

GETTING MORE FROM . . . QUICKBOOKS – SIMPLIFYING CUSTOMER PAYMENTS

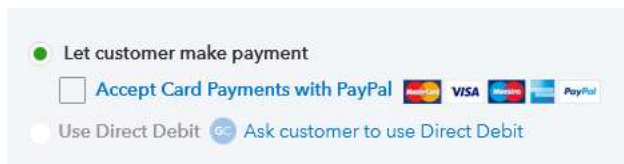
How do I Simplify getting payments from Customers against their invoices ?

Quickbooks has feature(s) that enable invoices that are sent to Clients or Customers from the accountancy software to be paid either immediately, or in some cases, automatically on the due date – **using the payment providers PayPal or GoCardless !**

The '**Payment service**' feature in Quickbooks can be successfully used both with 'standard' invoices raised to clients or customers, as well as for regular (or '**recurring**') invoices.

How do I setup this feature within Quickbooks ?

The '**payment service**' feature varies slightly depending on the payment provider being used by the business, but can be created from the Invoice page



- **For Paypal** – Quickbooks connects to the Paypal app and customers can then make payments online from a '**link**' attached to the each invoice
- **For GoCardless** – Quickbooks connects to the GoCardless app and customers can make either '**one off**' or regular direct debit payments against invoices issued from Quickbooks

NOTE - It also requires that the business has, or can setup, an account with PayPal and GoCardless to receive monies.

Why should I use it in my business ?

It is recommended for most businesses that issue invoices with a value of **up to £5,000**, who struggle with

1. '**on time**' payments from customers, or
 2. want to minimise the time spent on '**credit control**' issues !
- **Save time** – remove most, if not all, of the time and effort currently being spent by the business on '**credit control**', or in other words, chasing payment of invoices from customers.
 - **Improve business cashflow** – get paid by your clients or customers quicker and more easily - ensuring that more of **Your** cash is in **Your** bank account
 - **Accurate data** – Quickbooks will automatically ensure that the payments and the Paypal or GoCardless fees are recorded accurately in the accountancy software



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Do I need to set it up in Quickbooks ?

Yes – the apps both need to be **'connected'** to Quickbooks for all payment options !

There is a straightforward **'connection'** process between Quickbooks and your business PayPal or GoCardless account.

However it is important to ensure that the **'links'** between the bank accounts and fees account in Quickbooks are accurately identified against the equivalent fields in PayPal/GoCardless to ensure that the transactions can be automatically captured.

Is there any additional cost or is it included in my current subscription ?

No – this is a feature that is part of your existing Quickbooks software subscription.

There may be a small 'support' fee where you require additional assistance to make the **'connections'** between Quickbooks and **PayPal or GoCardless** operate efficiently.

Can the Sakura Team assist with this ?

Yes - if you are on our **Quickbooks Support service**, then arrange a call with Nasima who will be happy to discuss any issues or to assist with the **'connection'** process.

