



Vet your App-etite

Dawne Leaney Davidson
Tiffany Stewart, CPA, CMA





Take a minute
to connect with
your neighbour

#QBConnect | WiFi: QBConnect

CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

Today's speakers



Dawne Leaney Davidson

Owner, Freelif Accounting + Bookkeeping

Vice-President, Marabirch Inc.

Administrator, QB-HQ & QuickBooks

HQ for Business Owners



Tiffany J Stewart, CPA, CMA

Owner, Tiffany J. Stewart CPA

President, Marabirch Inc.

Administrator, QB-HQ & QuickBooks

HQ for Business Owners

Agenda

What is the app ecosystem?

How to navigate the ecosystem

How to choose an app

- For your firm
- For your client

Key apps

Selection and implementation



App ecosystem

Agenda

What is the app ecosystem?

How to navigate the ecosystem

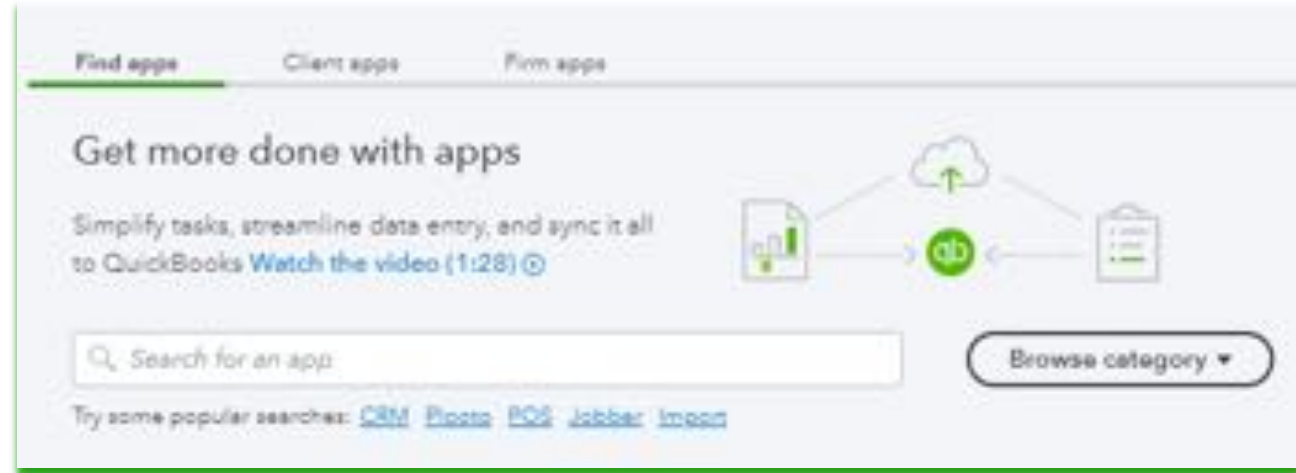
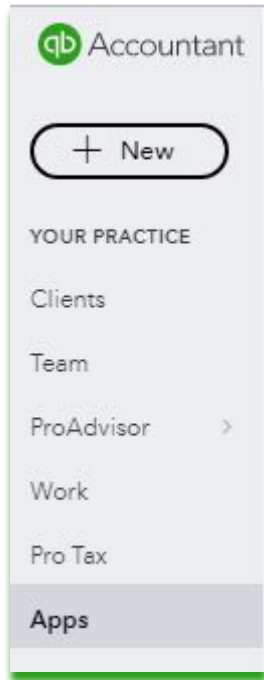
How to choose an app

