



# The best apps for your small business

Heather Satterley & Liz Scott



A photograph of two young women with blonde hair, seen from the chest up, engaged in a conversation outdoors at night. The woman on the left is in profile, looking towards the right, and is wearing a dark jacket with a light-colored fur collar. The woman on the right is facing her, also in profile, and is wearing a dark jacket. The background is dark and out of focus, showing some green foliage and a hint of a city light. The text "Take a minute to connect with your neighbor" is overlaid in white on the right side of the image.

Take a minute  
to connect with  
your neighbor

#QBConnect | WiFi: QBConnect

# Today's speakers







Heather Satterley  
Satterley Training & Consulting  
[heather@satterleyconsulting.com](mailto:heather@satterleyconsulting.com)

Liz Scott  
Accounting Lifeline  
[Liz@AccountingLifelineOK.com](mailto:Liz@AccountingLifelineOK.com)

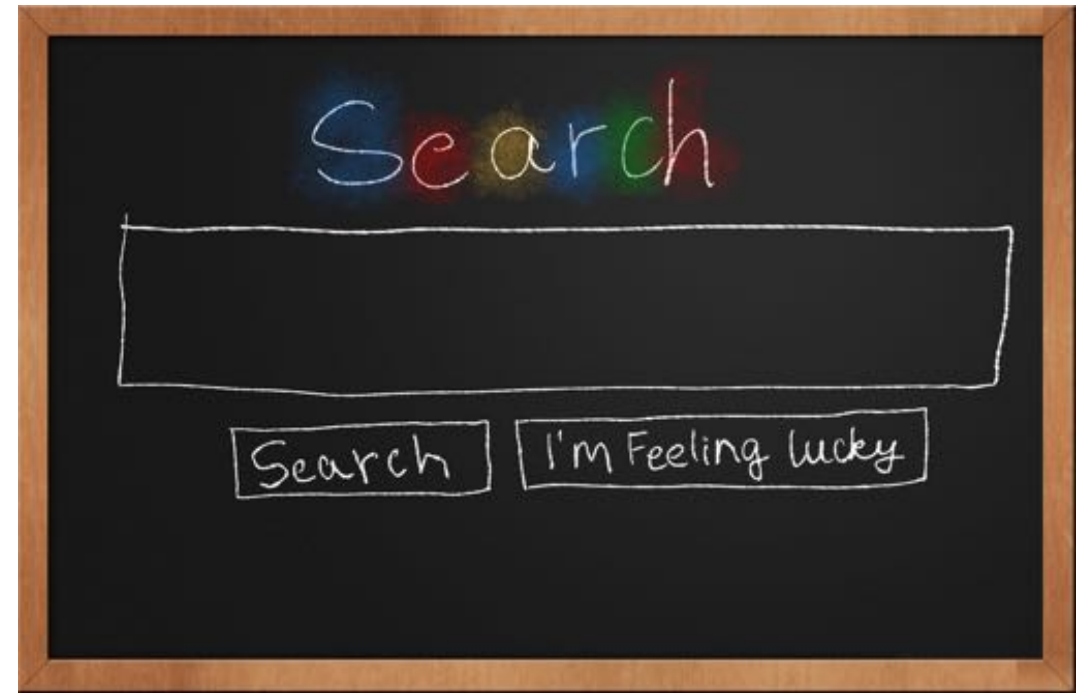
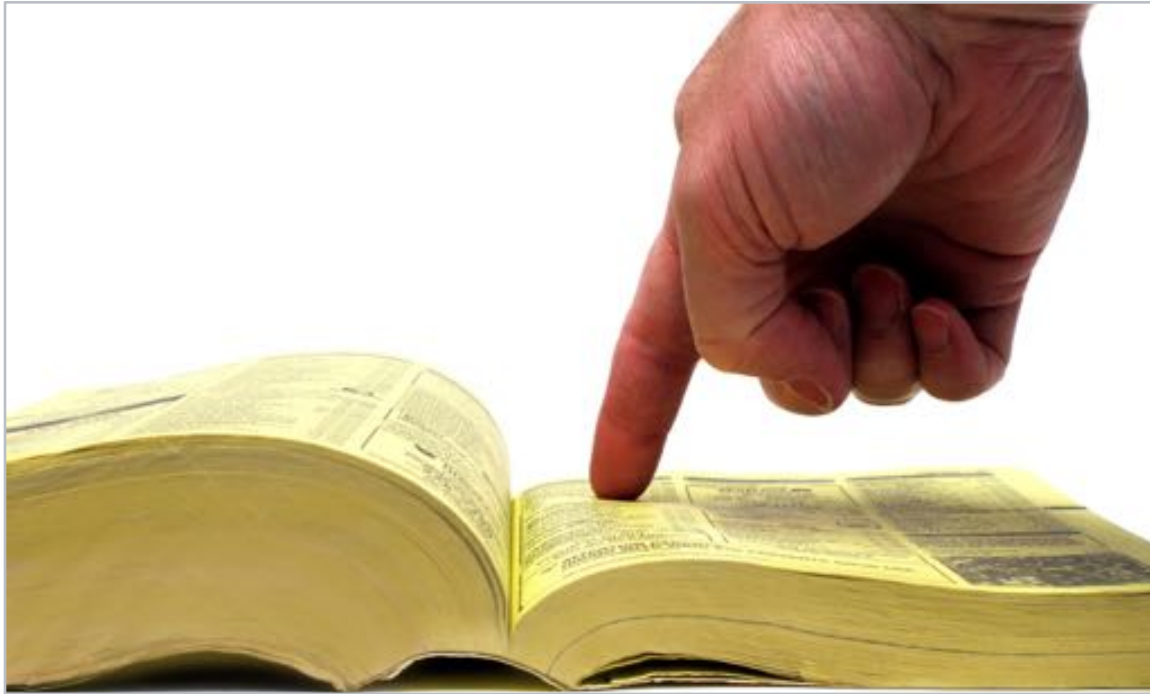
# Agenda

