

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

Sageworks Valuation Solution will be able to upload client data directly from QuickBooks Online without having to do any manual data entry.

Mar. 03, 2016

The logo for Sageworks, featuring the word "sage" in a blue, lowercase, sans-serif font, followed by "works" in a black, uppercase, sans-serif font. A registered trademark symbol (®) is located at the top right of the "s" in "works".

The financial information company [Sageworks](#) has announced an integration with Intuit's QuickBooks Online. Accountants who use ProfitCents, Sageworks' flagship financial analysis platform, or Sageworks Valuation Solution will be able to upload client data directly from QuickBooks Online without having to do any manual data entry.

Through this integration, Sageworks users will be able to spend less time at 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

professionals, an especially pressing concern during times of high activity like tax season. Last year Sageworks unveiled their Electronic Tax Return Reader, a technology that auto-imports financial data from client tax returns and allows financial professionals to build a customized financial report in less than 5 minutes, as well as an integration with Xero, another leading cloud-based small-business accounting software.

“Our goal is to help accounting professionals focus on providing high-value services to their business clients,” said Sageworks Chief Executive Officer Scott Ogle. “The less time that accountants have to spend on inputting and validating data, the more time they can spend with their clients. Our integration with QuickBooks Online is the latest in a series of steps we’re taking to make this possible.”

The new integration with QuickBooks Online allows Sageworks customers to quickly pull in client data, run reports that analyze the data, and immediately generate valuable insights about the client’s businesses or perform a business valuation. It works in the following manner: First, customers will log into the ProfitCents or Sageworks Valuation Solution, and within the Sageworks platform, users will have the ability to log into QuickBooks Online and select which clients’ data should be uploaded into the platform.

At that point, they’ll be able to run narrative analysis reports on that business, compare it to other companies in that same industry, or perform a valuation of that business, with no manual input required. Additionally, Sageworks’ users will have the ability to set up an automated narrative report for all of their clients that use QuickBooks online; this report will be emailed automatically every month to the Sageworks user, who can then share the insight and analysis with their business client.

Accountants who use Sageworks products will also be able to set automatic data

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

© 2024 Firmworks, LLC. All rights reserved