

INTUIT DEVELOPER NETWORK
MARKETING HANDBOOK

DECEMBER 2002

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CHAPTER 1

OVERVIEW

Through the Intuit® Developer Network and the QuickBooks® Software Development Kit (SDK), you can create, market, and sell applications that share data with QuickBooks.

Using the SDK, you can build applications to integrate with:

- QuickBooks Financial Software Pro Edition 2003
- QuickBooks Financial Software Premier Edition 2003
- QuickBooks Financial Software Premier: Accountant Edition 2003
- QuickBooks Financial Software Premier: Contractor Edition 2003
- QuickBooks Enterprise Solutions Business Management Software 2.0
- QuickBooks Enterprise Solutions Business Management Software: Accountant Edition 2.0
- QuickBooks Online Edition
- Canadian editions of QuickBooks 2003 (includes Pro, Premier, and Premier: Accountant Edition)

(For convenience, this document uses the shortened name “QuickBooks” to refer to the entire list above.)

This book and the related marketing information, tools, and templates mentioned in it are all available for download on the developer web site, located at <http://developer.intuit.com>. Together, they make up a suite of important marketing benefits, only available to Premier members of the Intuit Developer Network.

Intuit Developer Network Marketing Handbook

We created this book especially for people who are marketing or planning to market QuickBooks-integrated applications. In it, you’ll find guidance on how to take advantage of the many marketing resources available to Intuit Developer Network Premier members, and an overview of the developer web site (<http://developer.intuit.com>).

We touch on topics such as creating marketing collateral, marketing communications, public relations campaigns, marketing and advertising campaigns, and product sales, as well as legal guidelines.

Intuit Developer Network Developer Web Site

The developer web site, located at <http://developer.intuit.com>, is the primary place you'll find tools, reference information, and templates for marketing your QuickBooks-integrated application. The developer web site is also where we post news and other updates, so be sure to check it periodically.

To access the area for Intuit Developer Network members, go to the developer web site and log in. Member login is located in the upper right corner of our home page.

Intuit Developer Network

HOME PRODUCTS PRESS MEMBERSHIP DOWNLOADS

WELCOME TO THE INTUIT DEVELOPER NETWORK
RESOURCES AND TOOLS TO DEVELOP AND MARKET YOUR APPLICATION
GET PLUGGED IN →

WHAT'S HOT
INTUIT DEVELOPER CONFERENCE
NOVEMBER 13 & 14

MEMBER LOGIN/SIGNUP
Existing Members:
LOG IN NOW
If you don't have a membership:
BECOME A MEMBER

PROGRAM BENEFITS
Everybody wants you to develop for them. Here's what we've been developing for you.
Looking for awesome resources and tools? You clicked in the right place. Just want to grab the free SDK and run? No problem. But do yourself a favor. Don't take off before you master one of the coolest how-to tricks in software:
Now you can use QuickBooks to sell more of your product.
Almost everyone knows how to use QuickBooks for accounting. It's the leading small business accounting software. But did you know you can also use QuickBooks to sell your own software? To access this "feature," simply join the Intuit Developer Network, and plug into millions of small business customers who already know and utterly trust our brand.
Reach nearly 3 million loyal QuickBooks customers.

CUSTOMER TESTIMONIALS
"We have experienced a dramatic growth in sales directly related to QuickBooks ... a 15-20% increase in sales revenue."
Erik M. Eisel, Developers of Corecon, WendWare, Inc.

EXPRESS DOWNLOADS
QuickBooks SDK
Skip the B.S. (Business Stuff) and get your free SDK.
[Download Now](#)

Logging In to the Developer Web Site

1. Go to <http://developer.intuit.com>
2. Click the LOG IN NOW button, in the upper right corner of the page.
3. On the login page (pictured below), enter your company's login name and password. (Each company has just one, so if you don't know it, chances are someone that you work with does.)
4. Click the Log In button.

Member Services

Already signed up?

If you are already signed up for QuickBooks Business Services, log in here.

Log in name:

[Forgot your log in name?](#)

Password:

[Forgot your password?](#)

Common Questions

[If I'm not sure I've signed up, how can I check?](#)

[Why am I being asked to log in again? I already logged in once.](#)

[How do I update my e-mail address?](#)

[Can I change my password at any time?](#)

Troubleshooting Questions

[Why doesn't my password work?](#)

Member Area

The first page you see after you log in is the Member Area (shown below). Think of this page as “home base.” From this page, you can access all the reference information, tools, templates, and other downloads that are available to you as an Intuit Developer Network Premier member.

[Home](#) » [Member Area](#)

Premier Developer Area

Welcome to the Premier Developer Area! From here you can access all of your technical, marketing, and support tools.

QuickBooks Resources

Support

- [Knowledge Base](#)
- [QuickBooks Downloads](#)
- [Newsgroups](#)
- [Library](#)
- [Contact Developer Support](#)
(5 Incidents Remaining)

Sales and Marketing

- [Marketing Handbook](#) (PDF)(542K)
- [Marketing Tools](#)
- [Distributor Program](#)
- [Affiliate Program](#)

Solutions Marketplace

- [Visit the Solutions Marketplace](#)
- [Submit your Application](#)

Developer Directory

- [Visit the Developer Directory](#)
- [Submit your Company](#)

QuickBase Resources

Support

- [Forum](#)
- [QuickBase Technical FAQs](#)
- [QuickBase Downloads](#)
- [Sample Code](#)
- [Library](#)

My Account

- [Edit Contact Information](#)
- [Edit Company Information](#)
- [Feedback](#)

