



Grow Your Accounting Firm with Connex

Founder & CEO, Joseph Anderson, started his company with a vision to free QuickBooks users from manual data entry. Since seeing his mother (the primary breadwinner for the family) go through surgery for carpal tunnel in her 20's, Joseph has dedicated his career to developing automations for QuickBooks Online and Desktop editions.

Connex is now the most complete solution for QuickBooks users in the marketplace. We help accountants reconcile their clients' books

- Faster,
- More accurately, and
- At a lower cost

than other solutions in the market to minimize the need for manual reconciliation or journal entries. We offer advanced accounting functionalities within an intuitive user-interface, so our customers can have peace of mind that their books are reconciled.

At Connex our core value is “growth.” With the help of our automations, accounting professionals can grow their firms by having faster turnaround times and having the resources to serve more clients.

Unlike other automations that only sync sales to QuickBooks, Connex is a complete solution that includes automated inventory adjustment, reconciliation, and sales tax mapping. We have even helped customers reconcile multiple currencies and import historical sales.

Our signature technology is the Connex Rules Engine, which allows you to customize automated bookkeeping for clients with different business processes.

By combining customization and automation, Connex can help you to take on more clients at a fraction of the cost.

Automatic Reconciliation with Connex

Of all the automations we offer, the automatic reconciliations are the most intriguing for accountants. Connex offers two options for businesses who want to reconcile their orders in QuickBooks. Option #1 is the automated match deposit tool and option #2 is the detailed summary payout. .

Option #1: The Automated Match Deposit Tool

The Connex Match Deposit tool will save you hundreds of hours of manual data entry. The tool alleviates the burden of hand matching each sale to the payout by automatically downloading the payout from the payment processor, matching the sales, and recording the fees. You can even choose to sync a summary transaction, based on a payout.

Some key features of the Match Deposit tool:

- Automate the process of matching deposits, saving time and money
- Eliminate human data entry errors
- Help detect errors or missed payments
- Manage your accounting records more efficiently

Connex can save your firm hundreds of hours a year! But, don't take our word for it! We think our customers say it best:

“The features in Connex are phenomenal and superior to every solution. The Deposit Match tool blew me away. Now, I can't even imagine entering orders from Shopify by hand. Before, we used to cut and paste orders into emails and send them over to the fulfillment team. Now Connex automatically syncs ShipStation with QuickBooks for us, and it saves us at least 2 hours a day.” – Scott Avera, Co-Founder, Animals Matter.

Option #2: The Detailed Summary Payout

While the automated Match Deposit Tool is a game-changer for many businesses, Connex Founder Joseph Anderson realized that a "detailed summary payout" is a more efficient way to sync orders to QuickBooks.

Instead of syncing and matching orders individually, the detailed summary payout reconciles QuickBooks when the payouts occur.

This functionality is especially helpful if your clients don't want to sync individual customers to QuickBooks. If your clients have a large order volume and want to keep your books clean, the detailed summary payout feature of Connex is a better fit.

Please see the table on next page to compare the automated match deposit tool and the detailed summary payout.

Joseph's vision is to help accounting professionals provide the highest-quality services so both their clients and their firms can grow. *“When you have 5, 10 or more clients, it's impossible to keep their QuickBooks accounts updated if you have to manually check off every order by hand.”*

“When it comes to reconciling QuickBooks, we don't just take you half-way. We offer you a complete solution,” Joseph said.

Contact us at
sales@syncwithconnex.com
for more information



Automated Match Deposit Tool vs. Detailed Summary Payout

by Connex

Automated Match Deposit Tool	Detailed Summary Payout
Automatically match orders individually	Creates a detailed summary of line items based on the payout
Individual orders/customers synced to QuickBooks	An aggregate of sales per selling channel is synced to QuickBooks based on payout
Inventory adjusted in QuickBooks as order is synced	Inventory adjusted in QuickBooks when the payout occurs
Merchant fees are added to the order	Merchant fees are added to the order
Recommended for low order volume (less than 12,000 order per year) but will work with any number of orders	Suitable for any order volume. Recommended for multiple selling channels
Compatible with Shopify, Amazon, Square, Stripe	Compatible with Shopify, Amazon, Square, Stripe
Recommended for low inventory	Recommended if inventory can be out of sync until next payout
Compatible with all versions QuickBooks Online and QuickBooks Desktop	Compatible with all versions QuickBooks Online and QuickBooks Desktop



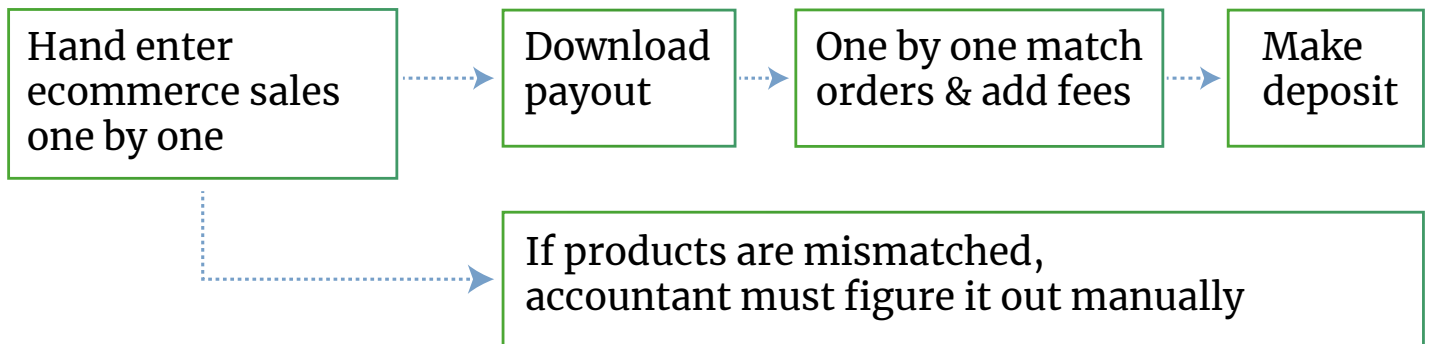
“With Connex we have been able to speed up the process of communication between our warehouse, and improve our cashflow. We have grown 600% since we started using Connex”

