

Tools and Tech

Geni Whitehouse, CPA



Introductions

- ◉ Name
- ◉ Company or Winery
- ◉ Role

- ◉ What brought you to this class?
- ◉ Biggest Technology Challenge?
- ◉ Product Need?

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AI and Machine Learning Blockchain

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Automation Opportunities

- ⦿ Accounting
- ⦿ POS
- ⦿ Expenses
- ⦿ Bill payment
- ⦿ Dashboards
- ⦿ Analytics
- ⦿ Budgets
- ⦿ Forecasts
- ⦿ Connector – WGITS

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Cloud Accounting

- QBO Online
- Xero
- Intacct
- Acumatica
- Dynamics 365 Business Central
- *Hosted QB Desktop*



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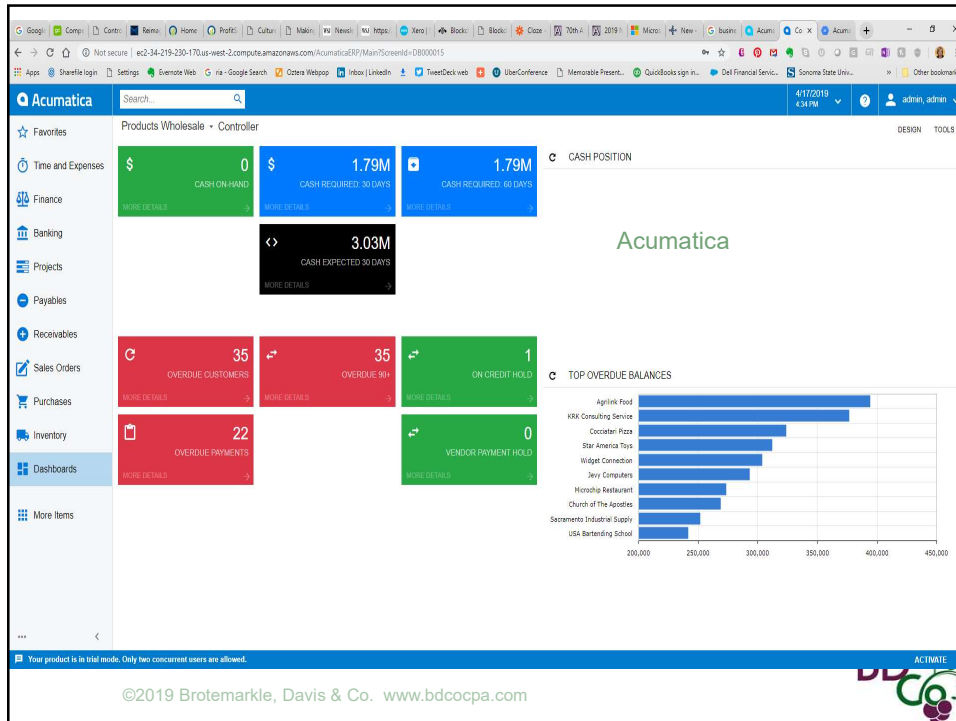
The screenshot displays the Dynamics 365 Business Central interface. A central pop-up window titled "VIEW - CREDIT LIMIT NOTIFICATION - 40000 - ALPINE SKI HOUSE" is open, showing a warning: "This customer has an overdue balance." Below this, a "Details" table lists financial metrics:

Field	Value
No.	40000
Name	Alpine Ski House
Balance (\$)	4,316.92
Outstanding Amt. (\$)	903.94
Shipped/Ret. Rec. Not Invd. (\$)	0.00
Current Amount (\$)	0.00
Total Amount (\$)	5,220.86
Credit Limit (\$)	0.00
Overdue Amounts (\$) as of 04/08/2019	4,316.92
Invoiced Prepayment Amount (\$)	0.00

The background interface shows a sales order for "Alpine Ski House" with a "NAV on the Cloud" header. The "Customer Details" section on the right lists the customer name as "Alpine Ski House" and the customer number as "40000".

