

# 30 Apps for Small Businesses



location  
salesforce  
- 2016 -



div  
</>  
body  
- 0101 -  
head  
- 1004 -  
query  
- 1005 -  
script  
- 2006 -

## Introduction

One of the many challenges of running small businesses is you often have more tasks to accomplish than resources to help you accomplish them. This can make growing your business challenging.

Small business leaders need to find new ways to help their organizations run more smoothly and ramp up—fast. There’s ever-evolving technology to assist you and help streamline your day. We asked a handful of small business leaders to share their insights on the applications that can best help

small and medium businesses grow. Then, we sourced [AppExchange](#), with 3,000+ apps and components for Salesforce, for even more [small business apps](#) that make a huge difference, including [lightning ready apps](#). With AppExchange, you get [apps that integrate into Salesforce](#), allowing for a seamless connection alongside the trust and security you expect from Salesforce.

“Unfortunately, many SMBs waste so much time managing the daily internal grind of financial, human resources, procurement and other back-office processes that they don’t have time to focus on growth, opportunity and innovation.”

– *the SMB Group*

# Start blazing your trail to amazing service at Trailhead.

Astro and friends will guide you through everything you need to know about Salesforce. With fun, easy-to-follow trails you'll be up and running in no time.

Find your path forward at [salesforce.com/trailhead](https://salesforce.com/trailhead)



- 3** Laying the Foundation
- 7** Streamline Your Marketing Automation and Customer Support
- 10** Communications
- 13** Project Management
- 15** Payments, Accounting, and Contracts
- 19** On The Road
- 22** Getting More Done
- 24** Connect Everything
- 26** Final Thoughts





## CHAPTER 1

# Laying the Foundation

Most of us already have basic apps on hand, but we're not adept at using their full capacities. There's a lot of power in these tools; newcomers looking to streamline their business process may want to start here.





## 1. Calendar in some free time

Time management is crucial. And there's only one real app for managing that: your calendar. Brian Roemmele, founder of PayFinders and a business and payments advisor, recently met with a retail business owner who had 12 appointments with different vendors, six with ad reps, and several others with customers interested in catering...all in one week. All of those appointments were marked down in what Roemmele described as a "ratty notebook." The result: the business owner was constantly late and always feeling behind. Roemmele showed him how to use his email calendar function to track appointments and send invites, and suddenly it all felt much easier to juggle.



**Tip:** Both Gmail and Outlook have great calendar functions, so make sure you're using them to the fullest. There are plenty of online videos to help. AppExchange also offers [CalendarAnything](#) by Silverline, a highly customizable tool that allows you to schedule and manage marketing campaigns, plan projects, and more.



## 2. Notes don't have to be a nightmare

No matter your industry, you need to take copious notes on various projects. But keeping track of all those notes is a nightmare if you're still using pen and paper. Save time by switching to an application. Rommele recommends [Evernote](#) for its simplicity. An iPad or other tablet is perfectly sized for note-taking, and if you prefer handwriting to typing you can use a stylus. The best part of electronic notes is that they are searchable (even the handwritten ones), eliminating the need for elaborate filing systems. "I see organized people and they look so neat," Roemele says.

**Bonus:** Check out [Evernote for Salesforce](#), and link notes, documents, and files from Evernote to your Salesforce records. Use it individually or share the intel with your team. It's even Salesforce1 and Lightning Ready.

"But overall those people aren't long-term successes as much as people who are absolutely chaotic and haphazard, but they have some control over the essentials."

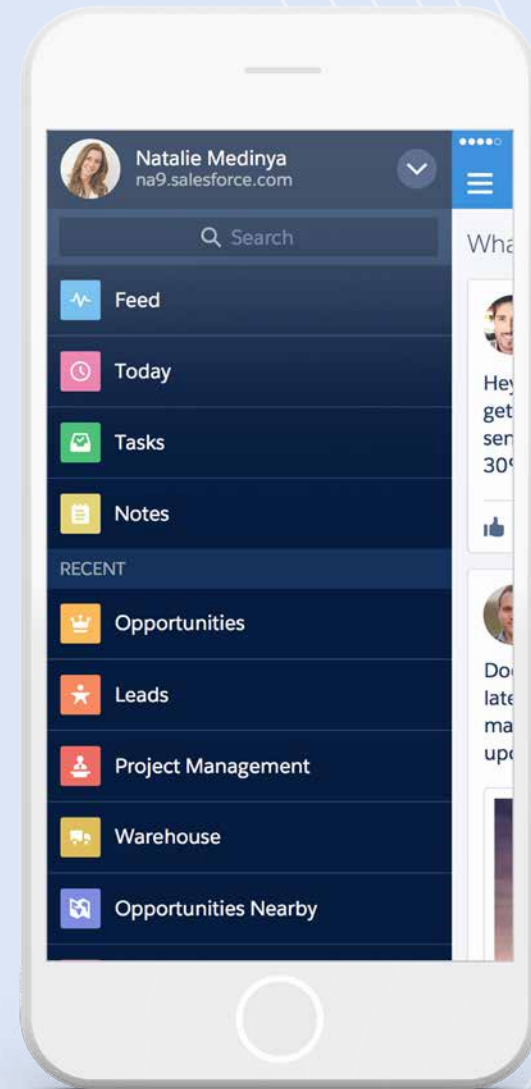


**Tip:** Carry your tablet in a looseleaf notebook or carrying case – whatever you use now to port your paper notebook around. Opening that to your android tablet or iPad can ease the transition.



### 3. Run your business from your phone

Get the latest information on your business, pull sales figures, organize your day, send urgent messages, manage your team and more – all from one app. Keep your data current and manage opportunities, leads, contacts, accounts, and more, as well as update them in real time with [Salesforce1](#). This Salesforce mobile app will help you fly through your to-do list as you collaborate instantly with feeds, groups, people and files. What's more, you can customize the app with your company's branding.





## CHAPTER 2

# Streamline Your Marketing Automation and Customer Support

If you're looking to grow, getting the word out to more customers – while keeping existing customers engaged – must be an essential focus of your business. Here are some apps to help you make that work easier.







