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# Vet your App-etite

Dawne Leaney Davidson
Tiffany Stewart, CPA, CMA

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# CPD Process

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- 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, Freelife Accounting + Bookkeeping

Vice-President, Marabirch Inc.

Administrator, QB-HQ & QuickBooks HQ for Business Owners

marabirch

QB-HQ

qb-hq for SMB

**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**

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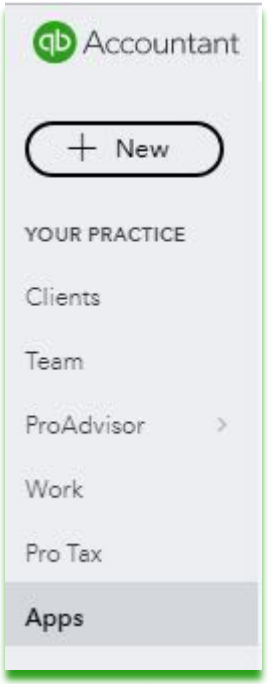
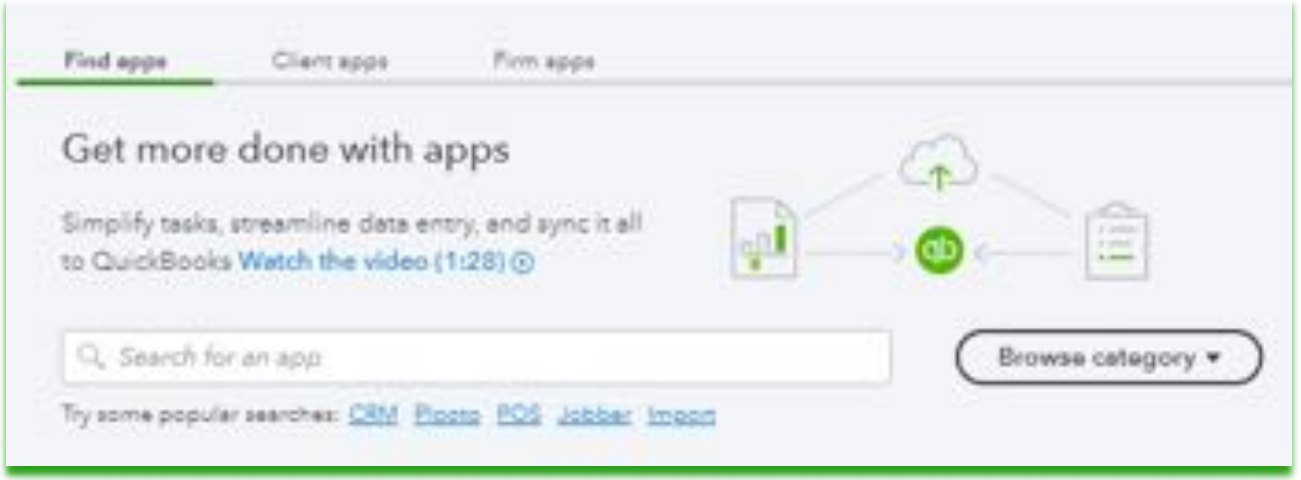
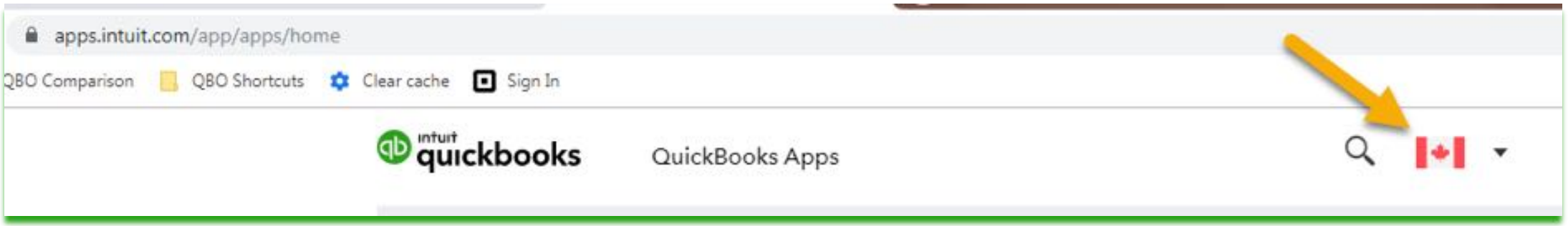
# How to navigate




