



VARCBase Practice Management

Run Your Business Instead of It Running You! TM

**Designed for QuickBooks ProAdvisors, Bookkeepers, Small Business Consultants,
CPA/Accountants, and IT Managed Service Providers.**

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VARCBase Practice Management

USER GUIDE

Welcome

VARCBase Practice Management is a very powerful Practice Management system and CRM enabling you to enter client data and your business services to manage your business more easily and effectively.

VARCBase Practice Management can:

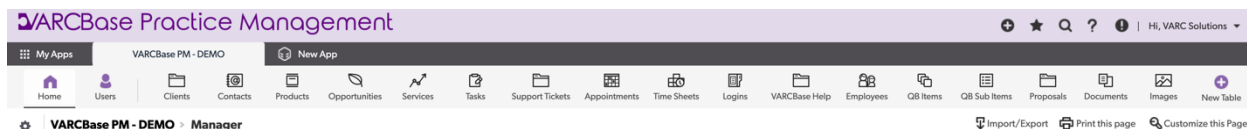
- **Empower your Sales Staff** - Give your salespeople a system that keeps them up to date on who to call, when to call, and why they are making the call, i.e., initial sales call, follow-up call, or schedule an appointment, etc.
- **Access Client Data** - Track your clients and prospects from first contact with your firm. Then, track the QuickBooks version and all of the add-on services you'll quote or provide them. You'll have all of their information at your fingertips.
- **Track New Prospects** - What products do they need? What additional services will they need in the future, etc.?
- **Record Firm Data** - Create, track, and update information essential to the smooth functioning of your firm; i.e., that phone number or link you keep losing.
- **Record Login Data** - Track & access client login/password data from anywhere, anytime, and protect this information using roles and permissions.
- **Track Client Tasks** - Track ongoing activities being performed by your firm, such as bookkeeping tasks, support calls, onsite visits, etc.
- **Track Billable Time** - Track billable time for you and your employees, including onsite client visits, support calls, consulting and training calls, etc., and import timesheets into QuickBooks.

VARCBase Practice Management allows you to see daily activity even while you or your staff are working offsite, which also helps with accountability.

Notes are date/time stamped with the recorder's name and are logged for a permanent record. Activities for that day/week/month easily retrievable. The status of proposals, activities, and appointments are also easy to see. VARCBase Practice Management allows you to enter client passwords and access them from any location (home, office, client location, on the road).

Dashboard

The Dashboard provides access to all of the system's functions, and is the first screen you see after logging in. The Dashboard home page and listed tables are customizable for each Role. The color scheme or style is also customizable for your company.



User **Roles** include Owner/Manager, Client Support, Office Staff, and Sales. Dashboards can be customized to fit your company's needs.

The **Home** page provides a search bar for quick access to clients or logins. Just type in the first few letters of a customer's name and click the search button to find clients beginning with those letters. Type the client's whole name to narrow your search.

Search Clients

Health

Clients contains 'Health': 11 Clients

	Status	Business Name	Billing Contact	Billing Phone	Billing E-Mail
 	Client	Axctrwu Care Health	Dean Bohan	(291) 951-5500	sstrait@pdll.net
 	Client	Central Health Care	Diana Carter	(215) 910-9200	rese@angevinagreup.com
 	Client	Family Healthcare Services	Rhonda Mobley	(215) 922-2242	Rhonda@familyhealthservices
 	Client	Health Claimxc Pluxc	William Green	(409) 995-5055	kim@opeekkeepergiry.com
 	Client	Home Healthcare	Moore	(215) 422-2290	moore@homehealthcare.com
 	Client	Hwurizwun Health	Bruce Guminey	(291) 252-0519	kentsaydana@sopcgypay.net
 	Client	Hwuuxctwun Healthcare	Gutierrez	(125) 456-2990	kenny@cheetahtransportation.net
 	Client	Intercede Health	Arnold Heller	(215) 456-9200	jhh@fyewtrend.com

VARCBase Practice Management includes 3 standard dashboards:

The **Manager Dashboard** provides an overview of the whole company. It gives the owner or business leader a list of new clients, upcoming appointments, and clients that need a check-in call, as well as charts to represent clients by version or product, and the real-time status of support tickets. The dashboard also includes quick access buttons to create new entries and access other helpful information.

The **Sales Dashboard** includes reports helpful for sales and high-touch client communications, such as Weekly – Follow-Up With New Clients, Weekly – Over 90 Day Calls, and an Appointment Calendar. The Weekly - Follow-Up With New Clients report shows clients with a status of “New Client” to help check in during the early stages of working with a new client. The Weekly - Over 90 Day Calls report sets VARCBase Practice Management apart from other CRMs. It lists clients that have not been seen in 45 days and have not been talked to in the last 75 days. The purpose is to make sure each client is touched or called at least every 90 days.

The Sales Dashboard also includes a client search box to make finding a particular client easy, and quick access buttons to create new entries and access other helpful information.

