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## TECHNOLOGY

# FreshBooks – A “First Hand” Perspective

Getting small clients to be diligent about their bookkeeping is a challenge that all accountants face, especially those who specialize in the smallest businesses.

Isaac M. O'Bannon • Feb. 27, 2013

This “First-Hand” article accompanied the [2013 review of Freshbooks](#).

## A Fresh Start

Getting small clients to be diligent about their bookkeeping is a challenge that all accountants face, especially those who specialize in the smallest businesses.

Helena Swyter, a CPA in Chicago, knows this first hand, since she's developed a strong specialty in serving the accounting and tax compliance needs of creative types and others in the social media world. While she also serves some larger entities, most of her clients are Sch. C filers, professional bloggers who receive income in varying forms.

After working for a Big 4 firm for several years, in 2012 she started her own practice, SweeterCPA ([www.SweeterCPA.com](http://www.SweeterCPA.com)), and quickly found that the online accounting system [FreshBooks](#) was a perfect fit for her clients and for her. “I recommend that all my clients use FreshBooks and I only recommend things that I would use myself.”

Active with social media, she realized the potential for serving the people who make a business of providing content, particularly bloggers. After attending a conference, she saw that these individuals were an untapped market, but one that was very much

in need of professional accounting, consulting and tax services. Generally a younger and more technology-inclined group, they also preferred online applications.

“Bloggers already live online, so even though my clients are all over the country, they are comfortable doing their accounting and working collaboratively online,” she said. “With FreshBooks, they can access their files at any time, and I can access their data and reports whenever they need me to.”

Another benefit of working with these entrepreneurs is that she never has to deal with the proverbial box of receipts. Her clients work online, usually get paid electronically and prefer to e-file when tax time comes around.

One of the features in FreshBooks that Helena finds most beneficial is its integration with payment and financial systems. It can automatically pull client data into the program, including PayPal, credit cards and bank accounts. This ensures that she and her clients are always working with the most up-to-date information.

Helena also appreciates that the system doesn't overwhelm her clients. “Some programs offer so many features and tools that most small businesses never use, but FreshBooks has narrowed it down to the core essentials, especially for what my clients need.” Plus, the program includes multiple reports that make it easy for her to produce quarterly updates and run profit and loss statements, whether helping clients understand their finances or when preparing their taxes.

Helena's biggest praise for FreshBooks is the company's customer service. “It doesn't feel like somebody in a business suit on the other side of the world. They're wonderful and can help my clients when I'm not available.” The support website also has several easy-to-understand videos that make understanding bookkeeping processes simple, she said.

“And the FreshBooks staff is very friendly. They even sent me a congratulations message when I got married.”

You can read the [2013 review of Freshbooks](#) here.

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**Helena Swyter, CPA**

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