APPify
the Processes

Discover the Power of Apps for Small Businesses — Intuit's App Center

Register for all the APPify webinars:
http://LongforSuccess.com/appify

Michelle Long, CPA, MBA

Long for Success

Owner of Long for Success, LLC

Author – available on Amazon http://tinyurl.com/MichelleLongAmazon
- ▸ *QuickBooks 2014 on Demand*
- ▸ *QuickBooks Practice Set & QuickBooks Online Practice Set*
- ▸ *How to Start a Home-based Bookkeeping Business*
- ▸ *Successful QuickBooks Consulting*

Award Winning
Ultimate Accounting vCon
July 24-25, 2014

Co-host Award Winning Ultimate Accounting vCon – virtual conference
- · **http://AccountingvCon.com** annually – next in July, 2014)

Linkedin Group ~65,000 members – Successful QuickBooks Consultants

intuit Certified ProAdvisor QuickBooks Advanced

intuit Certified ProAdvisor QuickBooks Online

International speaker – Intuit Trainer/Writer Network
- · Nationwide across the US & Canada
- · Australia and London

Subscribe: LongforSuccess.com/blog
Subscribe: https://www.youtube.com/user/MichelleLongCPA

Cindy Lee, MBA

- Sr. Marketing Manager of Apps.com at Intuit
- Formerly Sr. Marketing Manager on QuickBooks Accountant - launched 2013 and 2014 versions
- Switched career from wine marketing to solutions for small businesses & accountants
- MBA from Northwestern University with majors in Finance and Marketing
- Certified Lean Six-Sigma Black Belt

APPify the Processes – Gold Sponsors
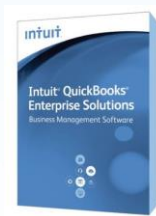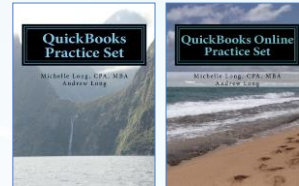
Prizes

Randomly selected from attendees:

- QB Accountant 2013
- Autographed copy of either QB Practice Set **or** QB Online Practice Set

Grand Prize – QB Enterprise 13.0 – attend all 6 webinars to be eligible

Agenda

- Intro and benefits of apps
- Determining the needs of the client
- Steps to APPify the Processes
- Overview of Apps.com
- How Intuit reviews and approves apps
- Discounts for ProAdvisors
- Upcoming webinars to learn more details about specific apps

Intro and Benefits of Apps

- What is an App?
  - Mobile or web based application
  - Integrate with QuickBooks or QuickBooks Online
- Benefits → Streamline the Processes
  - Enter Data Once
  - Update QuickBooks automatically without exposing your information (i.e. no need to expose QuickBooks data to app users)
  - Import to QuickBooks only when necessary
  - Manage apps from anywhere
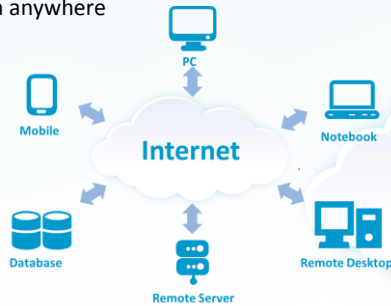
Why are 3rd Party Apps important?
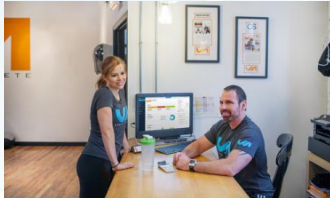
For Your Customers
- Customize the QB experience
- Save time
- Reduce/eliminate data entry

For You
- Better QBO migrator story
- Better conversion / retention
- Better customer service

5 Steps to APPify the Processes

1. Perform a Needs Assessment
2. Prioritize and Plan
3. Identify, test and evaluate apps
4. Implementation – set up and training
5. Monitor and support
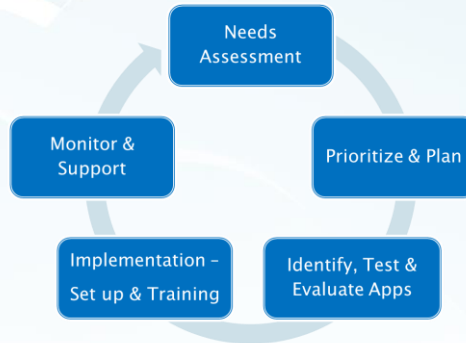
Needs Assessment – Initial Considerations

