



Advanced Seminars for QuickBooks® Users

Intuit Business Analysis ES

intuit.

Chuck Vigeant, M.Ed. Managing Partner **Accountigrate**
Intelligent Business & Accounting Solutions



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- Chuck Vigeant, M.Ed. ACQA Managing Partner
- Former controller with 30 Years of experience in the Accounting Technology Field
- Creator and “Grandfather” of Crystal Reports for QuickBooks
- Data Analyst, Schema Architect, Business Objects Technical Specialist for **Intuit Business Analysis ES**

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Today's Objectives

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- Brief Overview of Business Analysis
- Benefits
- Available Data
- Using the Product
 - Sign up
 - Built in Reports
 - Sales Performance Analyzer
 - Custom Sales Report Builder

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What is Business Analysis?

“It is a set of concepts and methods to improve business decision-making by using fact-based support systems”

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Business AnalysisES | Sales Performance Analyzer

Sales Performance Analyzer Rock Castle Construction
Data shown from 1/1/2011 through 12/31/2011

Show data for this...

Custom Date Range...
[Change Date Range](#)

For
Sales

By
Customer

20090130.01

Customers with Greatest Impact on Sales

44.44% of your customers... ...account for 80.82% of your sales

■ High Impact Customers
■ Low Impact Customers

■ Sales from High Impact Customers
■ Sales from Low Impact Customers

[Drill down to the customer summary report](#)

Data current as of: 2/16/2009 3:50 PM Accrual Basis

Chuck Vigeant, M.Ed. Managing Partner



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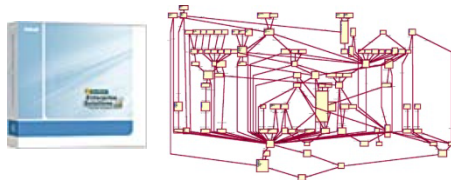
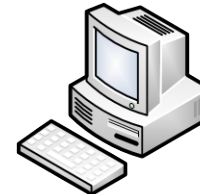
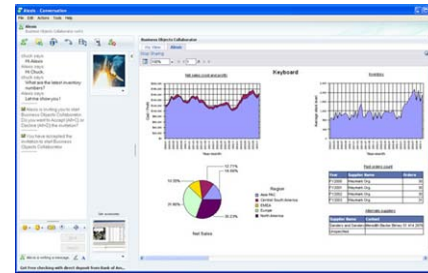
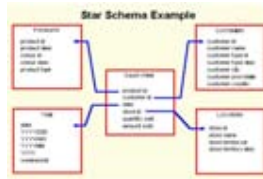
What are the benefits?

- Stem the tide of business failure
 - Over 50% of small businesses fail in the first five yrs
 - 69% don't make it past 7 years
- Reduce the time it takes to slice/dice
 - Eliminate exporting, cutting, pasting
 - No need to learn about tables, relationships
- Information is up to date
 - Data is updated every 15 minutes



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How does it work?





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What data is available?

- Sales Transactions
 - Invoices
 - Sales Receipts
 - Credit Memos
 - Statement Charges



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Let's Dive in!

- Built in Reports
 - Default Price Level by Customer
 - Item Sales Summary by Month
 - Item Sales Summary by Sales Rep
 - Statement Charges
- Sales Performance Analyzer
- Custom Sales Report Builder
- Brief look at extended capabilities

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Questions and Answers

Business
Analysis ES

POWERED BY
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