

Right Networks Transaction Pro Customer Success Story

Kim Mallard, CPA

The Company

A PricewaterhouseCoopers veteran and accounting instructor at East Carolina University, Kim Mallard had been practicing on and off as a CPA for several years before deciding to start a firm on her own in January 2021. She provides accounting, tax and bookkeeping services to clients.

The Challenge

Mallard was using QuickBooks Online Simple Start when she discovered that QuickBooks Online Accountant would be more useful for her firm. She used the bookkeeping application Financial Cents to track her billable hours and integrated the app with QuickBooks Online Accountant, but she couldn't get existing billing information from QuickBooks Online Simple Start into QuickBooks Online Accountant.

"My time was in Financial Cents, but I couldn't do my billing," Mallard says. "This was a big pain point."

The Solution

Mallard turned to Transaction Pro. With some help from a dedicated Transaction Pro expert, she was able to migrate all of the data stored in QuickBooks Online Simple Start to QuickBooks Online Accountant in about four hours. Previously, manually migrating information on just one client from QuickBooks Online Simple Start to QuickBooks Online Accountant had taken that long, if not longer.

The data-migration capabilities in Transaction Pro enabled Mallard to move data quickly and easily into QuickBooks Online Accountant so that she could later use the data in Financial Cents as well without the need for manual intervention. Now, whereas her billing process was once cumbersome and time-consuming, it's automated and simple.

"Now I can pull up the customer, and Financial Cents will feed into QuickBooks Online Accountant the amount of time I've spent on that customer," she says. "QuickBooks Online Accountant also feeds to

Financial Cents. All services and rates are feeding into it. None of that was possible until I used Transaction Pro to move data from QuickBooks Online Simple Start to QuickBooks Online Accountant."

Why Transaction Pro?

Mallard joined Rootworks, the Right Networks firm-improvement consultancy, in mid-2021 and discovered Transaction Pro. Transaction Pro customer service was a huge help in her migration.

"If you're going to do a migration, you need to do everything in the right order," she says. "It's a ton of data that I was migrating over. My Transaction Pro expert provided the handholding that I needed to not be afraid of screwing it up."

The Impact

For starters, Mallard was able to drop the monthly fee she paid for her QuickBooks Online Simple Start account once she fully migrated her data into QuickBooks Online Accountant. It's not a lot of money, but every little bit helps as she builds her business.

More importantly, automated billing is a major timesaver for a CPA running a sole proprietorship. Transaction Pro enabled Mallard to automate her billing process and save hours of work, letting her invoice and get paid faster, and enabling her to spend more time working for clients rather than keeping her books.

"I wanted the invoices in QuickBooks Online Accountant, the payments, the credit card payments," she says. "I have all of that flowing into QuickBooks Online Accountant now. I can look at invoices from 2017. I couldn't do that before. Transaction Pro helped me get to that point where things are automated now. It really is a huge timesaver."