

AUTOMATE YOUR BUSINESS TOOLBOX (Apps 101)

Presented by:

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Industries Represented?

Burning Questions?

Today's Goal:

Understand the Cloud

Understand SaaS model

Learn available business solutions via Apps

Identify 1 Improvement Area

Disclaimer #1: No recommendations are being made today, products discussed are for illustrative purposes.

Disclaimer #2: Not all available options are being discussed today, products discussed are for inspiration purposes.

Disclaimer #3: This is not a hands on learning lab, products are only being discussed for inspiration and illustration.

What is the Cloud?



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SaaS

SOFTWARE
AS
A
SERVICE

SaaS products are called Apps (Applications)

SaaS Service model (generally means):

Runs on a browser or mobile device

Pay as you go – you don't "own"

Sometimes Free

Updates as they happen

Less IT problems

Integrates with other Apps

What About Security????



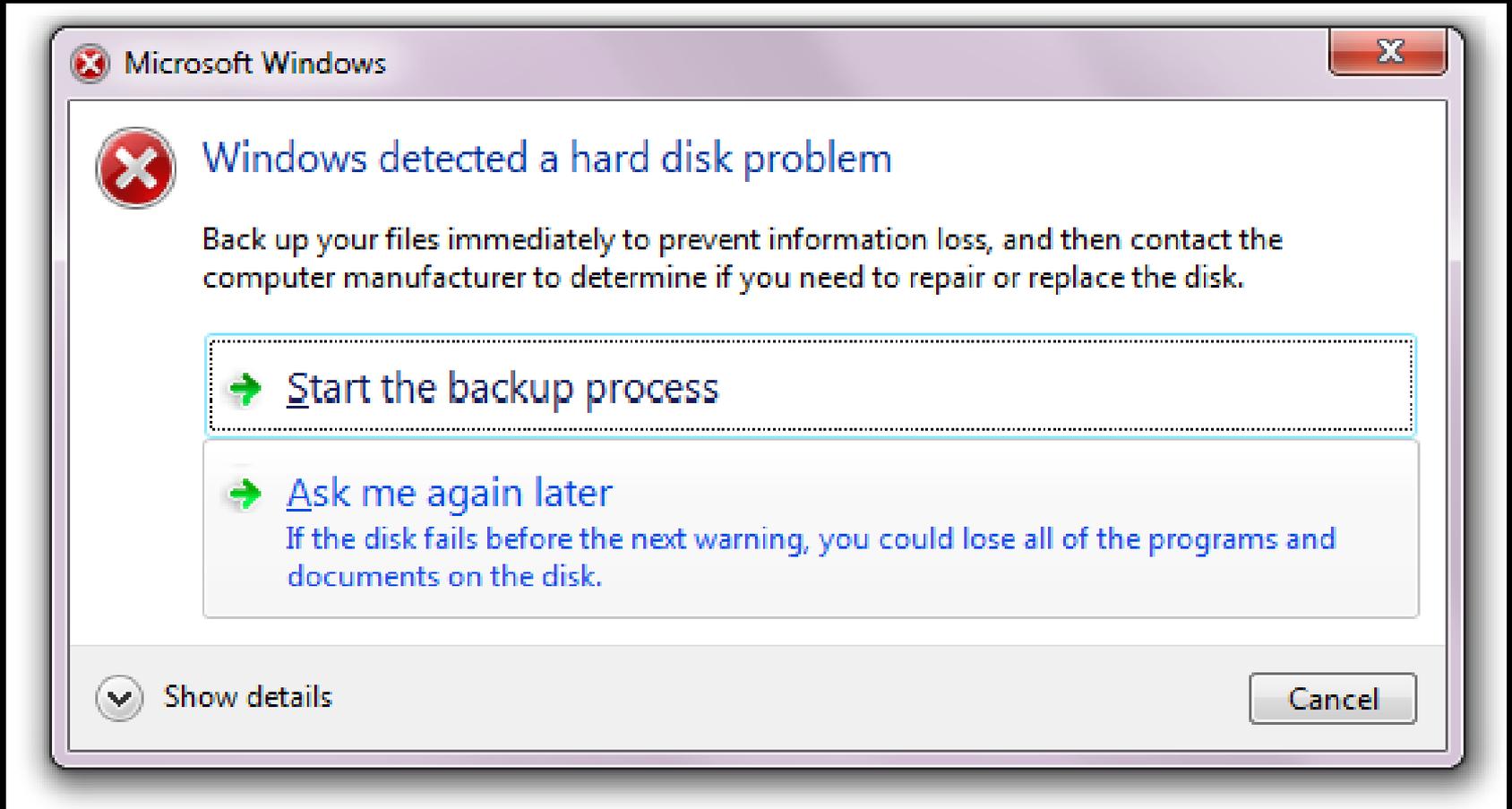
But but...



