



*Bay Area QuickBooks Meetup
Users Group*

July 16th 2008

Welcome



Steve Peterson, Organizer

**Open Position, Assistant
Organizer**

Sponsors



CLEARPATH
BUSINESS ADVISORS



Specializes in M&A, financial consulting and in-house legal services

webKPI

Financial DashBoard and Benchmarking tool for QuickBook Users





Vision

The vision of the QuickBooks users group is to provide a forum to:

- Create a learning environment to successfully use QuickBooks and third party applications
- Provide an opportunity for Bay Area members to network with other members from around the Bay Area by hosting regional meetings - To date areas have included San Jose, San Mateo, Pleasanton. Future includes San Leandro, Marin and San Francisco
- Develop community leaders among the members by creating speaking and peer training opportunities





Itinerary

1. **Call to Order & Initial Announcements 6:30pm**
Initial Announcements –
2. **Individual Member Introductions 6:40pm**
Everyone will have 45 seconds to introduce themselves. Who are you? What do you do? And how can the group help you?
3. **Member Presentation #1 – John Hallett, Maximizing Excel with QB 6:50pm**
John headed up IMA's efforts to expand mission for members. In doing so created the Excel Users group (excelmasters.org) and rapidly became a must see event that attracted 100 per session. Next event this Sat on Pivot Tables. John is Controller for HCP Travel and provided us with a case study before the meeting.
4. **10-Minute Networking and Refreshment Break 7:10PM**



Itinerary

5. **Member Presentation #2 – Advanced Database Designs – Steve Sweeney, Founder 7:20pm**
Bridging islands of data – Excel Data Aggregation
www.addesigns.com

6. **Member Presentation #3 - Bill.com - Barb Caylor, Marketing Manager (www.bill.com)**
On-line bill payment service provider

7. **Meeting Adjourned 8pm**





On the calendar

- Next Meeting is August 14th at 6:30pm in San Jose at Club Auto Sport –
 - Benchmarking Tools
 - Boris Nenide, Chief Operating Officer from Fintel
 - Robert Suesse, Fintel President
 - Dashboard
 - Steve Peterson, Co-Founder webKPI
 - September Meeting is September 17th in San Francisco
 - Looking for location
 - October meeting will be in San Leandro at TriNet Offices
 - Future Topics:
 - Demo of Fishbowl Inventory System
 - Timeforce Time and Attendance System
 - Legal considerations for start-ups
 - Other Suggestions?
 - Presentations will be posted on the website in the Files section
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