



BOLDLY | GO

Must-Have Apps for ProAdvisors

Kelly Gonsalves



- Born & raised in NYC
- I love to cook, travel & paddle board
- I have the most adorable pup named Nina
- I have been a Top 10 ProAdvisor twice

Learning Objectives

1. Gain insights into the must-have applications for ProAdvisors, understanding their impact on efficiency and productivity in a virtual accounting practice.
2. Learn about specialized app recommendations for various industries including e-commerce, legal, restaurant, construction, and non-profit sectors, contributed by expert colleagues in these fields.
3. Discover how to effectively incorporate apps into client work and team collaboration and provide tech solutions for other accounting firms, enhancing overall business efficiency.



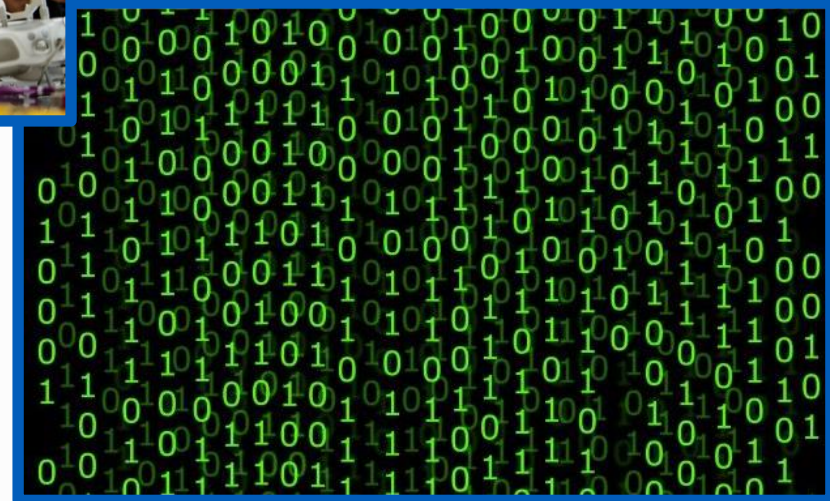
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Why Apps & Tech are Important to ProAdvisors

What usually comes to mind when we think of technology?



Technology

The application of knowledge for achieving practical goals in a **reproducible** way.

The word technology can also mean the products resulting from such efforts, including both tangible tools such as utensils or machines, and intangible ones such as software.



Becoming **Totally Booked**: A Tech Journey

Following Blindly

This was my desktop era. I was busy running from office to office to maintain QuickBooks files.

I could only generate revenue if I was onsite.

Early 2017

Finding What Worked

In the second half of 2017, **revenue doubled** compared with what we had made in the first half of the year.

2nd Half
2017

2018 forward

Changing My Game

My first conference!

I learned a lot about the apps, technology, and processes that other accountants were using to **SCALE** their business.

No Looking Back

Apps allow me to create **consistent processes** and **grow my client base** while **keeping costs down**.

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How Apps Can Help You

What do ***you*** want your firm to look like?

Do you want to ...

- *increase productivity?*
- *increase efficiency?*
- *reduce burnout?*



- *provide growth opportunities for staff?*
- *have more time off?*
- *have more flexibility?*

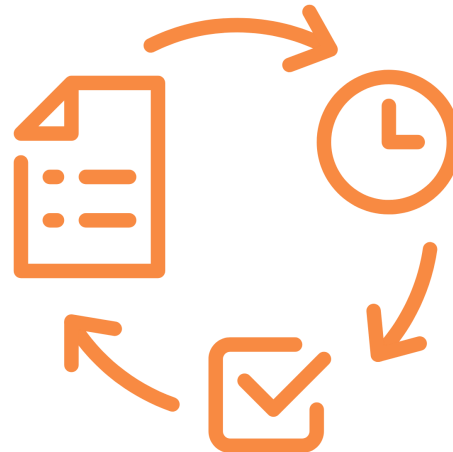
Apps can help!

Challenge Areas

CLIENT WORK



PRACTICE MANAGEMENT



TEAMWORK



Plus, of course, your GENERAL LEDGER!

