



# Customer Appointment Manager Brings Immediate Time Savings to the Austin Learning Center

“Customer Appointment Manager makes it so easy to manage our appointments and the synchronization with QuickBooks is exactly what we needed to avoid wasting time entering information twice.”

**Becky Fliss-Swanson**  
**Owner**  
**Austin Learning Center**

## SUCCESS STORY

---

### Austin Learning Center

### AT A GLANCE:

**Customer:**  
Austin Learning Center

**Location:**  
Austin, Texas

**Industry:**  
Education

**Business Challenge:**  
Needed a faster and more efficient way to synchronize student information with QuickBooks and produce invoices.

**Solution:**  
Customer Appointment Manager® appointment scheduling software and QuickBooks®.

**Results:**  
Austin Learning Center saves time and money while improving communication with staff and students.

### Customer Profile

Employees of the Austin Learning Center tutor students of all academic backgrounds and abilities in a wide range of subjects. In addition, the Austin Learning Center provides individual and group preparation for standardized tests and professional exams. Currently, 12 tutors provide one-to-one and small group instruction for students.

“It was a nightmare,” says Fliss-Swanson. “Not only was the data entry time consuming, but the poster boards were a mess.” Transferring student information from the paper-based system into QuickBooks and editing and changing appointments take a lot of time and result in errors that cost the company money. “It was frustrating and wasted time.”

### Business Challenge

For Becky Fliss-Swanson, owner of the Austin Learning Center, scheduling appointments and billing students for a tutor’s time had become cumbersome. Large poster boards with monthly calendars covered her office walls. As appointments were booked or changes were requested, the board was updated using a dry-erase marker. Each week, she would take down the poster board and manually enter the appointment details into a spreadsheet so the information could be used for billing using QuickBooks.

### Solution Overview

After researching various scheduling programs on the Internet, Customer Appointment Manager proved to be the right solution for the Austin Learning Center’s scheduling and billing headaches. With Customer Appointment Manager’s ability to automatically synchronize customer name, phone number, address, and email address with QuickBooks, dual-entry became a thing of the past. “Customer Appointment Manager makes it so easy to manage our appointments and the synchronization with QuickBooks is exactly what we needed to avoid wasting time





entering information twice,” says Fliss-Swanson. When needed, Fliss-Swanson can launch a QuickBooks invoice right from the appointment worksheet in Customer Appointment Manager, saving even more time.

Everyone in the office sees the same information, so employees stay up-to-date and the schedule stays accurate. An accurate schedule reporting means billing in QuickBooks is accurate. “I never knew how important accurate scheduling could be to my business,” says Fliss-Swanson. “It saves us money to be accurate.”

**Business Benefits**

Since the Austin Learning Center staff started using Customer Appointment Manager and its ability to synchronize customer information with QuickBooks to manage their appointments and store their student contact information, they have considerably reduced the time it takes to book and edit appointments and costly mistakes are avoided. The synchronization also keeps confidential financial information secure in QuickBooks while keeping student contact information up-to-date and accessible to the entire staff in Customer Appointment Manager. According to Fliss-Swanson, “Customer Appointment Manager and QuickBooks have transformed my business. I’ve had amazing growth because I’ve had great people behind me and two great systems.”

“Customer Appointment Manager and QuickBooks have transformed my business. I’ve had amazing growth because I’ve had great people behind me and two great systems.”

**Becky Fliss-Swanson**  
**Owner**  
**Austin Learning Center**

**FOR MORE INFORMATION VISIT:**

**Atlas Business Solutions, Inc.**  
[www.abs-usa.com](http://www.abs-usa.com)

**Quick Books**  
[www.quickbooks.com](http://www.quickbooks.com)

Our product and QuickBooks Financial Software work together to help simplify your business management. QuickBooks 2006 Financial Software helps you get more done faster, with a new Home page, simplified Customer and Vendor Centers, and sophisticated business planning tools.

QuickBooks and the QuickBooks logo are trademarks of Intuit Inc., displayed with permission.