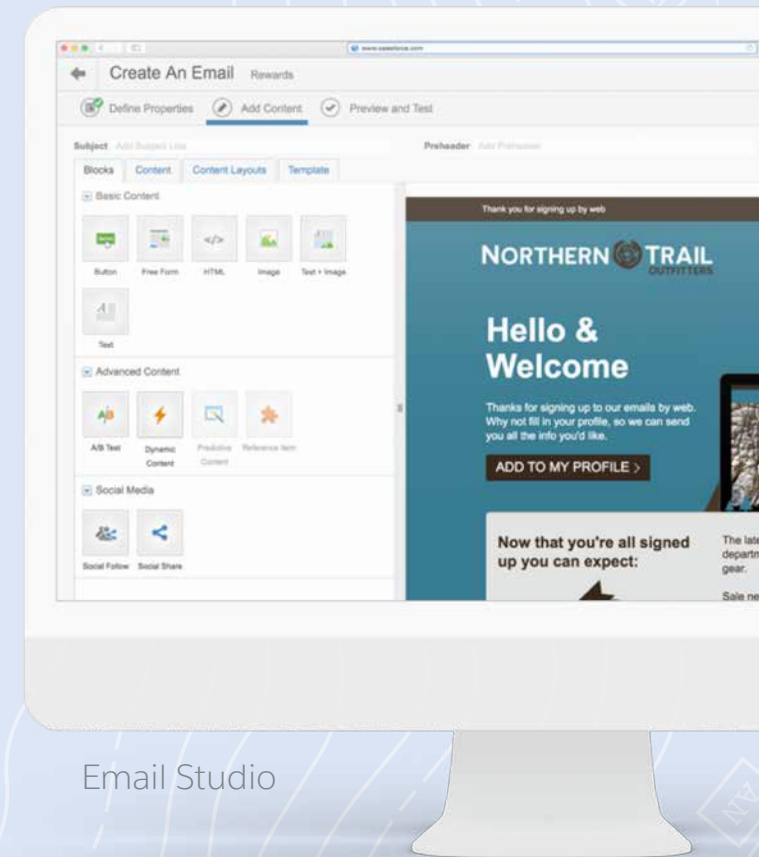
## 4. Email Marketing Made Easy

If you're just getting started with marketing automation—sending emails, managing subscribers, and tracking results – try Email Studio. It's connected to Salesforce's CRM, giving Marketing Cloud users direct access to Salesforce Reports or Campaigns. In short: marketers can use their CRM to further enrich their customer data in Marketing Cloud, and correlate data from other sources (such as point-of-sale information). [Pardot, available on AppExchange](#), lets marketers create automated campaigns in minutes, without help from IT, using drag-and-drop templates. You can create branded emails and landing pages, share campaigns with sales, and track and analyze each prospect's activity. **Bonus: both apps integrate with Salesforce.**



## 5. Social Media Monitoring

[Social Studio](#) allows your team to track, plan and analyze social marketing campaigns. It also gives you tools to monitor what people are saying on your owned social channels as well as participate in conversations about any topic on the Web. A great app that's useful for marketers as well as customer service teams, and of course for sales.

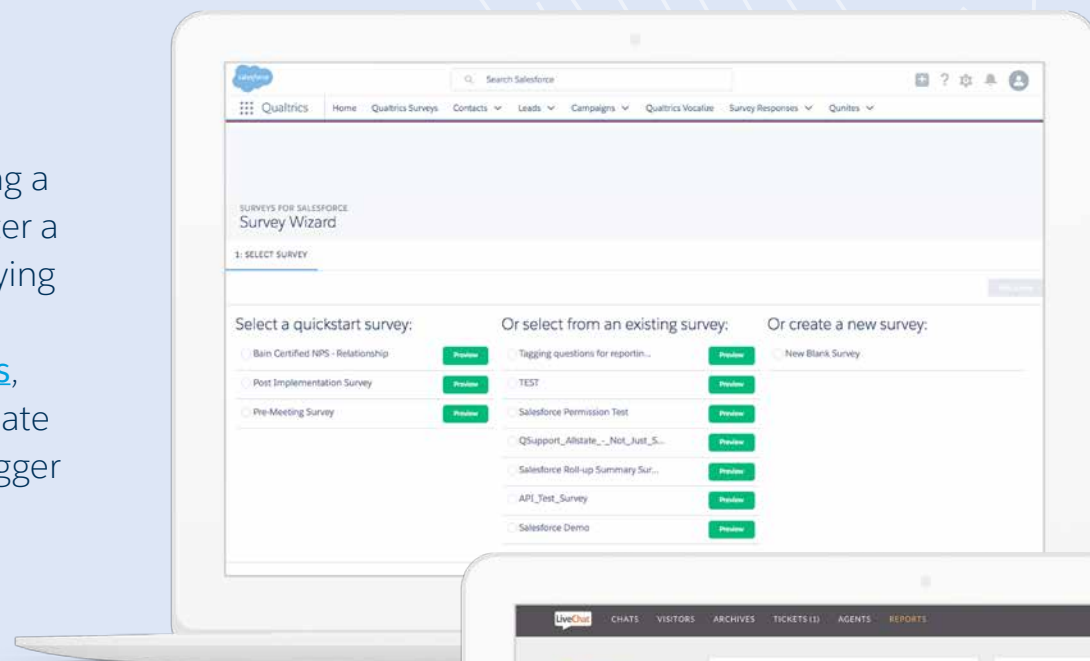


Email Studio



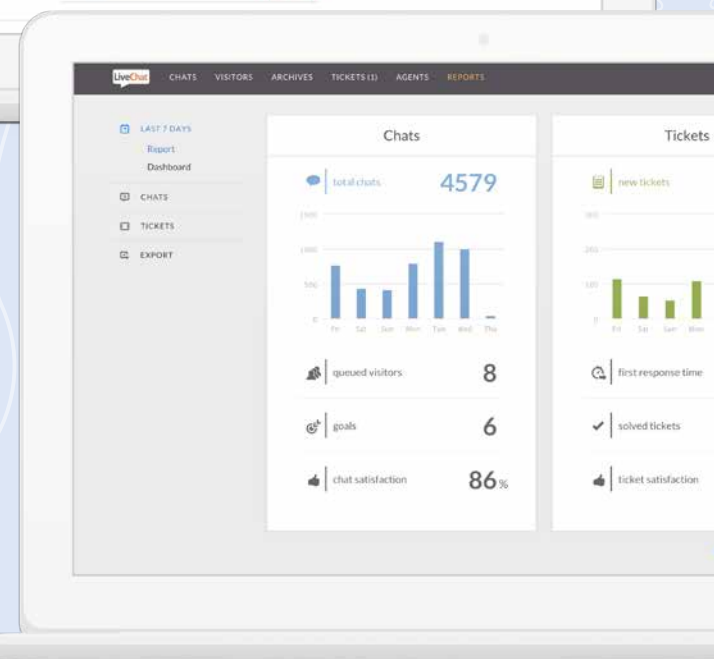
## 6. Get surveying

Jennifer Burton with CloudDoor recommends using a survey to get more information from customers after a sale. “If someone is a first-time buyer and you’re trying to upsell them, you could use it to get information to support that second sale,” she says. Try [Qualtrics](#), available on AppExchange, which allows you to create and send surveys out of Salesforce, and even to trigger automatic surveys based on Salesforce rules.