CLIENT WORK

- 1 Document Storage
- 2 Data Transformation & Reporting
- 3 Communication
- 4 Add-on Services



CLIENT WORK



Tech Toolkit

Document Storage

- Liscio*
- Sharefile
- SmartVault

Data Transformation & Reporting

- SaasAnt*
- QuickBooks Online Advanced
- LiveFlow*
- Fathom
- Google Sheets/Excel

Communication

- Liscio*
- ClientHub
- Gmail*/Outlook

Add-On Services

PAYABLES

- Corpay One*
- Relay*
- BILL

PAYROLL

- Gusto*
- QuickBooks Online Payroll*

SALES TAX

- TaxJar*
- Avalara* / Davo*

1099s

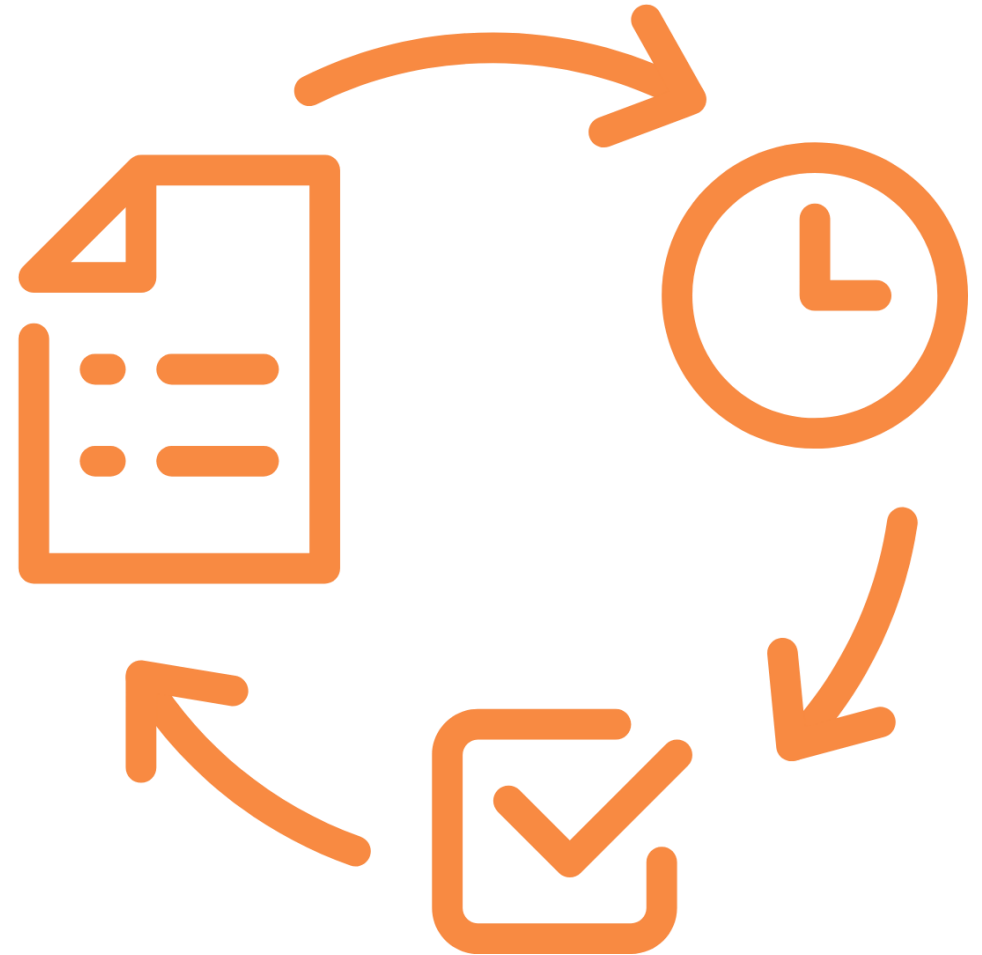
- Tax 1099
- Track1099*

401k

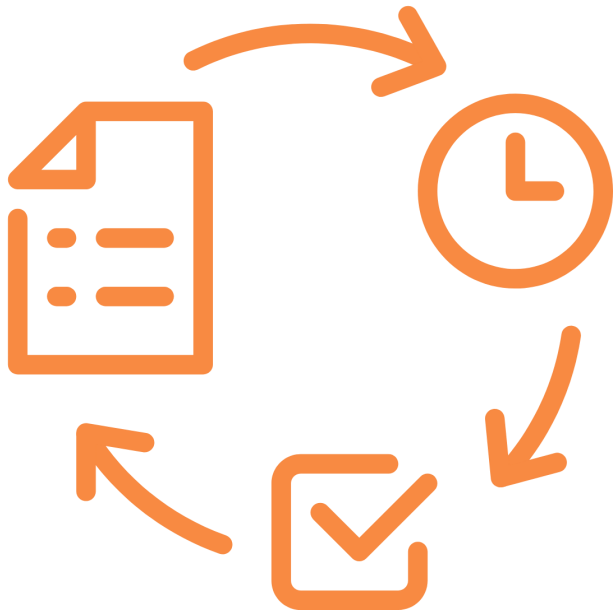
- Human Interest*

PRACTICE MANAGEMENT

- 1 Document Storage
- 2 Time Management
- 3 Project/Task Management
- 4 Security