The **Support Dashboard** shows My Open Tickets, My Open Tasks, My Appointments, and Upcoming Appointments, as well as a Support Graph showing each technician and their status, and a list of all open tasks to be completed. The “My” reports are filtered for the particular user currently logged in.

The Support Dashboard also includes a client search box to make finding a particular client easy, a client Logins search box, and quick access buttons to create new entries and access other helpful information.

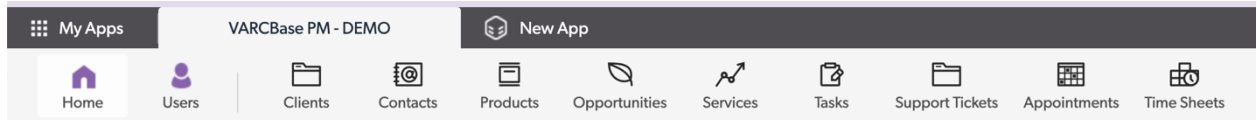
Menu Bar

The Menu Bar allows you to easily Add records, show Favorite reports, Search records, access Help, and view Alerts.



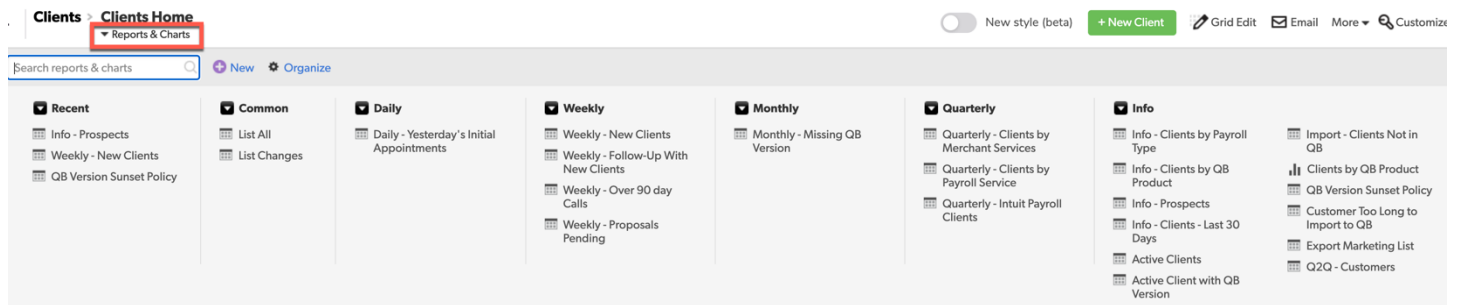
Tabs

Tabs guide you through your business operations, providing direct access to Clients, Contacts, Logins, Services, Tasks, Support, Appointments, Employees, and Time Sheets.



Reports

Under each Tab is a list of pre-defined reports. Reports can be edited to meet your needs, and additional reports are easy to create.



Tabs Overview

VARCBase Practice Management includes tabs across the top of the screen for the various information and activities you'll be managing in your business. The system is scalable to include additional tabs as your business grows or diversifies. The following is an overview of standard tabs.

Clients, Contacts, Products, Opportunities, Services, Tasks, Support Tickets, Appointments, Timesheets, Logins, VARCBase Help, Employees



1. **CLIENTS** tracks relevant data related to your clients, such as business name, primary billing contact info, address, and referral source. This is also where new client or prospect records are created.
2. **CONTACTS** tracks additional contacts related to your clients. For example, you might add the president, office manager, or CPA for a given client as an additional contact. When adding a contact, you'll first select the related client. Or, if you add a contact directly from a Client record, the related client will be filled in for you.
3. **PRODUCTS** are where you list the products or services your firm provides. For example, if you are a QuickBooks reseller, you might have a product for QuickBooks Premier, Enterprise, or Online. If you provide Consulting services, you might have a Product for the type of consulting you provide. If you provide software integrations, you might have a product for the software application you integrate.
4. **OPPORTUNITIES** represent the work being proposed to your clients and prospects. Opportunities help you track the sales status, such as Open - New, Open-Quoted, Closed - Won, or Closed - Lost. This makes it easy to see a list of open or closed opportunities, or won vs lost opportunities.
5. **SERVICES** represent the work being done and invoiced to your clients. For example, if you won an opportunity to provide consulting to your client, you would add a service record to invoice them for consulting work within that won opportunity.
6. **TASKS** captures your recurring or ad-hoc activities for a client, the assigned to, period, and date due.

7. **SUPPORT TICKETS** monitors client support tickets or incidents. Keep track of important information like when the ticket was called in, what the issue is, who it's assigned to, and the status. Log timesheets against Support tickets for future billing.
8. **APPOINTMENTS** are used for scheduling time for you and your employees. Calendar reports give you visibility to meetings for today, this week, and this month.
9. **TIMESHEETS** track time spent by you or your employees working on a particular ticket or task. Employees can add their time along with their billable or non-billable status. You can also import timesheets into QuickBooks for payroll or client invoicing.

Employees can also add timesheets while reviewing support tickets and tasks. At the bottom of a support ticket or task, click '**Add Time Sheet**' to create a new time sheet.