- 👉 Why consider apps?
- 👉 What makes a great app?
- 👉 Where should I focus first?
- 👉 Best apps for your small business



# Why consider apps

# You don't know what you don't know





**Manual  
processes**



# Save time!

Don't waste your most precious resource.





# What makes a great app?

# Scalability



## Ease of use

Complicated does not  
always mean better



# Customer support

Easy to access support is a must!

Look for YouTube and website videos

Peer reviews are an excellent resource





# Cost benefit

Compare the cost of app to the cost of the manual process

Include loaded labor materials and supplies

Lost opportunities



# Apps should feel like an extension of your business





# Where should I focus first?

**Determine where you are  
spending time on non  
value-added activities in  
your business**



# Identify value-added and non-value added steps

Value added



**FOCUS  
HERE**



Non-value added



# What's EATING YOUR TIME?

**Let apps do the work.**



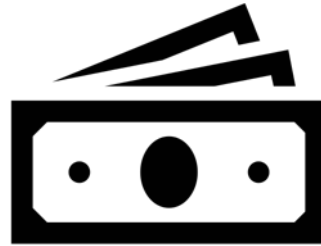
A decorative pattern of small dark dots arranged in a grid, located in the top-left corner of the slide.

# Best Apps for your Small Business

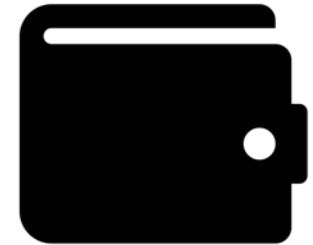
# What are the repeatable tasks that are taking up your valuable time?