PRACTICE MANAGEMENT



Tech Toolkit

Document Storage

- Google Drive*
- ShareFile
- OneDrive

Time Management

- Timeular*
- Memtime*
- Aero Workflow
- Timesheets.com
- Keeper
- Financial Cents
- QuickBooks Time

Project/Task Management

- Motion*
- Keeper
- Aero Workflow
- Financial Cents
- Karbon
- ClickUp

Security

- Visory
- TechGuru
- Practice Protect

Administrative

- Telephone services (Jill's Office*)
- Claude*/Chat GPT

TEAMWORK

- 1 CRM
- 2 Communication
- 3 Time Management
- 4 Password Management



TEAMWORK



Tech Toolkit

Communication (Internal)

- Slack*
- Microsoft Teams
- Google Chat

CRM

- Anchor*
- HoneyBook*
- Ignition
- Method
- Insightly

Time Management

- Timeular*
- Memtime*
- Aero Workflow
- **Keeper**
- **Financial Cents**
- QuickBooks Time
- **Timesheets.com**

Password Management

- 1Password*
- LastPass
- Google Password Manager

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Must-Have Apps: Niche Edition



Megan Genest-Tarnow



@MeganTarnow



/megantarnow/



/mtarnow

NONPROFIT

Niche Insights from Megan

Typical Client Activity

Tracking donors
Managing volunteers
Special Recording Needs

Discounts available:

TechSoup (QBO)
RightTool
Stripe
SalesForce

Typical Client Needs

CRM to Track Donations

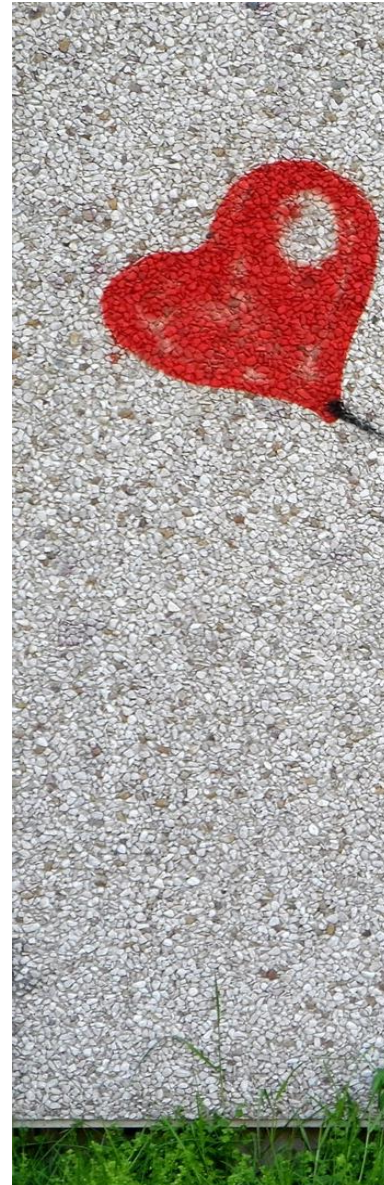
QBO is NOT a CRM!

Year End Donation Letters

Donor-managed
monthly donations

Spend management / Prepaid Expenses

Import to QuickBooks



NONPROFIT

Top Apps from Megan

Key Apps

Saasant

Hubdoc

Little Green Light, Neon

DonorBox, Zeffy

RightTool

Accruer

CostAllocation

Ramp

Support for NPs & You!

