

About Your Business/Non-Profit

FOOD FOR THOUGHT

A GUIDE TO PAYMENT PROCESSING

Best Practices with Payment Processing:

A business should shop for Payment Processing Providers every 2 to 3 years to ensure you are receiving the best deal. Businesses should also look into the fees the providers are charging.

What is Payment Processing?

- Behind-the-scenes processes that take place after a customer provides their card information for a transaction
- Routing customer information to their bank and then back to your business's bank

Why Credit Card Processing Costs Money:

Rate is 3 separate charges

- Interchange

-Goes to the card processing network

- Assessments

-Goes to card brands

- Value-added fees

-Goes to payment processor

Charges are usually lumped together for simplicity

[Read more](#)

IMPROVING CASH FLOW

Using software to keep track of cash flow

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Managing cash flow is tricky and time-consuming for a business owner. You can use online cash-flow management tools to make it easier to manage your business's cash flow. You can find a software that offers the features that you are looking for and maybe even more. There are options such as Float, Pulse, or Cushion that are available online from anywhere. Software can help you get an overview of your expenses and your receivables to get a better idea of where your business stands in that specific moment and match receivables to payables



QuickBooks®

TIP:

Create a Memorized Report in QuickBooks Desktop

PRO, PREMIER & ENTERPRISE

Create a memorized report

1. From the reports window, select **Memorize**.
2. On the Memorize Report window, type in the name you want to assign the report. Note that you need to enter a new name when you are saving a new memorized report. If you want to overwrite a previously saved report, use a name similar to it.
3. (Optional) Put a check mark on the **Save in Memorized Report Group** box if you want to save the report on a specific report group (Accountant, Banking, etc...)

[Read more](#)

ONLINE

Access a memorized report

There are several ways to access and open memorized reports.

From the Report Center:

1. Go to the **Reports** menu and select **Report Center**.
2. On the Report Center window, select the **Memorized** tab.
3. On the left panel, choose the appropriate group. If you didn't assign a report group when you memorized the report, choose **Uncategorized**.

RECEIVABLES - HOW TO GET PAID FASTER

Maintaining a healthy customer relationship

The customer is always right is a motto that everyone has heard. In the case of receivable management, that is the golden rule. By making sure your customer is happy, they are more likely to pay on time. Customer relationship management is probably more important than any aspect of your business because that is where your income is coming from. Creating relationships can make the customer more likely to become a returning customer, or they could even refer you to others.

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