- **Who** will do the work

- **What** needs to be done

- **When** does it need to be done

- **Where** will it be done and stored

- **Why** it needs to be done

- **How** will it be shared

Initial Needs Assessment

- **Access**
  - Desktop only
  - Desktop – Hosted or Remote access
  - Cloud Based – SaaS
  - Mobile access and needs
- **Users**
  - Locations
  - Needs – enter transactions, view reports, etc.

intuit

QuickBooks for
Windows Mobile
Companion

intuit
QuickBooks
Online

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Needs Assessment & Prioritize and Plan

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Scan Writer

Admin/IT:
Cloud
Mobile,
Docs

Marketing, Sales &
Receivables:
POS/ eCommerce,
Invoicing,
Payments, CRM

HR:
Time,
Payroll

CONCUR

Accounting
System

TSHEETS
We ♥ Employees

Operations:
Inventory,
Job Costing,
Scheduling

Financial:
Reporting,
KPIs,
Tax

Purchases &
Payables
Bills,
Expenses

Bill.com
Chase dreams, not paper.

Avalara
Making sales tax less taxing.

Register now – http://LongforSuccess.com/APPify

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The Small Business Lifecycle

THE QUICKBOOKS ECOSYSTEM HELPS YOU RUN YOUR
SMALL BUSINESS IN THE CLOUD

1. **Acquiring Customers**
2. **Managing Projects**
3. **Managing Inventory**
4. **Tracking Time and Expenses**
5. **Paying Bills**
6. **Getting Paid**
7. **Sales Taxes**

5 Steps to APPify the Processes

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Needs Assessment

Monitor & Support

Prioritize & Plan

Implementation – Set up & Training

Identify, Test & Evaluate Apps

Apps.com: From Listings to a Curated Experience

SMBs want to shop in App Stores where they can read reviews from other users and find & try multiple solutions that are right for them
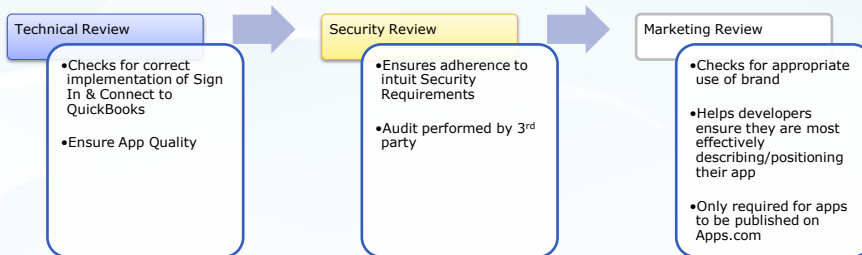
A Listing of Apps ➡️ **A Curated Site to Find the Right Apps for My Business**

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3 rounds of reviews before being listed on apps.com

Every app has been vetted by Intuit before they get listed on Apps.com

Technical Review ➡️ **Security Review** ➡️ **Marketing Review**

Technical Review	Security Review	Marketing Review
•Checks for correct implementation of Sign In & Connect to QuickBooks •Ensure App Quality	•Ensures adherence to intuit Security Requirements •Audit performed by 3rd party	•Checks for appropriate use of brand •Helps developers ensure they are most effectively describing/positioning their app •Only required for apps to be published on Apps.com

➕ **Expert review by a ProAdvisor**
➕ **Community review that drives featured placement**