Stripe -*NPO discount*

SalesForce - *free, but needs a lot of customization*

Tech Soup - *NPO resource*

QuickBooks for Nonprofits -
facebook group



Sherrell Martin

NITRAM FINANCIAL



nitramfinancial.com



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INTERIOR DESIGN

Niche Insights from Sherrell

— Typical Client Activities —

All-in-one platforms

PO's & progress invoicing

Reselling items used for staging

Job costing & projects

— Typical Client Needs —

Inventory is a factor

Sales Tax is a factor

Create a tech ecosystem

Get yourself a beta-client



INTERIOR DESIGN

Top Apps from Sherrell

Common Platforms

HousePro
(formerly Ivy)

Studio Designer

Design Manager

**basic reports available in all*

Common Key Apps

AvaTax, TaxJar, Sovos for Sales
Tax

nexus is being created when the designer travels

Zapier

fill-in gaps in your custom ecosystem

QBO is a harder sell

get a beta 'client' for testing



Tonya Schulte

THE PROFIT CONSTRUCTORS



theprofitconstructors.com



@schultetonya



/tonyaschulte



/theprofitconstructors



/theprofitconstructors

CONSTRUCTION

Niche Insights from Tonya

Typical Client Activity

Lots of moving parts
Projects & progress
invoicing

Project types:

New construction
Commercial GC
Residential GC
Specialty/Trade
Service Contractor

Typical Client Needs

Increased documentation
Tracking by project
WIP report evaluation

Tech changes with income
levels & Project type



CONSTRUCTION

Top Apps from Tonya

Common Approaches

Community Banks offer better lending,
Relay so they can connect to QBO

Wide use of classifications

Be sure to clearly state compliance needs for connected tech.

Common Key Apps

- LevelSet
- **Knowify**
- RedTeam Go
- ReadTeam Flex
- Corecon
- JobProgress
- BuilderTrend
- Housecall Pro
- BuildOps

Roundtable Labs:
Construction Junction

CONSTRUCTION

Top Apps from Tonya

Example: Commercial General Contractor

\$500k
to \$2m

Knowify

Budgeting, Estimating, **Limited Task Management**, Subcontractor Management, RFIs, Scheduling, Time Tracking, Invoicing (including AIA billing), Cost Tracking, **Customized Forms**, **Graphic Project Dashboard**, Mobile App, limited 2-way sync to and from QBO

\$2m to
\$10m

ReadTeam Flex (formerly
ReadTeam)

Preconstruction, **RFPs**, Budgeting, Estimating, **Task Management**, Subcontractor Management, RFIs, Scheduling, Time Tracking, Invoicing (including AIA billing), Cost Tracking, **Customized Forms**, **PDF WIP reporting**, PDF project profitability reports, Mobile App, 1-way sync from ReadTeam Flex into QBO, **direct integration with Levelset**

Corecon

Preconstruction, **RFPs**, Budgeting, Estimating, Subcontractor Management, **Daily Logs**, **Meeting Minutes**, RFIs, Scheduling, Time Tracking, Invoicing (including AIA billing), Cost Tracking, **Estimate to Procurement Wizard**, **Workflow Rules**, **Advanced Business Intelligence Dashboards**, **Financial Dashboard**, requires separate link software to connect to QBO

CONSTRUCTION

Top Apps from Tonya

Example: Residential General Contractor

\$500k
to \$2m

JobProgress

Budgeting, Estimating, Subcontractor Management, Scheduling, Time Tracking, Invoicing, Cost Tracking, **Customizable Financial Reports**, Mobile App, limited 2-way sync to and from QBO

Knowify

Budgeting, Estimating, **Limited Task Management**, Subcontractor Management, **RFIs**, Scheduling, Time Tracking, Invoicing (including T&M, cost plus and other variable types), Cost Tracking, **Customized Forms**, **Graphic Project Dashboard**, Mobile App, limited 2-way sync to and from QBO

\$2m to
\$10m

BuilderTrend

Preconstruction, **RFPs**, Budgeting, Estimating, **Task Management**, Subcontractor Management, **RFIs**, Scheduling, Time Tracking, Invoicing (including AIA billing), Cost Tracking, **Customized Forms**, **Cash and Accrual WIP reporting**, PDF project profitability reports, limited 2-way sync to and from QBO, **direct integration with Home Depot**

Corecon

Preconstruction, **RFPs**, Budgeting, Estimating, Subcontractor Management, **Daily Logs**, **Meeting Minutes**, **RFIs**, Scheduling, Time Tracking, Invoicing (including AIA billing), Cost Tracking, **Estimate to Procurement Wizard**, **Workflow Rules**, **Advanced Business Intelligence Dashboards**, **Financial Dashboard**, requires separate link software to connect to QBO

CONSTRUCTION

Top Apps from Tonya

Example: Specialty Trade/Service Contractor
(HVAC, Plumbing, Electrical, etc.)

