

ECONOMIC DEVELOPMENT ORGANIZATION SPARKS PRODUCTIVITY AND EFFICIENCY WITH GLOBALSEARCH® AND QUICKBOOKS INTEGRATION

Case Study:
Ann Arbor Spark
with **Lisa Bies**, Staff Accountant

Industry:
Non-Profit Organization Management

Departments Impacted:
Accounting

Featured Products:
GlobalSearch® with the QuickBooks Integration

Objectives:
Needed a solution to eliminate the manual paper invoice process in the accounting department



Meet Ann Arbor Spark

Based in the Ann Arbor region of Michigan, Ann Arbor Spark is an economic development organization and business accelerator. Focusing on supporting small start-up organizations in the technology industries, Ann Arbor Spark helps provide business accelerator grants to organizations to help them complete jobs across various aspects of their business, including website development, coding, video production, and more.

Challenge

After consolidating their two locations across the street from one another, Lisa Bies, Staff Accountant at Ann Arbor Spark, was looking for a solution to eliminate the manual paper process in their accounting department. To process the payment for the consultants who've helped organizations complete jobs, they would need to print the invoices and then enter the correct information into their CRM, Salesforce. After this step, Lisa would take the invoices over to their Senior Vice President of Business Acceleration to manually sign and approve each invoice. Each customer using a consultant would then need to approve the invoice as well. Lastly, all the approved documents would then need to be printed, attached, and stored in their office for their yearly audit.

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Our biggest pain point before implementing GlobalSearch was when I would have to input all the invoices into QuickBooks manually, said Lisa Bies.” “We generally have 30-40 invoices to process a month, depending on what work was completed for our clients. We are a small but mighty team, so the manual process was time-consuming,”

Lisa Bies



Solution: GlobalSearch®

Michigan Office Solutions, a partner of Ann Arbor Spark, who helps with their printing services, highly recommended Square 9's GlobalSearch. "We looked at a couple of other solutions, but we ultimately decided to go with GlobalSearch because of the recommendation from Michigan Office solutions," said Bies. The implementation process included mapping the correct fields in GlobalSearch to connect correctly into QuickBooks. The pandemic did slow down the process slightly, but with a couple of tweaks and some help from the Square 9 Professional Services team, they got it working right.

Benefit

"Everyone is pleased with our new solution, especially the Senior Vice President, who previously had to sign everything manually. Now he can quickly go into GlobalSearch and approve invoices automatically using the approved stamp," said Lisa Bies.

GlobalSearch has cut down a lot of paper use and printing for Ann Arbor Spark. The consultant invoices come in sporadically. When Lisa had a lot of invoices to process, she would previously spend 3-4 hours manually entering them into QuickBooks.

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"I save so much time on cross-checking invoices in the CRM and QuickBooks. Now it takes 30-60 minutes to approve a large pile of invoices, saving about 10 hours per month," said Bies. "I'm able to look at my reports and cross-check them in GlobalSearch, giving me more time to focus on other projects"

_____ Lisa Bies

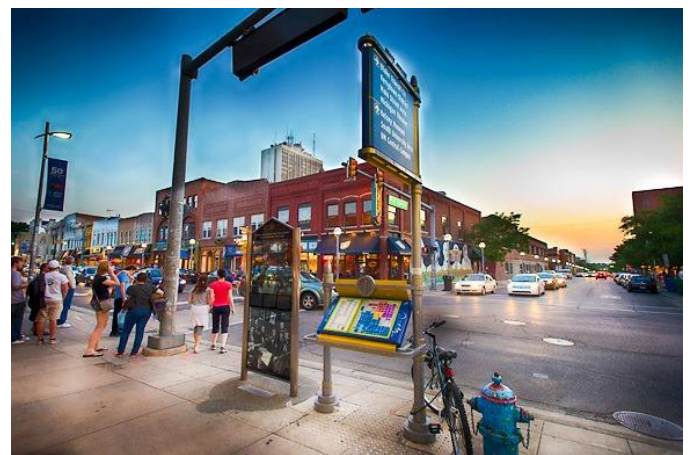
Result

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_____ "The QuickBooks integration has been such a time saver. I get exactly what I need to process the invoices accurately. Being remote with the pandemic, GlobalSearch has helped us immensely. We no longer have to be in the office or wait for team members to approve the invoices manually"

_____ Lisa Bies

When we asked Lisa, what feature she loves the most, she said, "The ease of getting the correct information into GlobalSearch has been great! It's easy to connect with QuickBooks, and all of our invoice information flows properly." Lisa also mentioned she would recommend GlobalSearch and has recommended it to a few other companies they work with.



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