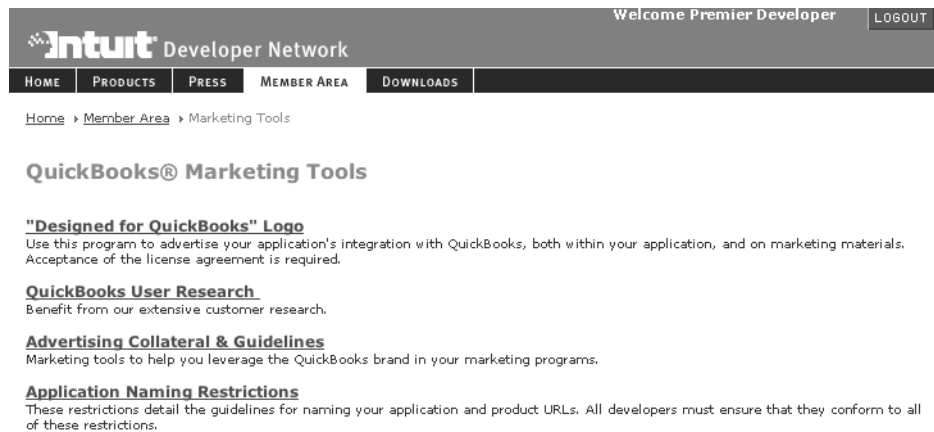
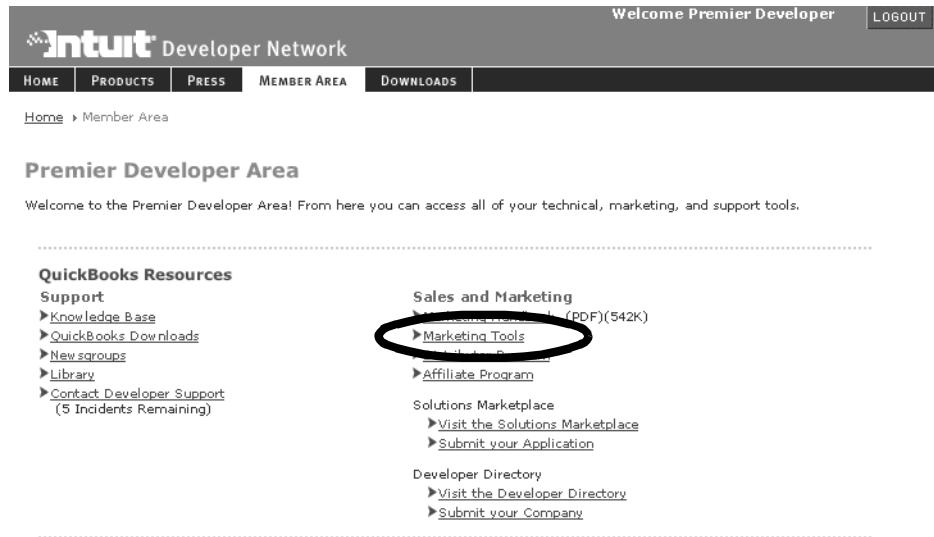
The Member Area contains:

- Support information—information about the SDK, technical documentation, newsgroups, library, and how to get in touch with our technical support engineers
- Sales and Marketing information—information about the QuickBooks Solutions Marketplace, QuickBooks Solutions Guide, QuickBooks Affiliate Program, Marketing Tools, and the Developer Directory
- My Account—links to information we have about your company, the ways we contact you, and the ways you can contact us

Note: Because we update the web site regularly, the locations, titles, and contents of materials referenced in this document may have changed since we published this book. To find the most recent versions of all the material in this book, look in the Member Area .


Marketing Tools

In the Marketing Tools section, accessible from the Member Area, you can download the “Designed for QuickBooks” logo, marketing collateral, and reference information. For more information, see Chapter 3.



My Account

Through the links in this area, you can change the information we have about your company and the ways we contact you, or contact us.

Welcome Premier DeveloperLOGOUT

HOMEPRODUCTSPRESSMEMBER AREADOWNLOADS

[Home](#) > [Member Area](#)

Premier Developer Area

Welcome to the Premier Developer Area! From here you can access all of your technical, marketing, and support tools.

QuickBooks Resources

Support

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- ▶ [QuickBase Downloads](#)
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- ▶ [Feedback](#)

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Edit Contacts

* = required fields

My Contact Information

My Name:*	<input type="text"/>		
My Email:*	<input type="text"/>		
Job Title:*	<input type="text"/>		
Role on Development Team:	<input type="text"/>		
My Phone:*	<input type="text"/>	-	<input type="text"/>
FAX:	<input type="text"/>	-	<input type="text"/>

MARKETING A QUICKBOOKS-INTEGRATED APPLICATION

In this chapter, we introduce Acme Software, a fictitious company, to illustrate the ways your company can take advantage of all the marketing benefits of your Intuit Developer Network Premier membership.

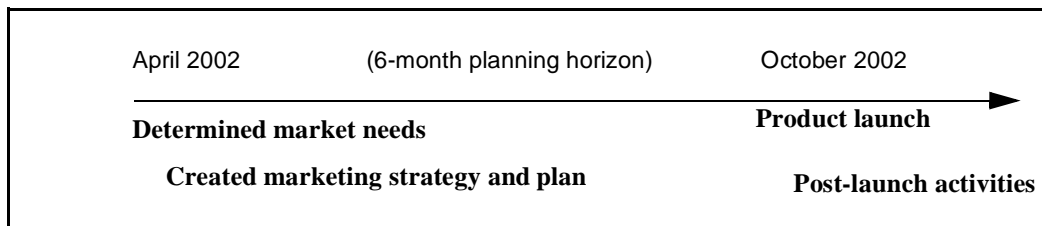
Acme produces construction management software for warehouse/industrial construction companies, modified to integrate with QuickBooks 2003. In the next couple of pages, you'll read about its marketing strategy.

Note: This example is not an endorsement of any specific marketing plan, is not business advice, and is meant only to clarify the marketing process. Intuit does not suggest that any business decisions described in this hypothetical case study are preferable to any others and in no way implies that the actions discussed would result in any particular business results.

Example Marketing Plan

Acme Software has just completed integrating its application, and its marketing plan leverages the many marketing tools and programs provided by the Intuit Developer Network.

We based Acme's plan on a six-month cycle, beginning with creating the strategy and ending with the product launch. Take a look at the overall timeline.