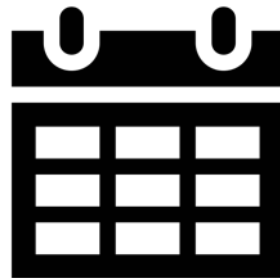
Billing



Managing Cash Flow



Managing expenses



Scheduling



Time-tracking / Payroll

# Apps to manage your cash flow



Manage your collections



Forecast how much cash you'll have in the future



Find the perfect debt collection company



Easy to use cash flow modeling



# Apps to manage payroll and taxes



Payroll, HR, and  
tax services



Automated sales tax  
reporting and filing



QuickBooks Online  
Payroll software



Automated tax  
compliance software

# Apps to manage your time and scheduling



Web-based and mobile time tracking and employee scheduling app



Online appointment scheduling



Employee times tracking and scheduling app

# Apps to automate data entry



Receipt capture made simple with mobile app



Cloud payable solution for small to mid-size businesses



Capture, analyses and posts bills, receipts and statements into your accounting solution



Itemized receipt fetching for Home Depot

# Apps to automate data entry



Connect to PayPal app integration makes it easier to enter transactions into QBO



Connect to Square app integration makes it easier to enter transactions into QBO



Import, export and delete data inside your QBO



Automated accounting for Amazon and Shopify

# Apps to gain insights into your business



Create a professional business plan and track your progress



Consolidated financial reporting



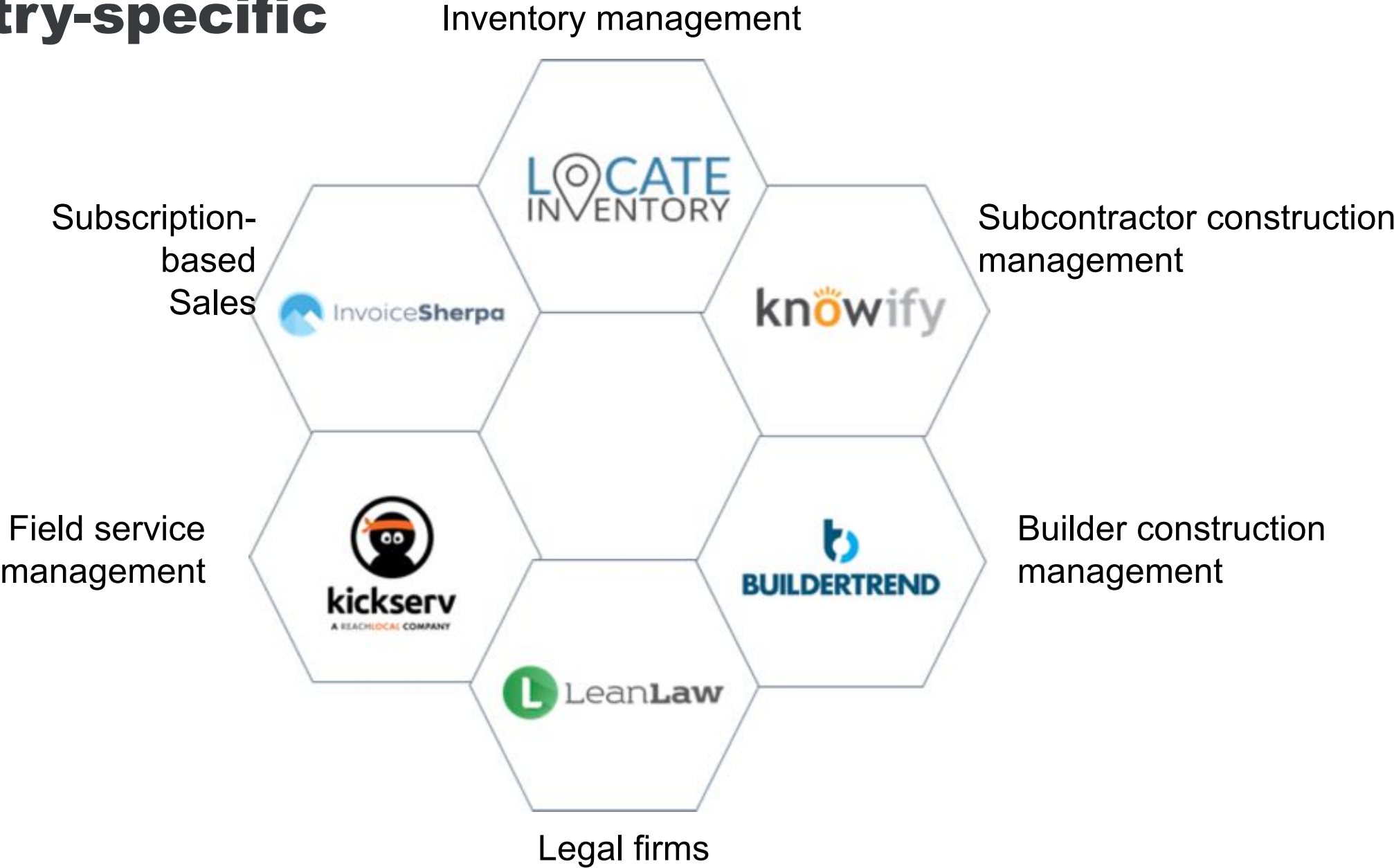
Simple financial reporting analysis



Gather and organize financials for instant business intelligence