Service Only

Jobber

Scheduling, Dispatching, Time Tracking, Invoicing, Mobile App, **Online Booking**, **Customizable Job Forms**, **Client Hub**, **Marketing**, Credit Card Processing, Reporting, Manual Sync with QBO

Housecall Pro

Scheduling, Dispatching, **Estimates**, Time Tracking, Invoicing, Mobile App, **Recurring Service Plans**, **Online Booking**, **Customizable Job Forms**, **Marketing**, **Call Answering Service**, Credit Card Processing, **Financing**, Reporting, **Open 2-way sync to and from QBO**

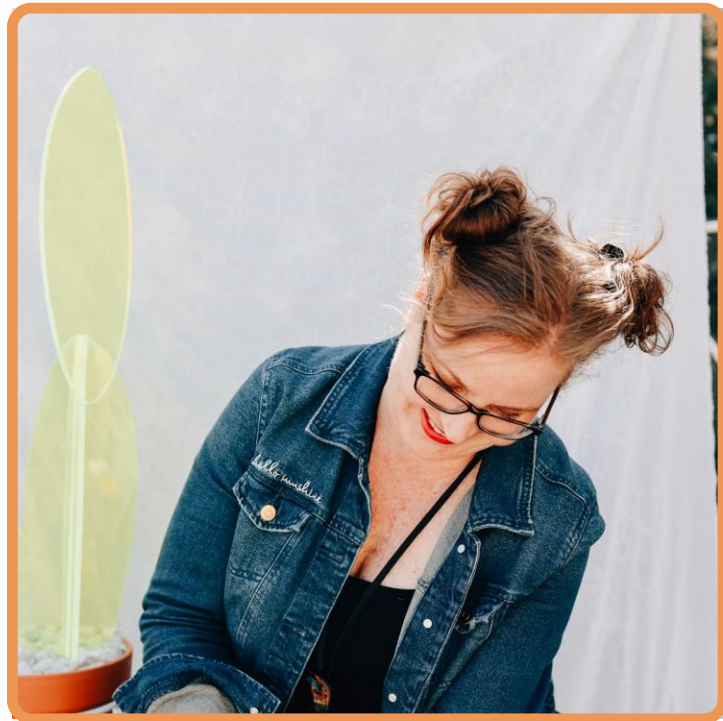
New
Construction
with or without
Service

Knowify

Separate New Construction area from Service Area, Budgeting, Estimating, **Limited Task Management**, Subcontractor Management, RFIs, Recurring Service Plans, Scheduling, Time Tracking, Invoicing (including T&M, cost plus and other variable types), Cost Tracking, **Customized Forms**, Graphic Project Dashboard, Mobile App, **limited 2-way sync to and from QBO**

BuildOps

Separate New Construction area from Service Area, **Preconstruction**, **RFPs**, Budgeting, Estimating, Subcontractor Management, RFIs, Recurring Service Plans, Scheduling, Time Tracking, Invoicing (including **PDF AIA billing**), Cost Tracking, Graphic Project Dashboard, **1-way sync to and from QBO**



