



10 Unmistakable Signs Your Business Has Outgrown QuickBooks

AN ERP SOLUTION IS EASIER THAN YOU THINK!

Innovia Consulting | 1062 Oak Forest Dr., Suite 300 | Onalaska, WI 54650

innovia.com | 1-800-834-7700 | sales@innovia.com



INTRODUCTION

Helping You Make the Right Call to Keep Your Business Going Strong!

If you are using QuickBooks to run your business, like Safewaze was, you might be running into problems ... QuickBooks is designed for and intended to be used by small businesses. It works well for that purpose and is a quality product, but as soon as you start trying to keep data and inventory moving at a complex business like a manufacturer or distributor, deficits start to appear. As you grow, what worked for you before may no longer be working for you now.

It is a bit like trying to dig up a stump with a garden trowel, isn't it?

Of course, there is a good reason you are trying to stretch the functionality of your software. Your business already has it, your team knows it, and the alternative, a true ERP system, is too big of a hassle.

The truth is, though, that Microsoft Dynamics 365 Business Central, Microsoft's affordable cloud-based ERP, makes it easier than ever before to upgrade your accounting system! You'll see why as we explore the **ten unmistakable signs that a move from QuickBooks to an ERP system is no longer just a nice idea but a strategic business imperative.**



“We went from QuickBooks, where planning for manufacturing and future purchases were almost impossible, to a system that is easy to use and plan with.”

[Click Here to Read the Entire Case Study](#)

— ROB ZUCCARELLI, FINANCE MANAGER

SIGN 1

Most of Your Reports Come from Manual Excel Sheets

One of the most frustrating things your team members may encounter with QuickBooks is the inability to provide adequate reporting from within the platform. To compensate, they will export data from the system and manipulate it for presentation with Excel spreadsheets. This means that the data you get will not be up-to-date and will not link back to the appropriate records within QuickBooks.

If you have been wondering if there was a better way ... you are right!

Business Central has robust internal reporting features, including the ability to personalize your role center so that much of the data you want to see appears right when you log in.

Beyond that, Business Central easily ties into Power BI, Microsoft's premier Business Intelligence tool. In this environment, you can slice your data up in virtually any way you can imagine and create detailed reports that tie back to the actual records in your ERP system.

If you are getting most of your reports from Excel spreadsheets, it is also probably contributing to the next sign ...



SIGN 2

You Cannot Report Data Before It Is Out-of-Date



See if this scenario matches what you experience. The quarter is ending, and you are preparing a report for your supervisor.

How long does this process take you? Did you start running reports in QuickBooks several weeks in advance just so you have enough time to manipulate the data in Excel to match the reporting requirements?

You need to make decisions every day. If your data is not real-time, it is a bit like driving while looking in the rearview mirror. That may have been okay a few decades ago when most of the business world operated at a similar pace, but today, you can bet your competitors are moving faster.

QuickBooks' main reporting problem is a deficiency of real-time information. The solution: real-time data access and reporting with Business Central. With it you can get:

- **Insight into business trends**
- **Better analytical tools for decision-making**
- **Faster report creation**

SIGN 3

You Need Solutions to Problems Only Manufacturers or Distributors Have

To succeed as a manufacturing or distribution business, you need to solve problems that are highly specific to your industry. If you must do that in a system that does not focus on these aspects of the business, that is just one more thing you have to worry about.

If you are running QuickBooks, you may need more features than your system provides. You lack a full-featured solution that meets the unique business problems you are facing. If you are looking for any of the following features, implementing them in QuickBooks will be a monumental challenge, but Business Central makes it easy:

- **Serialization and lot tracking**
- **BOM, route, and work center management**
- **Order processing synched with product availability**
- **Inventory tracking across any number of locations and predictive restocking policies**
- **Integrated shipping and labeling**
- **Cross-docking and dropshipping support**
- **Available to promise and capable to promise**

SIGN

4

Your Business Has Multiple Locations or Warehouses

As your business evolves, it is natural that you will open more than one distribution center. You need a system that can keep up! QuickBooks does not have the capacity to make this easy on your team, for a few reasons:

