



Joy Goldberg — Item owner

Retail Store: Item	Challenge: Startup shoe store needs to automate inventory tracking
Location: Larkspur	

“The POS system does the hard work for me.” — Joy Goldberg, store owner

## Bay Area Shoe Boutique Starts Off on the Right Foot with POS-Managed Inventory

Joy Goldberg knows shoes. She’s been immersed in the business her whole life – from her first job at a Tiburon shoe store to her career as a wholesale rep. Not to mention the influence of a father, grandfather and husband in the shoe trade.

So when she decided to fill a niche in Marin and open Item, a boutique specializing in designer shoes and accessories in Larkspur, she had all her Luciano Padovans and Juicy Coutures in a row.

### Shoe savvy, tech challenged

Joy needed help outfitting her store with the administrative tools that can make or break the bottom line. Calling herself “technically challenged,” she opted out of equipment comparisons and went directly for first-hand knowledge. Joy asked everyone she knew in retail about their experiences with bookkeeping, point of sale systems (POS) and inventory management.

Her research boiled down to a shopping list with one must-have: an affordable bookkeeping/POS system. It must be easy for a non-techie to use and allow her to know instantly what stock is on-hand and how well each item sells. And lastly, it needed to produce reports that would help her make nimble, informed business decisions.

She considered the Retail Management System from Microsoft, “but it costs a fortune and is more complicated than I need,” says Joy. Finally, in early 2004 a store owner from Brentwood confirmed Joy’s analysis in one simple statement, “All you need is QuickBooks.”

### Teaming up with Business Cents

To get started, Joy looked for help on the QuickBooks website and found Business Cents, a San Anselmo-based bookkeeping and software consulting company. The firm’s husband and wife

### The client

Item, a designer shoe and accessory store at 1102 Magnolia in Larkspur, brings big city style to Marin.

### The challenge

Find and install an affordable, easy-to-use point of sale and bookkeeping system. System must allow the “technically challenged” store owner to actively manage her inventory and retrieve sales and vendor information on the spot.

### The solution

- QuickBooks Point of Sale Pro with QuickBooks Pro integrated bookkeeping
- POS computer and administrative work station
- Business Cents consulting, system recommendation, installation and training

### The result

- Easier, quicker and more accurate inventory management
- Lean staffing because POS system fills in as third employee
- Instant access to vendor and sales reports – which items sell best and which have the highest margin – so owner Joy Goldberg can order strategically and maximize profits



owners Robin Wilson and David Glantz split the project, with Robin taking care of the bookkeeping side of the equation and David managing the POS system installation and training.

As Robin and Joy created a plan to configure Item's QuickBooks Pro bookkeeping program, Robin offered suggestions to streamline other new business set-up tasks. Questions to ask a payroll service. The kind of checks that work best with the computer and where to order them. Other service and supply vendors Joy might need.

Then, it was POS time. As independent consultants, David and Robin can recommend virtually any combination of hardware and software that will do the job. "They helped me pick the computer system," says Joy. "How to buy it, where to buy it, what pieces I needed. I really relied on them to walk me through it."

### Customizing the system for Item

David and a computer technician assembled the reasonably priced package of components for Item, managed the building of the network and made sure it was running smoothly. Their system is made up of:

- QuickBooks Point of Sale Pro software, integrated with QuickBooks Pro accounting
- POS computer – monitor, cash drawer, receipt printer, bar code scanner and credit card scanner using QuickBooks merchant service
- desktop workstation and printer so Joy can access account history and reports from her office using both QuickBooks POS and Financials

Because Item was the first retail point of sale client for Business Cents, David completed the QuickBooks POS software certification as he configured it for the shoe store. He discussed purchasing, sales and inventory scenarios with Joy, so he could understand how the system fit into her business operations. "We learned from each other," Joy says.

Usually, existing inventory is imported neatly into QuickBooks from a spreadsheet. Since Item was brand new, David input each sandal, espadrille and tote from the packing slips as the shipments arrived at the store. After that, he customized the system, turning off features and functions they didn't need and activating the ones they'd be using.

### Going live

In mid-2004, when Joy and store manager Cosima Crane threw open Item's doors and the first customers walked in, David was there, too. "We make it a point to be onsite when the system goes live," he explains.

Any glitches? Well, not that day. But later, Cosima was by herself and helping a steady stream of customers when the system went down. Without the cash register, she was sunk. Cosima phoned David and "he called back right away and talked me through it. We had it working in about 10 minutes," says Cosima. Through remote access to her system, he discovered a DSL service problem and helped her reset and get back online. "The best way to put it is that David is always available," she says.