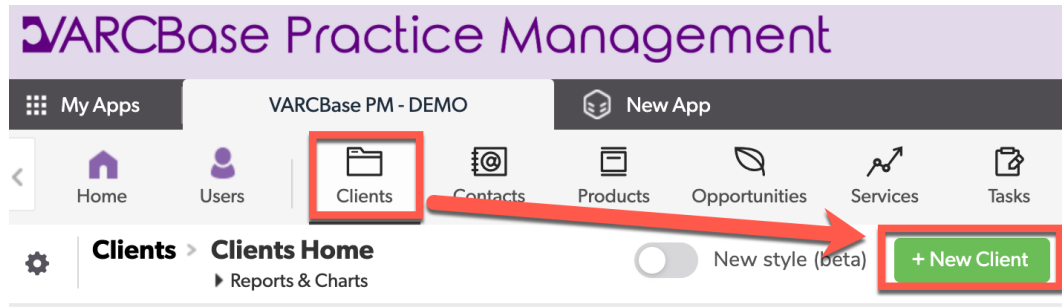
10. **LOGINS** securely stores passwords needed to access you clients data files, online accounts, remote computers, bank records, or other services. Add as many logins per client as needed.
11. **VARCBase Help** allows you to request help, enhancements, or customizations to your VARCBase Practice Management application. Adding a help entry notifies our staff of your request.
12. **EMPLOYEES** is a place to enter and manage the employees or contractors working in your business, and those employees that are assigned to support tickets, appointments, and timesheets.

Using VARCBase Practice Management

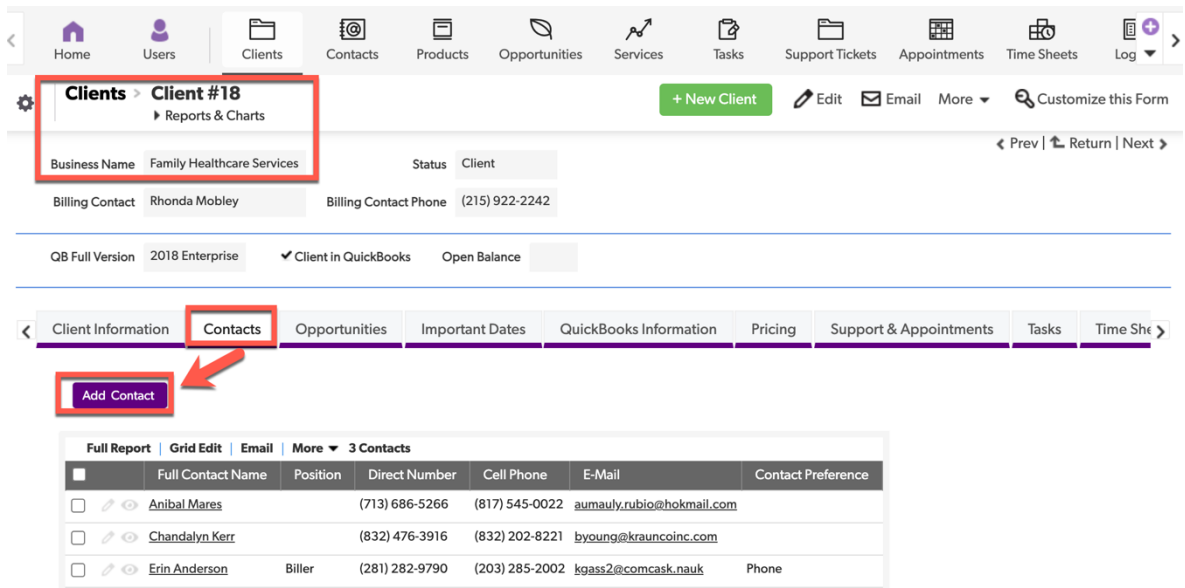
Let's explore the day-to-day use of the system, such as creating new clients, tracking sales opportunities, and supporting clients with appointments, support tickets, tasks, and keeping track of your time.

Add New Record (Two Ways)

1. For each Tab, you can add new entries by clicking the Tab name, then click the New... button.



2. In many cases, it's better to add a new record from a record you want the new record related to. For example, to add a Contact related to an existing Client, first open the Client record, then go to the Tab within the form, and click the Add button. VARCBase Practice Management automatically makes the association between the records to keep things organized.





Contacts > Edit Contact #869

▶ Reports & Charts

▼ Company Information

Client *	Family Healthcare Services	X ▼
QB Version	2018 Enterprise	

▼ Contact Information

First Name	Anibal
Last Name	Mares

Add A New Client

Clients are the people or businesses that you sell product to or perform services for. For each client, you can track relevant information such as business name, primary billing contact info, address, and referral source.

1. From the **CLIENTS Tab**, click **New Client**. This opens the **Add Client** screen, where you can enter relevant client details.

+ New Client	Grid Edit	Email	More ▼	Customize this Page
---------------------	-----------	-------	--------	---------------------

2. Enter a **Business Name** and select a **Status**, such as Prospect, New Client, Etc. The status is used to filter various reports for better organization.

