



Jennifer L Untiedt, LLC benefits from productivity gains of 80% by automating data entry with AutoEntry

OVERVIEW

Jennifer Untiedt founded her accountancy practice following a long and successful career working in the industry. Based in Northern Colorado, Jennifer Untiedt is a certified QuickBooks ProAdvisor, and offers services including bookkeeping, payroll and tax preparation.

The practice adopted AutoEntry in mid-2017, in order to eliminate time spent needlessly on manual data entry, securing significant time and cost savings as a result, and enabling the firm to reinvest these resources into business growth.

OVERCOMING THE CHALLENGE OF MANUAL DATA ENTRY

Jennifer L Untiedt, LLC was increasingly challenged by manual data entry related to bookkeeping. As it took on more

bookkeeping clients, the firm had more data to process, which was taking up too much time and attention to reconcile.

Jennifer Untiedt, founder of Jennifer L Untiedt, LLC comments, "We wanted to grow our bookkeeping services, however we couldn't justify the time we would need to spend on the ensuing data entry. We quickly came to the decision that we needed to automate this function in order to expand our business whilst staying profitable, and this led us to AutoEntry."

INTEGRATING WITH QUICKBOOKS ONLINE

Jennifer Untiedt has been using QuickBooks software for over 12 years in practice and is a certified QuickBooks ProAdvisor. Therefore, it was a prerequisite that the chosen data entry solution should be able to effortlessly

integrate with QuickBooks software. After reviewing all available options, the firm adopted AutoEntry.

Jennifer Untiedt comments, "A benefit of being a QuickBooks ProAdvisor means that you can access a range of informative online resources in order to stay ahead of industry trends and provide the best service possible to customers."

Jennifer Untiedt continues, "AutoEntry was recommended to us within this ProAdvisor network, so we signed up for its free trial. We were immediately impressed with how quickly and accurately it extracted the data from our paper documents into our QuickBooks account. We had initially considered other solutions, but we felt that AutoEntry offered the best value for money, whilst being more functional and so easy to use."

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“Adopting AutoEntry was undoubtedly the right choice for our practice, and with all of our bookkeeping data accurately automated into our QuickBooks account, we can focus more time engaging with our existing customers and taking on new business. We have a strong working relationship with AutoEntry, and with its very reasonable pricing, it's a perfect fit for a firm of our size.”

JENNIFER UNTIEDT, FOUNDER, JENNIFER L UNTIEDT, LLC



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SAVING TIME WITH AUTOMATION

Before using AutoEntry, the practice was typing in data by hand from paper documents, into its QuickBooks account. This used up time which could be spent completing other business-critical activities.

Jennifer Untiedt comments, "Typing in data by hand could take up to eight hours a week, which for a small, independent practice like ours, was an enormous amount of resource. Now we've automated this function with AutoEntry, we've incredibly, reduced time spent on this process by approximately 80 percent, and this also saves us the expense of taking on another member of staff."

FLEXIBLE DATA CAPTURE, INCLUDING BANK STATEMENTS

AutoEntry can capture data from a wide range of documents including bank and credit card statement, bills, invoices, expenses, receipts and more. Specifically from bank or credit card statements, AutoEntry can extract data including, the account number, date, description, balance and even the cheque number, if required.

Jennifer comments, "We can simply scan, or email through our documents into AutoEntry and once the solution

has captured and entered our data, it creates a digital record of the image and attaches it to the transaction in QuickBooks, allowing us to more easily keep track of our client's documents. We're now uploading hundreds of documents a month onto the platform, and it's particularly useful if we have a high volume of bank statements to process for a particular client, or when bank feeds are unavailable."

ATTENTIVE CUSTOMER SUPPORT

AutoEntry ensures all new customers receive full training, tailored to their individual objectives, as well as ongoing access to customer support, via its in-app chat function or email.

Jennifer Untiedt comments, "Whilst AutoEntry is easy to use, we valued the thorough training we received, which ensured that we knew how to get the best results from the solution. The team has been extremely helpful and responsive whenever we have questions."

FLEXIBLE PRICING TO SUPPORT A GROWING BUSINESSES

AutoEntry is unique in its pricing structure, as it offers a credit-based system which only charges users for the amount of documents they upload onto the system. There are no restrictive

contracts and any unused credits from one month, roll onto the next, meaning users don't pay more than they have to. Adding more client companies or employees incurs no extra charges, making AutoEntry up to 60 percent cheaper than alternative solutions, and therefore, the perfect solution for growing businesses like Jennifer L Untiedt, LLC.

A SERVICE PROVIDER TO SUPPORT FUTURE SUCCESS

Jennifer Untiedt will continue to use AutoEntry in the future as it takes on more bookkeeping customers. It will continue to explore AutoEntry's extensive range of features, which are continuously updated and refined, in order to ensure the highest levels of customer satisfaction.

Jennifer Untiedt concludes, "We're a forward-looking service provider and we believe that it's critical to automate outdated and unnecessary processes such as manual data entry, in order to spend as much time as possible with our clients. With that in mind, we're so pleased to have found AutoEntry and have no doubt that we will increasingly leverage the solution as we continue to grow our practice."