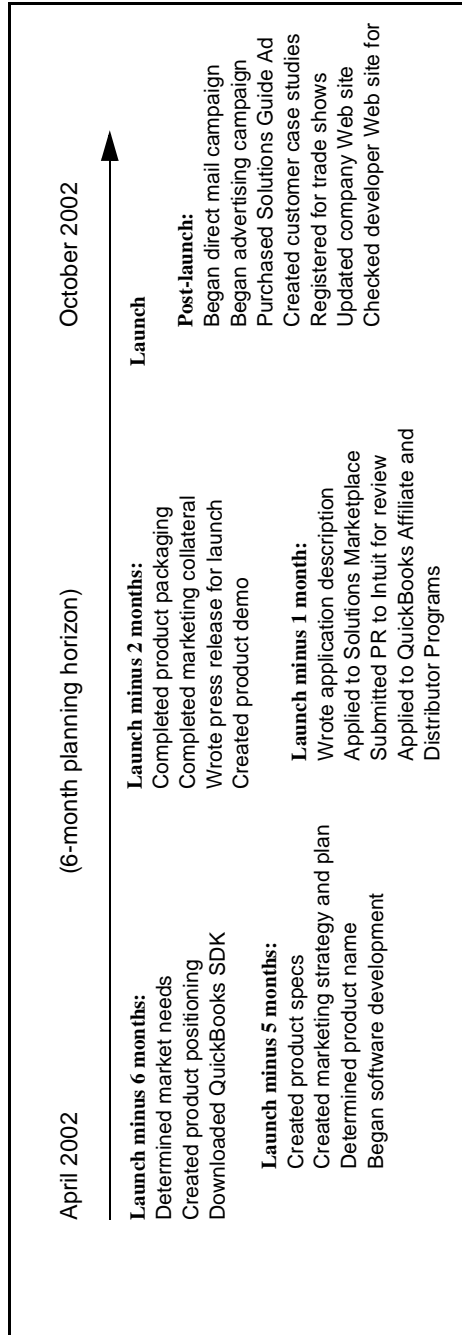


In general, Acme Software's strategy employs both direct and mass marketing activities, including:

- Direct mail campaigns using industry-targeted mail lists
- Advertising in construction-industry publications

- Participating in construction-industry trade shows
- Public relations activities

Acme primarily stuck to its tried and true marketing plan, but added a few specific activities related to QuickBooks integration. You'll find Acme's plan detailed on the next few pages.



Launch Minus Six Months

Six months before launch, Acme Software:

- Determined market needs with help from the QuickBooks User Research Report (see “QuickBooks User Research Report” (page 18))
- Determined its product’s positioning statement: “Construction management software (for warehouse/industrial construction companies) that works with QuickBooks 2003”

Note: For target market restrictions that might affect your product positioning statement, see “Target Market Restrictions for QuickBooks-Integrated Applications” (page 73).

- Downloaded the SDK from the developer web site and determined how to use it to build its QuickBooks-integrated application.

Launch Minus Five Months

Five months before launch, Acme Software:

- Created the product specifications (based on its product positioning and the information from the SDK)
- Developed its marketing strategy and plan
- Began to develop its application
- Named its product (see “Naming QuickBooks-Integrated Applications” (page 27))

Launch Minus Two Months

Two months before launch, Acme Software:

- Completed its product packaging plan and in-product link to QuickBooks (see “Designed for QuickBooks Logo” (page 14))
- Completed its marketing collateral (see “Marketing Tools” (page 13))
- Created a product demo (see “Creating and Using Product Demos” (page 56))

Launch Minus One Month

One month before launch, Acme Software:

- Completed its application description for the QuickBooks Solutions Marketplace (see “Writing an Application Description” (page 60))
- Applied to the Solutions Marketplace (see “Submit Your Application to the Marketplace” (page 64))

- Submitted its product launch press release to Intuit for review (see “Public Relations Campaigns” (page 31))
- Applied to the QuickBooks Affiliate Program (see “QuickBooks Affiliate Program” (page 30))

Product Launch

Acme Software launched its QuickBooks-integrated application in October 2002 with a press release, press and analyst briefings, and calls or visits to their existing customers.

Post-Launch Activities

Immediately after launch, Acme started post-launch marketing activities, including:

- Direct mail campaign using industry-targeted mail lists (see “Direct Mail and Email Campaigns” (page 28))
- Advertising campaign (see “Approved Copy for Marketing” (page 19))
- Running an ad in the QuickBooks Solutions Guide (see “QuickBooks Solutions Guide” (page 67))
- Gathering material for customer case studies (see “Creating Case Studies About Your Customers” (page 51))
- Registering for trade shows
- Planning future public relations activities (see “Public Relations Campaigns” (page 31))

Note: You need to submit all press releases referencing Intuit and Intuit products for review at least one week prior to distribution.

- Checking the developer web site often to learn about new tools, new programs, training opportunities, and upcoming events

CHAPTER 3

MARKETING TOOLS

In this chapter, you'll learn about all the marketing resources available to you as a Premier member of the Intuit Developer Network. You can access most of the resources described in the following pages in the Member Area, under the Sales and Marketing heading, although some topics are only discussed in this book.

Note: Before you begin any marketing activities for your QuickBooks-integrated application, be sure to read and understand the business and legal guidelines discussed in chapter 7 of this book.

Intuit Developer Network

Welcome Premier Developer [LOGOUT](#)

[HOME](#) [PRODUCTS](#) [PRESS](#) [MEMBER AREA](#) [DOWNLOADS](#)

[Home](#) > Member Area

Premier Developer Area

Welcome to the Premier Developer Area! From here you can access all of your technical, marketing, and support tools.

