



Real-Life (Cloud) Tech *with* ***Diane & Jake...***



+



Jake Reeves
Director of Sales
Summit Hosting



Diane Gilson
CEO & Founder
Info Plus Accounting, Inc.
& BuildYourNumbers.com



Why We're Teaming Up Today – Hosting: What it DOES and My (Real-Life) User Experience

- What the heck is hosting, anyway?
- Why hosting is the perfect answer for QuickBooks desktop users
- Why we made the switch to hosting our QuickBooks and related accounting files to Summit
- **Why it took me so long to make the change.**
- **Our experience getting started with Summit Cloud hosting**
- What my virtual desktop “looks” like – and how it acts:
 - ✓ **Various options I've chosen** for MY layout
 - ✓ **Summit features (vs. my prior experience with clients hosted in a different company)**
- Interview Jake: get answers to questions my clients typically ask when I recommend hosting



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ABOUT JAKE REEVES

- Brings **over two decades** of working in the technology industry.
- Jake specializes in providing **technical engineering services to businesses** that want to adopt the cloud but don't know where to begin.
- His focus is on his customers and partnerships in **finding the right solution, for the best cost.**



ABOUT DIANE GILSON

- **Consultant, Trainer, Speaker, Author and Product Developer**
- **Extensive Accounting Background**
 - *16 years in public accounting*
 - *13 years in banking*
 - *Founder of Info Plus Accounting in 1994*
- **25+ Years Working with Business Owners & Accounting Staff to Help Develop Job-Cost & Management Accounting Systems**
- **Certifications and Awards:**
 - *2022 ProAdvisor of the Year*
 - *Certified Advanced & Enterprise ProAdvisor*
 - *8-year Top 100 ProAdvisor*
 - *Top Niche Practice (Construction) ProAdvisor*
 - *CPA background*
 - *Certified Internal Auditor background*



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Our Journey to Hosting...

1. Earliest experiences with hosting
(General awareness, letting clients know about the option, working with clients who had it...)
2. Didn't seem necessary for us
(We had a server, all of us worked in the office with a direct connection to our QuickBooks and other accounting files, no need for "remote access.")
3. The pandemic changed everything!
(Overnight remote work with VPN back to our server. Clunky, slow, and unreliable.)
4. We researched options (six → three → Summit).
(Based on prior experience, I knew what I DIDN'T like AND what we wanted! Security, speed, and ease-of-use!)
5. We made the leap – and have been VERY happy
(Onboarding, related software, customizable to meet our personal preferences)



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My Virtual Hosted Desktop...

- ✓ Initial onboarding for screen size and TruGrid
(E.g., establishing TruGrid security, screen appearance, QuickBooks version, additional software choices, installs, etc.)
- ✓ Connecting (via TruGrid) to my desktop
(Log in to TruGrid, receive a code, and select “Connect.”)
- ✓ Virtual desktop appearance
(Summit logo, blue bar attributes, monitor options...)
- ✓ Windows/File Explorer: views and options
(Personal computer folders, Summit “shared” folder, desktop: “for your eyes only.”)



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My Virtual Hosted Desktop...



- ✓ Copy, paste, and move
(User-friendly right-clicks, copy, paste, and move between folders!)
- ✓ Desktop icons and customized taskbar
(Drag, drop, create shortcuts, taskbar setup, log-out icon, etc.)
- ✓ Internet access
(I use Chrome and Edge)
- ✓ Various additional software options
(e.g., We use Office 365: Excel, Word, Outlook, and Teams)
- ✓ Printing choices
(Just like in your office!)



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Top 10 Questions for Jake



1. **Data security?** (see our prior webinar)
2. **Remote access?**
3. **Backups? And options?**
4. **QuickBooks:**
 - *Versions?*
 - *Single and multi-user?*
 - *Performance?*
5. **Comparison to an in-house server?**
6. **“Specialty software” options?**
7. **Storage space?**
8. **Uptime?**
9. **Support?**
10. **Disaster recovery?**



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Giveaway results!

For Your Free Assessment and to get Your Special Offer, click here: [Summit Hosting](#)
Then, enter this Code: **SUMMIT30**
to enjoy your first 30 days **FREE!**

More Questions?

Contact Jake and the Summit Team at:
253-857-9417 or jreeves@summithosting.com
Schedule a time to chat with Jake: [Calendar](#)

+ Be sure to let Jake know that you watched our webinar
(or the recording) to get your free 30 days!



See Job Cost & Various QuickBooks Resources
(developed by Diane) at: [BuildYourNumbers.com](#)

1. **Our most popular product** - Online Job-Cost Training for QuickBooks desktop:
[CAMP – \(Construction Accounting & Management Program\)](#)
2. **Pre-built Construction Template for QuickBooks:**
[AccountingPRO](#)
3. **Find out what your Employees REALLY cost:**
[eCPA – Employee Labor Cost \(Burden\) Calculator](#)
4. **Accurate reports every month:**
[Month-End Closing Procedures](#)
5. We'll help you **choose the right fit for QuickBooks® and Enterprise software...**

And much more...

For questions or conversation, contact the Info Plus Team at:
734-544-7620 (9-5 Eastern) OR Help@InfoPlusAcct.com



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