Ryan Hamilton,
Operations Manager,
Plus-Plus USA

Workflow for Accounting Professionals "Before" and "After" Using Connex

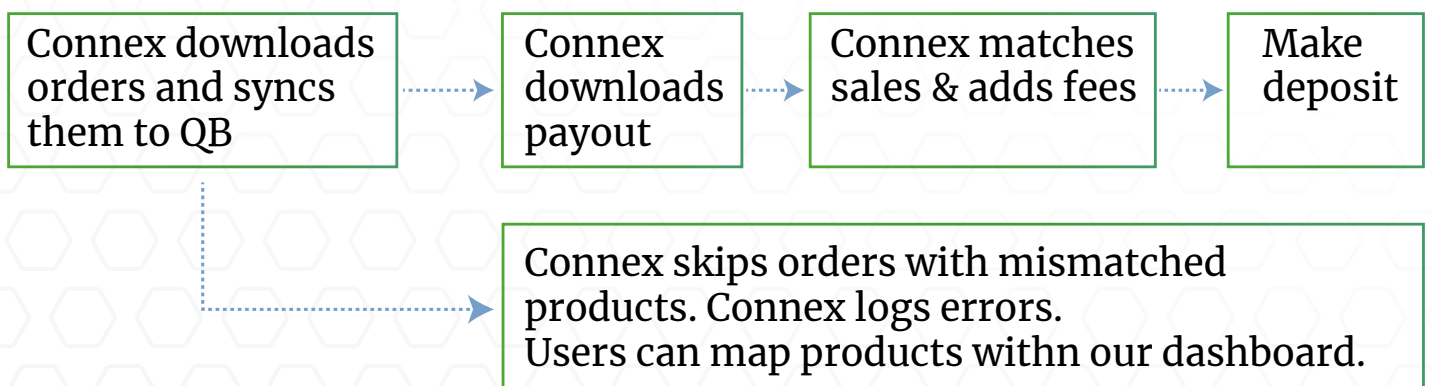
Before Estimated time for accounting professionals:

10+ hours per week per account



After Estimated time for accounting professionals:

less than 1 hour per week per account



Contact us at
sales@syncwithconnex.com
for more information



Connex for Accounting Professionals

\$599/month billed monthly,
or \$499/month billed annually

10% discount for 5 licenses
20% discount for 10 licenses

Contact sales@syncwithconnex.com
for more than 10 licenses

- | | |
|---|---|
| ✓ Includes 36,000 transactions annually (Option to purchase more transactions or use summary sale sync if needed) | ✓ Automatic one or two-way sync between QuickBooks and ecommerce channels |
| ✓ Automatically match online payouts to bank deposits | ✓ Automatic inventory sync between QuickBooks and selling channels |
| ✓ Sync orders from QuickBooks and update shipping information | ✓ Sync daily summary sales |
| ✓ Sync Amazon Settlement Reports | ✓ Close Sales Orders with Invoices |
| ✓ CRM Integrations (HubSpot, Keap and OntraPort) | ✓ Customize field mapping |
| ✓ Includes 1 additional hour of technical screensharing support | ✓ Includes 1 hour of complimentary onboarding with technical specialist |
| ✓ Email / ability to purchase additional screen share time | ✓ Tier 2 high priority technical support |

“Connex allows us to streamline processes through automation [and] handle larger volumes of business with same number of people. Sales are up 24% year-over-year and in July, sales were up 141% over last year. We were able to integrate a \$700,000 acquisition on day one not missing a beat!”



Tom Tennesen,
Interim CFO, PipeKnife



“Our main reason for using Connex was to save time from doing manual data entry. Connex takes only a few hours to set up and run. My favorite part is that it takes care of all the manual work, and captures all the important details for accounting.”

Emily Imbach,
Founder, Embach Solutions

Connex vs. Other QuickBooks Automation Platforms

	Connex: A Complete Solution	Others: Partial Solutions
Data syncing to QuickBooks		
Sync direction	Bidirectional to and from QuickBooks	Frequently a single direction to QuickBooks only
Manual vs. automatic sync	Automatic or manual	Frequently manual only
QuickBooks compatibility	QuickBooks Online and Desktop editions	Frequently QuickBooks Online only
Sync direction	Bidirectional sync between QuickBooks and selling channels	Frequently single direction only from selling channel to QuickBooks
Ecommerce integrations	Amazon, ShipStation, Shopify, and more	Varies
Advanced functionalities		
Refunds	Partial and full	Usually full refunds only
Automated payout matching	Stripe, Square, Shopify, Amazon	Not available
Detailed summary payout	Stripe, Square, Shopify, Amazon	Not available
Sync to multiple company files	Available	Usually not available
Inventory adjustment	Available for multiple selling channels	Usually not available for multiple selling channels
Historical syncing	Available	Not available
Setup & Onboarding		
Installation	No plugins, we set it up for you	Frequently requires plugins and lengthy installation
Team	100% US-based team	Frequently overseas team
Onboarding	Complimentary	Frequently requires additional fee

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