## 7. Get more leads with LiveChat

This app, [available on AppExchange](#), is ideal for ecommerce businesses. Customers can chat with a representative online, and the data from the chat can be rolled into your CRM. If you structure your LiveChat in a proactive way, you can even use this app to generate more leads.





## CHAPTER 3

# Communications

Using just your phone and email to communicate with teams and customers is not the most efficient strategy. Save time with communication applications that allow you to share screens and video chat in real time.





## 8. Social networking for employees

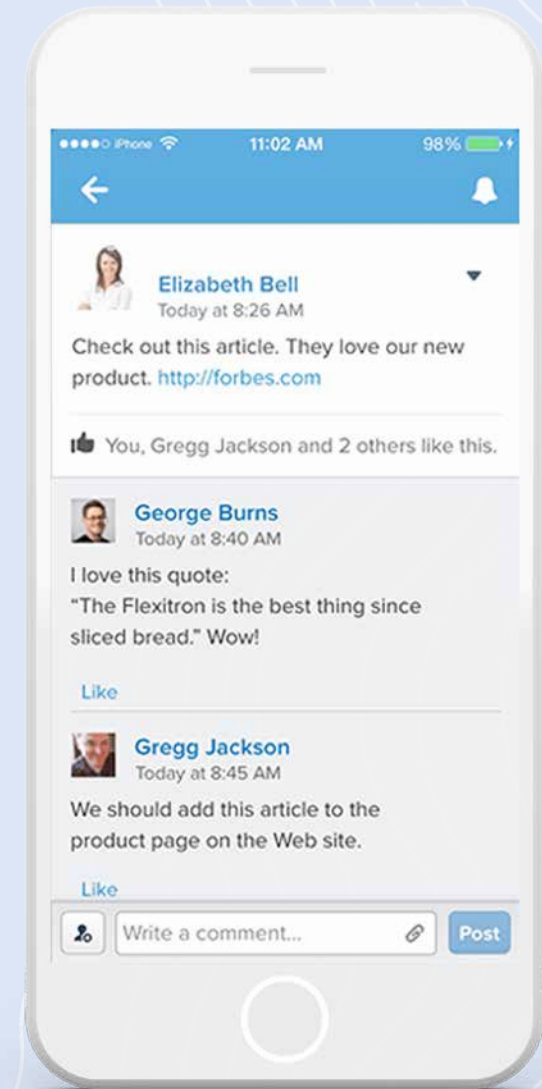
Connect every employee with the files, data, and experts they need so they can be more productive, more innovative, and have access to useful insights. No matter where your employees reside – if they're on the go or in the office – [Chatter](#) lets everyone stay connected and collaborate in real time. Right in Salesforce, use this internal social network to post updates, ask questions, create groups, share ideas and get feedback. Track your team and critical projects in the mobile feed. Close cases, update opportunities, find the latest presentations, and act on critical updates wherever you are.



## 9. Web Conferencing

Aaron Strout, president of marketing firm WCG, relies on GoTo Meeting's voice-over-internet protocol (VOIP) technology for calls, screen sharing, and video conferencing. "While the app definitely has some imperfections, an ability to VOIP and view others' screens (including video) on one's phone is powerful," Strout says. The ability to switch smoothly between VOIP and phone is also a helpful feature. You can integrate GoToMeeting with Salesforce via the [GoToMeeting Integration app](#), available on AppExchange.

Chatter





## 10. Live Messaging

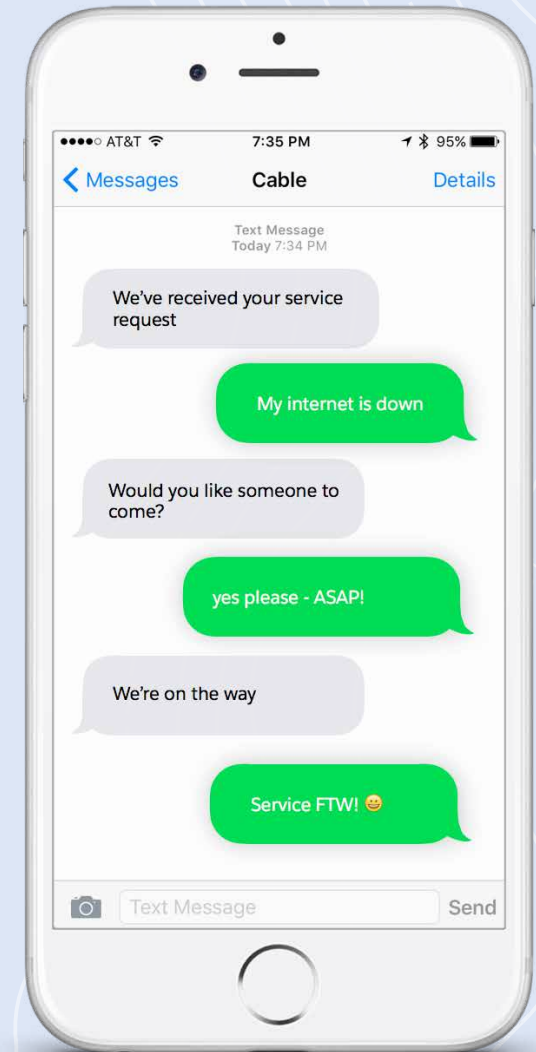
Consider this your conversation hub. The [Salesforce LiveMessage](#) app lets businesses connect with customers using messaging apps they prefer, such as SMS and Facebook Messenger. This lets agents juggle multiple customer conversations, which is great for your bottom line.