### Efficient and profitable

The QuickBooks POS has become indispensable to Item. "The computer is our third staff member," says Cosima. "We need way less manpower because the system does so much." In addition to ringing up sales, she uses the system to create purchase orders, receive shipments into inventory, approve invoices and catch shipping and billing errors.

Joy also relies on the POS for instant and easy access to decision-making data. She says, "If I can learn it, anybody can. And I can tell you who my best vendor is, who I'm making the most money with, how many pairs I've sold."

Having the POS system on board not only keeps Item efficient and profitable, it's fun. Around the last week of the month, Joy and Cosima make a game of querying the computer a few times a day to see how close they are to meeting their sales projections.

The women at Item continue their relationship with Business Cents, calling David for software updates and questions and selling shoes to Robin. "I have recommended the system to other retailers," Joy says. "But more than the computer, it's really about Business Cents."



Above: Naia Koobatian — interior designer & Susanna mgr.  
 Right: Linda Morrell — design consultant and Naia Koobatian

Retail Store: Collure Studio 1106 & Susanna	Challenge: Manage over 8,000 inventory items in two stores
Location: Larkspur	

“It narrows the window for human error.” — Susan Wright, store owner

## Two-Store Inventory of 8,000 Items Tamed with POS System

In 2003 Susan Wright, owner of a successful executive search firm in San Francisco, mustered up enough spare time to indulge her passion for interior design. She created Collure Studio 1106, at first a gift shop that stocked designer fabrics in a small shopping center near College of Marin.

Collure grew, taking on more staff and inventory, and soon they were bursting at the seams. So Susan split the business, making Collure the design studio, offering the services of interior designers and access to fabrics, wallpapers and trims from around the world. And in May 2007 she opened Susanna, the furniture, gallery and gift side of the company, in downtown Larkspur.

### Thousands of inventory items

After devoting countless tedious staff hours every year to tracking thousands of merchandise items, from plate chargers to throw pillows, Susan was ready to computerize it.

She talked to a few retailers, including the owner of Via Diva, a multi-location home furnishings store headquartered in San Rafael. “He had converted his operation to a point of sale system (POS),” says Susan, “and thought it was a great thing.”

Susan and her VP of operations, Priscilla Agricola, were looking for new financial software, and as Susan heard many times, “QuickBooks is the accounting software of choice to use with POS.” They decided to make the switch to QuickBooks and incorporate POS into the project.

### Bringing Business Cents on board

So Susan went to the QuickBooks website to look for help. She found it with San Anselmo-based consultants Business Cents. POS specialist and Business Cents owner David Glantz came on board to install and adapt the software and train her staff on the system. David worked closely with Susan’s technician, who put together the computer components.

### The company

Collure Studio 1106, interior design services, designer fabrics and trims at 1106 Magnolia in Larkspur. Susanna, gifts and home décor at 545 Magnolia, next to the Lark Theater in Larkspur

### The challenge

- Install a multi-store POS system for a growing company that can’t slow down during the process
- Manage 8,000 inventory items in three locations – two stores and off-site storage

### The solution

- QuickBooks POS Pro Multi-Store software integrated with QuickBooks Pro accounting
- Touch-screen monitors with credit card scanners
- Barcode printers and scanners
- Remote access for accounting and troubleshooting
- Business Cents consulting, installation, training and support

### The result

- Save time and money by being in control of a large inventory
- Purchase merchandise based on reports that identify best-selling items and preferred vendors
- Quickly and accurately report quarterly sales tax
- Stay in touch with customers through in-system customer mailing lists
- Improved security and theft control



But before the team could hit the ground running, they had to settle on which type of system would work best for the stores. Two standalone systems? A multi-store system linked through a network? Susan discussed the options with everyone involved – her computer technician, her accountant, David and her staff.

The conclusion? A multi-store network would support sales by allowing designers at Collure to see and recommend in-stock items at Susanna. Linking the stores would streamline financial information and save time for the back office people. And creating an integrated system would give Susan, as owner, centralized control over the two locations.

The team agreed on a system that includes:

- QuickBooks POS Pro Multi-Store software, integrated with QuickBooks Pro accounting
- Touch-screen monitors and cash drawers
- Barcode printers and scanners
- QuickBooks Merchant Services to process credit card sales
- A network server at Collure, the company headquarters
- Remote access for accounting functions

## The road to smooth sailing

David customized the system for Collure and taught the employees to process sales, produce purchase orders, receive shipments into inventory and print tags for new merchandise. “It’s a really approachable system,” Susan says. “And David took us through it in stages, not overwhelming us with everything in the book.”