Kristen Nies Ciraldo

THE FRIDAY GUIDE



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RESTAURANTS & BARS

Niche Insights from Kristen

Typical Client Activity

Not a lot of 'at desk' time

Extremely fast paced

Irregular work schedule

'hands off' re: the books
and tech in general

Typical Client Needs

More frequent reporting

More detailed data entry

KPI centered books

Advisory-lite *service level*



RESTAURANTS & BARS

Top Apps from Kristen

Key Approaches

POS awareness

Cash flow centric

Customized GL

Extra niche knowledge
even outside your scope

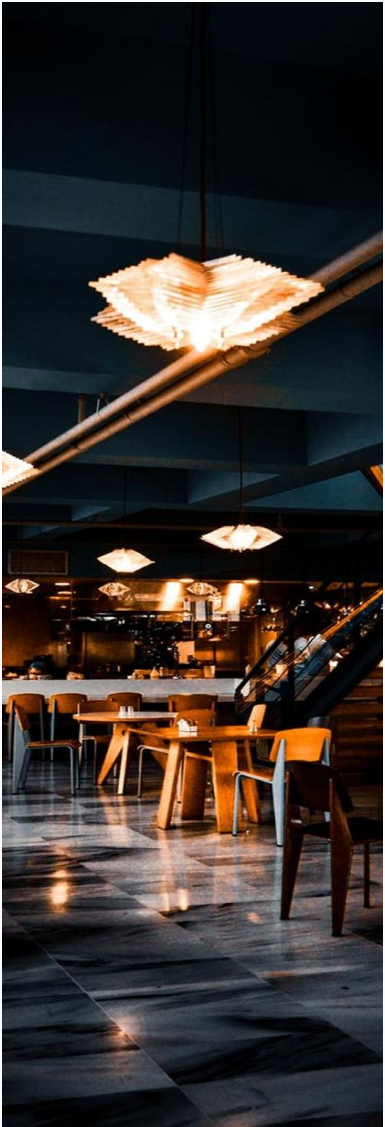
Key App Solves

MarginEdge, Shogo

Davo

Hubdoc

Adobe + Email Alias
for making life easier for everyone



Yours Truly...

Kelly Gonsalves

TOTALLY BOOKED



 totallybooked.nyc

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ECOMMERCE

Niche Insights from Me!

Typical Client Activity

Selling in MANY places

Tech forward

Heavy on marketing

Range from Dropshippers to
Inventory Holders

Sales tax Compliance heavy
Often unaware of what comes
out of their gross income

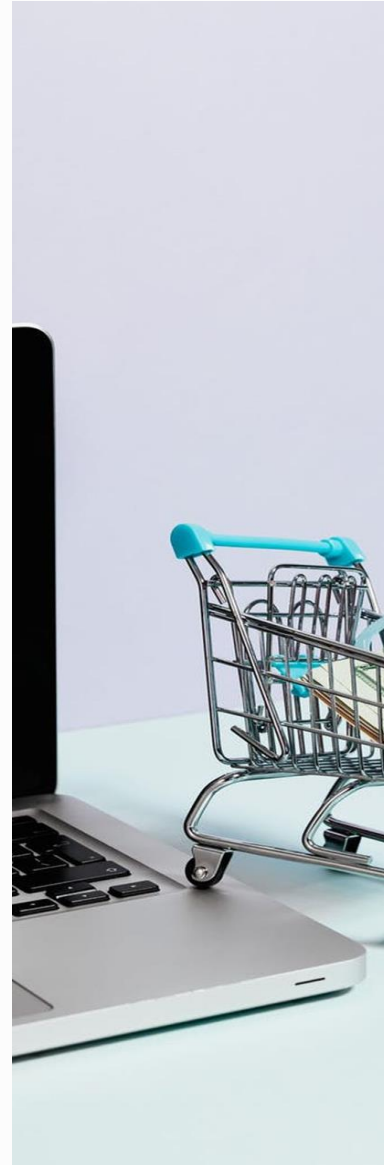
Typical Client Needs

Sales Tax compliance

Combining all of their
Marketplaces, Payment
methods and Store fronts

Time clock if there is a brick &
mortar which affects Payroll

Help understanding Gross vs
Net Income



ECOMMERCE

Top Apps from Me!

Common Approaches

Ask lots of questions
Loans are constantly offered
from Shopify/Square/Amazon

Sales Tax should be kept
separate from main operating
account

Use apps that represent real
time

Track Discounts, Refunds and
Chargebacks

Common Key Apps

Synder*, **Puzzle***,
QB Commerce

TaxJar*, **Avalara/Davo***

Payroll that ties to timeclock
Connecteam > **Gusto***

QB Time > QBO Payroll

Inventory: Simple, Warehousing,
Manufacturing

Become familiar with:
Shopify, Amazon, eBay, Etsy,
Stripe, Square, PayPal, TikTok
Shop, Lightspeed
Shippo*, ShipStation



Monique Swansen

AUTOMATED ACCOUNTING
ACCOUNTING FOR GREEN



automatedaccountingsvc.com



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CANNABIS

Niche Insights from Monique

Typical Client Activity

Lots of regulation upkeep

Inventory

Purchases w/debit cards

ATM fee income

Typical Client Needs

Lots of strict processes

Local or state banks only

Cash Controls

POS translation

they are focused on legal issues





CANNABIS

Top Apps from Monique

Common Key Apps / Services

PrintBoss for a/p

Gusto or iSolved

Bookkeep

ClickUp & **Keeper**

Roshi, Canix, Flourish

Dutchie or Flowhub POS

Key Caveats

Limited payroll providers due to increased limits & regulations

You can use QBO, but not connected services such as payroll, checking, etc.

