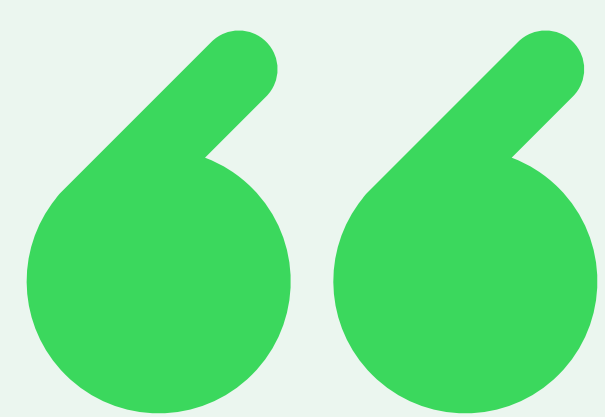




CASE STUDY

EMPOWERING RETAIL CLIENT GROWTH with QuickBooks Advanced

Simplifying complexity and driving efficiencies



Without the right tools and systems, businesses lack the visibility they need to survive, especially in tough times. The subscription isn't a cost – **it's an investment in the business's longevity**, helping make the right decisions to sustain and grow.



DR KAMRAN SHAIKH
Managing Director at Morgan Reach



Morgan Reach, a Chartered Certified Accountancy practice with offices in Birmingham, London, and Manchester, has spent over a decade offering a range of services, including accounting, tax advisory, business consulting, estate planning, and compliance.

As a forward-thinking practice, Morgan Reach places significant importance on their tech stack, constantly evolving to maintain their status as trusted advisors. Expanding their QuickBooks ecosystem is a key part of their strategy to support growing and complex businesses.

The challenge

Morgan Reach observed a shift in client requirements, particularly among their retail clients, who increasingly needed enhanced functionality to manage their growing transaction volumes and operational complexities. They were also looking to scale their QuickBooks Advanced offering into other sectors.



We often see clients outgrow their QuickBooks Plus license. For many of our retail clients who are handling growing transactions or have more complex needs, **we need to provide value-added services. QuickBooks Advanced is pitched in the right sweet spot for us to deliver**, Dr Shaikh revealed.

The practice also identified manufacturing as a sector where QuickBooks Advanced could address significant pain points. He noted:

"Manufacturing businesses often deal with complex supply chains, inventory management, and high transaction volumes. **We see QuickBooks Advanced as the solution they need to manage these complexities seamlessly.**"



The solution

QuickBooks Advanced was identified as the ideal solution to improve efficiency, scalability, and visibility for both growth-oriented and operationally complex clients. Dr Shaikh emphasised the platform's ability to handle dual challenges, saying:

"QuickBooks Advanced is designed to provide advanced functionality while remaining simple to use. This balance is critical for businesses managing growth and complexity."

Key benefits:

01

Spreadsheet sync

The spreadsheet sync feature is eliminating hours of manual work for clients using platforms without API integrations.

"Spreadsheet sync is a lifesaver for clients using platforms like Leap, where there's no API integration. Instead of wasting hours on duplication, they can simply import everything directly into QuickBooks," he explained.

02

Enhanced visibility

Both clients and Morgan Reach are benefiting from the platform's top-down business insights. Dr Shaikh highlighted: "Visibility is critical for both sides. It gives clients visibility in one place and helps them identify whether things are going well or not. For us, we can step in and support their decision-making."

03

Custom workflows and reporting

QuickBooks Advanced allows the practice to tailor workflows and reporting to meet individual client needs. "Businesses might be operating on multi-sites even if they're not large businesses. With workflow automation for report approvals, payment reminders, and other processes, they can now improve overall efficiencies within the business," he added.

04

Data confidentiality

The solution ensures role-based access, safeguarding sensitive information and improving operational transparency. Dr Shaikh elaborated: "If somebody's processing sales, they should only have access to sales. The same for accounts payable, they can run reports within Apron from Advanced and allocate it to the right person. So the confidentiality of data in terms of the two ledgers are completely separate. This also extends to payroll and staff data, including salaries, ensuring these remain confidential - a vital feature for both us and our clients."

05

Multi-currency capabilities

Handling FX differences was previously time-consuming and prone to error. With QuickBooks Advanced, this process is now streamlined. Dr Shaikh noted: "The multi-currency feature is very strong. We've seen a big difference in efficiency. Previously, we had to do manual exchange rates and batch transactions for FX differences. Now, the system does it seamlessly."

Expansion into the manufacturing sector

As part of growing their client portfolio, the practice identified manufacturing businesses as a key target market for QuickBooks Advanced. Dr Shaikh pointed out the platform's suitability for manufacturers:

Any industry dealing with commoditisation, managing stock, and requiring workflows and regular reporting would benefit greatly from QuickBooks Advanced. Many manufacturers work with international suppliers, so multi-currency functionality is critical. They also use systems like Excel to manage production schedules, and spreadsheet sync allows them to integrate that data without manual duplication.

He also revealed how detailed reporting and cost management aligned perfectly with manufacturing requirements: "Manufacturing businesses need to track costs at every stage of production. Advanced helps them identify inefficiencies, reduce waste, and ensure profitability."

He further explained how QuickBooks Advanced moves beyond basic compliance to add real value by enabling advisory services: "It's not just about compliance or offering basic value-added services. It's about becoming a trusted advisor, working with businesses to provide a platform that makes their reporting more efficient."

Targeting the manufacturing sector is seen as a significant opportunity for Morgan Reach. Dr Shaikh said: "Manufacturing businesses are often underserved by traditional accounting solutions. By offering them QuickBooks Advanced, we can provide a tailored solution that addresses their pain points while driving our own growth."



Implementation experience

The onboarding process was smooth, supported by QuickBooks' support team. Dr Shaikh reflected on the implementation experience:



We've been fortunate to have excellent account managers and QuickBooks support. Priority support is a big part of Advanced, and it really came through during migrations.

Rob, our technical lead, worked directly with one of our clients. He handled everything brilliantly, was always available, and explained the system's functionality clearly. **The feedback from the customer was that they felt handheld throughout the process. It was as if he was available to them 24/7.**

Looking ahead

Morgan Reach is optimistic about the potential of QuickBooks Advanced. Dr Shaikh stated:



Advanced is already a very good product. As AI becomes more prominent and businesses look for less hand-holding, QuickBooks Advanced will become integral to how businesses operate. **It will be at the heart of the practice, ensuring businesses have more functionality and efficiency.**

Morgan Reach summarised the transformative impact of QuickBooks Advanced for his practice and for others: "You'll get **business growth and efficiency, confidentiality and segregation, reporting, and better decision-making.**"

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