Apps can be connected directly through your QBOA dashboard

# How to navigate

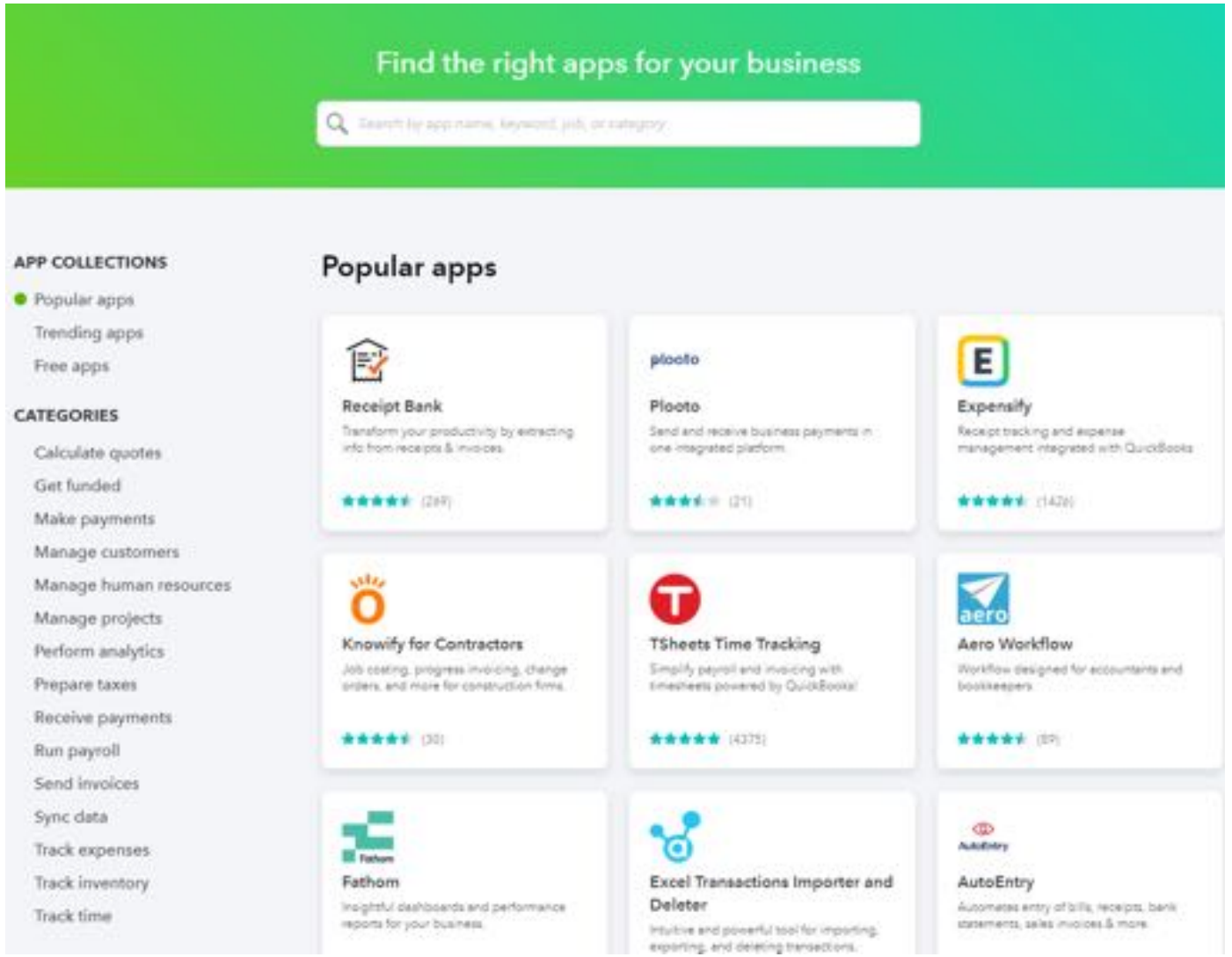



Apps can be connected through apps.com

# How to navigate

## Search by:

- Search box
- Collections
- Categories



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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**