NO apps that connect to a bank or cc processor

(so no QB Payments or QB Payroll)



Sarah Prevost & Lynda Artesani

THE PROPER TRUST



thepropertrust.com



@lynda_artesani @mintagelabs



/the-proper-trust



search: the proper trust



/thepropertrust

LEGAL

Top Apps from Lynda & Sarah

Typical Client Activity

Trust Accounting

Billable expenses

Specialized reporting

Billable hours

Typical Client Needs

Practice Management

Document Storage

Calendaring

WIP (work in progress) billing



LEGAL

Top Apps from Lynda & Sarah

Common Approaches

Often clients will do everything inside one app

Customer/SubCustomer inside QBO to track Cases

Lots of education around why tech is needed

You can't just flip a switch, a lot of time goes into setup and process creation

Common Key Apps

Clio - smaller firms but is full practice mgmt. QBO & Xero

LeanLaw - strictly billing and is best with Trust Acct Subledgers. QBO Only

Internal: **Keeper & FinancialCents**

Dext is their AP digital file box & Relay to pay bills

LiveFlow for reporting

Liscio for client communication

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A Process for Selecting Apps

Choosing your process



ADMIT HOW YOU
REALLY WORK

KNOW WHAT YOU
REALLY NEED

SHOP FOR WHAT
YOU REALLY WANT



BEFORE the FIRST THING

Identify your deal breakers.

*This is the tech that is
already in place that you
do not want to give up or change!*

- general ledger
- tech your client is using & needs
 - proprietary systems
 - banking



the FIRST THING

Identify your key features.

*These are functional components
you must have.*

- connection to your general ledger
 - use of classes
 - private labeling

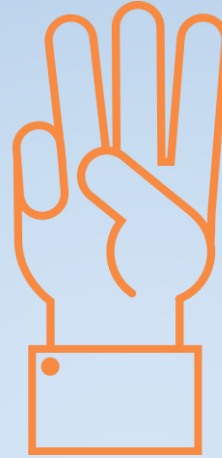


the SECOND thing

Identify your key players.

Who needs access and what kind of access is required?

- View only access
- Internal communication
- Tiered security
- Mobile access
- Accountant platform
- Pricing
- Overlap with other tech
- Time tracking
- Security



the THIRD thing

Identify your key players.

Is it worth it?

Do the benefits you'll gain from the solution justify
a temporary disruption in your processes and
progress?

the FIRST thing

Identify your key features.

The functional components
you must have.



the SECOND thing

Identify your key players.

Who needs access and
what kind of access is required?



the THIRD thing

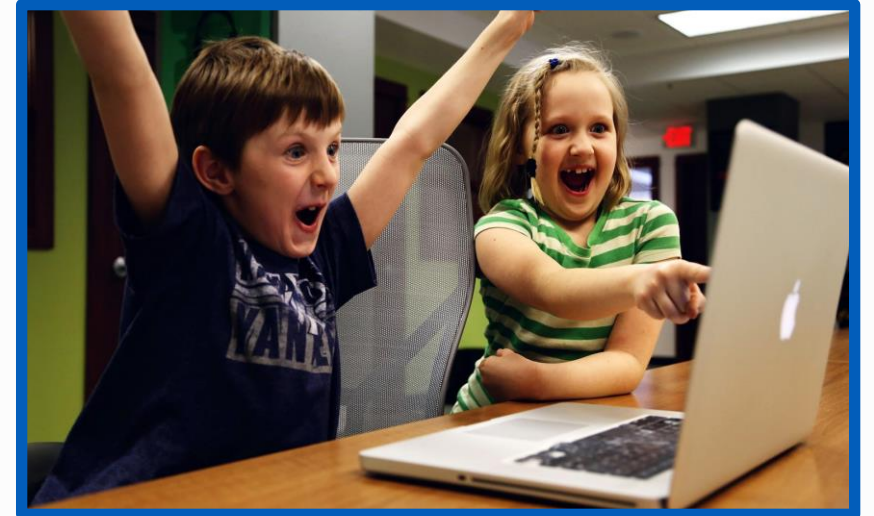
Weigh the benefits .

Does the solution justify
changes to your process?



The technology you use
impresses no one.
The experience you create
with it is **EVERYTHING.**

-Sean Gerety





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Must-Have Apps for ProAdvisors