## 11. Screen Sharing streamlined

Here's a really cool app that takes screen sharing to a whole new level. With [TeamViewer](#), you can log on and instantly view other screens, remotely. It supports file sharing, chat, and whiteboard functionalities. What's more, it works on mobile devices!

Salesforce LiveMessage

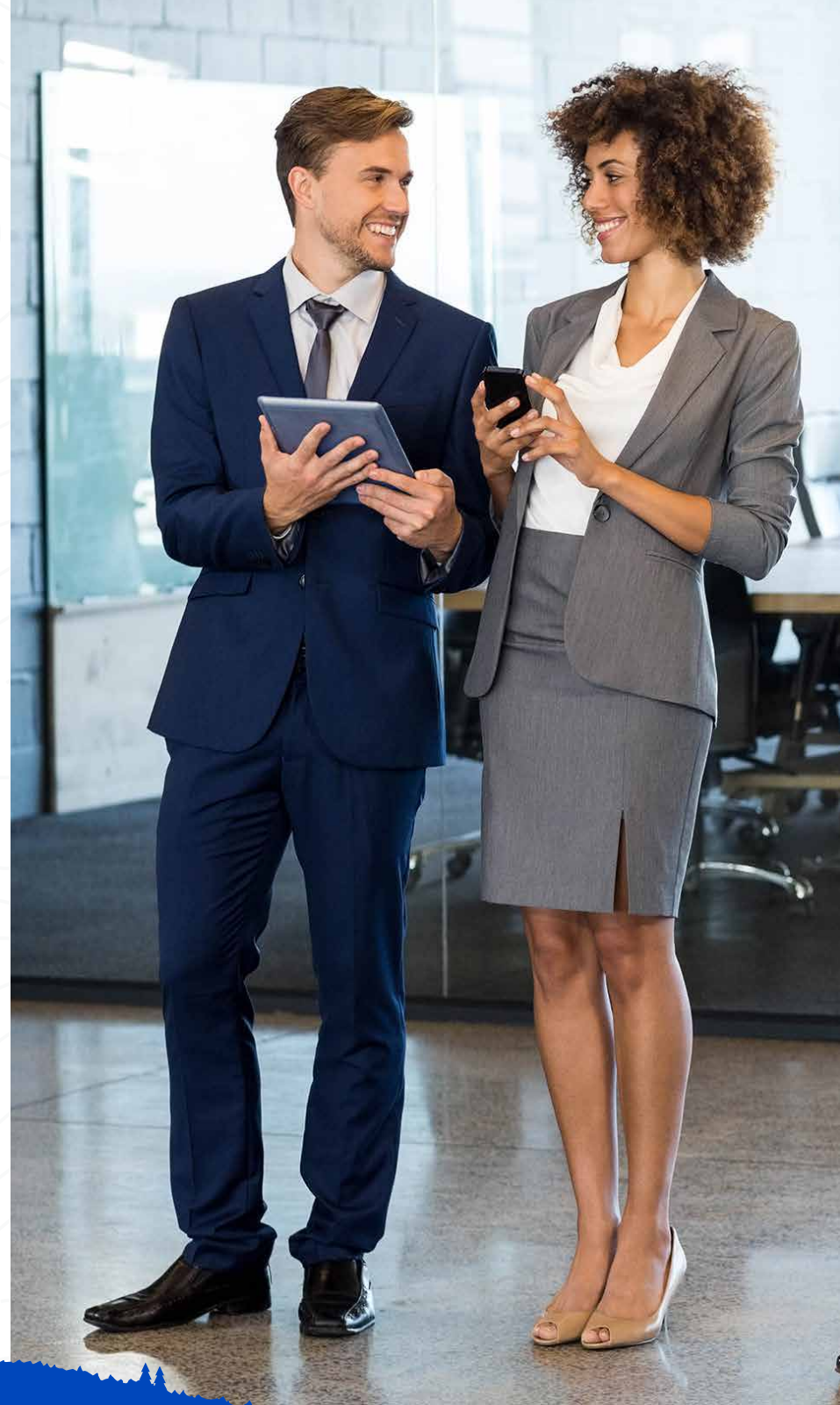




## CHAPTER 4

# Project Management Doesn't Have to be a Headache

So now you have a bulk of information that you need to share across your team? Don't count on email to disseminate your documents. There's easy ways to share and collaborate with your co-workers in real time. Check out out some of these apps.





## 12. Automate Your Task Management

So you closed the sale. Now what? Get your customer up and running with [TaskRay](#), an automated project management app built on Salesforce App Cloud and available on AppExchange. Use TaskRay's project templates and automation to create a top-notch post-sale experience for all of your customers.



## 13. Spreadsheets on steroids

Spreadsheet apps like SmartSheet can help keep large, complex projects that have many steps organized. Burton with CloudDoor, uses this app to keep track of to do's for projects that have as many as 1,000 lines line items. "It's very versatile," she says. You can get the same useful functionality with the [Smart-Mass-Update](#) app, available on AppExchange.



## 14. Conquer Project Milestones Faster

Need an app that makes it easier to plan out projects, make and assign task lists, and collaborate? Try [MilestonesPM](#), available on AppExchange. It comes with automatic reminders, built-in calendar functionality for logging time, and it even integrates with your email.



## CHAPTER 5

# Payments, Accounting, and Contracts

Small business owners trying to grow can't spend all of their time dealing with the minutia of payments and accounting functions. But you can't ignore the financial aspects of your business, either. Luckily, there's an app for that.

Here's a selection of the best apps to help you automate and manage your business finance operations so you can do more with less time and effort.