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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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Key apps

**Selection and implementation**

# 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?

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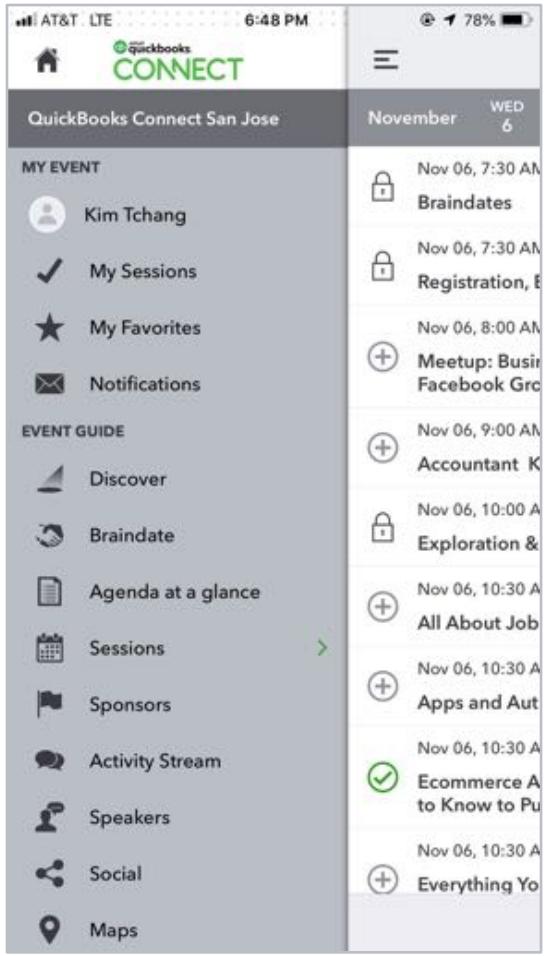


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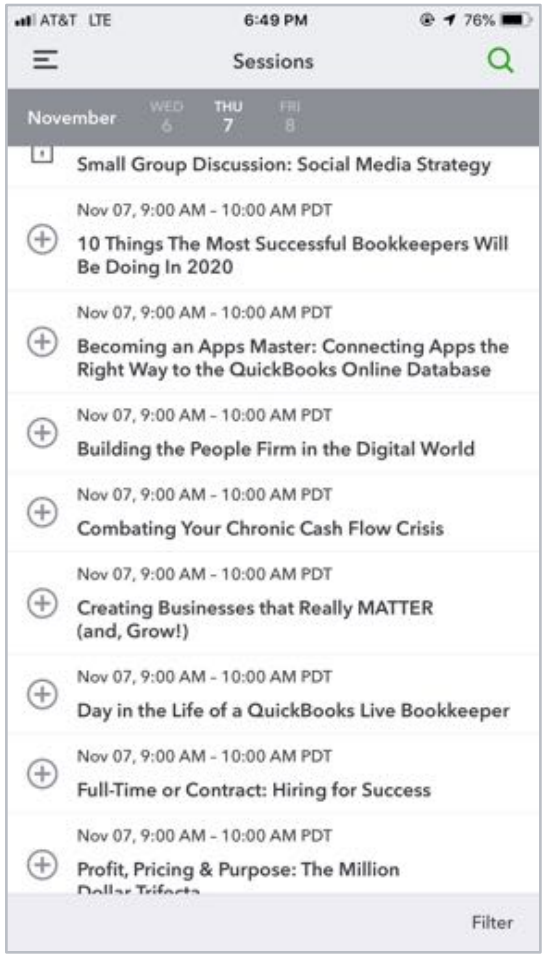