But but...



But but...



Google this: Data Center Security Requirements



What About Cost????



On premise Server

Lifespan: 5-7 years

\$5-15K

Material cost only, no IT support, or software

\$300 Laptops...

Storage

Google Drive

Dropbox

Box

Accounting

QuickBooks Online

LessAccounting

Go Daddy Bookkeeping

Sage One

Wave Accounting

Xero

Accounting example: QuickBooks Online

Joe's Landscaping
Friday, August 30 2013

Income

\$1,390.39 OPEN INVOICES	\$1,311.79 OVERDUE	\$570.00 PAID LAST 30 DAYS
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Expenses

\$2,519.24
PAID EXPENSES
LAST 30 DAYS

\$1,350.00	Uncategorized Ex...
\$900.00	Rent or Lease
\$95.10	Automobile
\$75.00	Legal & Professiona...
\$99.14	Everything else

Profit & Loss

\$23,065.75
NET INCOME

\$25,495.00 INCOME
\$2,429.25 EXPENSES

Bank Accounts

12 Transactions
need your attention

Checking	\$-3,621.93
Example Bank U.S.A.	Moments ago
Savings	\$200.00
Example Bank U.S.A.	Moments ago
Mastercard	\$304.96
Example Bank U.S.A.	Moments ago
Visa	\$35.00

Activities

All

- Need Attention
 - OVERDUE Invoice 1018:** \$80.00 to Sushi by Katsuyuki
Aug 2
 - OVERDUE Invoice 1032:** \$414.72 to Travis Waldron
Aug 8
 - OVERDUE Invoice 1019:** \$80.00 to Sushi by Katsuyuki
Aug 9
 - OVERDUE Invoice 1010:** \$375.00 to Weiskopf Consulting
Aug 9
 - OVERDUE Invoice 1037:** \$362.07 to Sonnenschein Family Store
Aug 11
- QuickBooks Pro/Premier user? [Read this first.](#)
- August 30, 2013
TODAY
- [Take a tour of the home page](#)

Customer Relationship Management

Zoho

Mavenlink

Pipedrive

17Hats

Smartsheet (awesome templates)

CRM example: Pipedrive

The screenshot displays the Pipedrive CRM interface. At the top, there's a navigation bar with the Pipedrive logo, a search bar, and several menu items: Deals, Activities (with a notification badge), Contacts, Products, and Statistics. The user profile for Martin Tajur is visible on the right. Below the navigation bar, there's a 'Sales' dropdown and a filter for 'All open deals'. The main area shows a sales pipeline with five stages: Idea (120,890 \$, 6 deals), Meeting Arranged (18,723 \$, 5 deals), Needs Discovered (7,500 \$, 2 deals), Proposal Delivered (1,400 \$, 2 deals), and Offer Accepted (4,300 \$, 3 deals). Each stage contains a list of deals with their respective values and status icons. Two mobile device overlays are shown: one for a 'LOEG branding' deal in the 'Qualified' stage with a value of \$1,800, and another for a 'Sales Pipeline' overview showing various deals like 'Proposal Presented', 'Brandywine Logo Design', and 'Wright Corporated deal'.

Idea	Meeting Arranged	Needs Discovered	Proposal Delivered	Offer Accepted
120 890 \$ 6 deals	18 723 \$ 5 deals	7 500 \$ 2 deals	1 400 \$ 2 deals	4 300 \$ 3 deals
Managing Sales Team Meeti... 10 200 \$ Rogersound Labs	Professional Selling Skills 3 600 \$ Omni Tech	Consultative Selling Training 7 500 \$ Price's Electronics	Rosewood, Inc. deal 0 \$ Rosewood, Inc.	Something for the team 0 \$ Wordstorm
ABC Store deal 50 000 \$ ABC Store	Motivating a Team 123 \$ Maxiserve	New fe 0 \$ Clickh		
Century House deal 55 000 \$ Century House	Franklyn Insurance Co deal 3 000 \$ Franklyn Insurance Co			
SEO 5 690 \$ Ivorypint Inc.	Design for new homepage 12 000 \$ Microcorp			
Vendox deal 0 \$ Vendox	New welcome flash 0 \$ Action Auto			
SEO 0 \$ Rogersound Labs				