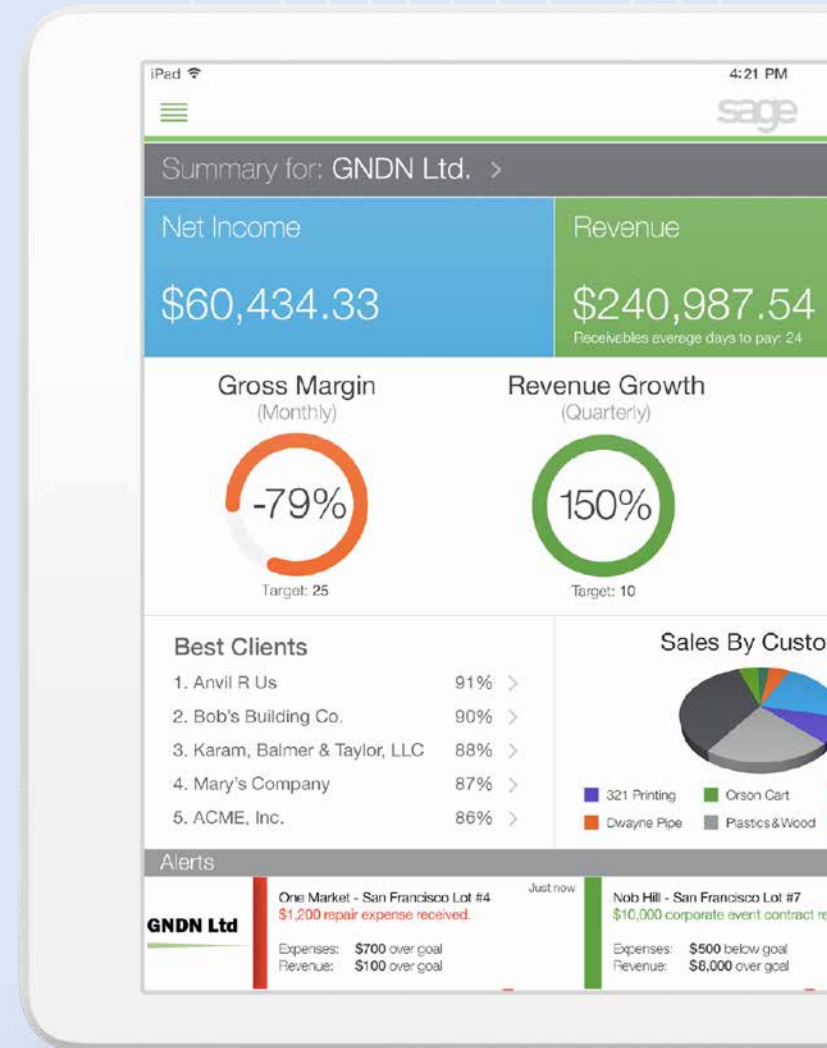
## 15. Create Client Docs Like a Pro

[Conga Composer](#) lets you easily pull in data from Salesforce to quickly create and deliver client-ready proposals, account plans, invoices, quotes, contracts, reports, and more. “It’s a great way to create a really impressive-looking quote or proposal,” says Burton.



## 16. A Better Way to Crunch Your Numbers

There are plenty of accounting apps out there, but [Sage Live](#) is one of the best. Why? It connects your CRM, accounting, and financial data all in one place, eliminating hours of having to pull, clean, and compile data. Plus, with mobile access, you can get your accounting, bookkeeping, and payroll tasks done anywhere, anytime.





## 17. Keep Track of Business Accounts

Mint is an easy way to keep track of all your business accounts in one place, giving you the ability to access the information you need online from your desktop or any mobile device.



## 18. E-signatures are here to stay

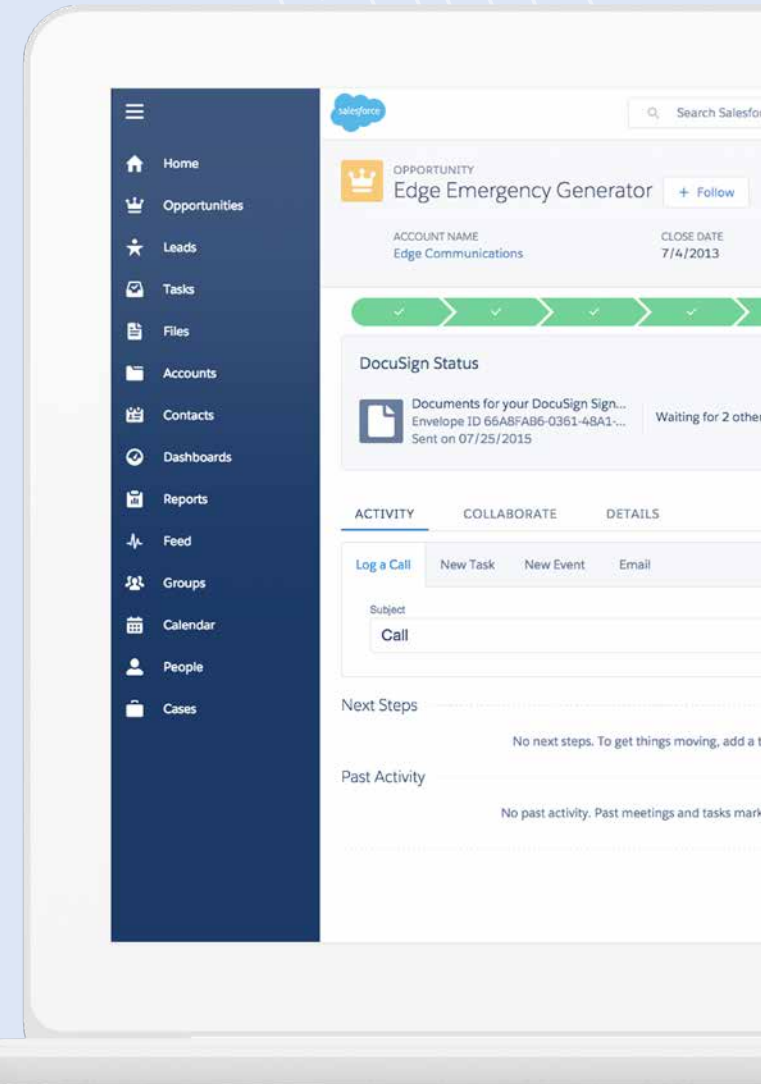
Say goodbye forever to scanning, faxing, or trucking down in person to pick up a hard-copy signature. [DocuSign](#) lets anyone send, review, sign, and submit documents from any device, making life easier for both your customers and your sales team.



## 19. Credit Card Processing Made Simple

Square lets you process card, cash, check, and gift card transactions from anywhere you are, with one simple swipe. Plus, the Square Point of Sale app gives you get immediate access to a whole range of tools to help you run your business better, including invoicing, real-time inventory management, and sales reports.