QuickBooks Resources

Support

- ▶ [Knowledge Base](#)
- ▶ [QuickBooks Downloads](#)
- ▶ [Newsgroups](#)
- ▶ [Library](#)
- ▶ [Contact Developer Support](#)
(5 Incidents Remaining)

Sales and Marketing

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- ▶ [Marketing Tools](#)
- ▶ [Distributor Program](#)
- ▶ [Affiliate Program](#)

Solutions Marketplace

- ▶ [Visit the Solutions Marketplace](#)
- ▶ [Submit your Application](#)

Developer Directory

- ▶ [Visit the Developer Directory](#)
- ▶ [Submit your Company](#)

QuickBase Resources

Support

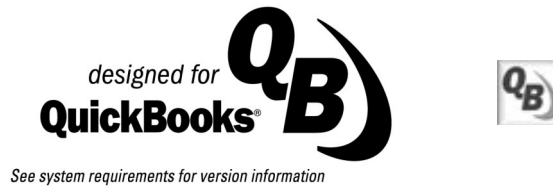
- ▶ [Forum](#)
- ▶ [QuickBase Technical FAQs](#)
- ▶ [QuickBase Downloads](#)
- ▶ [Sample Code](#)
- ▶ [Library](#)

My Account

- ▶ [Edit Contact Information](#)
- ▶ [Edit Company Information](#)
- ▶ [Feedback](#)

Designed for QuickBooks Logo

The Designed for QuickBooks logo includes a logo and button. Both are available for you in the Marketing Tools section of the Member Area of the developer web site.



You can use the Designed for QuickBooks logo (under the terms and conditions of the relevant license agreement), on your product packaging, company web site, in trade show promotional material and signage, in marketing collateral, or in advertising. You can also create a custom logo that includes your company name, application name, and an approved tag line identifying your application as one that integrates data with QuickBooks.

Note: Companies typically create a custom logo to include a reference to QuickBooks data integration in an existing product logo. You need to follow Intuit's specific guidelines when you create a custom logo (see "Creating a Custom Logo" (page 17)).

You can use the button (under the terms and conditions of the relevant license agreement), in the user interface of your application to launch QuickBooks software, and/or allowing users to exchange data with QuickBooks.

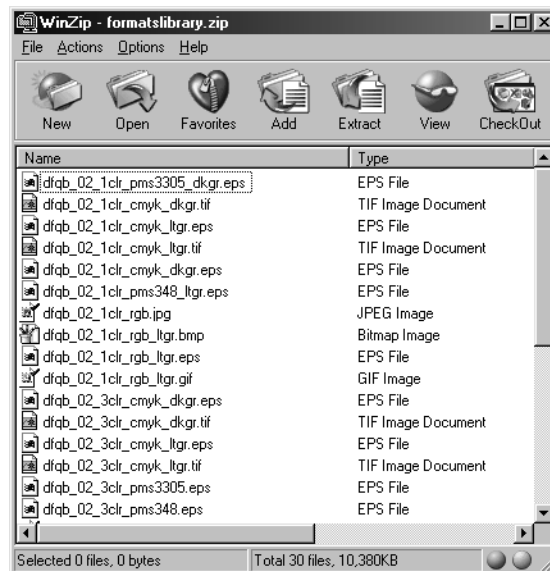
Using the Designed for QuickBooks Logo

You can identify your QuickBooks-integrated application with the Designed for QuickBooks logo.

The logo is a quick, visual way for your customers to identify that your application integrates data with QuickBooks software.

Detailed information about the logo and how to use it is available on the developer web site in the Marketing Tools section of the Member Area.

Once you accept the Logo License Agreement, download the logo from the Logo Library. It contains the logo files in various sizes and colors, as well as several graphics formats. Here's what the Logo Library looks like.

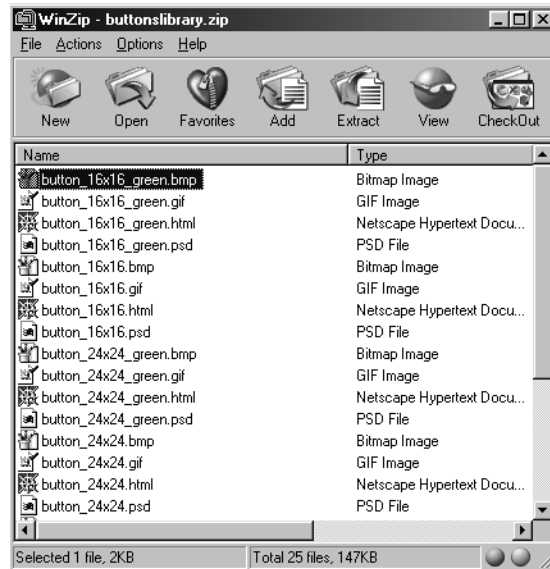


Using the QuickBooks Button

Accepting the Logo License Agreement also gives you access to QuickBooks buttons. The buttons are for you to use within the user interface of your QuickBooks-integrated application to initiate data exchange with QuickBooks. More specific information is included in Exhibit B of the Logo License Agreement.

The Buttons Library contains various sizes and colors of the button also in several graphic formats.

Here's what the Buttons Library looks like.

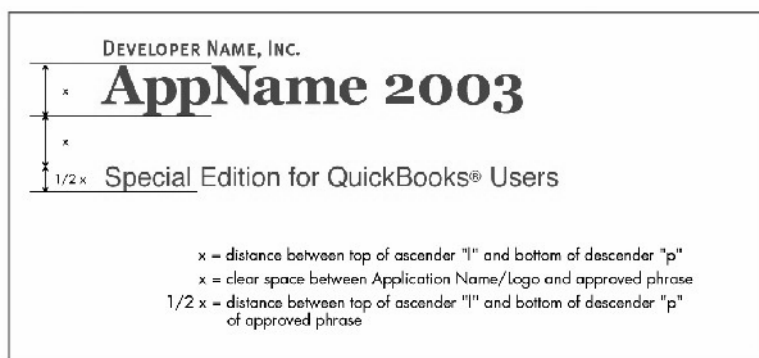


Here's one of the buttons in the library.



Creating a Custom Logo

Subject to the guidelines and restrictions listed below, you can also identify a QuickBooks-integrated application with a custom logo (shown below).



You must create your custom logo in one of the following ways (and only in one of the following ways):

DeveloperCompanyName

ApplicationName 2003

Special Edition for *QuickBooks® 2003* Users

or

DeveloperCompanyName

ApplicationName 2003

Designed for use with *QuickBooks® 2003*

or

DeveloperCompanyName

ApplicationName 2003

For use with *QuickBooks® 2003*

In the conventions above, *DeveloperCompanyName* (optional) is the name of your company, *ApplicationName* is the name of your QuickBooks-integrated application, and *QuickBooks 2003* (optional) is the application(s) version(s) identifier. The phrases below the name and version identifier must be separated by at least one clear line of space equivalent to the font size of the application name and version identifier.