Time & Expense

Tsheets- Timesheets & Scheduling

SpringAhead- Timesheets & Expenses
(one login)

Concur-Travel & Expense

Certify-Travel & Expense

Time (and scheduling) example: TSheets

The image displays two views of the TSheets time tracking system. On the left is a web browser interface showing a user's time card for the week of October 1st to 4th. The interface includes a user selection dropdown (User: Matt Newbill) and a table with columns for dates and job codes. A 'Card' pop-up window is overlaid on the table, showing the current time card entry: 'clocked in at 12:15pm', 'total: 2:00', 'code: web design', and a 'Clock Out' button. On the right is a mobile app interface for an iPhone. The app screen shows the 'Time Card' for 'Research' at 'ACorp - Marketing', with a timer at '0:00:13' and an 'In' time of '12:23 AM'. The app features buttons for 'Stop Timer', 'Switch Task', and 'Add Notes'. It also displays 'Day Total: 1:05:25' and 'Week Total: 23:54:31', along with a 'View History' button. The bottom navigation bar includes 'Time Card', 'Time Log', and 'Tasks'.

0/1	Thu, 10/2	Fri, 10/3	Sat, 10/4	Jobcode Totals
2.2	1.3	2		10.5
5.5	5	8		27.5
	3			5.5
7.7	9.3	10	0	43.5

Card

clocked in at 12:15pm
total: 2:00
total: 2:00
code: web design [Switch =](#)
sheet notes...
Clock Out
Pop-out Time Card

Time Card

0:00:13 Research
ACorp - Marketing
In: 12:23 AM

Stop Timer Switch Task Add Notes

Day Total: 1:05:25
Week Total: 23:54:31
View History

Expense Example: Concur

Concur for mobile goes where you go.

Our mobile solution makes your smartphone even smarter—
and life a little easier.



Concur[®] Expense: Tell expense pain to hit the road.

Concur[®] for Mobile complements our Web based solution, allowing you to manage anything [expense](#) and or [travel](#) related, wherever you are. From booking and managing itineraries to capturing receipts and submitting [expense reports](#), your smartphone can do it all with Concur:

- Capture receipts with your smartphone, then ditch the paper.
- Upload IRS compliant images directly to expense reports.
- Immediately approve or reject expense reports via manager access.
- Add car mileage to an expense report

Just snap, export, and ... you're done.

Simply take a picture of each receipt, hit "export," and ExpenseIt Pro automatically creates, itemizes and categorizes the expense entries. The report is well on its way to being complete, the data is photo-accurate, and paper receipts become a

Accounts Payable

Bill.com

Bill & Pay-Example

Concur Invoice

Analytics

[Finagraph](#)-Ratio & Trends (Historical)

[Mentio](#)- Cash Flow Forecasting (Future)
(mobile platform only)

[LivePlan](#)-Business Plans & Historical
Analytics

[Moody's MARQ Score](#) – Credit Rating &
Action Plan

Business Funds

Kabbage- short term loans

BlueVine-lines of credit and invoice factoring

Collbox- Collect & Manage Receivables

Business Funds Example: Collbox

CollBox β

Edd Luczycki

- Dashboard
- Settings
- Support
- Logout

Dashboard

Collectible

Customer	Phone	Email	Invoices	Balance	
Weiskopf Consulting	(650) 555-1423	Consulting@intuit.com	1	\$375.00	Collect...
Barnett Design	(650) 557-1289	Design@intuit.com	1	\$274.50	Collect...
Sonnenschein Family Store	(650) 557-8463	Familiystore@intuit.com	1	\$362.07	Collect...

\$1011.57
Collectible 

\$6007.55
Collecting 

\$0.00
Collected 

\$0.00
Non-collectible 

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Other

Avalara- sales tax compliance

DocuSign-Electronic document signing

The options are endless....go find them!