Clients > Add Client

▶ Reports & Charts

Business Name	Reilly & Riley Associates	Status	Prospect ▼
---------------	---------------------------	--------	------------

3. In the **Client Information** tab, enter contact, phone, email, and other relevant information.

Client Information	QuickBooks Information
First Name <input type="text"/>	Last Name <input type="text"/>
Billing Phone <input type="text"/> ext. <input type="text"/>	Billing Fax <input type="text"/>
Billing E-Mail <input type="text"/>	Web Page <input type="text"/>
Referral Source <input type="text"/>	Referred By <input type="text"/>
Number of Employees <input type="text"/>	Years in Business <input type="text"/>
Description of Company <input type="text"/>	

4. Below **Addresses and Notes**, enter the Physical and/or Mailing address for the client. Check **Mailing Same as Physical** to copy the **Physical** address to the **Mailing** address.
5. Use **Notes** to enter additional information not captured in an another field. This field can be updated at any time. Be aware that once this data is saved, the logged entry can't be deleted or changed. Notes are date/time stamped along with the user who entered the note. If you consistently need another field for specific information, submit a Help request.

Notes -- [FEB-17-21 11:21 AM VARC Solutions] -----
This client is new to QuickBooks. Small AC and Plumbing business.

6. The **QuickBooks Information** tab tracks important information about the QuickBooks software your client uses.

QB Defined Industry <input type="text"/>	CAN <input type="text"/>	Intuit Account ID (Email) <input type="text"/>
QuickBooks Year <input type="text"/>	QB Version <input type="text"/>	QB Level/Bundle <input type="text"/>
Number of QB Users <input type="text"/>	Hosting <input type="text"/>	QB Edition <input type="text"/>
Payroll <input type="text"/>	Merchant Services <input type="text"/>	Hosting Provider <input type="text"/>
<input type="button" value="Save & close"/> <input type="button" value="Cancel"/>		

- The **QB Defined Industry** is a drop-down list of industries the client may be in, and may be different than the QB Edition. For example, a client may be in the Retail industry, but could be using the General Business edition of QuickBooks.
- **CAN** is the customer account number with Intuit.

- **Intuit Account ID (Email)** is the primary intuit account login email for the client.
- **QuickBooks Year** is the release year of the intuit product.
- **QB Version** is the Intuit product used by the client.
- **QB Level/Bundle** is the level or bundle of the Intuit product used, such as Gold, Platinum, etc.
- **QB Edition** is the QuickBooks industry-specific edition being used.
- **Number of Users** corresponds to the number of licenses the user has.
- **Hosting** is a Yes or No entry to indicate if the client uses a hosted (aka Cloud) version of the desktop QuickBooks software.
- **Hosting Provider** tracks the hosting provider if the client is using QuickBooks hosting.
- The **Payroll** field tracks the payroll service the client is using.
- The **Merchant Services** field tracks whether your client accepts cards for payment and/or where they are at in the approval process.

After you **Save & Close** the **Add Client** window, additional tabs are used to track additional information and ongoing work with the client.

7. The **Important Dates** tab conveniently displays the date of your last follow-up call, first timesheet, and last timesheet. As you use VARCBASE Practice Management, these dates will automatically populate.


Last Follow Up	09-01-2020		
First Timesheet Date	02-03-2021	Last Timesheet Date	02-08-2021
		Length of Time for Client	5 days

Add a New Contact

Contacts are the people within a particular company you work with or need to communicate with. You might have one or many contacts at a given company. For example, you might add the Accounts Payable person for billing, the Owner or President for strategic conversations, a project manager for specific work projects, or even the company's internal bookkeeper, accountant, or CPA.

You can add a contact directly to the Contacts table, or open the client record and add a contact from there.

1. From the **Contacts Tab**, click **New Contact**. This opens the **Add Contact** screen, where you can enter relevant contact details. Or, open a client record from the **Clients** tab, click on the **Contacts** tab within the form, and click **Add Contact**.


 **Contacts** > **Add Contact**
▶ Reports & Charts

Company Information

Client * X ▾ Status Client

QB Version 2018 Enterprise

Contact Information

First Name 

Last Name

Main Business Phone (215) 922-2242

Direct Number ext.

Cell Phone

E-Mail

Contact Preference ▾

▾

Add a New Product

Products are the products or services your firm provides. For example, if you are a QuickBooks reseller, you might have a product for QuickBooks Premier, Enterprise, or Online. If you provide Consulting services, you might have a Product for the type of consulting you provide, such as Bookkeeping, IT Consulting, or Tax Prep. If you provide software integrations, you might have a product for the software application you integrate, such as TSheets, Avalara, or SharePoint.

1. From the **Products Tab**, click **New Product**. This opens the **Add Product** screen, where you can enter relevant product details.

