

Roxanne Brown of Professional Business Solutions 4U, LLC, located in Maryland, has been a Certified QuickBooks ProAdvisor since 1999. With over 24 years of experience in the field of bookkeeping, office management, instruction, and QuickBooks consulting she is always on the lookout for new solutions to solve the needs of her clients.

*I encourage everyone to check out BDT; go through the Demo they offer; or the free trial. Once you try it, you "will be hooked!" It's been a great addition to my practice and the services that I can offer my clients and their CPA's*

**Roxanne Brown, President**

### Business Challenge:

In the past several years, more and more businesses have embraced the technology that the Internet 'world' has to offer. With the increase of eCommerce business owners, it has become even more important to have a variety of solutions available to work effectively with them. Whether I am working with a client on another coast, or one a few miles away, there is always the challenge of transferring data files securely and easily between our locations, as well as to their CPA. Approximately 75% of my business is performed remotely, working with eCommerce clients around the globe. I use a variety of methods, based on the need of the client, their comfort level with technology, and the size of the files; and I am always looking for services that may offer more than one solution.

### An Interview With

**Roxanne Brown**

Professional Business Solutions 4U, LLC

### At a Glance:

- *Increased number of eCommerce business owners*
- *Increased need for a variety of solutions to work with clients*
- *75% of business is performed remotely*
- *Clients are around the globe*
- *Challenge of "how" to transfer files securely & easily to multiple locations*
- *Always on the lookout for services that offer more than one solution*
- *Processes need to be easy, quick and secure*

### Finding Solutions:

One of the biggest challenges I face is getting the client files transferred. It is important that the procedure be easy for them, quick and secure, and spending hours trying different methods until one works is not an option. Many of the client's I work with have very large files, so traditional methods do not work; with BDT I do not have to worry about this.

Additionally, all of us encourage our clients to back-up on a daily basis; we explain how invaluable a good back-up plan can be, with the hope that our clients' will become pro-active to safeguard their important financial data. Unfortunately, many clients are not consistent or have not taken the necessary precautions until it is too late, and they lose their data entirely, or a good portion of it. BDT takes the "hassle" out of their backup procedure; it is automatic, the backups are stored off site for added safety, and they are easily retrieved in the event of an emergency.

BDT also has a feature called 'Review on Demand,' which allows me to retrieve a current back up from the client at any time, which has been an added bonus for myself and my clients!

### Results:

I have been extremely pleased with the impressive service that Business Data Transfer (BDT) offers, and believe they have done an excellent job of addressing the challenge of transferring client files securely and easily.

They have also gone beyond the basic needs of transferring files and solved other 'problem areas' as well, such as: having a good back-up procedure in place - one that is automatic, off-site and secure, Review on Demand Back-up retrieval, and the ability to easily send the file(s) to multiple locations with the confidence and security that is desperately needed in this electronic age of computers.

With BDT, their QuickBooks file is 'tagged' and the automatic back-up is set within 2-3 minutes, making sure your client always has a good back-up: they can 'set it and forget it.' The first time they need it, you are their hero for life...and they *will* need it at some point.

The other challenge BDT has solved for my business is the ability for the client to send their file to multiple locations. Typically, I am the 'link' between the client and their CPA, so it is important that they have the same ease and flexibility to send their file to the CPA as needed. With BDT, they can send a 'restricted' or 'unrestricted' file. With a restricted file, there isn't a problem with someone accidentally entering data into the wrong file or overwriting the most current changes. The unrestricted file is a back up that can be used for review as needed. Many of my clients have a home office, multiple locations, or travel a good bit; with the BDT service they can restore a back-up for review while they are on the road, or work from home easily.

BDT is very quick and easy to install, on either the Advisor/CPA end or the client side. The customer and technical support at BDT is top notch, and the fact that the BDT staff will assist the customer in the installation and 'tagging' of files has been an added bonus for me, freeing up valuable time and giving the client added confidence.

### Conclusion:

I work a bit 'outside of the box' with many of the applications that I use, and I am happy to say that BDT has worked well for my business and clients' needs.

I assist with a lot of conversions, or integration of additional software with my eCommerce clients; many need to send me back-ups of very large database files (such as Order Managers that are housed in Access). These files are too large to be sent via email, and FTP can be slow, insecure, difficult to use, or inaccessible... and remote access is not always a feasible option for various reasons. As soon as I know we are going to implement a large conversion, and it's going to be more than one or two file transfers, I sign them up using the convenient 'Management Console' and have the BDT staff perform the set-up with the client directly. The client then sends me their QB file (if they have one), and a back-up of any other programs/applications that may be needed, as well as other large documents that are needed for the project. Once the conversion is finished and they are on their way, I encourage them to continue with BDT: if for no other reason than the automatic back-up service. I can choose to bill the client through my account, or they can switch to direct billing via BDT. Which ever way they choose to be billed, it's a service they will continue to use for years and years, and the next time I need a back-up to review, they know they can send it quickly and securely to me at any time.

© 2004-2005 Intuit Developer Network Advisory Council (IDNAC). All Rights reserved.

Intuit, the Intuit logo, Quicken, QuickBooks, Turbo Tax, ProSeries, and Lacerte, among others, are registered trademarks and/or registered service marks of Intuit Inc., in the United States and other countries; and are displayed with permission. Other parties' trademarks or service marks are the property of their respective owners and should be treated as such. This interview is provided for educational/information purposes only and does not represent any endorsement by IDNAC or its members.

Visit us on the web at <http://www.idnac.org>