Other Example: Avalara

Avalara can help you manage sales tax compliance



Tax rate calculation



Certificate management



Filing and returns

BILLIONS of sales tax transactions processed.

MILLIONS of exemption certificates managed.

HUNDREDS OF THOUSANDS of sales tax returns filed.

BILLIONS of dollars in taxes remitted.

100+ countries around the world.

MARKET LEADER. Avalara.

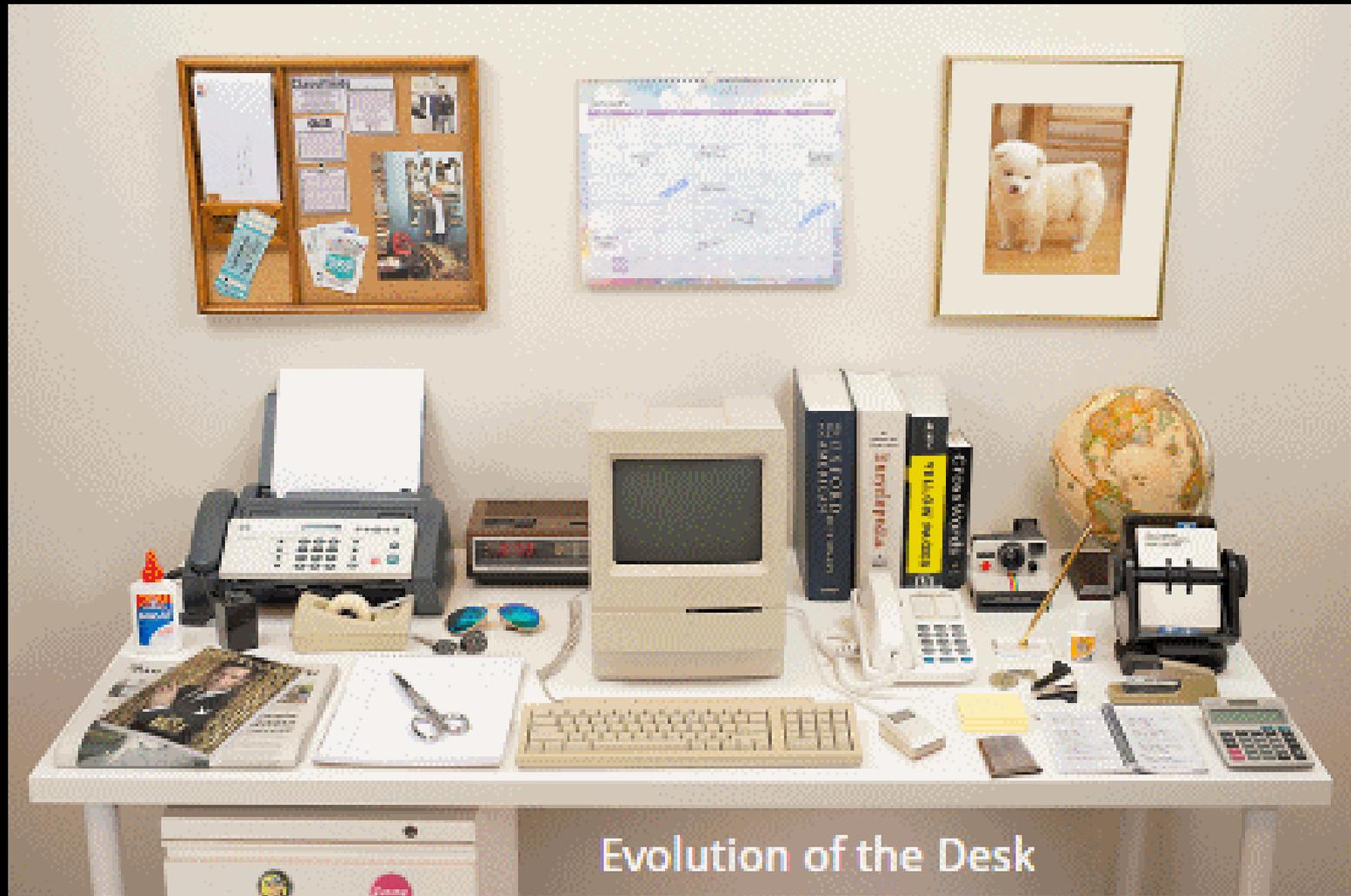
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Evolution of the Desk

1980

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