Products > **Add Product**
▶ Reports & Charts

☒ Active

Type

Service ▼

QB Item Name

Consulting:Tax Preparation ✕ ▼

Product

Tax Preparation ... 9+

Sales Price

\$150.00

Description

Tax Preparation at end of year


Save & close ▼

Cancel

Add a New Opportunity


Opportunities represent the work being quoted to your clients and prospects. Opportunities help you track the sales status, such as Open - New, Open-Quoted, Closed - Won, or Closed - Lost. This makes it easy to see a list of open or closed opportunities, or won vs lost opportunities.


1. From the **Opportunities Tab**, click **New Opportunity**. This opens the **Add Opportunity** screen, where you can enter relevant opportunity details. Or, add an opportunity from an existing client record.

 **Opportunities** > **Add Opportunity** Save & close Cancel

▶ Reports & Charts


Opportunities

Date02-17-2021


ClientHome Healthcare


Billing Phone(215) 422-2290

Billing Emailmoore@homehealthcare.cor

Full Contact NameRobert Andrews


Contact Emailkaz@kraurfumauskrluswholausalau.com

StatusOpen - Quoted

ProductQB Premier

NotesCustomer interested in latest version of QB Premier.

File AttachmentChoose FileNo file chosen

Follow Up02-26-2021


URL

Save & close Cancel

Add a New Service

Services represent the work being done and invoiced to your clients. For example, if you won an opportunity to provide consulting to your client, you would add a service record to invoice them for consulting work within that won opportunity.

1. From the **Services Tab**, click **New Service**. This opens the **Add Service** screen, where you can enter relevant service details. Or, add a service from an existing client record.


 **Services > Add Service**
▶ Reports & Charts

Services Provided

Opportunity Status


Closed - Won

Client


Home Healthcare 

Billing Phone (215) 422-2290

Product


Consulting:Accounting 

Related Opportunity

Consulting:Accounting 

Cost \$150.00

Qty

1 


Rate

\$150.00


Description

Monthly Bookkeeping: 2 Bank Accounts, 1 Credit Card, and Sales Tax Reconcile.

Per

Hour 


Date Started

02-17-2021 

Add a New Task

Tasks capture your recurring or ad-hoc activities for a client, the assigned to, period, and date due. For example, you can use tasks to capture routine or even recurring bookkeeping activities such as a bank reconciliation. With status fields to track completed status and completion date, you can easily report on open or even past-due tasks.

1. From the **Tasks Tab**, click **New Task**. This opens the **Add Task** screen, where you can enter relevant task details, and assign to yourself or another employee. Or, add a task from an existing client record.

 **Tasks** > **Add Task**
▶ Reports & Charts

Tasks

Customer

Home Healthcare X ▼


Assigned To

Angie Willis X ▼


Type

Month End Close ▼

Summary

Month End Close and Financials 

Period Ending

02-17-2021 

Days to Complete

5

Calculated Due Date

02-22-2021

Notes

Finish reconcile of two bank accounts, run updated financials YTD and MTD, and send to client.


Save & close ▼

Cancel

Add a New Support Ticket

Support tickets keep track of important “break/fix” incidents for your clients. Use support tickets to capture information like call in date, issue description, assigned to, and status. Log timesheets against the tickets for future billing.

1. From the **Support Tickets Tab**, click **New Support Ticket**. This opens the **Add Support Ticket** screen, where you can enter relevant ticket details, and assign to yourself or another employee. Or, add a Support Ticket from an existing client record. After you select a client, contact details will automatically appear for the clients phone and email address.

 **Support Tickets > Add Ticket** ▶ Reports & Charts Save & close ▼

Client Information

Client *

Home Healthcare

×

▼

Ticket Called In By:

Robert Andrews

×

▼

Business Phone

(215) 422-2290

Direct Number

(281) 298-7540

Cell Phone

Email

kaz@kraurfumauskrluswholausalau.com

QuickBooks Version

2018 Enterprise

Support Information

Assigned To

Annette Banks

×

▼

Service Item

QuickBooks Training

×

▼

Priority *

Medium

▼

Ticket Called in on:

02-17-2021

📅

Due Date *

02-19-2021

📅

Status

Not Started

▼

Issue

Needs help understanding how Items relate to COA and Financials

Screen Capture

Choose File

No file chosen

Save & close ▼ Cancel

2. Select a ticket **Service Item** to help track and organize your work.
3. Assign a **Priority** to help prioritize work across all your clients.
4. Assign a desired Due Date, describe the issue, and if applicable, upload a picture or document as an attachment.

Add a New Appointment

Appointments are used to schedule time for you and your employees. Use built-in reports to see upcoming appointments and appointments this month.

1. From the **Appointments Tab**, click **New Appointment**. This opens the **Add Appointment** screen, where you can enter relevant appointment details for yourself or another employee. Or, add an appointment from an existing client record.

Appointments > Add Appointment Save & close Cancel

Client Info

Company Home Healthcare ×

Contact Moore

Phone (215) 422-2290

Address [2001 Kim Pass, Houston, Texas 77025](#)

QB Version 2018 Enterprise

Appointment Info

Date * 02-22-2021 📅 Start Time * 09:00 AM End Time * 11:00 AM

Appointment With Robin Hall ×

Type of Appointment File Setup ▼

Service Consulting:Accounting ×

Appointment Location Onsite ▼

Reason for Appointment Client needs new file set up. Current file is corrupt and having too many problems.

