

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









Jake Reeves
Director of Sales
Summit Hosting



Diane Gilson
CEO & Founder
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& BuildYourNumbers.com

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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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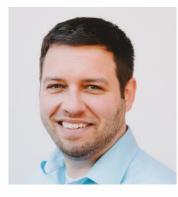
Our Journey to Hosting...

- 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



- **Data security? (see our prior webinar)**
- Remote access?
- **Backups? And options?**
- QuickBooks:
 - Versions?
 - Single and multi-user?
 - Performance?

- Comparison to an in-house server?
- "Specialty software" options?
- **Storage space?**
- **Uptime?**
- **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?

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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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