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Key apps

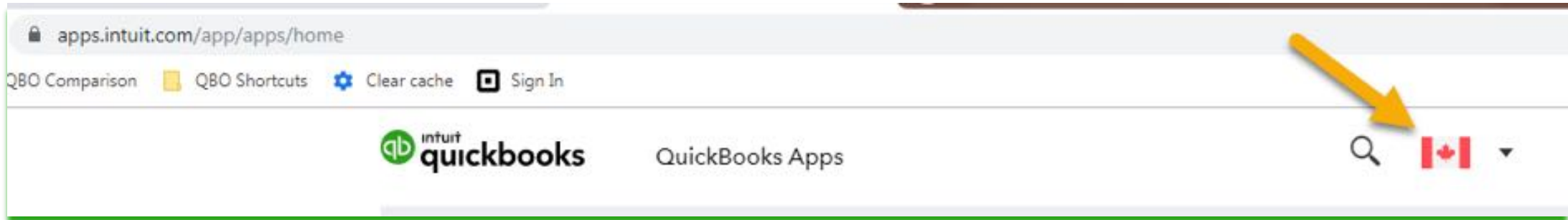
Selection and implementation

How to navigate



Apps can be connected directly through your QBOA dashboard

How to navigate



Apps can be connected through apps.com

How to navigate

Search by:

- Search box
- Collections
- Categories

The screenshot shows the QuickBooks app marketplace interface. At the top, a green header contains the text "Find the right apps for your business" and a search bar with the placeholder "Search by app name, keyword, job, or category". Below the header, the interface is divided into two main sections: "APP COLLECTIONS" and "Popular apps".

APP COLLECTIONS

- Popular apps (selected)
- Trending apps
- Free apps

CATEGORIES

- Calculate quotes
- Get funded
- Make payments
- Manage customers
- Manage human resources
- Manage projects
- Perform analytics
- Prepare taxes
- Receive payments
- Run payroll
- Send invoices
- Sync data
- Track expenses
- Track inventory
- Track time

Popular apps

App Name	Description	Rating	Count
Receipt Bank	Transform your productivity by extracting info from receipts & invoices.	★★★★★	(249)
Plooto	Send and receive business payments in one integrated platform.	★★★★	(21)
Expensify	Receipt tracking and expense management integrated with QuickBooks.	★★★★★	(142)
Knowify for Contractors	Job costing, progress invoicing, change orders, and more for construction firms.	★★★★★	(32)
TSheets Time Tracking	Simplify payroll and invoicing with timesheets powered by QuickBooks!	★★★★★	(4375)
Aero Workflow	Workflow designed for accountants and bookkeepers.	★★★★★	(87)
Fathom	Insightful dashboards and performance reports for your business.		
Excel Transactions Importer and Deleter	Intuitive and powerful tool for importing, exporting, and deleting transactions.		
AutoEntry	Automates entry of bills, receipts, bank statements, sales invoices & more.		

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How to choose an app

Who is the end user?

What pain point do I need to solve?

Does it integrate with QBO?

Does it **need** to integrate with QBO?

- Is Zapier an option?
- Is SaasAnt an option?

Does it work on multiple platforms?

What is the cost?

What level/quality of support is offered?

Does QB-HQ recommend the app? Your community?

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Key apps

- CRM
- Time tracking
- Payroll
- Data fetching/publishing
- Payment solutions
- Enhanced Reporting
- Backup services
- Industry specific
- Communication



Key Apps

DISCUSSION

Agenda

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Selection and implementation

When is the best time for implementation?

- Now? Month end? Year end?

Make sure everyone who needs access is set up and has sufficient training

- Google and YouTube aren't always the answer. Make sure to utilize (and leave enough time for) any onboarding and training services provided by the app.

Will the new app affect any other connected apps?

Ensure nothing falls through the cracks between the “old way” and the new process