DocuSign





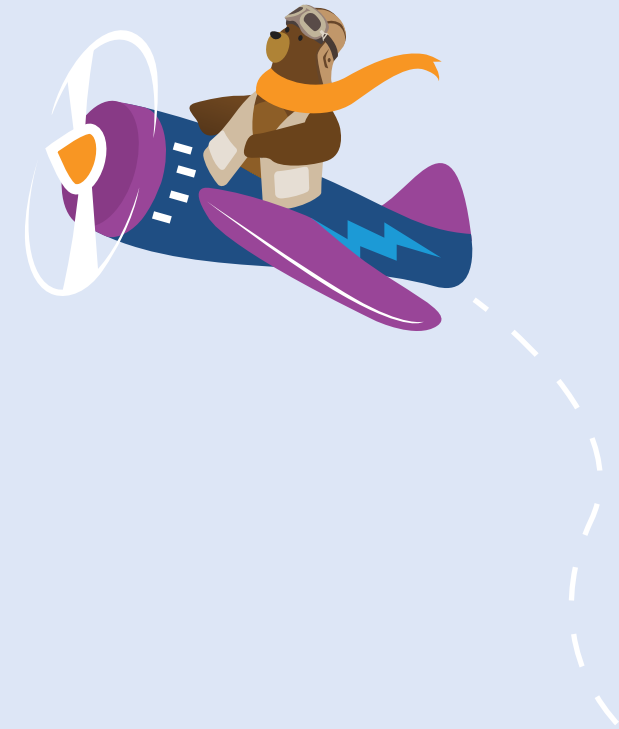
## 20. Take the pain out of travel and expense reporting

[Concur Small Businesses](#) is a travel, expense, and invoice management tool that lets you book flights, capture receipts, and submit expenses right from your phone. With the [Concur Connector](#) on AppExchange, you can even link your existing Concur accounts with Salesforce on AppExchange you can link your existing Concur accounts with Salesforce.



## 21. Make life easier for your professional services team

The [Professional Services Automation App](#) lets your professional services team track expenses, manage projects, and enter in billable time on the go.



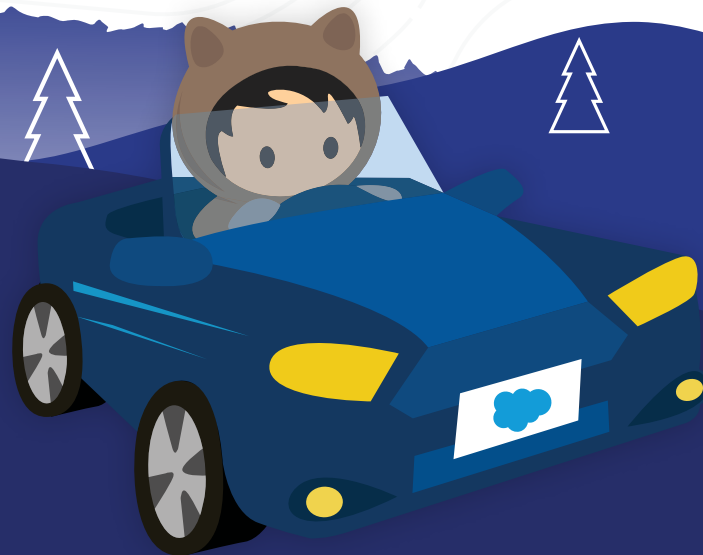
**Bonus Tip:** If you want to streamline your sales process from quote to cash, check out [CPQ](#). This app helps reps reduce quote errors and close more deals by making it easy to configure unique product solutions for each customer and ensuring pricing and quoting accuracy.



## CHAPTER 6

# On The Road

When you're on the road, it's easy to fall behind and get overwhelmed when daily work (and your stash of expense receipts and flight itineraries) start to pile up. Here are a few apps that can help you stay on top of it all, even when you're on the move.





## 22. Make your calendar work for you

The MobileDay app syncs with your smartphone calendar, notifies you of your upcoming meetings, and lets you make calls with just one click.



## 23. Never forget a password again

Nobody can be expected to remember the millions of passwords to all the business tools you use each day – especially when you’re signing in on different devices from the road. That’s where Okta comes in. It’s a single sign-on app that lets you use one password to access all the other programs you need to get through your day.



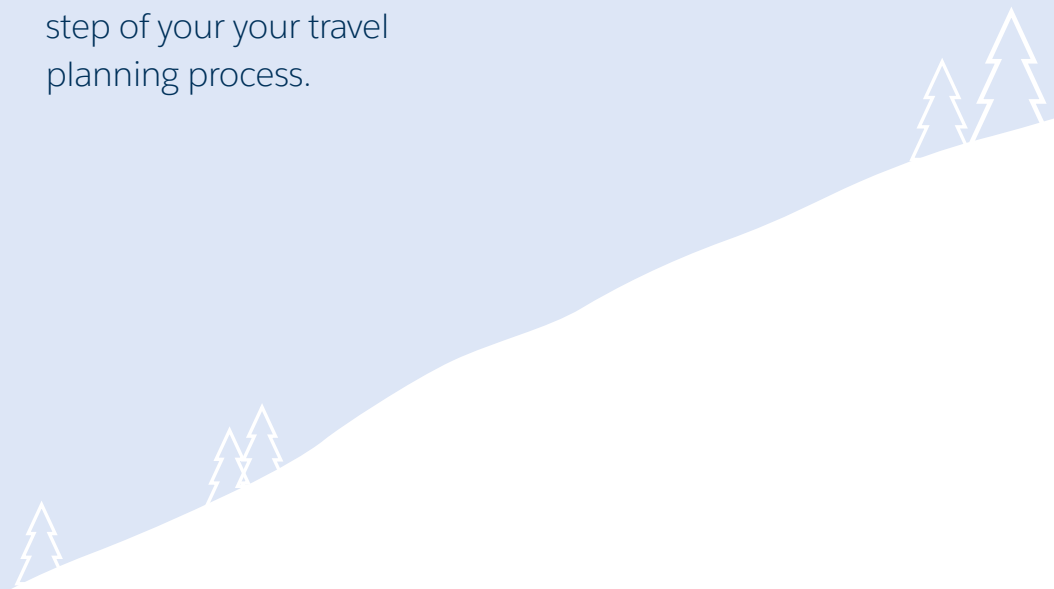
## 24. Book travel with ease

TripCase lets you manage your travel itineraries and access travel information right from your phone. It even integrates with online booking services, calendar apps, and expense management tools to help streamline every step of your your travel planning process.