Phrase restrictions are as follows:

- Phrases must always appear in plain text and must not be displayed in the same or similar type style as Intuit uses for the QuickBooks logo. In particular, do not use Franklin bold oblique or another typeface similar to Franklin bold oblique.
- Phrases must be at least 50% smaller than the QuickBooks-integrated application name and logo in all materials, including packaging.
- Phrases cannot be integrated into, or be any part of, any composite or compound logo or mark for the QuickBooks-integrated application name, brand, or trade name. Any such use of an approved phrase must be separated from and placed after the developer company's own branding.
- The Designed for QuickBooks 2003 logo, if licensed to the developer company by Intuit, cannot be integrated into or part of any composite or compound (custom) logo or mark for the developer application name, brand, or trade name. It must appear separate from and placed after the developer company's own branding, and must conform to the style and usage restrictions of the QuickBooks Logo License Agreement (see "Using the Designed for QuickBooks Logo" (page 14)).
- In all materials (including product packaging) that contain the phrases illustrated above, the following text (together with any other required disclaimers set forth in any existing agreements between Intuit and the developer company) must also be placed in the fine print. The text can be in a small type size but must be legible. The text must read as follows:

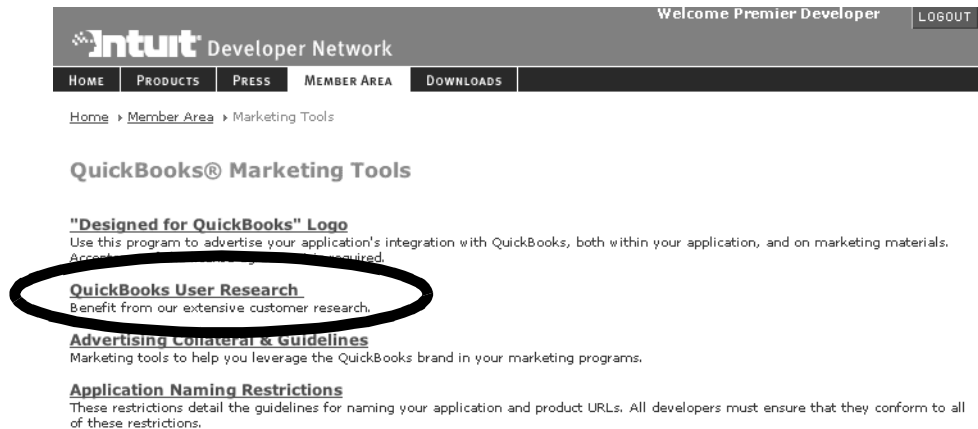
QuickBooks is a registered trademark and service mark of Intuit Inc. in the United States and other countries. For use with U.S. and Canadian editions of QuickBooks 2003 only.

For more information about Intuit trademarks and service marks, see "Using, Referencing, and Protecting Intuit Trademarks and Service Marks" (page 71).

QuickBooks User Research Report

You can download the QuickBooks User Research report from the Member Area of the developer web site. It's one of a number of tools behind the Marketing

Tools link. The report shares valuable background information about QuickBooks customers.



The QuickBooks User Research report can help you:

- Write positioning statements
- Determine key messages
- Understand QuickBooks product strategy
- Identify business opportunities

Approved Copy for Marketing

In the sections below, you'll find Intuit-approved marketing copy that you can use in your own marketing campaigns. It's the same copy that Intuit uses for QuickBooks packaging and marketing materials. This same information is also available in the Marketing Tools section of the Member Area.

Approved Advertising Copy for QuickBooks

The following Intuit-approved copy is for your company's marketing campaigns. Keep in mind that permission to use Intuit advertising copy is limited to uses that are directly related to the promotion of QuickBooks products and QuickBooks-integrated applications.

Note: You can use the Intuit-approved text in this section for general marketing activities, advertising, and other promotional purposes, including material for the web, direct mail and email campaigns, brochures, sales collateral, print advertising, and advertising using other media. Use of the text must conform to the general guidelines in chapter 7. Do not use the text in this section in public relations material (for example, press releases). For text appropriate for that purpose, see “Approved Copy for Public Relations Activities” (page 43).

Approved Copy for QuickBooks Pro 2003

Bullet points:

- Advanced tools for fast and easy small business financial management
- Improvements to the features small businesses use most, and new, most frequently requested advanced tools
- Now integrates with more business software applications than before
- Includes estimating and time tracking

“10-Word” Copy

QuickBooks Pro 2003 provides advanced tools for fast and easy small business financial management.

“25-Word” Copy

QuickBooks Pro 2003 includes everything in QuickBooks Basic, plus advanced tools for your business finances. Estimating, time tracking, integration with over 100 business applications, and many more new and improved features!

“50-Word” Copy

QuickBooks Pro 2003 includes everything in QuickBooks Basic, plus advanced tools for managing your business finances. Includes estimating, time tracking, integration with over 100 business applications, and is multi-user capable for up to 5 simultaneous users. Also includes many more new and improved features, such as more form design templates, more form customization options, budgeting, enhanced class tracking, and improved data back up options.

Approved Copy for QuickBooks Premier 2003

Bullet points:

All of the features of QuickBooks Pro, PLUS:

- New, more comprehensive reports and analysis
- New, more advanced accounting features
- Remote access—work from home, the road, or anywhere*

* Internet access required. One 12-month basic subscription valid for customers who purchase and install QuickBooks Premier: Accountant Edition 2003 software before 12/30/03. 12 months of basic service begins at the time of installation of QuickBooks Premier: Accountant Edition software. After 12 months, Premier: Accountant Edition users can subscribe to the service for a fee. Fees apply for additional subscriptions. Service subject to change.

- Exclusive business services designed to increase your productivity

“10-Word” Copy

QuickBooks Premier 2003 provides the most comprehensive tools for small business financial management.