1. **If you are using the on-premise and desktop systems, accessing data remotely is challenging.** This issue is compounded when IT resources are limited or non-existent. A cloud-based system is more appropriate to a multi-location business. While QuickBooks does have a cloud solution, at a certain point of growth, your users may start experiencing poor performance due to high system usage. Business Central scales easily and takes advantage of Microsoft Azure technology so the cloud can always meet your needs.
2. **The way QuickBooks tracks information does not allow for easy analysis by location.** Its location-tracking ability is minimal compared to the fully customizable reporting options available in Business Central.
3. **Do you need to form inventory and production plans that take multiple locations into account, including their inventory and production capacity?** QuickBooks simply does not allow you to plan on that scale.

With Business Central, you can support as many locations as you need with:

- **The ability to access your data anytime, anywhere, and from any device.** It doesn't matter if you're in the office, on the production floor, or in the football stands.
- **Easy access for on-site or remote employees** with desktop, mobile, and web apps.
- **The latest security features from Microsoft 365** to keep your data safe.

If you are running QuickBooks, you likely have systems set up at each location. It can be difficult to manage. What if that was not the case? What if all your locations fed information into one database in the cloud? With Business Central, they can.

SIGN 5

You Cannot Meet Your Customer Demands Within Your Software



Especially if you distribute to a large retailer or work with a sophisticated wholesale partner, you may find that QuickBooks does not help you meet their demands. For example, many of these companies require their suppliers to use an EDI. While QuickBooks has some EDI offerings, none are truly integrated like they would be with Business Central. And there's great news if you are using SPS or TrueCommerce: you don't have to switch! In fact, you'll enjoy better integration with Business Central.

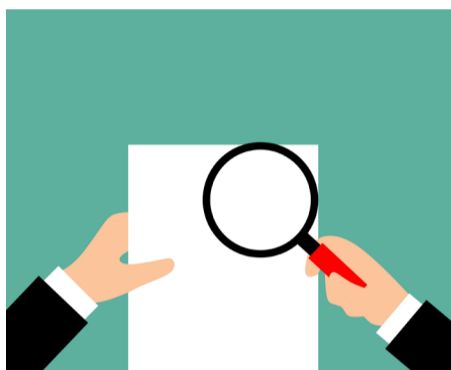
Yes, your customers might bend the rules or come up with a workaround if they really need what you are offering; but you can bet that if a competitor comes in who offers the features they need, they will be switching. As soon as you see this happening, it is time to be proactive and get a solution like Business Central that offers the level of sophistication your customers expect.

This issue is particularly pronounced when we consider the next sign.

SIGN

6

You Need Better Financial Controls



The world of finance has many regulations, and it should. Everyone—from providers to end-users to the IRS—needs to be vigilant to prevent the possibility of fraud and other forms of malfeasance. Not only should you be concerned with preventing these issues from occurring, but you also need the data to prove they are not occurring. To help meet that challenge, you need financial controls.

One particularly glaring deficiency in QuickBooks' system is that you can go back and edit a source document after the posting process. To comply with the Generally Accepted Accounting Principles (GAAP), your source documents need to be permanent. In order to change something, you need to void the transaction and then issue a new one so that a clear audit trail is established. If there is a possibility that someone went in and changed information instead of following this procedure, you may have a tough time proving that your finance office did what it said it did.

With Business Central, you never have to worry about this potential blind spot because it does not exist in the programming. It requires you to act in GAAP-compliant ways so that you can confidently enter your next audit knowing that the trails are there and that the books say what you think they should be saying.

SIGN 7

You Rely on Multiple Platforms for Your Business Solutions

At a certain point of growth, you probably needed to seek out other software platforms to solve business challenges you face. Managing inventory is a very common challenge manufacturers and distributors need to solve. QuickBooks simply does not do this, so your only option is to seek out third-party software solutions outside of your system. While Fishbowl and similar products are great, the problem is now you are managing two systems with all the added complexity that comes with that.

For small teams or in limited cases, this might be okay. People adapt, learn, and compensate for the lack of integration. However, once you start adding more team members or more third-party systems, it quickly becomes unmanageable.