Save & close Cancel

2. Enter the appointment **Date**, **Start Time**, **End Time**, and the employee the appointment is assigned to.
3. Enter the **Type of Appointment**, **Service**, **Location**, and **Reason for the Appointment**.

Add a New Time Sheet

Track the time you or your employees spend on a particular task, appointment, or support ticket. Depending on the assignments in a given week, your employee might have one or more timesheets. There is no limit to the number of timesheets you can track. The key is to track the employee, client, and type of work in enough detail so you can pay employees appropriately for their time and invoice clients later for the work.

1. From the **Time Sheet Tab**, click **New Time Sheet**. This opens the **Add Time Sheet** screen, where you can enter relevant timesheet details for yourself or another employee.

The screenshot shows the 'Add Time Sheet' form. At the top, there is a breadcrumb trail: 'Time Sheets > Add Time Sheet' with a 'Reports & Charts' link. A green 'Save & close' button is in the top right. The form is divided into two main sections: 'Company Information' and 'Time Sheet Information'. Under 'Company Information', the 'Client' dropdown is set to 'Home Healthcare'. Under 'Time Sheet Information', the 'Date' is '02-22-2021' with a calendar icon. The 'Employee' dropdown is 'Robin Hall'. The 'Appointment' dropdown is '02-22-2021'. The 'Service' dropdown is 'Consulting:Accounting'. The 'Duration' is '2'. The 'Billable' checkbox is checked. The 'Payroll Item' dropdown is 'Hourly Rate'. The 'Notes' field contains the text 'Setting up new company file for client.' At the bottom, there are 'Save & close' and 'Cancel' buttons.

Time Sheets > Add Time Sheet Save & close

▶ Reports & Charts

Company Information

Client: Home Healthcare

Time Sheet Information

Date: 02-22-2021

Employee: Robin Hall

Appointment: 02-22-2021

Service: Consulting:Accounting

Duration: 2

☒ Billable

Payroll Item: Hourly Rate

Notes: Setting up new company file for client.

Save & close Cancel

2. If the timesheet is for a particular client, select a **Client** from the list.
3. Enter the Employee and work Date.
4. Enter the Service being performed, Duration, Billable status, Payroll Item, and Notes. Time can be entered as hours (1:00) or minutes (0:59).
5. Enter notes that will help you recall later what the work was about. This can also help if your client has a billing question later.

Add a New Login

Logins capture key information needed to support your clients. For example, with your clients bank information, you can view or download statements needed to reconcile bank accounts without client intervention.

1. From the **Logins Tab**, click **New Login**. This opens the **Add Login** screen, where you can enter relevant client login details.

The screenshot shows the 'Add Login' form in the VARCBase Practice Management system. The breadcrumb navigation is 'Logins > Add Login', with a link to 'Reports & Charts'. The form is titled 'Login' and contains the following fields:

- Company ***: A dropdown menu with 'Home Healthcare' selected.
- Type**: A dropdown menu with 'Windows' selected.
- Web Address**: A text input field with a placeholder icon.
- Username**: A text input field with 'rhanhins' entered.
- Password**: A text input field with '@###!!9484Alpha' entered.
- Security Question**: A text input field with 'Name of Best Friend' entered.
- Security Answer**: A text input field with 'Robin' entered.

At the bottom of the form are two buttons: 'Save & close' (green) and 'Cancel' (grey).

2. Select the client you want to record a login for. The red asterisk indicates this is a required field.
3. Select a **Type** from the drop-down list, such as Bank logins, EFTPS, Windows, etc. You can create multiple login records for each client, to track all the ones you need.
4. For each login, enter applicable information such as website address, Username, Password, and any security questions.

Add a New VARCBASE Help Request

Sometimes you're going to need some help. Maybe you just have a question or need some additional training. Or based on your evolving business, you may need more involved enhancements or customizations.

VARC Solutions offers paid support on an hourly basis (billed in 15 minute increments), and most issues can be resolved in less than an hour.

Just submit a help request and our team will respond, usually within 1 business day.

1. From the **VARCBASE Help Tab**, click **New Help Request**. This opens the **Add Help Request** screen, where you can add a new request.

The screenshot shows the 'Add Help Request' form within the 'VARCBASE Help' section. The form includes a header with a gear icon, the title 'VARCBASE Help > Add Help Request', a 'Reports & Charts' link, and a 'Save & close' button. Below the header, a dropdown menu shows 'VARCBASE Help' is selected. A note states: 'VARC Solutions will review your request and get back to you. Work is performed at our hourly development rate of \$150/hr.' The form fields are: 'Your Company Name' (Acme Bookkeeping Services), 'Your Name' (Joe Smith), 'Preferred Communication Method' (Phone), 'Best Contact Information' (281-555-9874), 'Help Needed' (Customization), 'Request Details' (I need help adding a new service offering: QuickBooks Conversion), 'Importance' (High), and 'Resolved' (No). At the bottom are 'Save & close' and 'Cancel' buttons.

