

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

comes to their business finances, and it's very likely that we'll be the first person they go to when looking for a bookkeeper, so it is important that we understand the ...

Apr. 04, 2017



To serve our small business clients to the best of our abilities, it's important that we as accountants work with both the business owner and bookkeeper, to ensure the business' financial success. Bookkeepers generally make our jobs easier, allowing us to view critical business data in its entirety and avoid a shoebox full of receipts. There

are however several factors worth considering when helping find the right

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

We should also have an understanding of advanced business technology that may be able to supplement specific bookkeeping tasks. By implementing advanced technology, business owners may be able to take over some elements of the bookkeeping workflow, ultimately saving them money.

For example, small business owners, bookkeepers and accountants looking to reduce the monotonous, time-consuming data entry process should consider expense management software that streamlines this workflow. When advising clients on the type of expense management software they should introduce to their workflow, consider the following features:

- **Mobile App with Document Capture Capabilities:** Receipts, invoices and other documents are obtained in a number of ways; whether it's email, traditional mail or in person, making it difficult to keep track of everything. Since just about every small business owner has a smartphone, today's expense management software needs to have a mobile feature that allows users to simply snap a photo of business documents and extract key information that can be uploaded to the most popular accounting software.
- **Integrate with Powerful Accounting Software:** Most small businesses use advanced accounting software, like QuickBooks® Online or Sage One, so to maximize the value of the expense management software, it is important that there is a seamless integration with the businesses' accounting software of choice.
- **Cloud Capabilities:** The cloud gives us the opportunity to collaborate with our small business clients, as well as their bookkeepers, remotely. In addition to boosting productivity, it also gives your clients peace-of-mind, knowing you are always available to review a document, analyze data and provide them with guidance, regardless of your location. Therefore, it is crucial that newly implemented software is cloud-based.

When your clients implement an efficient expense management software, you as the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

owners may be uncomfortable with the fact that there is no face-to-face interaction, it could help the business reduce their overhead, and it also makes the data-entry process that much more important.

When employing a virtual bookkeeper, the small business grants the bookkeeper access to their business information via cloud services. From there, the business owner can assign specific tasks and workflows to their virtual bookkeeper.

Virtual bookkeepers also come in different forms, from the independent “solopreneur” who works with a handful of clients, to a large, outsourced bookkeeping firm. Often times, the larger virtual firms offer small businesses a team of bookkeepers, providing a unique system of checks-and-balances, compared to only one person reviewing the books on a daily basis.

When advising your small business clients on the type of bookkeeper that is best for their business, it is important to remember that the state of the business will often dictate the type of bookkeeper that is needed. Whether it is the business size, industry or the owner's personality, there are a number of variables that need to be considered. Remember: every business is unique and no one type of bookkeeping service will work for all of your small business clients.

Dawn Brolin, CPA, is Accountant-in-Residence at [The Neat Company](#).

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us