



## Certified Payroll Solution

Enhanced My Credibility as a Certified QuickBooks ProAdvisor



"Flexible Financials, LLC has been pleased with the Sunburst *Certified Payroll Solution*. We have had to address additional complexities in benefit rates, multiple job classifications worked by a single individual, and other nuances that were not part of our original job specifications. In each case, we found the product was adaptable to our needs."

**Don Grassmann**  
Owner  
Flexible Financials LLC

### SUCCESS STORY

*Flexible Financials, LLC*

#### Customer Profile

Flexible Financials, LLC is an independent financial consulting firm with over 25 years experience helping fast-growing businesses develop the financial tools, processes, and skills to successfully manage business expansion. They employ a personalized, hands-on approach designed to tackle the critical success factors unique to each client's situations.

#### Business Challenge

One of our first clients was a staffing agency that trains and provides skilled laborers to contractors. The laborers are certified and licensed to remove asbestos, lead-based paint, and mold throughout the southeast United States. As our client's business grew, more and more of its work involved weekly certified payroll reports as mandated by the Davis-Bacon Act.

Initially, our client managed this reporting using an Excel-based template. However, within a period of two years, the burden of certified payroll reporting consumed over 20% of the bookkeeper's time. The complexity and redundant data entry became an obstacle to our client's further business growth.

#### Solution Overview

We evaluated QuickBooks add-on products for certified payroll reporting. We selected Sunburst Software's product based on its functionality, outstanding documentation, of the industry's ins and outs. Phone discussions with Nancy Smyth confirmed our confidence in our selection.

#### Business Benefits

The *Certified Payroll Solution* program worked, as advertised from day one, and it achieved a payback in less than 60 days. In fact, as a software product, it is probably the highest return product Flexible Financials has implemented to date.

Reporting cycles, which took one full day of the bookkeeper's time per week,, are now routinely completed in under an hour. Moreover, the client was pleased recently when a job opportunity arose that involved over 100 people with an almost immediate start date. As an added challenge, the end customer required weekly certified payroll reports within 8 hours of when checks were created. It was a relief that these requirements were not an obstacle or even a concern as the job terms and conditions were negotiated. Our client won the job and successfully met the reporting requirements with no added staff or overtime.

The Sunburst *Certified Payroll Solution* program required some modifications to the client's data structures.

For example, certified payroll jobs weren't consistently isolated in the Customer:Job list, nor did the client always create unique payroll items for certified labor job classifications. However, these were simple and straightforward changes to make. We had to load required reporting identifiers in the "ship to" addresses for each certified payroll job.

### AT A GLANCE:

**Customer:**

Flexible Financials, LLC

**Location:**

Brentwood, Tennessee

**Industry:**

IT/Financial Consulting  
QuickBooks ProAdvisor

**Business Challenge:**

A client providing skilled laborers to contractors was managing it's growing certified payroll reports using an Excel-based template, consuming 20% of the bookkeeper's time each week.

**Solution:**

We evaluated add-on products for Quickbooks and selected Sunburst Software's product based on it's functionality, outstanding documentation, and their obvious understanding of the industry.

**Results:**

The Certified Payroll Solution worked as advertised from day one, acheiving a payback in less than 60 days.





## SUCCESS STORY

## Flexible Financials

There was, also, a one-time setup involved in loading the Federal exemptions and EEOC data into the Sunburst product for all active employees, whether working on certified projects or not. We learned that Intuit did not permit these fields from being read directly by outside products like Sunburst Software, or this duplicate setup would have been avoided.

Collectively, the changes required several workdays to make. The changes might have gone faster except we were dealing with several hundred active employees.

We were excited to explore the *Wage Manager Solution* utility bundled with the Sunburst *Certified Payroll Solution*. The *Wage Manager Solution* program permits mass changes to rates and payroll items using a spreadsheet-like interface.

We have had to address additional complexities in benefit rates, multiple job classifications worked by a single individual, and other nuances that were not part of the original job specifications. In each case, we found the product was adaptable to our needs.

While we have discussed the business successes of the client so far, I would like to add that Flexible Financials has been pleased with the Sunburst *Certified Payroll Solution*.

What makes the team of Ben and Nancy Smyth effective is their combined understanding of certified payroll reporting requirements and QuickBooks, along with a responsive customer service model.

It has helped Flexible Financials, as a company, to partner with Sunburst because it enhances our credibility with our client as we meet and overcome each of the business challenges faced by our client.

We've worked with other software partners that don't have the same level of commitment and expertise in their field, and the results can be disappointing. Sunburst, while a smaller company, is an effective business partner.

QuickBooks users who need integrated applications to work WITH their company file to enhance the overall effectiveness of the financial package, as well as, the ProAdvisors who evaluate the integrated applications, will find integrated solutions to meet most of their needs in the Intuit *QuickBooks Solutions Marketplace*, <http://marketplace.intuit.com>



"Sunburst Software provides outstanding support, typically addressing each issue within 24 hours. We were so impressed with their skill and commitment that when we considered an unrelated custom programming project, we contacted Sunburst first. We have found their insight into QuickBooks and associated payroll processes unparalleled."

*Don Grassmann  
Owner  
Flexible Financials LLC*

### FOR MORE INFORMATION VISIT:

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