

Spyder Trap Moves to Frictionless Project Accounting with Quick Base Sync

As a growing marketing technology firm, Spyder Trap needed a better way to match invoices and payments to the actual work being done. The solution was Quick Base Sync, a built-in feature of Intuit Quick Base that keeps the firm's QuickBooks Online and Quick Base systems in perfect harmony. The results are fewer mundane tasks for the accounting department and better insights into profitability and growth planning.

The Challenge

- Matching invoices to projects required redundant data entry in multiple systems
- Lost or misplaced data due to human error
- Manual calculations for understanding project success
- Unpredictable commissions payments and schedules

The Solution

- Quick Base Sync for syncing data between accounting system (QuickBooks Online) and project management system (Intuit Quick Base)
- Automatic invoice creation and payments tracking
- Automated reporting of project expenses, project success metrics, and commissions payments
- Subscription notifications to keep accounting and business teams up to date

The Results

- Savings of 252 hours per year moving from manual to automated processes
- Ability to steer business towards more profitable projects with automated profitability tracking
- Elimination of human error in key accounting processes
- Easy tracking of invoice payments
- Frictionless commissions payouts.



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Complex projects are the norm in the digital marketing industry. Companies like Spyder Trap – a forward-thinking marketing technology firm based in Minnesota – often set up multiple stages of a given project and invoice customers when each stage is complete.

Managing those processes can be difficult with separate project management and accounting systems, so Spyder Trap looked for a better way.

With Quick Base Sync, a built-in feature of Intuit Quick Base that enables users to import data from other cloud apps, Spyder Trap was able to connect its project management system (Quick Base) to its accounting system (QuickBooks Online) to automate not only invoice generation, but also payment and expense tracking to get a clear, unfiltered view of its business.

The results are fewer mundane tasks for the small accounting team and insights to help shape the future of the company.

“Quick Base Sync is very intuitive and powerful. Once we get our expenses and bills out of QuickBooks Online, we can attribute our costs to our projects. That gives us perfect profitability calculations and the business intelligence insights we need to take our company in the right direction,” says Scott Storlie, Quality & Process Manager for Spyder Trap.

The Trouble With Manual Processes

Prior to using Quick Base Sync, Spyder Trap relied on a manual process for invoice generation and tracking. Project managers would create several invoice requests in the project management Quick Base app. Then the small accountant team would generate the invoices in QuickBooks Online, then manually upload PDF files of each invoice back into the Quick Base app. With each invoice payment, an accounting team member would have to update the project manually by logging into Quick Base and checking an appropriate box.

“It was a lot of steps, which meant there was a lot of opportunity for human error,” says Storlie.



Quick Base Sync changed all that by giving Spyder Trap a way to automate much of that process.

Now, project managers can generate multiple invoice requests for any project in Quick Base. Once the invoices are created in QuickBooks Online, an accounting team member simply adds the invoice numbers into the Quick Base app. From that point on, all relevant data on those invoices is automatically synced from QuickBooks Online into the Quick Base app, including customer information, balances, due dates, descriptions, line items, and more.

Payments information is also tracked automatically, which enables the Spyder Trap team to track not only how much is owed, but also to get ahead of monthly commissions for sales reps. Rather than manually combing through all paid invoices to match them to commissions (commissions are paid based on the prior month's payments), Spyder Trap can easily generate a monthly Quick Base report for seamless commissions payments.

The Real Value of Insight

The process improvements Spyder Trap created with Quick Base Sync have a real effect on efficiency. Storlie estimates the team will save 252 hours over the next year by eliminating manual processes in accounting, project management, and commissions. That's roughly equivalent to 6.5 weeks of a full-time employee.

While reducing the manual efforts and human errors of the billing and payments processes were more than enough to warrant celebration of the Quick Base Sync-enabled solution, Storlie points to another benefit as well. Having the right data in a central place allows Spyder Trap to assess profitability by job and job type.

"We categorize our projects by type, whether we're building custom web sites or working on search marketing optimization or something else. Understanding our profitability by category means we can understand which projects are most profitable, so we can do more of the work that benefits us the most," says Storlie.



About Quick Base

Quick Base provides a cloud-based platform that empowers problem solvers to quickly turn ideas for better ways to work into apps that make their organizations more efficient. For nearly 20 years, people of all technical backgrounds have been using the Quick Base platform to create solutions that streamline processes, capture real-time data, and improve company operations, all while working in concert with existing IT systems. Based in Cambridge, MA and a former division of Intuit, Quick Base has a 6,000+ customer universe of app-enabled businesses that spans all industries and company sizes, and includes more than half of the Fortune 100.

For more information, please visit: www.QuickBase.com