

# Turn Technology Troubles Into Triumphs

Presented by

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# Our Goals Today

- Understand “the Cloud”
- Know the true cost of SaaS
- Identify business solutions Apps
- Set a goal to speed up one business process or eliminate one business task with technology

Presented by Shelly Robbins, Accounting  
Technology Consultant

Industries Represented?

Burning Questions?

# Disclaimers

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

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

#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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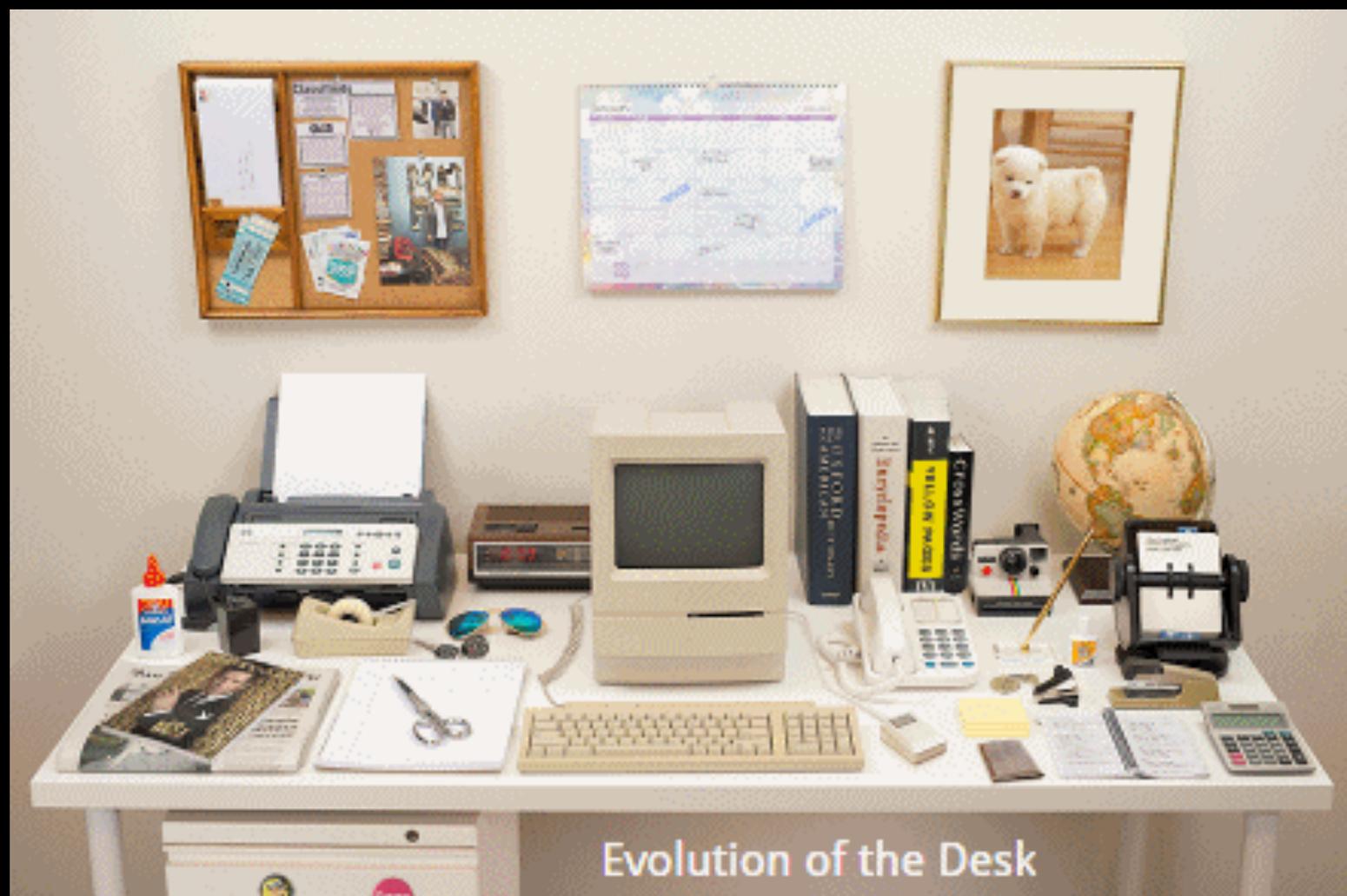


