Spyder Trap Moves to Frictionless Project Accounting with QuickBase Sync

As a growing marketing technology firm, Spyder Trap needed a better way to match invoices and payments to the actual work being done. The solution was QuickBase Sync, a built-in feature of Intuit QuickBase that keeps the firm’s QuickBooks Online and QuickBase systems in perfect harmony. The results are fewer mundane tasks for the accounting department and better insights into profitability and growth planning.

“QuickBase Sync gives us perfect profitability calculations and the business intelligence insights we need to take our company in the right direction.”

Scott Storlie
Quality & Process Manager
Spyder Trap
Complex projects are the norm in the digital marketing industry. Companies like Spyder Trap — a forward-thinking marketing technology firm based in Minnesota — often set up multiple stages of a given project and invoice customers when each stage is complete.

Managing those processes can be difficult with separate project management and accounting systems, so Spyder Trap looked for a better way.

With QuickBase Sync, a built-in feature of Intuit QuickBase that enables users to import data from other cloud apps, Spyder Trap was able to connect its project management system (QuickBase) to its accounting system (QuickBooks Online) to automate not only invoice generation, but also payment and expense tracking to get a clear, unfiltered view of its business.

The results are fewer mundane tasks for the small accounting team and insights to help shape the future of the company.

“QuickBase Sync is very intuitive and powerful. Once we get our expenses and bills out of QuickBooks Online, we can attribute our costs to our projects. That gives us perfect profitability calculations and the business intelligence insights we need to take our company in the right direction,” says Scott Storlie, Quality & Process Manager for Spyder Trap.

**The Trouble With Manual Processes**

Prior to using QuickBase Sync, Spyder Trap relied on a manual process for invoice generation and tracking. Project managers would create several invoice requests in the project management QuickBase app. Then the small accountant team would generate the invoices in QuickBooks Online, then manually upload PDF files of each invoice back into the QuickBase app. With each invoice payment, an accounting team member would have to update the project manually by logging into QuickBase and checking an appropriate box.

“It was a lot of steps, which meant there was a lot of opportunity for human error,” says Storlie.
QuickBase Sync changed all that by giving Spyder Trap a way to automate much of that process.

Now, project managers can generate multiple invoice requests for any project in QuickBase. Once the invoices are created in QuickBooks Online, an accounting team member simply adds the invoice numbers into the QuickBase app. From that point on, all relevant data on those invoices is automatically synced from QuickBooks Online into the QuickBase app, including customer information, balances, due dates, descriptions, line items, and more.

Payments information is also tracked automatically, which enables the Spyder Trap team to track not only how much is owed, but also to get ahead of monthly commissions for sales reps. Rather than manually combing through all paid invoices to match them to commissions (commissions are paid based on the prior month’s payments), Spyder Trap can easily generate a monthly QuickBase report for seamless commissions payments.

The Real Value of Insight

The process improvements Spyder Trap created with QuickBase Sync have a real effect on efficiency. Storlie estimates the team will save 252 hours over the next year by eliminating manual processes in accounting, project management, and commissions. That’s roughly equivalent to 6.5 weeks of a full-time employee.

While reducing the manual efforts and human errors of the billing and payments processes were more than enough to warrant celebration of the QuickBase Sync-enabled solution, Storlie points to another benefit as well. Having the right data in a central place allows Spyder Trap to assess profitability by job and job type.

“We categorize our projects by type, whether we’re building custom web sites or working on search marketing optimization or something else. Understanding our profitability by category means we can understand which projects are most profitable, so we can do more of the work that benefits us the most,” says Storlie.