“25-Word” Copy

QuickBooks Premier 2003 provides the most comprehensive tools for small business financial management. QuickBooks Premier includes all the features in QuickBooks Pro, plus new financial management tools to help your business achieve better results.

“50-Word” Copy

QuickBooks Premier 2003 provides the most comprehensive tools for small business financial management. In addition to the benefits and features of QuickBooks Pro, QuickBooks Premier helps you gain greater insight into how your business is performing, improve accuracy, and save even more time with new financial management tools to create forecasts, budgets, business plans, and more to help your business achieve better results!

Approved Copy for QuickBooks Premier 2003: Accountant Edition

Bullet points:

- Manage your QuickBooks clients’ financial activities more effectively
- Be more productive
- Gain improved accounting control
- Work the way you want—with remote access* to your clients’ QuickBook files

* Internet access required. One 12-month basic subscription valid for customers who purchase and install QuickBooks Premier: Accountant Edition 2003 software before 12/30/03. 12 months of basic service begins at the time of installation of QuickBooks Premier: Accountant Edition software. After 12 months, Premier: Accountatn Edition users can subscribe to the service for a fee. Fees apply for additional subscriptions. Service subject to change.

“10-Word” Copy

QuickBooks Premier 2003: Accountant Edition is customized for accountants with advanced accounting functionality to help you work more efficiently on your clients’ files.

“25-Word” Copy

QuickBooks Premier 2002: Accountant Edition is customized for accountants with advanced accounting functionality to help you work more efficiently on your clients' files. It also contains all the features of QuickBooks Basic, Pro, and Premier 2003.

“50-Word” Copy

QuickBooks Premier 2002: Accountant Edition is customized for accountants with advanced accounting functionality to help you work more efficiently on your clients' files. It contains all the features of QuickBooks Basic, Pro, and Premier 2003 to help you better serve your clients. Includes remote access*, enhanced closing procedure, customized reports for accountants, multiple journal-entry views and enhanced general journal-entry options.

* Internet access required. One 12-month basic subscription valid for customers who purchase and install QuickBooks Premier: Accountant Edition 2003 software before 12/30/03. 12 months of basic service begins at the time of installation of QuickBooks Premier: Accountant Edition software. After 12 months, Premier: Accountant Edition users can subscribe to the service for a fee. Fees apply for additional subscriptions. Service subject to change.

Approved Copy for QuickBooks Premier 2003: Contractor Edition

“10-Word” Copy

QuickBooks Premier: Contractor Edition 2003 is Custom Built for Contractors to help you manage your business more effectively.

“25-Word” Copy

QuickBooks Premier: Contractor Edition 2003 is Custom Built for Contractors to help you manage your business more effectively. Improved Job Costing and Contractor-specific Reports help you see which jobs are making money—and which are not.

“50-Word” Copy

QuickBooks Premier: Contractor Edition 2003 is Custom Built for Contractors to help you manage your business more effectively. Improved Job Costing and Contractor-specific Reports help you see which jobs are making money—and which are not. In addition, you can create more accurate and complete estimates with Change Orders. Plus industry-specific form templates and the new Contractor Menu and Navigator make QuickBooks faster and easier for contractors.

Approved Copy for QuickBooks Enterprise Solutions

“10-Word” Copy

QuickBooks Enterprise Solutions Business Management Software 2.0 offers growing businesses our most comprehensive business management tools.

“25-Word” Copy

QuickBooks Enterprise Solutions Business Management Software 2.0 offers growing businesses our most comprehensive set of business management tools. With QuickBooks Enterprise Solutions 2.0, you'll get more capacity, improved performance, and better tools to manage your growth.

“50-Word” Copy

QuickBooks Enterprise Solutions Business Management Software 2.0 offers growing businesses our most comprehensive set of business management tools. With QuickBooks Enterprise Solutions 2.0, you'll get more capacity, improved performance, and better tools to manage your growth. With QuickBooks Enterprise Solutions 2.0, you'll receive 10 simultaneous users*, higher list limits, improved performance, tools to track more employee data, and more, including all the 2003 features of QuickBooks Pro, premier, and Premier: Accountant Edition.

* Users on the same network must all use the same version of QuickBooks Enterprise Solutions to access the same company file. 10 software licenses included with purchase.

Approved Copy for QuickBooks Online Edition

“10-Word” Copy

QuickBooks Online Edition is the fastest, easiest way to get started with small business accounting.

“25-Word” Copy

QuickBooks Online Edition is the fastest, easiest way to get started with small business accounting. It works over the Internet, so you can access your finances anytime, anywhere.

“50-Word” Copy

QuickBooks Online Edition is the fastest, easiest way to get started with small business accounting. It works over the Internet, so you can access your finances anytime, anywhere. Organizes all your financial information in one place, so you are always in control. An Internet connection is all you need to work anytime, anywhere—at home, in the office, or on the road. Easy transactions help you get paid and pay others.

Approved Copy for QuickBooks Pro 2003, Canadian edition

Advanced tools for fast and easy small business financial management

Short Copy

QuickBooks Pro 2003 includes everything in QuickBooks Basic, plus advanced tools for managing your business finances. Includes: budgeting, estimating, time tracking, integration with more business applications, and is multi-user capable for up to 5 simultaneous users. Also includes more professional form design templates, more form customization options, enhanced class tracking, improved data back up options, sales order tracking, multicurrency, and multiple price levels.

Long Copy

QuickBooks Pro 2003 provides advanced tools for fast and easy small business financial management

- **Financial Management**

In addition to providing everything available in QuickBooks Basic, QuickBooks Pro provides you with financial management tools to help your business achieve better results. With one click, you can use your actual QuickBooks data to create a budget.

- **Enhanced Inventory**

Now you can track both individual inventory items (components, raw material) and "assemblies" (combined inventory items, finished goods or products) that you sell.

- **More Customization**

Look more professional with new customization options. Includes: improved customer statements, enhanced class tracking, forms design, and more options for forms and printing.

