

# Scaling New Heights 2019 - Desktop to Online

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## A RETURN TO THE ARENA

After a four year hiatus, I finally relented and accepted an invite from Joe Woodard to come speak at his conference. I had previously thought that I would not do this again, but there is a whole QuickBooks Enterprise community that is still wrestling with kludgy and inadequate tools for extracting data, and a dearth of knowledge regarding what QuickBooks does - and doesn't do - underneath the hood.

There were many faces I recognized from my attendance at SNH, Sleeter, Intuit, and Accountex conferences during the past several decades - including product developers and pro advisors alike, but there was also an influx of fresh faces who are reliant on QuickBooks for either a portion, or all of their income.

## MY ITINERARY

I presented 90 minute lectures on three subjects:

1. QuickBooks data underneath the hood - why you can't get what you want
2. Pro Advisors as Data Scientists
3. Analytics and Reporting for Small Businesses

In the first lecture, I presented many of the items iterated here on this website regarding what you are not able to get out of QuickBooks (see this guide [QuickBooks Data Availability](#)). But I also discussed my work in the actual database when I was contracted by Intuit a decade ago to extract data for cloud applications, so attendees would have a better understand of not only the how's, but the why's.

For the lecture on Data Scientists, I took attendees through the process of delivering custom reports and analytics to their customers - including several intensive interactive exercises on determining where the data comes from, column by column.

The lecture on Analytics and Reporting for Small Business covered the gamut from presentation considerations, to lost arts like break even analysis, and to less discussed metrics, like customer acquisition costs. We covered sample metric sets for a variety of industries as well.

## MY MAIN GOAL

In addition to my lectures, I moderated a panel of our Certified QQube Solution Providers, who were also invited by Joe Woodard to discuss the ins and outs of custom reporting.

This was a key panel for me, as one of my main goals for this conference was to "pass the baton" to the next generation of Custom Report Writers and Analytics experts.

The panel members: [Ernest Cook of Better Idea Group](#), [Angela Meharg of Datisfy](#), and [Fran Reed of FeedUpDataOptics](#), have inculcated a business model totally devoted to the practice of Custom Solutions. [Mario Nowogrodzki of Mendelson Consulting](#) was slated to appear, but had a teaching presentation of his own at the same time.

For many years, after the initial Intuit SDK (Software Development Kit) arrived on the scene, I was literally the only game in town. We produced thousands of reports, using the tools available at the time, but soon realized two things: (1) we were the bottle neck, and (2) it was way too difficult, using the current tools available for data extraction.

So we created our flagship product the QQube Data Warehouse, which would allow end users to do relatively simple things out of the box, while drastically reducing the time it would take to publish custom report solutions.

## MY MAIN TAKEAWAY

Although I expected to see many new wares in the online marketplace as Intuit moves away from desktop and into the online arena (excepting Enterprise of course), the one thing I didn't expect to see was the proliferation of work arounds in the QuickBooks Online edition that mirrored the same work arounds we had used in desktop years ago. This was particularly true with job costing, inventory, and reporting.

There were many new QB online related applications, including several in the reporting arena - which also reminds me of what those conferences looked like years ago, only with desktop add-ons.

The sad truth, is that most of those QuickBooks Add-Ons are no longer in existence - unless, they were stand alone products, that just happened to integrate with QuickBooks.

I am proud of the fact that we are still showing double digit growth - with no end in sight. We managed to stay outside of what QuickBooks might do - and their level of competence in this arena.

For each iteration of reporting tool that Enterprise has introduced over the years (QODBC,

Custom Reporting, Advanced Reporting) we have increased our business. We have superior knowledge, a superior product, and superior Certified Solution Providers to provide custom analytics to those that can't or won't on their own.

## WHAT THIS MEANS FOR CLEARIFY®

Intuit has expressed its strong desire to apply resources to the desktop (e.g. Enterprise), but after two decades of disappointing expectations, I never rely on their words, as it can be mostly "fake news". Additionally it has been almost 6 years since they have added anything new to their SDK.

However, my recent communications with high level officials seem to indicate that some changes are coming - and we will add those to our product as they become available. We also have several large features upcoming in the near future.

It also means that we are going to get into the online space to meet the most significant holes, while also realizing that the available data for those significant holes is still not completely available.

We will do it cautiously, and ensuring that we don't lessen any endeavors to make our current product better, and easier to use.

But, I learned many years ago that history always repeats itself. Intuit will be slow to get all of the data out, and there will be many pitfalls to be cautious about.