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New Players

- Commerce 7 (founder of Vin65)
- Figure
- Truvi (Simply CMS founder)
- Xüdle



Bill payment

- ◉ Bill.com – approvals and workflow
- ◉ MineralTree.com
- ◉ Veem.com for global payments

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Dashboards

- ◉ Fathom
- ◉ Finagraph
- ◉ Futurli

- ◉ VinDashboard – WD integration

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Benchmarks

Community Benchmark - newsletter

February 2019 vs. 2018 Year-over-Year Change by Region

Visitors - '18 vs '19						
VISITORS	Napa Public (27)	Napa By Appt. (29)	Paso Robles (25)	San Luis Obispo (21)	Mendocino (23)	Santa Cruz Mountains (9)
February YOY	9.4%	-2.6%	-3.2%	17.6%	-21.5%	-13.0%
Year to Date YOY	11.5%	7.3%	2.3%	5.0%	-16.5%	-2.4%
% reporting	67%	66%	64%	67%	35%	44%

Total Sales - '18 vs '19						
SALES	Napa Public (27)	Napa By Appt. (29)	Paso Robles (25)	San Luis Obispo (21)	Mendocino (23)	Santa Cruz Mountains (9)
February YOY	13.7%	25.0%	11.8%	-3.40%	44.5%	-23.0%
Year to Date YOY	9.5%	30.2%	26.2%	1.5%	25.0%	-10.50%
% reporting	63%	62%	64%	67%	35%	44%

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Analytics

- MS PowerBI
- Qlik
- Tableau

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CashFlow forecasting

- ◉ Cashflow tool by Finagraph \$50/user

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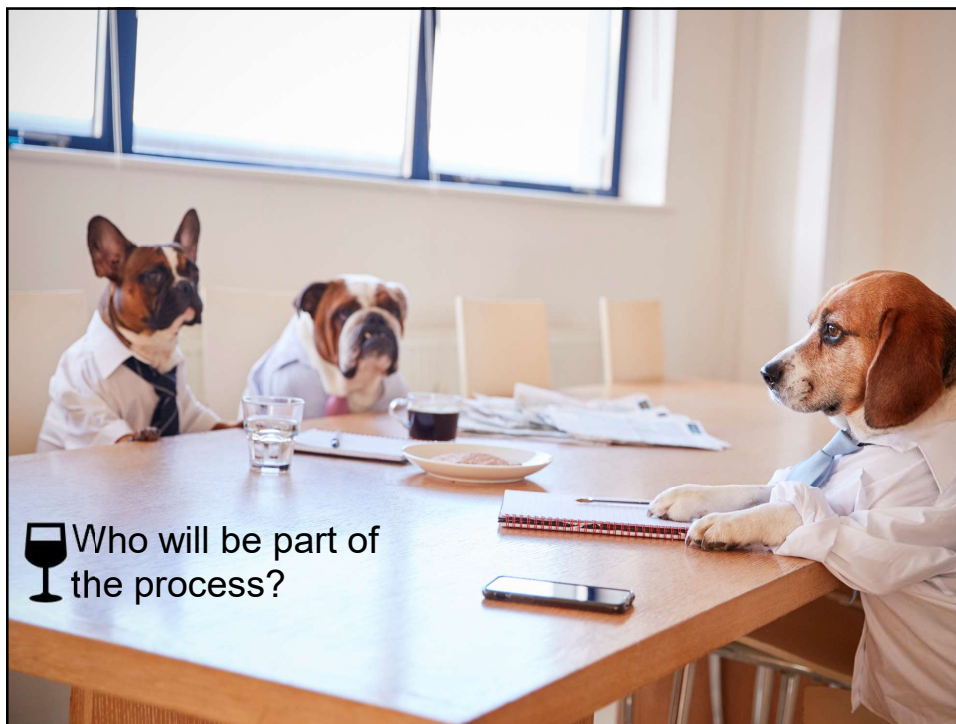
Tools for Budgeting


- ◉ PlanGuru
- ◉ ProfitSee
- ◉ LivePlan

- ◉ Spreadsheet

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 Who will be part of the process?

What stood out for you?

Thank You!

Geni@bdcocpa.com

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