- **More Integration**

Product developers all across North America are creating new applications that work with QuickBooks Pro. QuickBooks and integrated applications are designed to work together. Data integration helps you save time by reducing data entry. Software applications that can exchange data with QuickBooks Pro are being developed for many types of businesses in retail, nonprofit, real estate, healthcare, service businesses, legal, automotive, construction, and more.

Approved Copy for QuickBooks Premier 2003, Canadian edition

The most comprehensive tools for small business financial management

Short Copy

QuickBooks Premier includes everything in QuickBooks Pro, plus it helps you gain greater insight into how your business is performing, improves accuracy, helps you take your business to the next level with new financial management tools, and integrates with more business applications.

Includes: Remote access to QuickBooks using the Internet, automated forecasting, change orders for estimates, improved journal entries, customized, exportable report templates, enhanced reconciliation reporting, closing date exception reports.

Long Copy

QuickBooks Premier 2003 provides the most comprehensive tools for small business financial management.

■ Financial Management

In addition to providing everything available in QuickBooks Pro, QuickBooks Premier provides you with financial management tools to help your business achieve better results. Use your QuickBooks data and answer simple, step-by-step questions to automatically create a 3-year projected balance sheet, profit and loss and cash plan. A new forecasting feature lets you compare your forecast vs. your actual income and expenses.

■ Enhanced Inventory

Now you can track both individual inventory items (components, raw material) and "assemblies" (combined inventory items, finished goods or products) that you sell.

■ Remote Access

Work in QuickBooks wherever you are by connecting to your computer via the Internet. No additional copies of QuickBooks are needed. Multi-user remote access is also available.*

■ Financial Controls

Get the extra financial controls you need without losing the flexibility and ease-of-use you expect from QuickBooks. New comprehensive tools for financial management include: general journal features; closing date procedures and reports; reconciliation reports; customized, exportable templates.

■ More Integration

Product developers all across North America are creating new applications that work with QuickBooks Premier. QuickBooks and integrated applications are designed to work together. Data integration helps you save time by reducing data entry. Software applications that can exchange data with QuickBooks Pro and Premier are being developed for many types of businesses in retail,

nonprofit, real estate, healthcare, service businesses, legal, automotive, construction, and more.

*Internet access required. One 12-month subscription to Remote Access Service included at no charge, valid for customers who purchase and install QuickBooks Premier 2003 software before December 31, 2003. 12 months of service begin at the time of installation of QuickBooks Premier software. After 12 months, Premier users can subscribe to the service for a fee. Fees apply for additional subscriptions. Terms subject to change.

Approved Advertising Copy for Integrated Applications

You can use the following copy to reference your QuickBooks-integrated application: Be sure to specify exactly which QuickBooks products your application integrates with (include edition and year).

Now *ApplicationName* integrates data with small business financial software *QuickBooks Pro and Premier Editions 2003*, *QuickBooks Enterprise Solutions 2.0*, *QuickBooks Online Edition*, and *Canadian editions of QuickBooks*.

or

Data [that is, sales, customer, financial information, or other data that you identify here] you select can be automatically shared between *ApplicationName* and *QuickBooks Pro and Premier Editions 2003*, *QuickBooks Enterprise Solutions 2.0*, *QuickBooks Online Edition*, and *Canadian editions of QuickBooks*.

or

Integrating *ApplicationName* with *QuickBooks Pro and Premier Editions 2003*, *QuickBooks Enterprise Solutions 2.0*, *QuickBooks Online Edition*, or *Canadian editions of QuickBooks* can help you save time by reducing data entry.

The following paragraph is approved copy to describe QuickBooks and the QuickBooks-integrated applications that support it:

QuickBooks is an easy-to-use financial management solution for small businesses with simple to sophisticated needs. *QuickBooks Pro and Premier Editions 2003*, *QuickBooks Enterprise Solutions 2.0*, *QuickBooks Online Edition*, and *Canadian editions of QuickBooks* integrate data with general and industry-specific applications developed by those companies participating in the Intuit Developer Network.

Naming QuickBooks-Integrated Applications

In general, you can choose whatever name you like for your QuickBooks-integrated application, however, Intuit does protect its brand by placing the following restrictions on third-party application names.

All developer companies participating in the Intuit Developer Network must adhere to the following application naming restrictions. These restrictions apply to all QuickBooks-integrated applications.

Do not use the following words or partial words (or phonetic equivalents) in the name, name-phrase, or branding of your QuickBooks-integrated application. In addition, do not use them in any domain name, keyword, or other Internet addressing signifier or in the developer company name or trade name. The words not allowed are:

- QuickBooks
- QB
- Intu
- tuit
- Quick
- Turbo

Note: For complete information about naming your QuickBooks-integrated application, please refer to the Application Naming Restrictions document, located in the Marketing Tools section of the Member Area on the developer web site.

QuickBooks Automated Tour

The QuickBooks Automated Tours are self-running demos. The tours help customers understand the QuickBooks products before they buy, and they help you sell the QuickBooks product as part of a product bundle along with your QuickBooks-integrated application. Find the tours on the developer web site, in the Marketing Tools section of the Member Area.

You can use the QuickBooks Tours in two ways: include a link to one of the QuickBooks Automated Tours on your company web site, or download one of the files to put on your trial CD or to run at tradeshow.

Note: Your customers will need to have Macromedia Flash installed to use the QuickBooks Tours.

QuickBooks Fact Sheet

You can use the Intuit-produced QuickBooks 2003 fact sheet in your marketing efforts. Download the fact sheet from the developer web site, and print it or use it as a PDF along with your other marketing collateral.

The fact sheet (next page) is located in the Marketing Tools section of Member Area of the developer web site.

Note: You cannot make modifications, additions, or deletions to the fact sheet; you must distribute it exactly as is.

Direct Mail and Email Campaigns

Direct mail campaigns, whether email or postal mail, are a proven method for spreading the word about your products. Below, you'll find a suggested template, as well as a sample letter made from the template, to help you create direct mail campaigns.