## 25. Avoid roadblocks

A community-based traffic app, Waze allows users to share real-time traffic and road data. So you can avoid delays on your business travels as well as your daily commute.

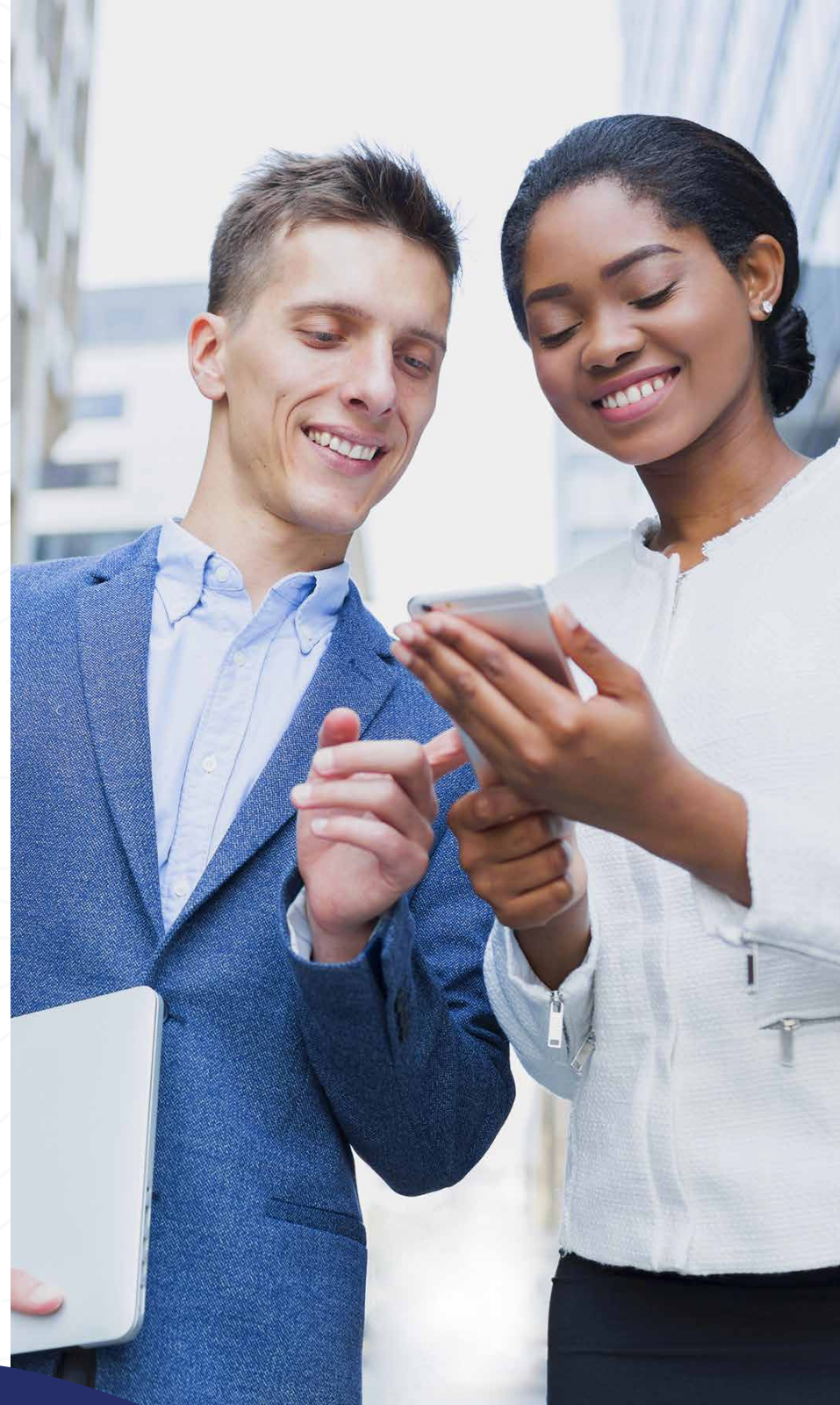




## CHAPTER 7

# Getting More Done

The first step is to cut out tasks or automate processes to save time. The next level is to use the time you do have in the most efficient way possible. Here's a selection of apps that can help you make the most of every minute.





## 26. Improve your focus and accomplish more

Focus@Will is a music app that productivity expert Cathy Sexton swears by. Unlike Spotify or Pandora, its playlists are designed specifically to help you focus. The music selection contains instrumental tracks that have been remixed and remastered to soothe your limbic system and keep you engaged. And you can even customize your playlist based on energy level: low, medium, or high.



## 27. Track your time

Be careful what you wish for – the RescueTime app lets you know how you're *really* spending your time. It runs in the background on your computer and mobile devices, tracks the time you spend on applications and websites, and spits out reports based on your activity. Once you've identified your productivity pitfalls, you can set alerts for when you've spent a certain amount of time on an activity or block distracting websites.





## 28. Just get it done

[Done](#) is the ultimate to-do list app. Auto-create, find, filter, sort, assign, edit, delete, discuss – whatever you need to do to complete your tasks, this app helps you do it better.

**Pro Tip:** it's fully integrated into Salesforce and available on AppExchange.



**Bonus Tip:** If simplicity is more your style, try **Clear** for Mac or iOS. Swipe tasks off your list when they are complete. The clean interface can make a long to-do list feel less overwhelming.





## CHAPTER 8

# Connect Everything

Make the most of your newfound productivity by making sure the tools you use are connected. Integrate everything to save time, reduce effort, and minimize error rates that come from having to re-enter data in multiple programs. Here's some apps that can help you with that.





## 29. Integrate with just a click

With Workato, you can connect Salesforce to a whole range of other apps without needing to hire a developer or involve IT. Thanks to pre-built connections, you can sync your applications with just a few clicks.