One of the big challenges was bringing the system up to date while business carried on at a hectic pace. Although many stores

pick a starting point, entering sales and inventory from that moment on, Susan wanted the system to contain a full year of history and inventory.

So as her staff entered new transactions, she and Priscilla recorded data from earlier events. David offered to bring in the Business Cents team to help with the inputting, but Susan thought she could make short work of it. What she didn’t know is that it would take a full year to catch up. “For a good portion of the time, we were only able to work on the backlog for one day a week,” she says.

## The payoff

The POS system is paying off in organization, readily available information and accuracy. “It narrows the window for human error,” says Susan.

Inventory is under control, and can be updated or changed only by employees with the security password. And now the staff at Collure and Susanna can track the physical location of all 8,000 pieces of merchandise in inventory, as well as identify the best vendors and which merchandise sold well.

Another time-saver is the ease of sales tax reporting. The POS system cut out an entire step. They don’t miss entering sales data from receipt books into an Excel spreadsheet to get sales totals and tax figures by county. Now they simply print the report.

So did they do the right thing? Susan says yes. “I feel like this year we’ll really be able to reap the rewards.”



Above: James "Doc" King — marketing communications mgr.  
Right: Penny Rosen and store manager Luis Bourdon

Retail Store: American Soil & Stone	Challenge: Track inventory for timely ordering
Location: San Rafael	

**“Now we know it’s time to reorder, before we run out.”** — Penny Rosen, accounting mgr.

## POS Makes a Rocky Inventory Smooth

Every time American Soil & Stone’s (AS&S) San Rafael store ran out of flagstone or soil amendment, owner Alfonso Garcia lost a sale.

So it was with some urgency that he and Accounting Manager Penny Rosen began looking into point of sale (POS) inventory management systems. They checked out a couple of options and ruled them out, realizing it made sense to link a POS with the company’s QuickBooks accounting software.

When all roads led to a QuickBooks POS, Penny and Alfonso went to the QuickBooks website to learn about the system and check out local POS-certified consultants. Although they spoke to a couple of the listed companies, Marin-based Business Cents owner David Glantz was the only one they met with. “We liked him immediately,” says Penny. “There were good vibes.”

David brought the POS system to the American Soil office and demonstrated how it would streamline the way they did business, and alert them when it was time to reorder. Alfonso and Penny liked what they saw.

### Getting set up

AS&S hired their computer support vendor to put together a network of four sales stations and an accounting station for Penny. Meanwhile, Business Cents purchased the QuickBooks software and POS hardware, including the bar code scanners and POS printers, and took them to the computer vendor’s office. David installed the POS components and incorporated a long-overdue upgrade to QuickBooks Premier Retail accounting software.

“I thought I could set it up myself, because I’ve installed software before,” says Penny. But Alfonso thought it was better to have David do it. “He was right. David knew things I wouldn’t have known to do,” Penny agrees.

### The client

American Soil & Stone, a landscaping materials supplier at 565A Jacoby Street in San Rafael

### The challenge

Integrate industrial inventory management with QuickBooks accounting. Must identify reorder point to avoid lost sales.