Selection and Implementation

DISCUSSION

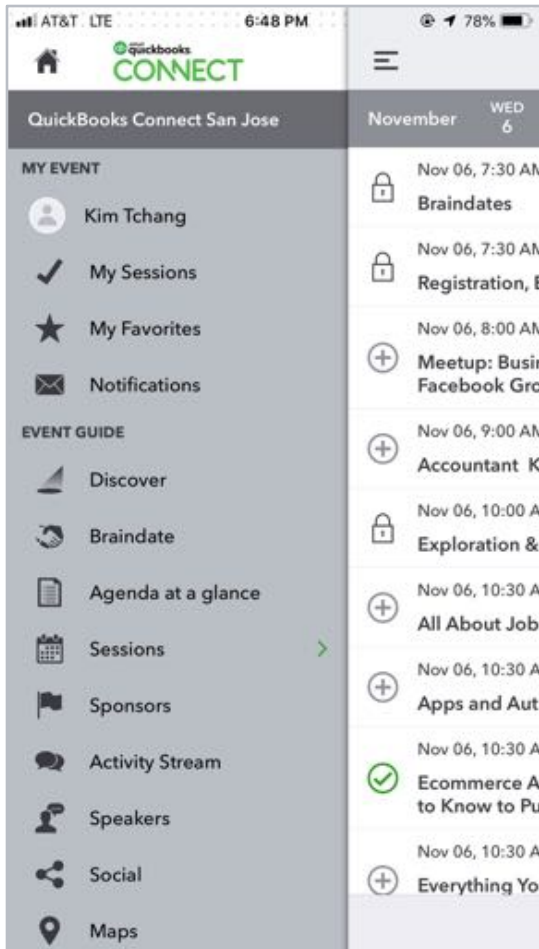


Questions?

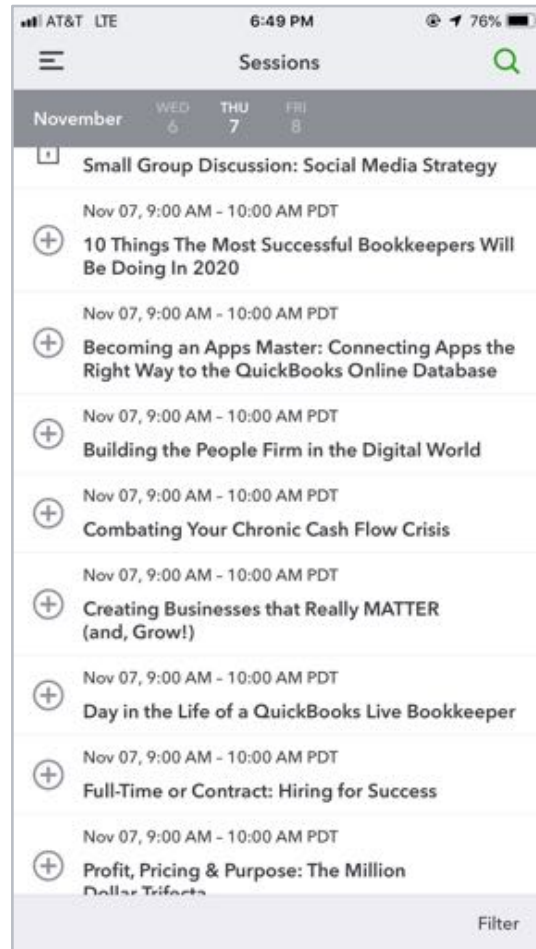
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