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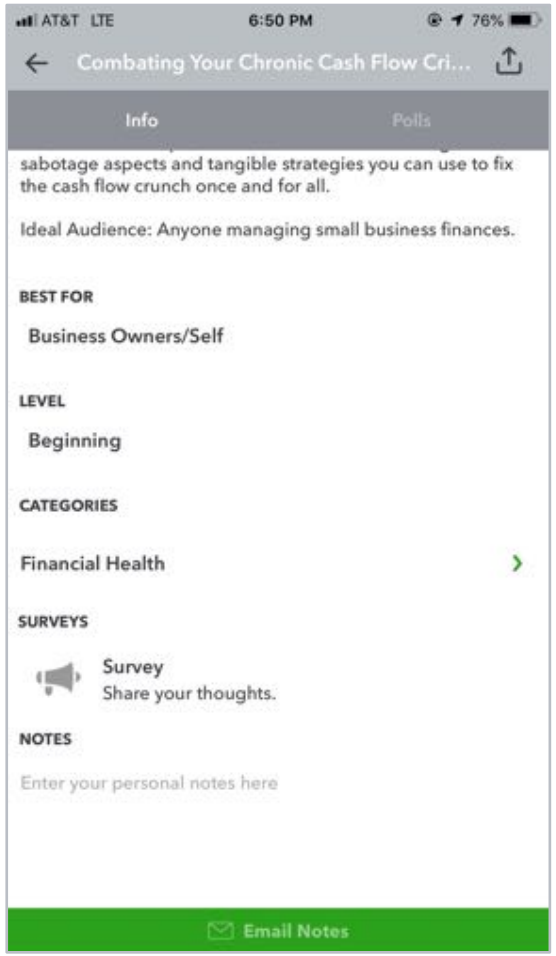


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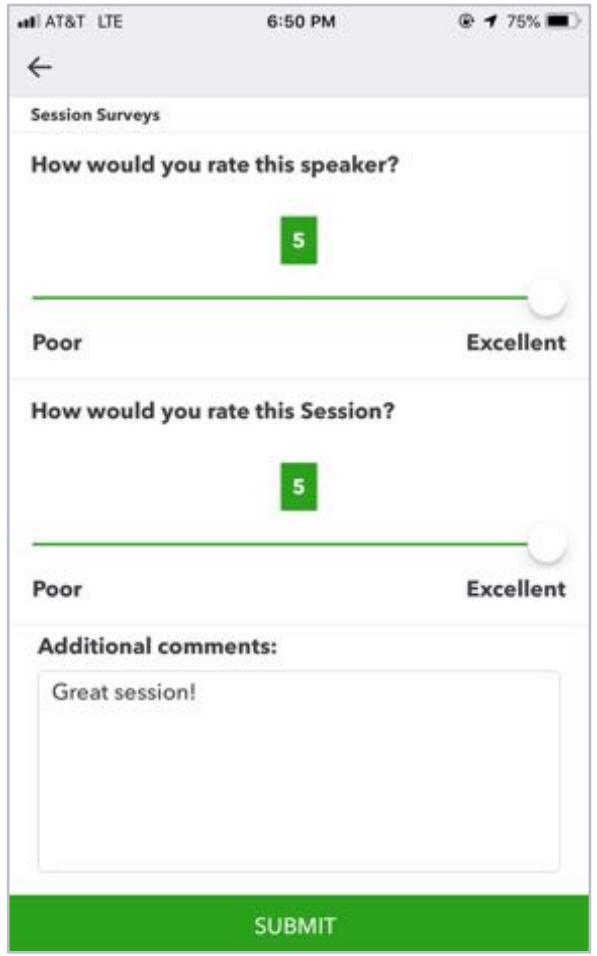