The solution: Seek out one system that can consolidate the functionality you need into one place. Doing so streamlines your processes. You reduce the number of “copies” of your data because you are working in an all-in-one solution.

Business Central SaaS comes with built-in functionality for:

- **Inventory management**
- **Warehousing**
- **Manufacturing**
- **CRM**

All in addition to the accounting features you need. As you are seeking to get as close as possible to an all-in-one solution, Business Central can help!

SIGN 8

Users Are Complaining About the System

One of the surest ways to know if you need an upgrade to your system is to listen to your team members. Do they like the system you have? Or are they complaining about it?

No one wants to have a vision for how they can do their work most effectively and then run into technological roadblocks. If your users are running into these challenges, there is a good chance your retention rate may be hurting before too long as well!

Generally, user complaints fall into one of two broad categories:

1. **Features** – Most of the deficiencies we discussed above fall into this category. Your users act as your barometer to measure if you are missing critical features.
2. **Performance** – The system might respond slowly to input or error out unexpectedly. If your users feel that a process should not take as long as it should, they will let you know.

Business Central SaaS has you covered on both fronts. It offers a far more comprehensive set of features than QuickBooks, and for your performance woes, it runs on Azure, Microsoft's cutting-edge cloud server solution.

What makes this platform so much better for your business system? It comes down to scalability and uptime. Azure allows you to pay for the power you need, and if you ever need more, adding on is simple, allowing you to quickly scale up as your business grows. To make you feel confident in your uptime, Microsoft guarantees 99.9% availability of the service. Can the server hosting your QuickBooks installation do the same?

SIGN 9

You Need Integration with Outlook and Other Office Applications

Do you use Excel, Word, Outlook, and other Microsoft applications in your office? If so, you likely wish they could work more readily with your accounting system. After all, integrating these products would save you a lot of time moving information back and forth. In fact, what if you could interact with your system right from a customer email in Outlook?

Here is where getting an ERP system from one of the top software companies in the world comes in very handy! Business Central is owned by Microsoft, so it's no surprise that it works seamlessly with the Microsoft 365 programs you love. No third-party connector needed.

Consider all your team members that may not be familiar with your accounting system but do work that you would like to track within it. Training them on all your QuickBooks functionality is time-consuming and unnecessary. Business Central offers a solution. As the only Microsoft-owned ERP solution for the mid-market, your users can remain in the office applications they know and love while having your data seamlessly integrated.





BUSCH
SYSTEMS

I switched to Innovia as our partner of record primarily because of the depth and breadth of knowledge that each member of their team brought to the table. That's what I was missing: Getting the feedback I needed to move forward.

[Click Here to Read the Entire Case Study](#)



— MARTY PEPPER, VP OF OPERATIONS

SIGN 10

You Need a True Partner that Gets and Invests in Your Business

When you purchased QuickBooks, you probably bought it and implemented it on your own, but the most successful business leaders bring in outside expertise to maximize their ROI. No different than your CPA, attorney, or other trusted advisor, your Microsoft partner will add value to your business over the long term.

What if when you hired a firm to help with technology, they:

- **Met with you quarterly with a non-billable, experienced business professional who could offer expert advice on your technology priorities and business processes.**
- **Offered a full-service support team that can get your system back up to speed whenever you encounter any problems.**
- **Provide you with free training resources, including regular blogs, webinars, conferences, podcasts, and more.**

Innovia is proud to be this kind of partner. We have helped many companies just like yours make the transition from QuickBooks to Business Central. We know the path, and we can guide you along the way.

When it comes to your industry, Innovia's got that covered, too. Our team has decades worth of experience in the manufacturing and distribution sectors. You can trust that what we are bringing to you is truly a "best practice" that we have seen work time and again.

You have gotten this far, how about one more step?

Schedule a free needs analysis
consultation today.



Hi, I'm Andrew,
Find a time that works for you!

[Click Here to Schedule Your Consultation](#)

Or if you want more information, contact us today at
1-800-834-7700 or send a message to sales@innovia.com.

