Dext

Geneviève Pesant

An experienced bookkeeper, Geneviève has been supporting small businesses and independent professionals for years - but she also wanted to grow her own business. With Dext Commerce she now has the extra time she needs to dedicate towards new clients.

Meet Geneviève Pesant

Before her love for accounting, Geneviève Pesant was a biochemist. To this day, her passion for numbers fuels her drive to help as many companies as possible with complex financial data.

Now located in Estrie, she has been providing general bookkeeping and tax-filing services for various professionals and businesses all over the province of Québec for nearly five years. An independent professional herself, Geneviève understands the needs of small business owners and freelancers.

"I work with individuals and solopreneurs, and I'm also a consultant and trainer for solopreneurs that need help doing their own bookkeeping."

The Opportunity

A spreadsheet nightmare

In Canada, the various tax codes for different business types and sizes can make it difficult for entrepreneurs to understand what they need to do and how. On top of that, Geneviève has several digital commerce clients who sell products on a variety of platforms and use different payment methods. This adds an extra layer of complexity to the data that needs to be gathered and sorted for bookkeeping.

"Using Excel spreadsheets for sales transactions made life harder for me. It was very time-consuming because the sales had to be added up monthly. Using filters didn't help either and, in the end, there were just too many steps."

With so much time spent gathering and managing sales data, Geneviève could not take on more clients. As the volume of transactions from current clients increased, she realized she needed a solution.

Geneviève was already using Dext Prepare to quickly extract expense data from invoices, receipts and bank statements, and was impressed with the speed and accuracy, as well as the number of submission methods she could use. So, when she turned to technology to deal with her clients' sales transaction data, she knew where to look…

The Solution

The software Geneviève's business was missing

After a one-hour onboarding and training call with the Dext team, Geneviève was ready to get started on Dext Commerce, a bookkeeping automation tool to fetch, standardize and reconcile sales transaction data from dozens of different platforms. She knew Commerce was a robust and sophisticated software - still, she was impressed with how simple it was to get started.

"Setting up Commerce is easy and quick. I had a lot more work to do in Quickbooks to import products and set up the clearing accounts properly because it was a new client, so I wanted to make sure everything was perfect", she says.

The features she uses the most are exporting the sales transactions from the Shopify store to QuickBooks, and the transactions that come through QuickBooks to the client's PayPal account. The transaction process is smooth and efficient from each point in the transaction journey.

The first benefit she noticed? No more spreadsheets.

"Keeping track of all the Excel documents was very tough. Using Dext Commerce from a compliance standpoint is a lot more trusting in comparison... In case you need to track anything back, everything's there and easy to find."

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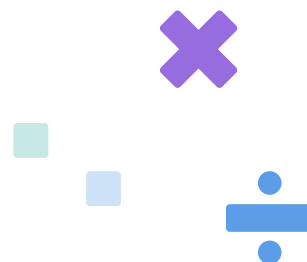
The Impact

More time, more results, more revenue

With Dext Commerce, the ability to view real-time sales transactions while working for a client has made Geneviève's workflow processes a lot more efficient. Keeping track of the client's inventory and having visibility over all the sales data makes all the difference.

On top of that, navigating the complex tax codes has never been more straightforward. She especially loves how the tax codes are automatically recognized for each sale transaction - something she couldn't even dream of before.

Then, of course, there's the time saved. Geneviève estimates Dext Commerce saves her one hour for every 30 sales transactions she receives. When looking at how many transactions she deals with every month, that's an immense amount of time - which she can now spend on providing better advice to her clients and, of course, acquiring new ones.

> *My firm is still growing, and I'll for sure be recommending Dext Commerce to my clients. I'm going to eventually phase out monthly billing to a fixed fee, and this is thanks to using Dext products. This will definitely change the way I work and have an impact on my ROI.*

For more information on Dext Commerce, please visit **dext.com/ca/products/commerce**

This case study was obtained as part of a series of interviews conducted with partners who were given a small token of appreciation for participating.