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### **What are you most excited about with the release of QuickBooks 2006?**

In general, I am most excited about the database. I think it will provide a huge opportunity for Intuit to expand functionality in the core product, and it will allow them to move into higher-end markets with QuickBooks Enterprise. This will be great for developers because it will expand the types of users that will be able to use QuickBooks.

### **What do you feel are the 5 best enhancements in the QuickBooks Product Line and SDK for 2006? What is your favorite and why?**

My favorite new additions are:

1. The Toggle feature in the Accountant Edition that allows the accountant to instantly toggle between the various flavors so they can see what their client's see. This feature is also very valuable to developers who are developing add-ons since they can test how their add-on works with each edition.
2. The new database, although it's not visible to the user, is also a very positive change to the QuickBooks product line. It will allow for greater flexibility as Intuit moves the product forward in the years to come.
3. The new handling of forced bank reconciliations is also very important for accountants. It fixes a problem that accountants had when clients forced bank reconciliations that did not balance. It used to essentially "hide" the adjustment in the Opening Balance equity account, but now it puts the adjustment in an expense account called Reconciliation Discrepancies.
4. The new Easy-Step interview provides a streamlined process that greatly simplifies the setup of a new data file. The Payroll setup wizard was also

simplified and should reduce the errors clients make during the payroll setup.

5. The new Navigators give a more complete view of workflows and steps to take while performing everyday bookkeeping tasks.

### **How do you feel these enhancements will benefit ProAdvisors, Developers, and ultimately the end user?**

Advisors and developers should see several advantages with these changes. The new database should provide a more robust foundation, allowing larger data sets, and more opportunities for customization and add-on integrations.

### **In your opinion, what were the best enhancements to the ProAdvisor and/or IDN Programs for 2006? (Membership benefits)**

In my opinion, membership in these programs is an absolute must if you plan to work with clients in the QuickBooks marketplace. The features and benefits of the programs are important, but in my opinion, the access to all the Intuit software makes the programs more than worth the money.

### **What was Intuit's best marketing programs for building Advisor/Developer awareness to end user's? Is there anything that could make it more useful or something you would like to see offered?**

Intuit has been touring the country educating advisors about the products for the past two years. In doing so, they've broadened the market awareness of their products and that helps advisors and developers. I would like to see Intuit partner more, and compete less, with advisors and developers. However, like many large companies, they tend to focus inward on their own views rather than dedicating their efforts to promote the success of outside companies. That frustrates developers and other influencers, but we don't see that changing in

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the near future. The message here is that you're really on your own. If you happen to fit into their current goals, you might get help from them. But don't count on it being long-term, and don't count on it helping your business if there are opportunities they could develop internally, or with other partners.

**Please give us 5 traits that you feel will help Advisors & Developers to create lasting relationships, and/or any ideas on how to bridge the gap.**

I think successful advisors and developer should consider the following:

1. You have to focus your goals on a narrow market niche. If you try to broaden too much, you'll be in Intuit's sand box, so focus on what you do best, and at OWN your pace.
2. Know your market better than anyone else. There are so many 'niches' out there that are underserved, you can really own them if you focus and really understand the market needs better than any other company. Your best defense is your knowledge of the market and your relationships with the customer base.
3. Vertical solutions are still very underserved by the QuickBooks vertical editions, despite the great marketing efforts at Intuit. Developers can take advantage of this by adding work-flow enhancements needed by customers that are not currently being addressed by Intuit. Always remember that QuickBooks (even the vertical editions) is a general use, horizontal product. To REALLY solve for the needs in vertical markets, you'll need add-ons that fill in the gaps. In many cases, the add-on solution will be larger and more front-and-center as far as the user is concerned, while QuickBooks will be used as the general ledger only. Good examples of developers who've taken this approach would be *Fishbowl*, *BillQuick*, *Cabinet NG*, and *Corecon*. Each add-on program has solved needs the end user, and now they use QuickBooks more as an add-on to their solution rather than the other way around.
4. Advisors and developers need to develop relationships with each other through organizations such as IDNAC, and The Sleeter Group.

5. By learning about each other's solutions and by working together we have found several mutually beneficial relationships; the whole is greater than the sum of the parts. For example, if you're developing or specializing in inventory, look for other advisors and developers who specialize in related products such as point-of-sale, barcode scanning, labeling, retail, purchase order management, or other related areas. By combining marketing efforts with companies (even if they are somewhat competitive to your own), you might find greater success for both partners. IDNAC is a great place to begin this process.

**What would you like to see happen for the 2007 QB Product Line/SDK?**

I'd like to see the reporting area enhanced. Now that the database underpinnings are in place, there is much better flexibility available to Intuit that would allow them to provide better reporting to end users. I'd also like to see QuickBooks either support ASPs, or provide better sharing of data between multi-office clients when they choose not to use the Online Edition. I think the Online Edition has come a LONG way, but many clients still choose the desktop editions, and they need to share data. We'd also like to see Intuit open up the SDK to developers who want to read or write paycheck data. There are also big opportunities in e-commerce integration with QuickBooks.

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