

CUSTOMER STORY

From QuickBooks to Quick Wins: 3+ Hours Saved Per Client Monthly.

How This 25-Year Firm Saves 3+ Hours Per Client Every Month After Switching from QuickBooks



3+ Hours saved per client monthly



85 → 2%

Manual Work
Manual transaction work eliminated

98%

Automated
Transaction processing

3-4

Hours Saved
Per client per month



J.R. Faris,
CEO, Accountant

"I can definitely say that Puzzle blows QuickBooks out of the water in terms of how many transactions we have to touch, I can't imagine QuickBooks ever getting there, even if you have all the best rules in the world."

The Challenge

Susan Wozena, CPA and Director of Bookkeeping at Accountant, looked at the January report and saw the problem crystallized in a single number: 1,200 Stripe transactions for one client in one month.

In QuickBooks, this meant a significant amount of manual work—pulling transaction lists, scrubbing data line by line, separating deferred revenue, creating manual journal entries, attaching spreadsheets to explain the totals. "To sort through and reconcile that many transactions in QuickBooks would have been a nightmare," Susan recalls. But in Puzzle? "It just does it."

This moment highlighted what Accountant's leadership already knew: their 25-year-old firm, serving thousands of venture-backed startups, had hit a ceiling.

QuickBooks wasn't just inefficient—it was actively preventing them from scaling.

The QuickBooks Problem: 85% Manual Work

The numbers were stark. Even with rules configured in QuickBooks, 85% of transactions still require manual review for Accountant.

"You can set up rules in QuickBooks, but you have to set up a lot of rules if you want to get to 100% automatic. That's a project in itself," Susan explains. "And the description in the rule has to match the description from the bank exactly. If it says Amazon but the bank says Amazon.com, the rule might not apply."

For subscription businesses using Stripe—a significant portion of their startup clients—the integration problems were even worse. "With QuickBooks, we don't even integrate Stripe transactions," Susan says. The process involved manual spreadsheet work, data sanitization, and journal entries. For high-volume Stripe clients, this added at least an additional hour per month on top of regular bookkeeping work.

Then there was support challenges when issues arose. The firm faced a choice: accept the growth ceiling or find a new path forward.

The Solution

The Transformation: 98% Automated

When Puzzle co-founder Sasha Orloff first proposed building a QuickBooks competitor, Accountalent's founders were skeptical. "This guy's crazy," recalls J.R. Faris, Accountalent's CEO. But the results spoke for themselves. Today, Puzzle processes roughly 98% of transactions automatically.

The Stripe integration that had been a nightmare? Completely solved. "If we've got people selling subscriptions on Stripe, Puzzle is the absolute only way to go. It integrates properly," Susan confirms. "With Puzzle, it just does it. We can actually integrate, so we've got all that detail in there. It's a huge time savings."



From Data Entry to Advisory Services

The most significant transformation wasn't technical—it was strategic. Susan describes the shift: "Instead of spending time keying things in and reviewing categorizations, we spend more time looking at trends and reviewing other analytics."

The efficiency gains even enabled a service upgrade:

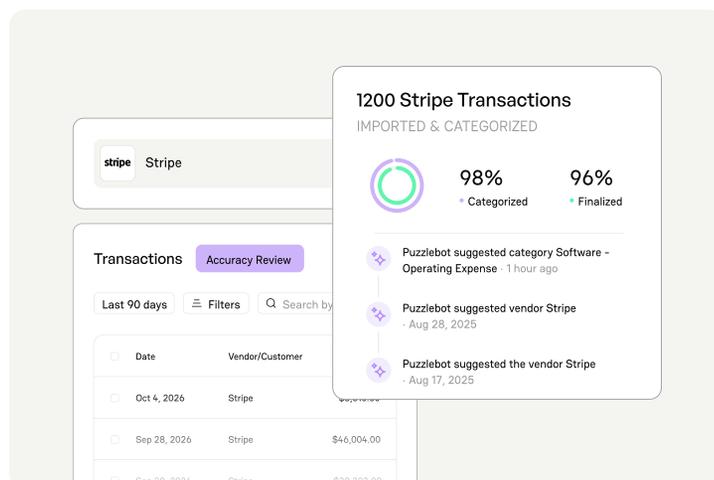
The Result

Business Impact: 120 Hours Monthly Freed Up Over 40 Clients

The efficiency gains were concrete and immediate:

- 2-3 hours saved per client per month on average
- 3-4 hours saved per client per month for SaaS/subscription businesses on Stripe
- 40 new clients added without proportional headcount increase

Across 40 new clients at an average of 3 hours saved monthly, that's 120 hours per month of capacity freed up—almost the equivalent of needing to hire a new employee.



The Partnership Difference

Beyond the technology, Accountalent found something impossible with legacy software providers: a genuine partnership.

Support response times tell the story:

- QuickBooks: days, weeks, or never
- Puzzle: under 1 hour via direct Slack channel



Susan Wozena,
CPA, Director of Bookkeeping @ Accountalent

"We're now doing weekly bookkeeping instead of monthly. It keeps everything up to date at all times."

Ready to modernize your accounting practice?

Discover how forward-thinking firms are using Puzzle to improve margins, save time, and deliver better client experiences.

Contact our firms team:
firms@puzzle.io