# Industry-specific



# Funding



Matches you with lenders for a quick infusion of cash



Fast invoice financing



Business loans for QuickBooks customers



Business loans, lines of credit and invoice factoring

# Backup



ChronoBooks

Backup, restore and  
copy QuickBooks  
Online

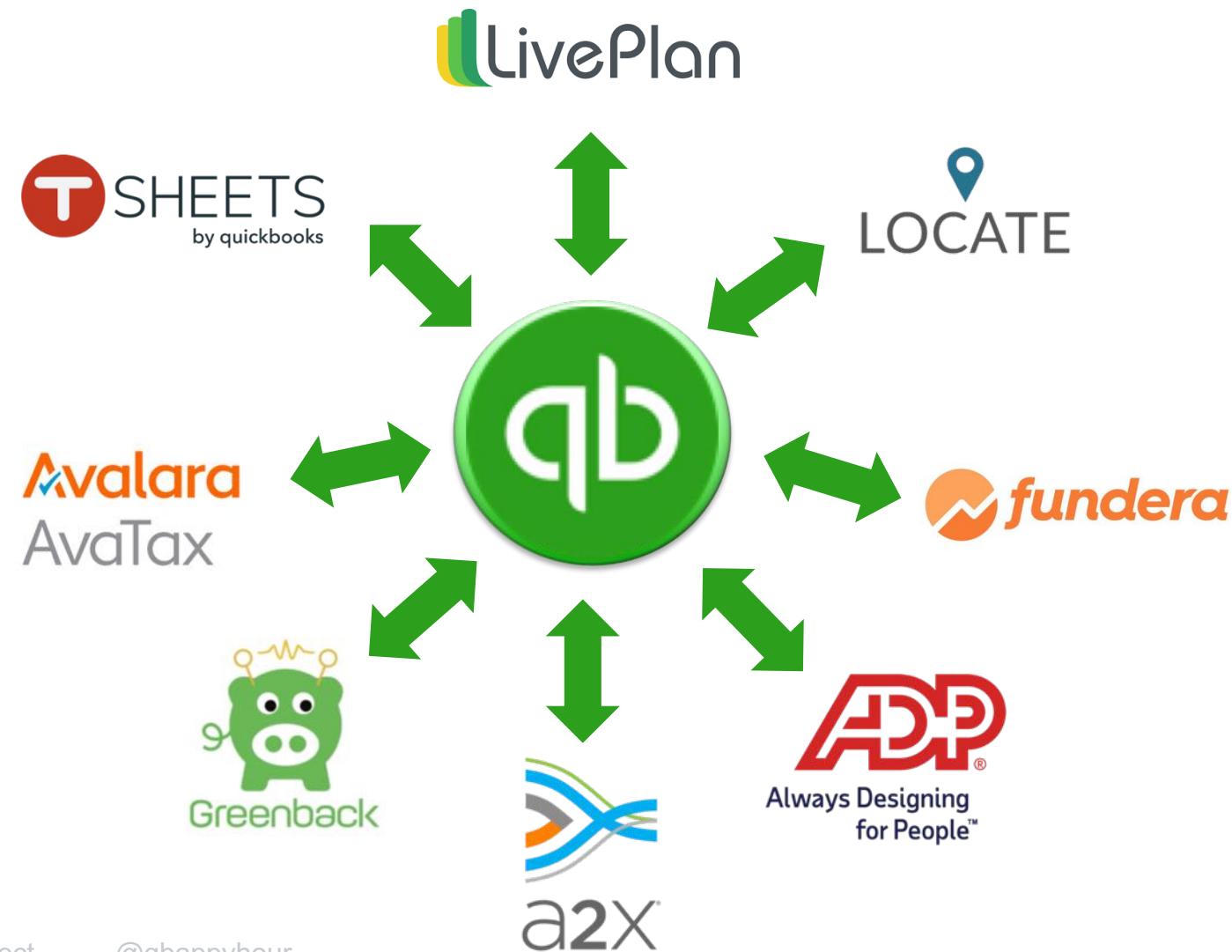


Backup, restore and  
copy QuickBooks  
Online

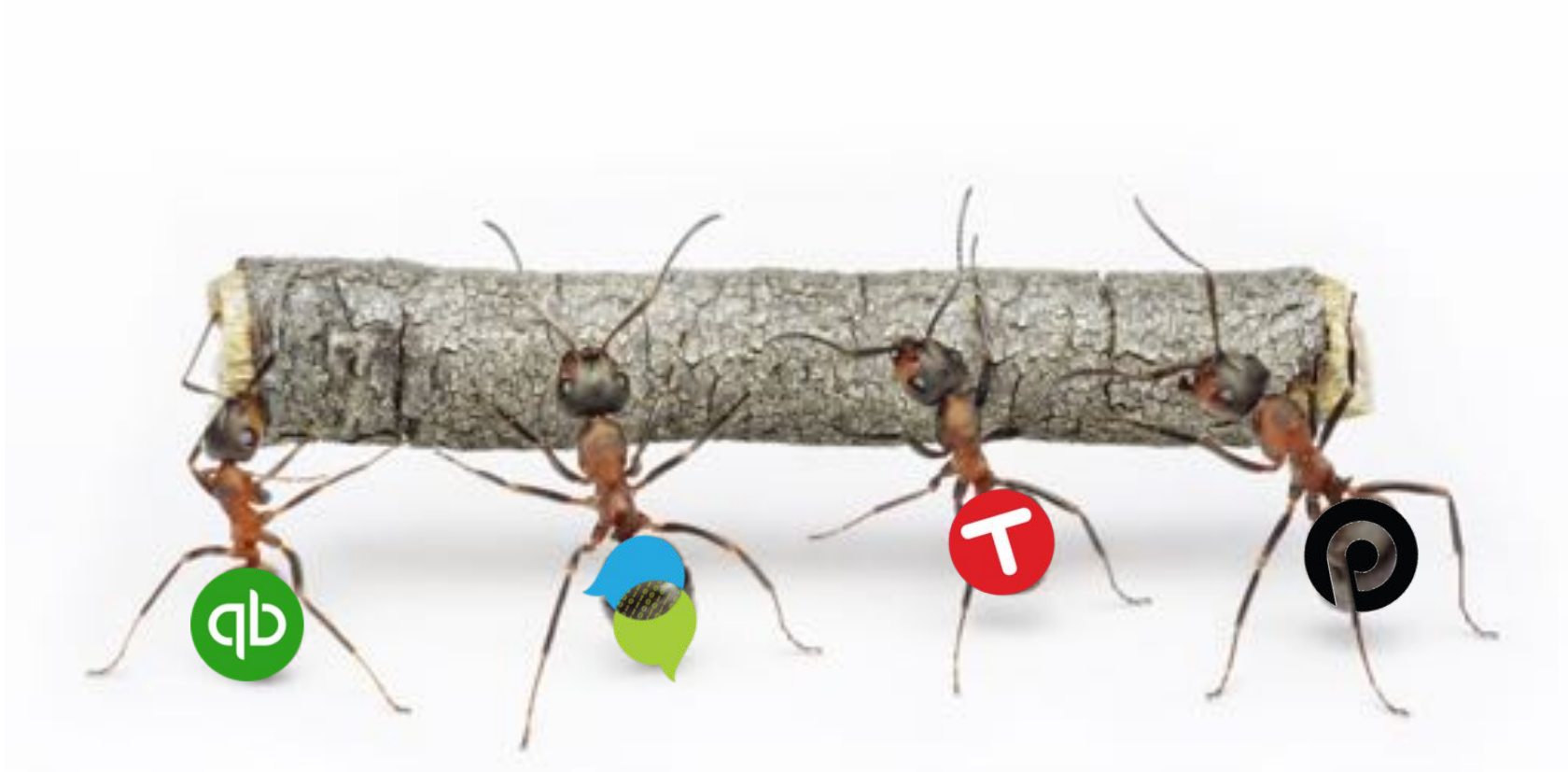


Backup, restore and  
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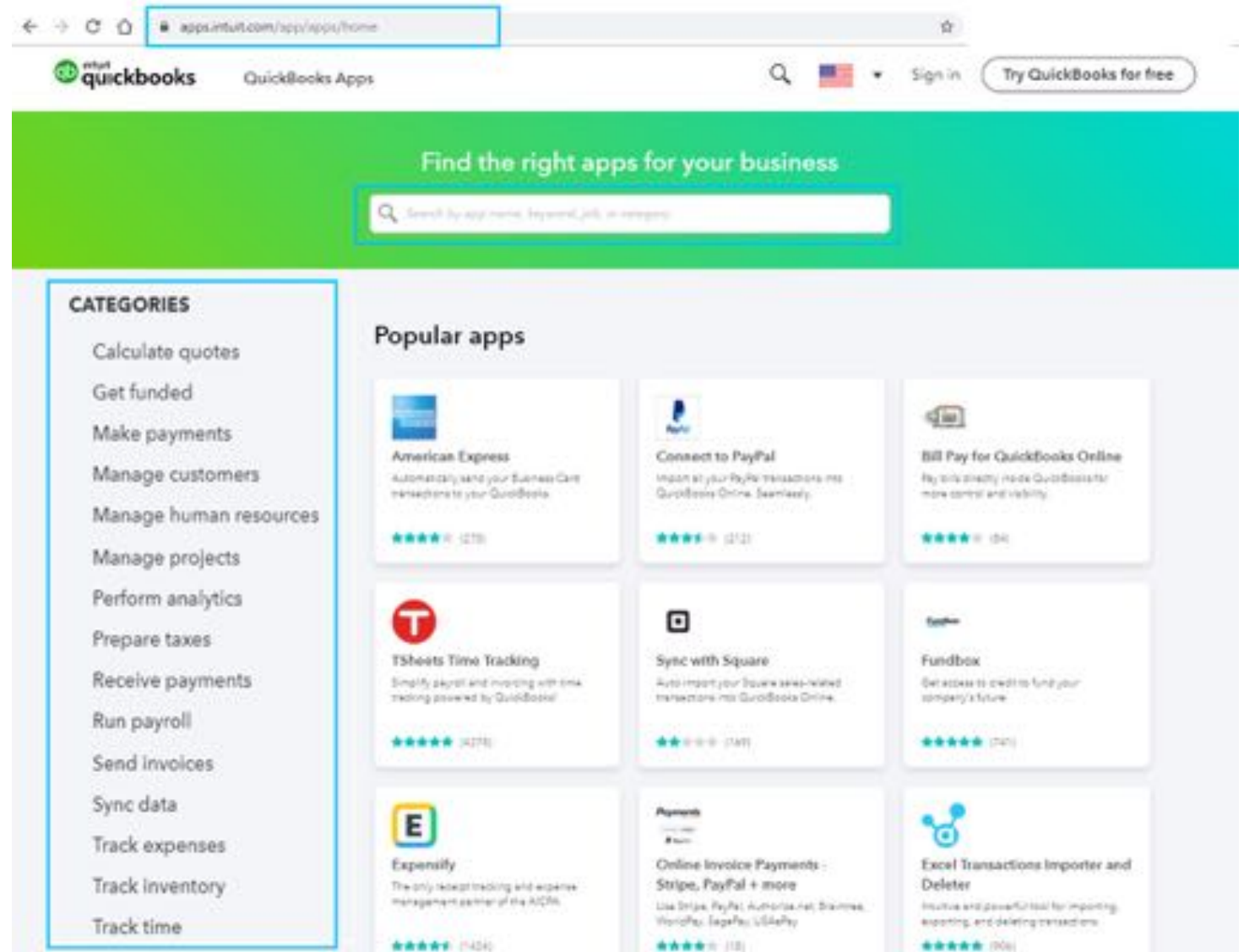
# Multi apps for your business