# What is the Cloud?





Cloud Computing



Evolution of the Desk

1980

# 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????



Computer Data Center

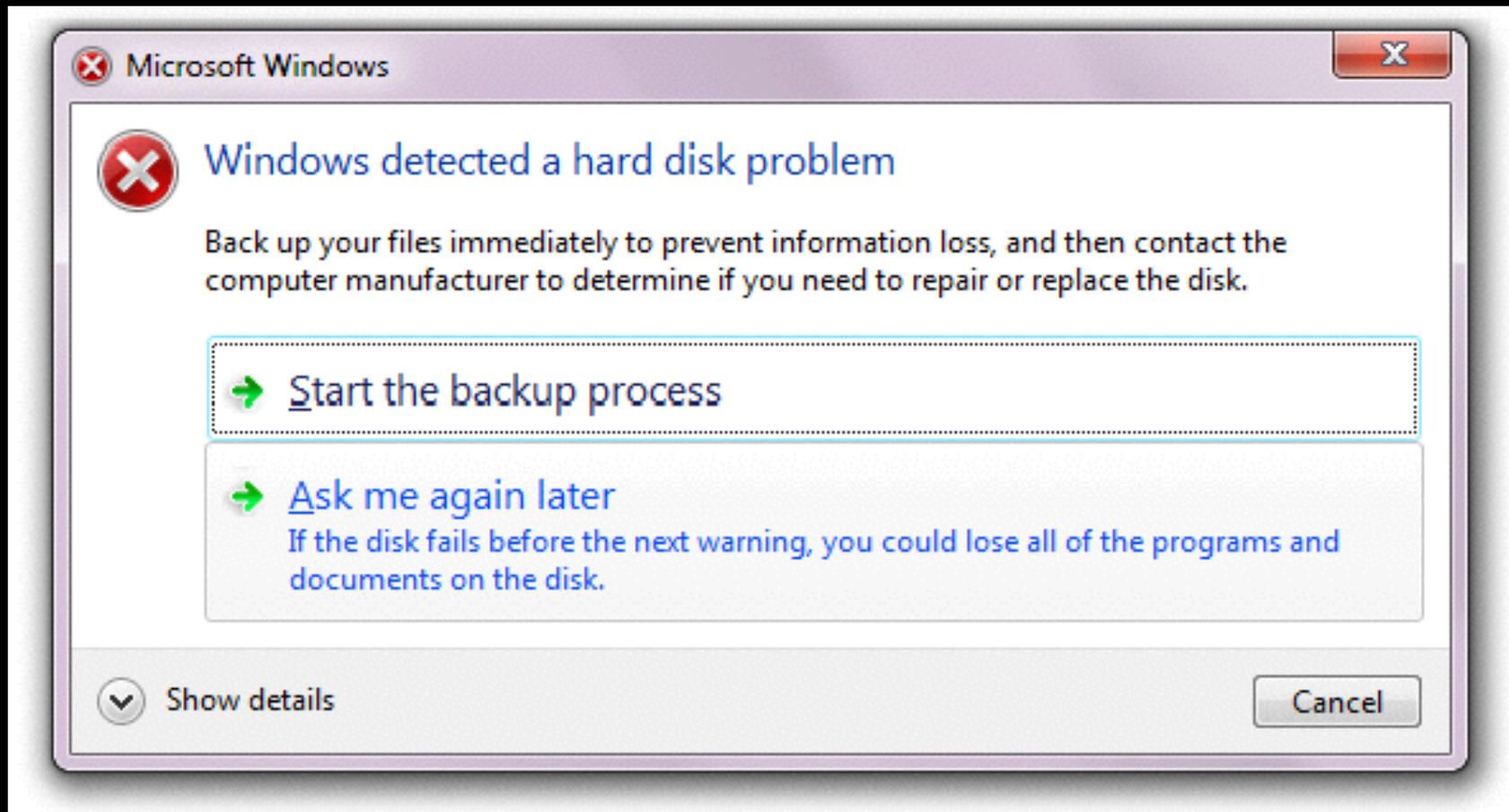
But but...