VARCBASE Help > Add Help Request [Reports & Charts](#) [Save & close](#)

VARCBASE Help

VARC Solutions will review your request and get back to you. Work is performed at our hourly development rate of \$150/hr.

Your Company Name: Acme Bookkeeping Services

Your Name: Joe Smith

Preferred Communication Method: Phone

Best Contact Information: 281-555-9874

Help Needed: Customization

Request Details: I need help adding a new service offering: QuickBooks Conversion

Importance: High

Resolved: No

[Save & close](#) [Cancel](#)

2. Enter other help request details, along with the best way to reach you and the importance.

Add a New Employee

Employees are the people assigned to support tickets, appointments, and time sheets. Enter and manage the employees or contractors working in your business as needed.

Note: While it's more efficient to have everyone in and using the system, not all employees will need access to VARCBASE Practice Management. You can add an employee to assign to various tasks, and manage their assignments for them if you want.

1. From the **Employees Tab**, click **New Employee**. This opens the **Add Employee** screen, where you can add a new employee or contractor.

The screenshot shows the 'Add Employee' form in the VARCBASE Practice Management system. The form is titled 'Employees > Add Employee' and includes a 'Save & close' button in the top right corner. The form fields are as follows:

- Employee / Contractor:** A dropdown menu with 'Employee' selected.
- First Name:** A text field with 'Brad' entered.
- Last Name:** A text field with 'White' entered.
- Full Name:** A text field with 'Brad White' entered.
- SS# or TaxID:** A text field with '111-22-3215' entered.
- Address:** A section with a search bar and several text fields. The search bar contains 'Search for an address'. The text fields contain '906 Anna Lane', 'Street 2', 'Friendswood', 'Texas' (a dropdown menu), and '77549'. To the right of the address fields is a map showing the location of the address.
- Cell Phone:** A text field with '281-555-1234' entered.
- Personal Email:** A text field with 'brad777@hotmail.com' entered.
- Work Email:** A text field with 'bradley@varcmail.com' entered.

2. Enter other employee details as needed for employee tracking.

Reports

VARCBase Practice Management includes built-in reports for each list or activity area. Reports can be customized as needed, and new reports can be created. You'll find that much of this can be done on your own, but VARC Solutions is available to customize or build additional reports on an hourly development basis.


Client Reports





Within the **Clients** tab, VARCBase PM categorizes reports as Daily, Weekly, Monthly, Quarterly, and Info (aka As-Needed) to help organize your work.


Daily Reports

Daily reports keep you up to date with open sales opportunities and Yesterday's client first appointments to see if the client is happy.

- Open Sales Opportunities
- Yesterday's Initial Appointments

 **Clients** > **Open Sales Opportunities**
▶ Reports & Charts













☐ New style (beta)  Favorite  Grid Edit  Email  More



Colored Rows are past the follow up date

11 Clients

Status is not 'Inactive' AND ...

<input type="checkbox"/>	Business Name	Billing Contact	Billing Phone	Billing E-Mail	^ # of Open Opportunities	Last Follow Up	Next Contact
<input type="checkbox"/>	 Business Consultants	Jonny Cash	(225) 555-7878	johncash@businessconsultants.com	2	12-01-2020	01-15-2021
<input type="checkbox"/>	 GoToCo, LLC	Dave Edwards	(555) 412-6914 x112	edwardsd@gotoco.com	2	09-01-2020	01-05-2021
<input type="checkbox"/>	 415 -Demo - Feb 2020	Kathy Abbassi	(281) 555-1234	AbbassiK@415Group.com	1	10-01-2020	03-05-2021
<input type="checkbox"/>	 A/C Services	Jerry Baldwin	(215) 425-0125	jerry@acservices.com	1	12-01-2020	04-17-2021
<input type="checkbox"/>	 Aardvark Transatlantic, Ltd	Sonny Bailey	(215) 995-9596	sonnybailey@aardvark.com	1	12-01-2020	05-08-2021
<input type="checkbox"/>	 ABC Appliances	Cindy Johnson	(281) 412-6522	cindy@abcappliances.com	1	12-01-2020	06-30-2021
<input type="checkbox"/>	 Able Bookkeepers	Sue Morgan	(555) 894-8888 x154	susan@ablebooks.com	1	10-01-2020	07-05-2021
<input type="checkbox"/>	 Brakes and More	Chad Morgan	(215) 555-0929	Chadmorgan@barakesandmore.com	1	12-01-2020	
<input type="checkbox"/>	 Home Healthcare	Moore	(215) 422-2290	moore@homehealthcare.com	1	12-01-2020	08-06-2021
<input type="checkbox"/>	 Ladder Supply Company, Inc	Suzy Arrow	(215) 926-2449	Suzy@laddersupply.com	1	09-01-2020	09-30-2021
<input type="checkbox"/>	 Luxury Living	James Abad	(415) 652-5061	JamesA@luxliving.com	1	10-01-2020	12-31-2021
TOT						13	

Weekly Reports

Weekly reports keep you in contact with clients, by showing who needs a follow-up call or visit, thank you card, or personal note.

