The 'APPY HOUR®
with Liz & Heather
www.theappyhour.com

Firm Spotlight with Nerd Enterprises

NERD® ENTERPRISES

Meet your Hosts

The 'APPY HOUR with Liz & Heather
www.theappyhour.com

Heather Satterley
Director of Education and Media, Woodard

Liz Scott
CEO, Liz Scott Training & Consulting

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NERD® ENTERPRISES

Seth David

Master of Flow

- Founder of Nerd Enterprises, Inc.
- Specializes in financial education and business consulting.
- Over 20 years of experience in the industry.
- Helps businesses streamline operations using cloud-based tools and technology.
- Passionate about empowering accountants and bookkeepers to achieve financial clarity and success.

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Proposals

anchor

Approval Workflow

ApprovalMax

E Commerce

Dext | Commerce

Accounts Payable

Dext Prepare with Receipt Bank

Settle Bill Pay Purchasing Financing

MakersHub
Making AP Unbelievably Enjoyable

Inventory

katana

Outsourcing

FINSMART
Trusted FinOps Partner

Training

MY TASK LMS
LEARNING REDEFINED

THANK YOU 2024 SPONSORS!

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Agenda

- Overview of workflow
- Peek inside the internal tech stack
- Special app highlight
- Look at external stack
- Special app Highlight

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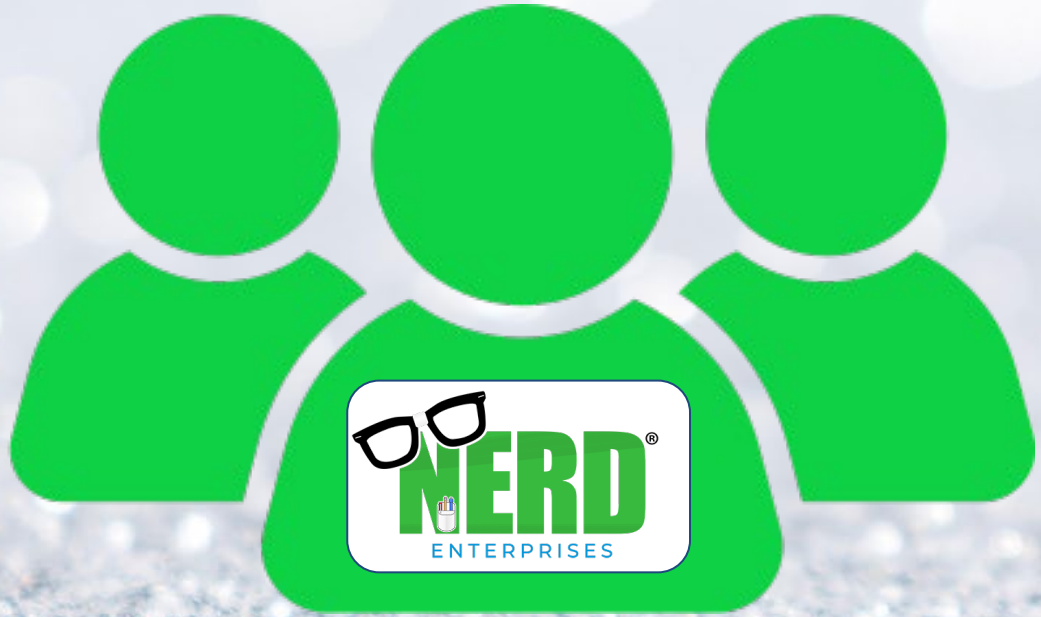
Firm Insights

- Team Size: 5
- Client Size: 250
- Niche: not really
- Growth Goals: 15%



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Internal Apps

- G Suite
- Slack
- Dashlane
- Notion
- Buffer
- Airtable
- Zapier
- Kajabi

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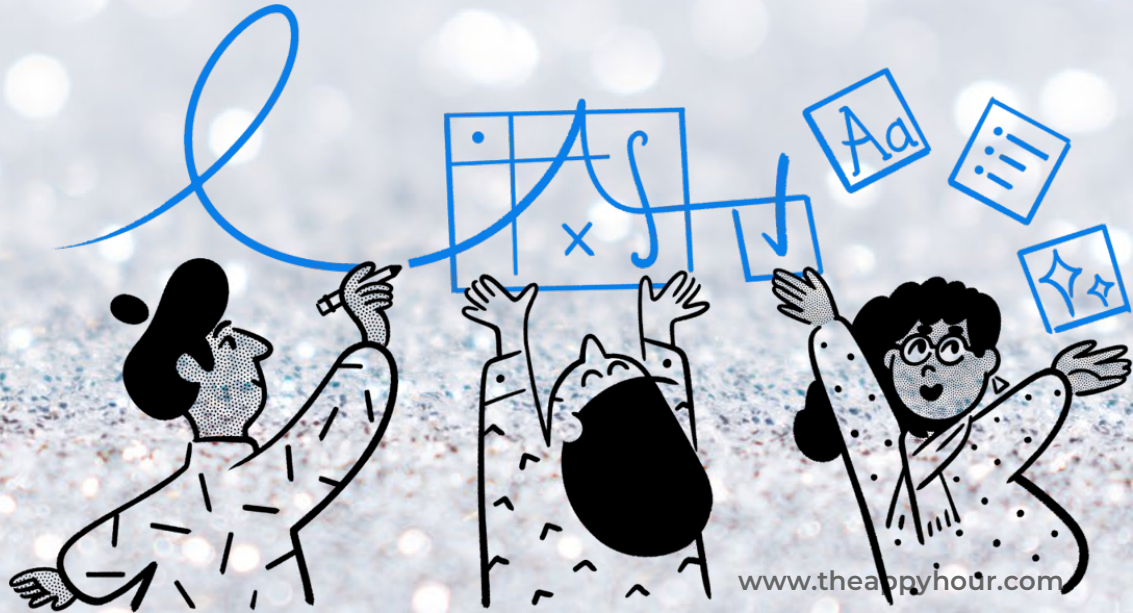
- **AI**
  Integrated AI assistant
- **Docs**
  Simple & powerful
- **Wikis**
  Centralize your knowledge
- **Projects**
  For every team or size
- **Calendar**
  Time and work, together
- **Sites**
  Publish anything, fast
- **Templates**
  Setups to get you started

Notion



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External Apps

- QuickBooks
- MakersHub
- Webgility
- Notion
- Cin7

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The MakersHub process

Capture

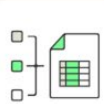
Our Smart Data Capture feature means you'll never have to manually enter bill or receipt data again.

Approve

Pay with confidence. Rest easy knowing every bill and receipt has been reviewed by the right people.

Sync

A deep 2-way integration with QuickBooks (Online & Desktop) that automates bill, payment, item, and vendor record creation.



Map

MakersHub auto-creates records in QuickBooks, even coding them to the right place in the Chart of Accounts.

MakersHub Pay

Payments with full accounting context and authorization controls. Discover flexible payment record creation and streamlined reconciliation.

Read more ›

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Upcoming Episodes

10/8/24 - ApprovalMax: Firm Spotlight into Entreflow

10/22/24 - Level Accounting & Advisory Shares Their Tech Stack

10/30/24 - Intuit Connect LIVE!

11/12/24 - ApprovalMax: How to Improve AP Processes with Automation

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