User** button
  - Pass through the *User Name and Password* window by selecting **Next**
  - If the user is currently set to *All Areas of QuickBooks* you will want to change it to **Selected**. If it is already set to **Selected** no change is required. Click on **Next**
  - In the Sales and Accounts Receivable window, remove the checkmark next to the *View complete credit card numbers* option. No other changes are required on this page. Click on **Finish**



Make sure  
this is  
unchecked  
and click  
on **Finish**.

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## Product Pictures Available In QBPOS V 7

### Why We Like This New Feature



Click on the logo-link above for POS discounts from Intuit or visit our website at <http://www.sdgbs.com>

It was actually pretty hard to choose our favorite new feature for QBPOS 7.0, though pictures did win out. Not only do we think it will increase the accuracy of transactions, but it likely lays a foundation so that those with web-stores might move pictures up to their website.

Those new feature that also rank high on our list include:

- **Rewards Manager** (Customer loyalty discounts)
- **Shipping Manager** (UPS only at this time)
- **Seamless Credit Card Integration** between QBPOS and QBFS (the ability to click on a button and “get funding status” is really cool)
- **Multi-Store Exchange** – both scheduling of and the new transfer method; “Intuit Service” (It is free and the way it works is like magic)
- **Long Item Descriptions** – seemingly unlimited characters for your second product description
- **Manager Override Security Restrictions** - “I need a manager override on workstation 1” (at long last!)

### How It Works

When you add pictures to items, not only can you see the picture when reviewing the products at the item level, but they will also be displayed when listing items on both sales and purchasing documents. Two pictures can be added for each item quite easily by editing the item directly as you will see in this document, but it is important to note they can also be imported and matched to existing items in the database; saving you the time and effort of adding each picture one at a time. In either case, you can use pictures formatted as jpg, tif, gif or bmp.

### Getting Started

- First you will need to turn the feature on. From the main menu, choose **Edit>Preferences>Company**
- Navigate to the **Inventory** section and check the box next to “I want to associate pictures with my inventory items” and click on **Save**
- Open up an inventory item that you want to associate a picture or two with so that you are in the **Edit Item** window and go to the **Item Pictures** tab
- To add a picture, click on the + symbol and you will be presented with the opportunity to browse your available drives for the picture you want to use. Click on **Open** to add the picture and it will be displayed within QBPOS

Click on this icon to search your drive(s) for the picture you want to use.

You can switch the default picture to be used here.

You can also right click on the picture box for a drop down menu.

- It is also worth noting that you can view either picture when working within a document. By clicking on the picture that is displayed, you get a larger view of it and can change to see the second picture

Click here to move between pictures.

Click the picture for a larger view

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## Upcoming Events

Steve will be presenting information on QuickBooks and QBPOS at several upcoming events. If you are interested in attending a seminar or webinar, please visit our website for more information. Currently scheduled events include:

Course	Format	Date	Target Audience	Organizer
QuickBooks, The Undisputed Choice for Working with Shoe Box Clients	Webinar	12/19/07	Accountants and Consultants	Intuit
QuickBooks Essentials Training	Seminar	1/29/08	End User	El Dorado Hills Chamber of Commerce
What's New for QBPOS 7	Webinar	TBD	End User	SDG Business Solutions

## Featured Products

<p>Sorry – no picture available at this time</p>	<p><b><u>Zebra LP-2824 Printer</u>      <u>\$165.00</u></b></p> <p>We have a small number of unused, but open box Zebra printers that work with QBPOS. They have no manufacturer warranty, but have been bench tested and we will accept a return for up to 45 days after purchase should the unit fail. Compare to Intuit price for new model of \$369.95.</p>
<p>Sorry – no picture available at this time</p>	<p><b><u>Cypher Labs Physical Inventory Scanner</u>      <u>\$525.99</u></b></p> <p>These physical inventory scanners are last year's model for use with QBPOS. If you have shopped for these in the past you know that they list for around \$700. We can still get this model for you and have it programmed to work with QBPOS</p>



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