# Let your apps do the heavy lifting



# Where do I find an app for that?





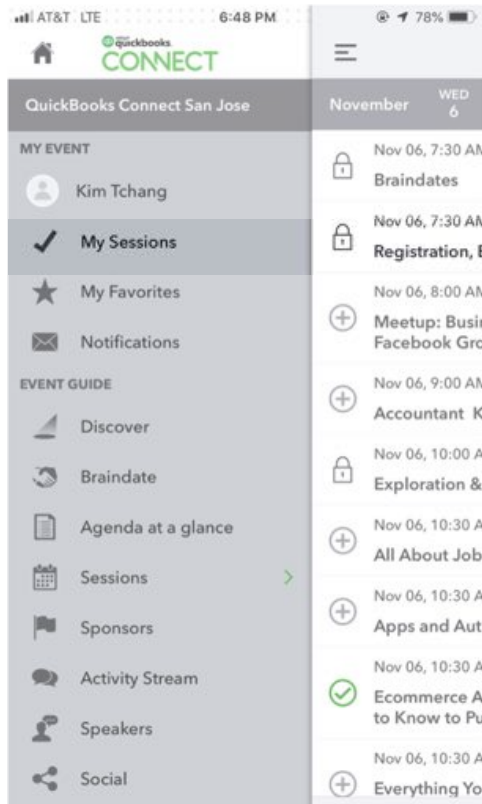
# Questions?



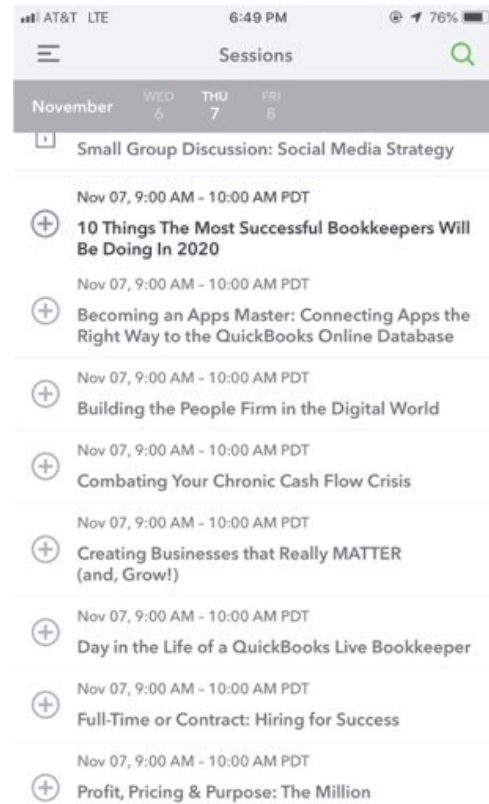
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