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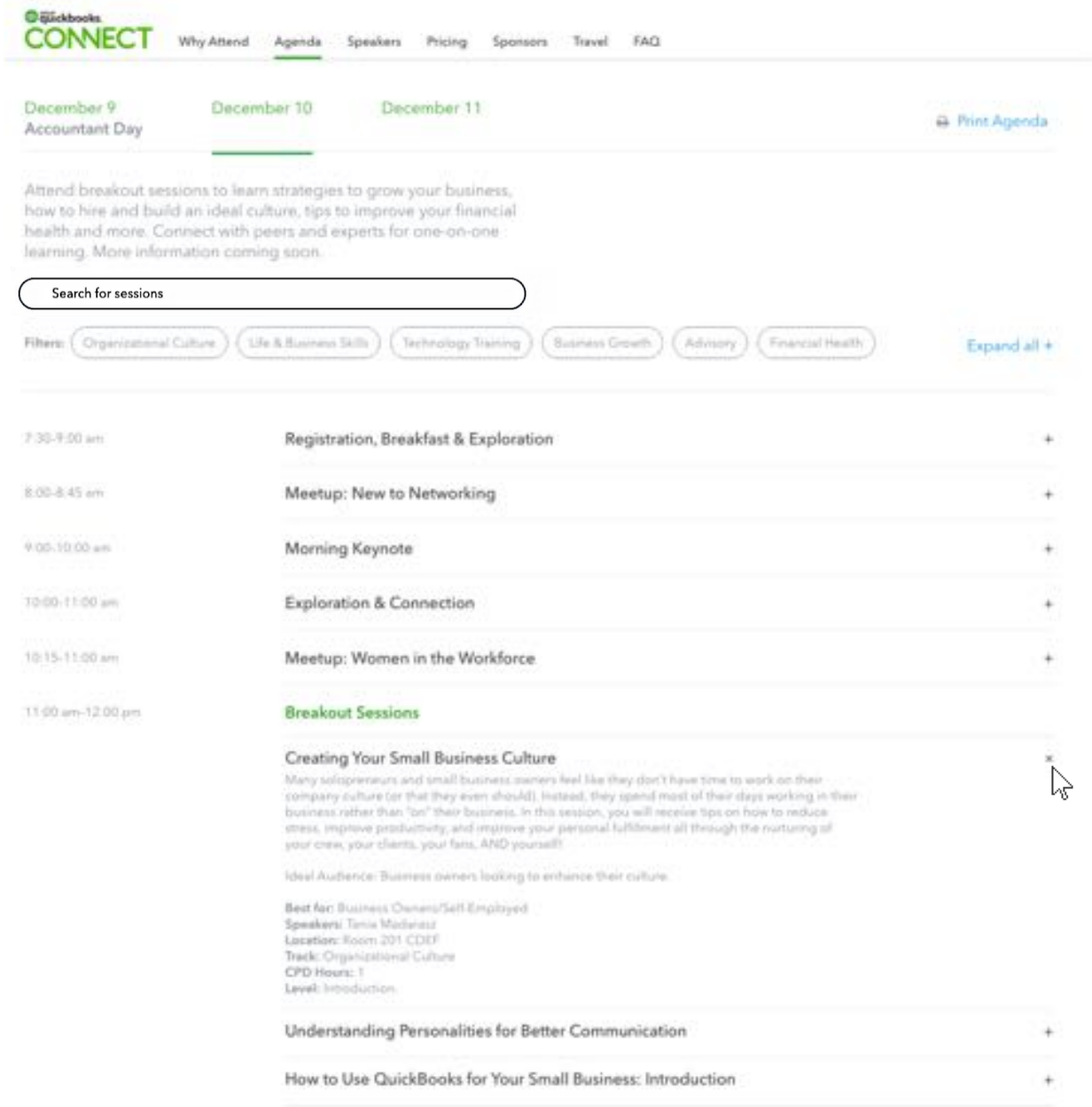

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