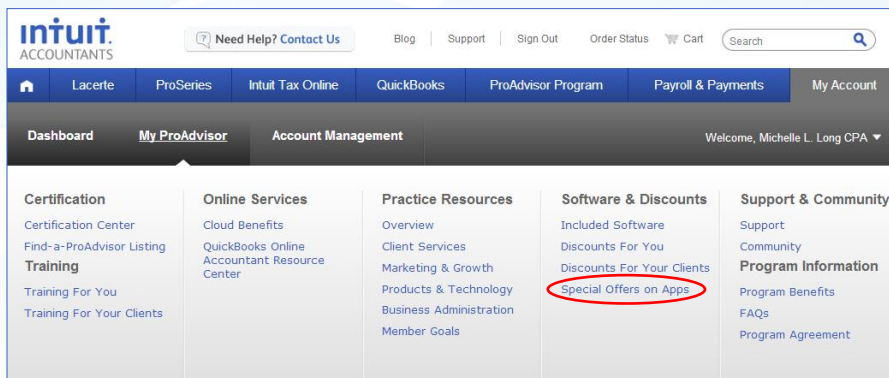Long for Success

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How to navigate Apps.com
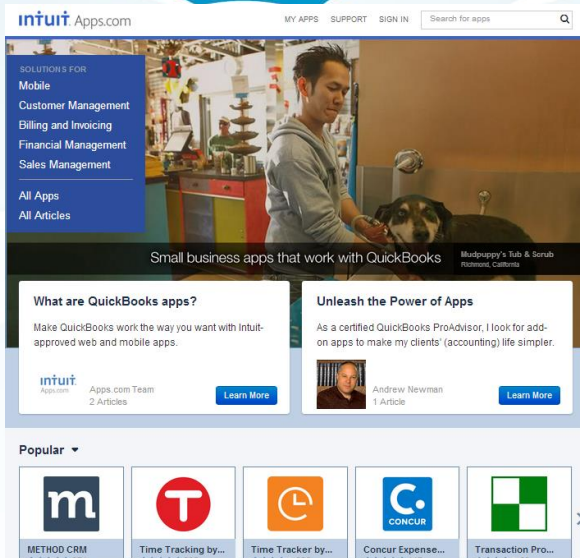
Content
Categories
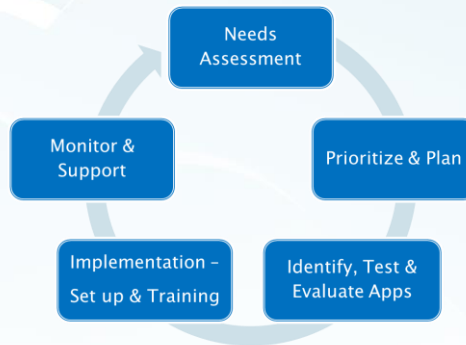Blog posts
Search
AppCard
Reviews

Discounts for ProAdvisors

5 Steps to APPify the Processes

1. Perform a Needs Assessment
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Needs Assessment

Prioritize & Plan

Identify, Test & Evaluate Apps

Implementation – Set up & Training

Monitor & Support

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- Key benefits of the app – problems it solves
- Who is it right for — which clients or industries
- Quick demo of how it works — key features and integration
- Comments from a peer — hear from an accountant or bookkeeper who has implemented it
- Partner program

Scan Writer

Bill.com
Chase dreams, not paper.

C. CONCUR

T SHEETS
We ♥ Employees

a Avalara
Making sales tax less taxing.

Register now – http://LongforSuccess.com/APPify
Subscribe: https://www.youtube.com/user/MichelleLongCPA

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APPify the Processes Webinars

Intuit – Discover the Power of Apps for Small Businesses — Intuit's App Center

ScanWriter - ScanWriter offers an unprecedented Data Entry Automation solution that enters 100's of transactions into QuickBooks or Excel from your bank and credit card statements, bills, sales orders, and more

Bill.com - Grow Your Practice with Bill Pay: Learn how to easily automate your client's payables and receivables online. Route bills for approval, store and share documents, send invoices via email or US mail, pay and get paid, charge customers via ACH or credit card. Automatically sync with QuickBooks; Desktop, Hosted or Online.

Concur - Automatically create expense reports from credit card charges and TripIt travel itineraries. Seamlessly sync your expenses with QuickBooks. Capture receipts, reimburse employees and get on with business. Do it all online, or go mobile!

TSheets - 5-star rated on Intuit's Apps.com, TSheets is the time tracking solution that's a real power player for payroll. Mobile, easy to use and works with most accounting solutions. Eliminate manual & duplicate time entry for super fast payroll & invoicing.

Avalara - Thousands of sales tax jurisdictions and taxability rules. Tax-exempt customers. Tax filing deadlines. Avalara AvaTax streamlines it all – and works inside your billing system.

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Award Winning Ultimate Accounting vCon

A high content accounting conference with a price tag you won't believe!

2 day virtual conference – July 24 – 25

Bonus: use coupon code APPIFY at checkout to register for only $209 **http://accountingvcon.com**

Sessions include:
- The New QuickBooks Online Accountant: Realize the Benefits of a True Virtual Office
- Strategies to Monetizing Cloud Hosting in Your Accounting Practice
- 10 Steps to Revolutionize Your Client's Receivables (and Create a New Revenue Stream for Yourself)
- Modern Payroll: Delight Your Clients and Generate new Revenue
- Pricing Your Way to More Profits
- From Bookkeeping to Client Reporting: How to Drive Efficiency While Increasing Your Value in the Eyes of Your Client

Thanks for Attending

Michelle L. Long, CPA, MBA
Owner, Long for Success, LLC

Michelle@LongforSuccess.com
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