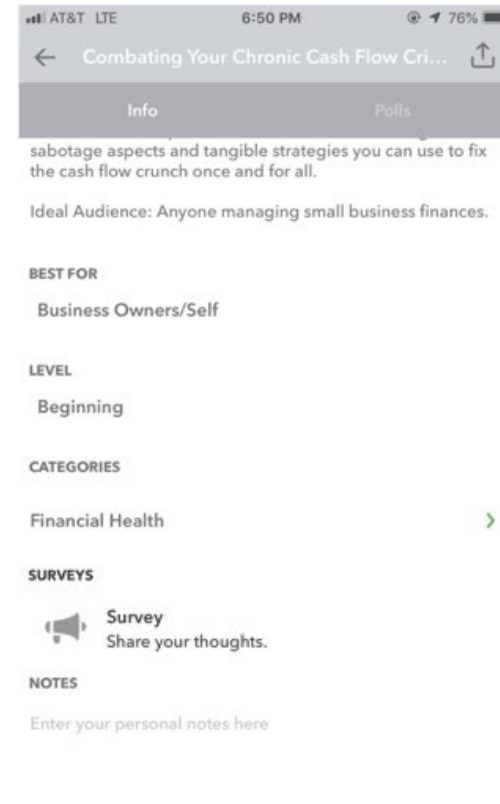
## 1. Select Sessions



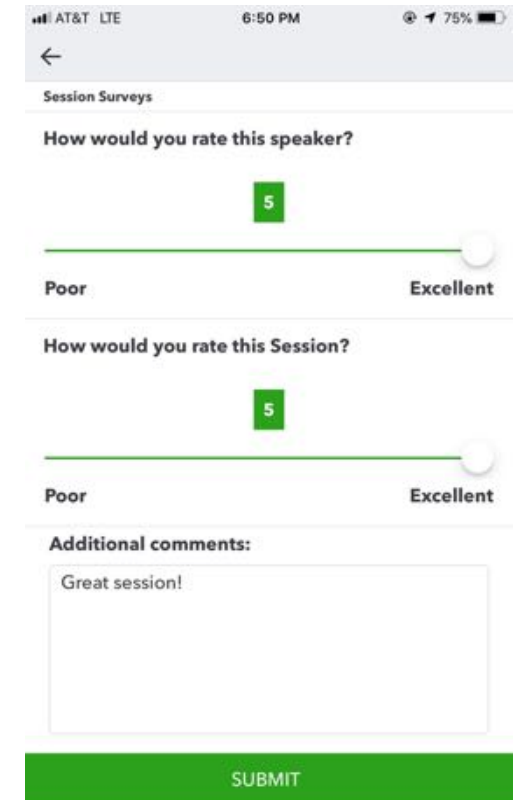
## 2. Select Session Title



## 3. Select Survey



## 4. 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://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is present. Below the search bar are filter buttons: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health', followed by an 'Expand all +' link. The agenda list shows sessions for November 7. The first session is 'Registration, Breakfast & Exploration' from 7:30-7:00 am. The second is 'Braindates' from 7:30-10:30 am, with a description: 'New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)'. It also notes 'Best for: All Audiences' and 'CPE Hours: not eligible'. The third session is 'Yoga' from 8:00-8:30 am. The fourth is 'Breakout Sessions' from 8:00-8:45 am, which includes several sub-sessions: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.



OWN  
THE  
FUTURE