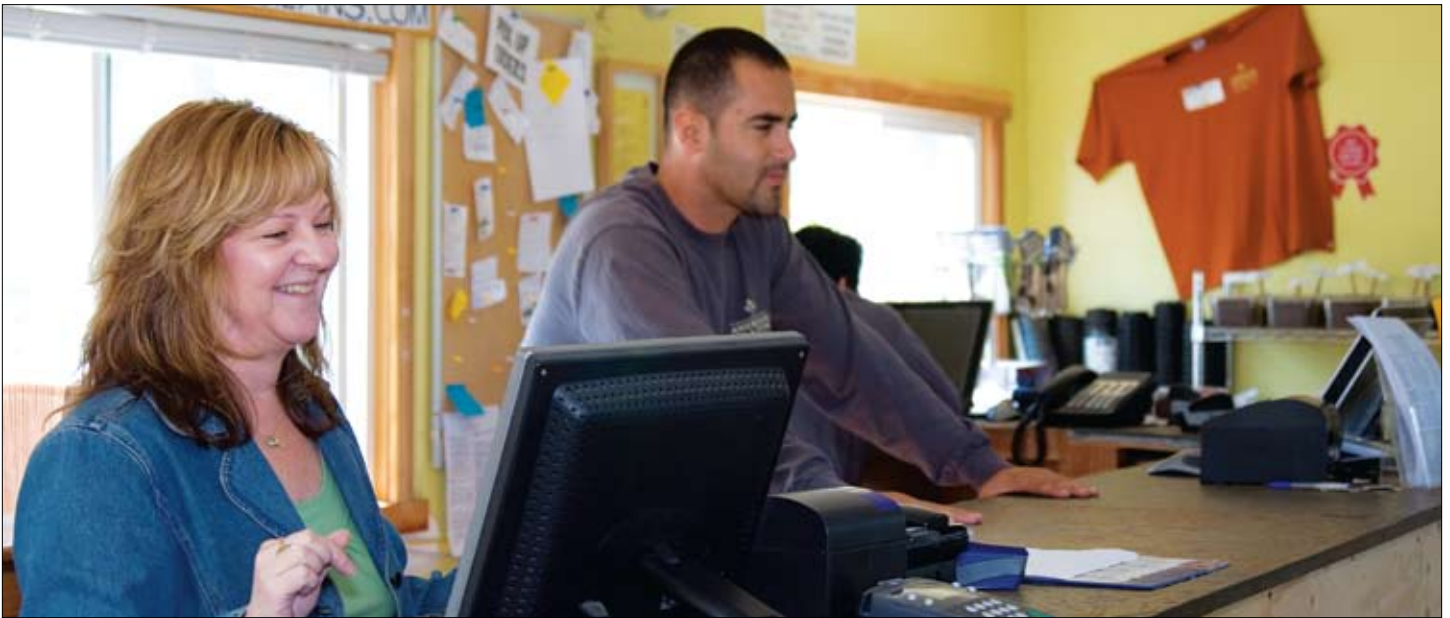
### The solution

QuickBooks Point of Sale Pro integrated with existing QuickBooks Premier Retail accounting

- POS workstations and administrative server
- Bar code scanners and printers
- QuickBooks Merchant Services with integrated credit/ATM card swipes
- Business Cents consulting, system installation and training

### The result

- Automatic, accurate inventory tracking
- Higher sales because material outages are prevented
- Save one to two full days of administrative time every month because of integration with accounting software



From creating the merchandise accounts and setting up the customer database to customizing the system to enhance AS&S operations, it saved time to get it right the first time.

Once the system was in place, David trained the staff by walking them through business scenarios, such as how to ring up a customer who wants 500 pounds of a custom soil blend and three Tuscan pots, delivered. Then, to make the transition smooth, he spent the day the system went live in the store with the AS&S sales staff.

The sales team took to the system easily. James “Doc” King, a self-professed non-computer person, says, “It’s very intuitive. The screens lead you through the process. Click an icon and it gives you choices.”

### Translating tons to pounds

The system customization involved an unusual element – setting up calculations necessary to receive materials by the ton, then sell them by the cubic yard or by the pound. “The system couldn’t do that and David made it happen,” Penny says.

And it was working like a charm, until a routine software maintenance patch arrived from QuickBooks that accidentally undid all the conversion calculations. Suddenly, the AS&S books showed they were paying more to purchase the products than they were charging customers.

David sent the data to QuickBooks, and with his background in IT, was able to work closely with the corporation’s tech staff to unravel the kink. “To minimize the disruption, I restored the data to American Soil’s system in the middle of the night,” says David.

### An industrial retailer

Because American Soil is not a typical storefront retailer, “We had a couple of oddball problems David hadn’t seen before,” Penny says. “But he knew the system inside and out and he made it easier for us.”

For example, unlike most stores that process only cash and credit sales, many AS&S transactions are recorded on account and invoiced later. They also keep track of job costing for landscapers and contractors who are reselling the materials. Another less common requirement is a mechanism to calculate and charge for deliveries. Business Cents made sure these options were in place.

### The big difference

Now, Alfonso and his sales team always know what materials are on hand and are alerted when it’s time to place a reorder. His staff easily generates purchase orders on the system and can speed the process by emailing them directly to suppliers.

On the accounting side of the business, and most important to Penny, every time a customer makes a purchase the resulting invoice automatically becomes part of her financial data. That’s a radical change from the pre-POS days when she had to input a big pile of complex invoices by hand at the end of every month.

“The integrated system saves me a full day or two every month,” Penny says. “It has helped me immensely. And I would highly recommend Business Cents.”