Clients listed as New Clients have had one appointment, but have not been followed up with yet. We recommend only changing the client status from New Client to Client after you've started work and have checked in with them to ensure things are going well.

- New Clients
- Follow-up with New Clients
- Over 90 day Calls

Monthly Reports

Monthly reports are good for catching missing information, and to keep on top of clients that might have an older version of QuickBooks that is soon to sunset (ie, lose support from Intuit if the software is over 3 years old). These reports can also be used as good sales opportunities to check in on additional work or needs the client may have.

- Missing QB Version
- QB Version Sunset Policy

Quarterly Reports

Quarterly reports also help you stay on top of timely updates that require more lead time, such as renewing or switching a payroll service or credit card merchant account. These reports create an actionable list for targeted marketing campaigns.

- Clients by Merchant Services
- Clients by Payroll Service
- Intuit Payroll Clients

Info Reports

Informational reports show you which clients you've touched in the last 30 days, and help visualize your clients by QuickBooks Product, Type, etc.

- Clients by Payroll Type
- Clients by QB Product
- Clients by QB Product (Graph)
- Clients – Last 30 Days
- Active Clients
- Active Clients with QB Version
- Client Map
- Clients by Version/Year
- Export – Marketing List

Login Reports

The Login Reports include **Logins by Client** and **Logins by Type**. It's also easy to search or filter the login reports for a particular client or type, for quick access to just what you need.

Task Reports



















The Tasks tab has one standard report: **Activities to be Completed**.

This report lists the Client, Type, Period Ending, Due Date, etc. All past due activities are displayed in pink for increased visibility.

Support Ticket Reports





Support Ticket reports help you stay on top of open tickets, and visualize the types of work your employees are doing.

- Open Incidents by Technician
- Incident Graph – Technician
- Incident Graph – Technician & Status
- Incidents Graph – Status

Support Open Incidents by Technician								
GRID EDIT EMAIL PRINT OTHER ▼								
	Status	Priority	Client	Assigned To	Phone #	Date of Incident	Due Date ▲	Issue
(empty)								
NEW!  	Not Started	Medium	AlexandraCo		(713) 352-2345 x253	02-15-2010	02-15-2010	[FEB-15-10 9:53 AM
Juiced Test								
NEW!  	Waiting - Internal	OMG!!	RichardCo	Juiced Test	(281) 412-6914	12-18-2009	12-18-2009	[DEC-18-09 3:30 PM
NEW!  	Not Started	Low	RichardCo	Juiced Test	(281) 412-6914	01-13-2010	01-13-2010	[JAN-13-10 4:57 PM
NEW!  	Not Started	Low	RichardCo	Juiced Test	(281) 412-6914	01-13-2010	01-13-2010	[JAN-13-10 4:58 PM
NEW!  	Not Started	Low	RichardCo	Juiced Test	(281) 412-6914	01-13-2010	01-13-2010	[JAN-13-10 4:59 PM
NEW!  	Not Started	Medium	RichardCo	Juiced Test	(281) 412-6914	01-26-2010	01-26-2010	[JAN-26-10 8:38 PM
NEW!  	Not Started	Medium	BobBobCo	Juiced Test	(281) 554-2394	01-27-2010	01-27-2010	[JAN-27-10 7:03 PM for end of year, 2009
NEW!  	Started	OMG!!	BobBobCo	Juiced Test	(281) 554-2394	01-28-2010	01-28-2010	[JAN-28-10 8:49 PM keeps freezing when
NEW!  	Not Started	High	HeatherCo	Juiced Test	(713) 583-2852	01-30-2010	01-30-2010	[JAN-30-10 2:18 PM a vendor spreadsheet call ASAP

Appointments Reports

For appointments, the most important report is **Upcoming Appointments** to help you know what's coming up soon.

Appointments Upcoming Appointments						 Add a New Appointment	 Customize this Report
Appointment - Time Begin is on or after today						Results 1 to 1 (out of 1)	
GRID EDIT EMAIL PRINT OTHER ▼							
Client	Phone	Address	Begin Appt	End Appt	Reason for Appt		
Saturday, 05-15-2010						1 Appointment	
NEW!  	Fairfield Metalxc, Inc.	(409) 595-0556 3555 Preston Avenue	Saturday, 05-15-2010 01:00 PM	Saturday, 05-15-2010 05:00 PM	Set up New QuickBooks file, they have 4 new employees that need to be trained.		

Customizing Reports

VARCBase Practice Management reports are easy to customize. You can sort, group, filter, and summarize information easily.

Each tab or table includes fields that may or not currently display on a given report. Reports can be customized to see additional fields (columns) or unneeded fields can be removed from a report.

Report customizations can be made once for a given purpose or saved for use again later.

VARC Solutions is available on an hourly basis for training or to customize/build additional reports as needed.