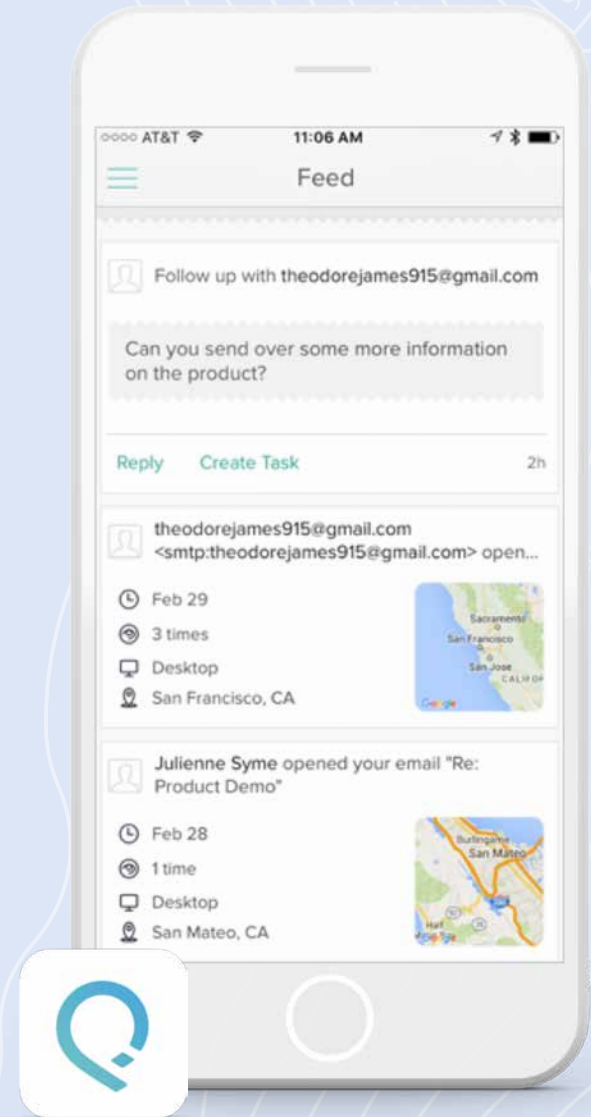
Burton uses [QuickBooks Integration](#) by Workato to connect Salesforce to QuickBooks. Now, once a deal closes, the data is seamlessly transferred to QuickBooks for invoicing.

Check out the all-powerful [multi-app Workato integration](#) on AppExchange to find out how you can integrate 100+ apps (including Eventbrite, Netsuite, Intacct, Gmail, and more) into Salesforce with just a few clicks.



## 30. Sell from your email

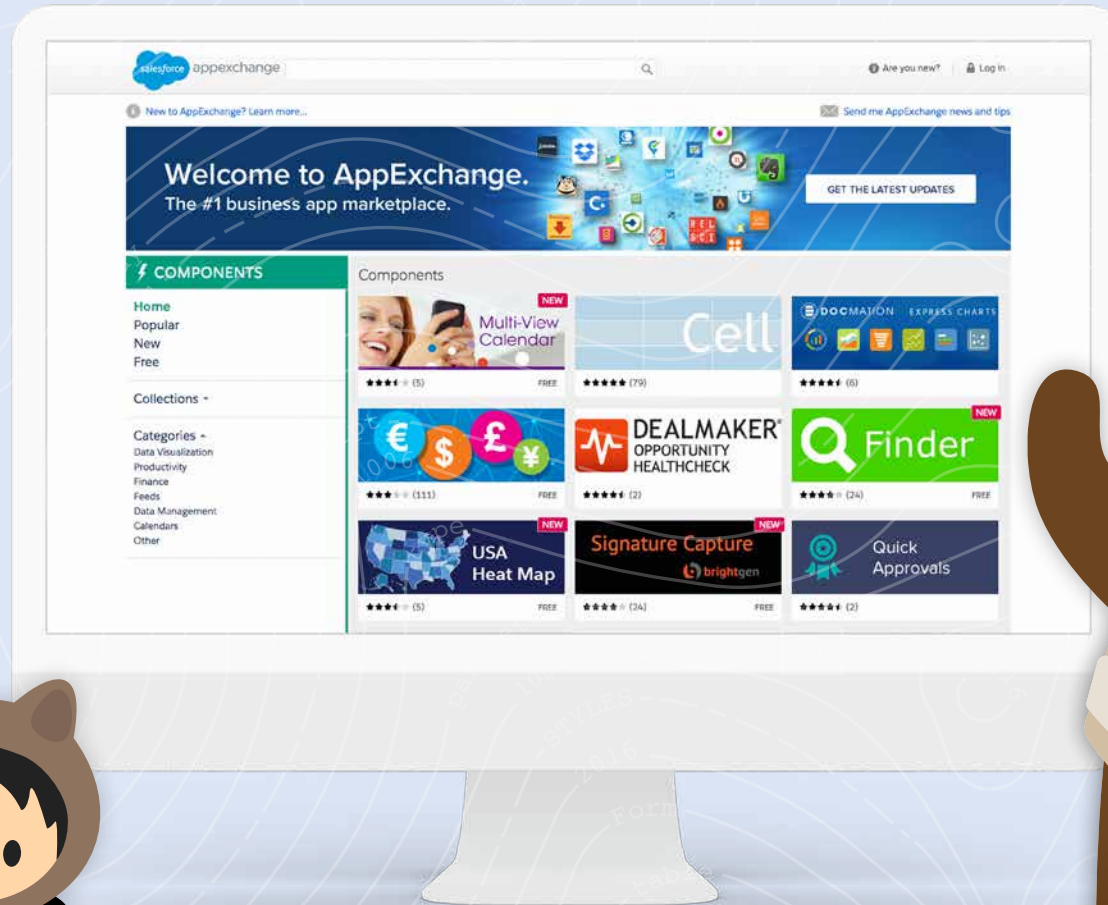
The [SalesforceIQ Inbox](#) app connects your CRM and email, letting you log sales activity, schedule meetings, and get notified when a prospect opens your email. Plus, SalesforceIQ even suggests priority follow-up tasks based on your email activity. All without having to leave your inbox.



The right apps can do a lot. They can eliminate frustrating tasks and automate processes to make your days easier and more productive. They can even help your business grow faster.

So start small, experiment, and see which apps work best for you.

**EXPLORE APEXCHANGE >**



DF

AM

TH

class

class

16

100416

10510

DF

APPXCHANGE

FORM

CARD



CONNECT TO YOUR CUSTOMERS  
IN A WHOLE NEW WAY



The information provided in this e-book is strictly for the convenience of our customers and is for general informational purposes only. Publication by salesforce.com does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links, or other items contained within this e-book. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the e-book. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.

© 2017 salesforce.com, inc. All rights reserved.