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...or even just a phone?

# Real Value of SaaS



Time saved

Other costs saved

rent, phone, utilities, supplies, labor

Quality of life

“Increase the speed of  
business and you’ll increase  
the rate of profit.”

# Business Solutions Apps

Storage

Google Drive

Dropbox

Box

Accounting

QuickBooks Online

LessAccounting

Go Daddy Bookkeeping

Sage One

Wave Accounting

Xero

# Accounting example: Xero



Everything in one place

Add-ons Options



# Customer Relationship Management

Zoho

Mavenlink

Pipedrive

17Hats

Smartsheet (awesome templates)

# CRM example: Pipedrive

The image displays the Pipedrive CRM interface on a desktop browser and two mobile app views. The desktop view shows a sales pipeline with stages: Idea, Meeting Arranged, Needs Discovered, Proposal Delivered, and Offer Accepted. The mobile app views show detailed deal information and a sales pipeline on a smartphone.

**Desktop Interface:**

- URL: <https://beta.pipedrive.com/pipeline/1/filter/1348>
- Navigation: Deals, Activities, Contacts, Products, Statistics
- User: Martin Tajur, AF Consulting
- Stages: Sales, All open deals

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 \$ Woodstorm
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 \$ Ivoryprint Inc.	Design for new homepage 12 000 \$ Microcorp			
Vendox deal 0 \$ Vendox	New welcome flash 0 \$ Action Auto			
SEO 0 \$ Rogersound Labs				

**Mobile App Views:**

- LOEG branding:** \$1,800, Won. Status: Qualified. Activity: Present the mood board (Sep 23, 2015 5:30 PM).
- Sales Pipeline:** Proposal Presented (125,152.01 \$), Brandywine Logo Design (2,000 \$), Wright Corporated deal (10,050 €), Branding RFP deal (16,160 €), Design for weekly newsletter (26,000 \$), LOEG branding (8,000 \$), JXE Sales team training (25,000 \$), Marketing mix (35,000 \$), Quatermain deal.

## Time & Expense

Tsheets- Timesheets & Scheduling

SpringAhead- Timesheets & Expenses (one login)

Concur-Travel & Expense

Certify-Travel & Expense

# Time (and scheduling) example: TSheets

User: Matt Newbill Switch User »

10/1	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...

**Save**

**Clock Out**

Pop-out Time Card

Carrier 12:23 PM

**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

Time Card Stop Log Tasks

# Expense Example: Concur

Concur for mobile goes where you go.

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



**Concur<sup>®</sup> Expense: Tell expense pain to hit the road.**

Concur<sup>®</sup> 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 Expenselt 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

Example: [bill.com](http://bill.com)



Command  
and Control

your cash flow,  
payables and receivables —  
anytime, anywhere.

## 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 Funding Options

Kabbage- short term loans

BlueVine-lines of credit and invoice factoring

Collbox- Collect & Manage Receivables

# Funding Example: Collbox

CollBox  $\beta$

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	Familystore@intuit.com	1	\$362.07	Collect...

**\$1011.57**  
Collectible 

**\$6007.55**  
Collecting 

**\$0.00**  
Collected 

**\$0.00**  
Non-collectible 

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## Other Business Solutions Apps

Avalara- sales tax compliance

DocuSign-Electronic document signing

Acuity Scheduling \$10 /month and your appointments are booked!

The options are endless... go find them!

The options are endless....find them!

# Set a goal

- Set a goal to speed up one business process or eliminate one business task with technology
- Share what you learn with others

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