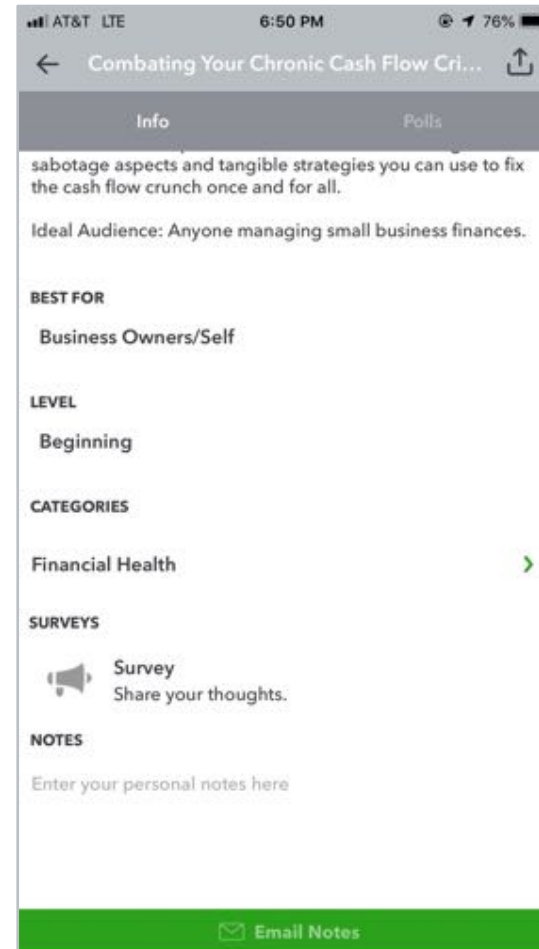
1. Select Sessions



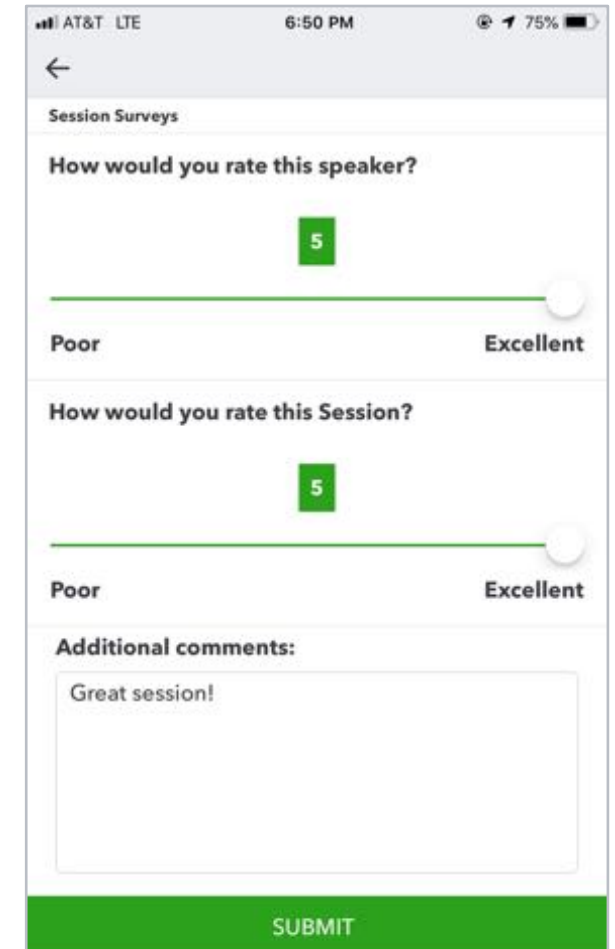
2. Select Session Title



3. Select Survey



3. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://can.quickbooksconnect.com/agenda/>

The screenshot displays the QuickBooks Connect agenda for December 10, 2023. At the top, there are navigation links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. Below this, the date 'December 10' is highlighted, with 'December 9 Accountant Day' and 'December 11' also visible. A 'Print Agenda' button is located in the top right corner. A descriptive paragraph follows, stating: 'Attend breakout sessions to learn strategies to grow your business, how to hire and build an ideal culture, tips to improve your financial health and more. Connect with peers and experts for one-on-one learning. More information coming soon.' Below this is a search bar labeled 'Search for sessions'. A 'Filters' section contains buttons for 'Organizational Culture', 'Life & Business Skills', 'Technology Training', 'Business Growth', 'Advisory', and 'Financial Health', along with an 'Expand all +' link. The main content is a list of sessions with their times and titles, each with a '+' icon for expansion. The sessions listed are: 7:30-9:00 am: Registration, Breakfast & Exploration; 8:00-8:45 am: Meetup: New to Networking; 9:00-10:00 am: Morning Keynote; 10:00-11:00 am: Exploration & Connection; 10:15-11:00 am: Meetup: Women in the Workforce; 11:00 am-12:00 pm: Breakout Sessions. The 'Breakout Sessions' section is expanded to show details for 'Creating Your Small Business Culture', including a description, ideal audience, best for, speakers, location, track, CPD hours, and level. Other sessions listed below are 'Understanding Personalities for Better Communication' and 'How to Use QuickBooks for Your Small Business: Introduction'.

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FUTURE