When you create your own, be sure to customize with information about:

- Characteristics of your target customers
- Solution your product provides
- Best features of your QuickBooks-integrated application

Note: When sending email, it's wise to be sensitive to your customer's privacy concerns and to avoid being labeled as a "spammer." You can accomplish this by giving customers (before your first email campaign) the option of receiving emails from you or not, and by including directions on how to "unsubscribe" from an email list in every email you send. Helpful privacy information, such as how to develop a privacy policy, can be found at various Internet sites, including web sites for the Online Privacy Alliance (www.privacyalliance.org), the Direct Marketing Association (www.dma.org), and the Privacy Leadership Initiative (www.understandingprivacy.org).

Template

Dear [Customer],

[Company Name] is pleased to announce that [Product Name] now integrates data with small business financial software QuickBooks® Pro and Premier Editions 2002 and 2003, QuickBooks Enterprise Solutions 2.0, QuickBooks Online Edition, and Canadian editions of QuickBooks. [Product Name] is designed for businesses that [Characteristics of Target Customer] by [Solution the Product

Provides]. Integrating [Product Name] data with QuickBooks can help you save time by reducing data entry. [Product Name]:

- [Product Feature 1]
- [Product Feature 2]
- [Product Feature 3]

QuickBooks is the number-one selling small business accounting software. And now [Product Name] integrates data with QuickBooks, the most comprehensive set of tools for small business financial management.

Find out more information about [Product Name] by calling [Phone #], or visit our web site at [URL of web site]. You can learn more about QuickBooks products at www.quickbooks.com/go/idn.

Sincerely,

[Company Name]

Sample Letter

We used the template on the last page to create this letter for Acme Software, the fictitious company we introduced in chapter 2.

Dear Mr. Jones,

Acme Software is pleased to announce that Construction Helper now integrates data with small business financial software QuickBooks® Pro and Premier Editions 2002 and 2003, QuickBooks Enterprise Solutions 2.0, QuickBooks Online Edition, and Canadian editions of QuickBooks. Construction Helper is designed for construction companies who want to better manage construction projects by integrating online order data with QuickBooks products. Integrating Construction Helper data with QuickBooks can help you save time by reducing data entry. Construction Helper includes:

- A sophisticated set-up wizard that easily creates a new project or converts project data from other construction management software
- Daily, weekly, and monthly status indicators for project account receivables and account payables that can also easily be detailed into comprehensive reports
- A new Mobile Helper feature that downloads critical project data into PDAs or other mobile equipment for onsite project management

QuickBooks is the number-one selling small business accounting software. And now Construction Helper integrates data with QuickBooks, the most comprehensive set of tools for small business financial management.

Find out more information about Construction Helper by calling 1-800-ACMENOW, or visit our web site at www.acmesoftware.com. You can learn more about QuickBooks products at www.quickbooks.com/.

Sincerely,

Acme Software

QuickBooks Affiliate Program

As a Premier Developer, you're eligible to participate in the QuickBooks Affiliate Program. The Affiliate Program allows you to sell standalone versions of QuickBooks 2003 editions directly to customers, at a discount. You earn a commission on every QuickBooks product sale.

Main benefits of participating in the QuickBooks Affiliate Program:

- Customer discounts
- Commission
- Association with the QuickBooks brand
- Easy set-up and program administration
- Added value for your web site

For more information, click the Affiliate Program link in the Sales and Marketing section of the Member Area.

Intuit Developer Network

Welcome Premier Developer [LOGOUT](#)

[HOME](#) [PRODUCTS](#) [PRESS](#) [MEMBER AREA](#) [DOWNLOADS](#)

[Home](#) > [Member Area](#)

Premier Developer Area

Welcome to the Premier Developer Area! From here you can access all of your technical, marketing, and support tools.

QuickBooks Resources
Support

- ▶ [Knowledge Base](#)
- ▶ [QuickBooks Downloads](#)
- ▶ [Newsgroups](#)
- ▶ [Library](#)
- ▶ [Contact Developer Support](#)
(5 Incidents Remaining)

Sales and Marketing

- ▶ [Marketing Handbook](#) (PDF)(542K)
- ▶ [Marketing Tools](#)
- ▶ [Product Demo](#)
- ▶ [Affiliate Program](#)
- ▶ [Solutions Marketplace](#)

CHAPTER 4

PUBLIC RELATIONS CAMPAIGNS

In this section, you'll find general public relations language and style guidelines, press release and media relations guidelines, and approved copy for your company's public relations activities that reference Intuit and Intuit products.

General Public Relations Language and Style Guidelines

There are six key rules we ask that you follow when writing your public relations material—including press releases, case studies, and fact sheets. These rules also apply when you're talking with reporters and industry analysts about your product's integration with QuickBooks and your company's involvement in the Intuit Developer Network.

1. Confirm that your product name or feature name meets Intuit's application naming restrictions.

- **Yes:** You can describe a feature in your application as a "QuickBooks link."
- **No:** You cannot name a feature in your application "QuickBooks Link." As described in "Naming QuickBooks-Integrated Applications" (page 27), your company cannot use "QuickBooks," "QB," "Intu," "tuit," "Quick," or "Turbo" (or phonetic equivalents) in the name, name-phrase, or branding of the application or in your company name or trade name.

2. Accurately describe your company's relationship with Intuit, the Intuit Developer Network, and the QuickBooks product.

- **Yes:** Describe yourself as an Intuit Developer Network member or participant as described in "Referencing Relationships Between Intuit and Developer Companies" (page 73).
- **No:** Your company is not a "partner" of Intuit or "forming an alliance with" Intuit. You cannot use language that reflects or insinuates this type of relationship. Other words to avoid are "team," "work with," and "collaborate."

3. Accurately describe your application's relationship with Intuit, the Intuit Developer Network and the QuickBooks product.

- **Yes:** The QuickBooks SDK enables “data sharing,” “data integration,” or “data exchange.” You can refer to your product as “QuickBooks-integrated,” or “integrated with QuickBooks.”
 - **No:** The QuickBooks SDK does not enable “seamless integration” or “complete integration.” You can’t say that your application is “integrated into QuickBooks.”
4. **Clearly state which QuickBooks products your application shares data with.**
- **Yes:** The QuickBooks SDK enables data integration with QuickBooks Pro and Premier editions 2002 and 2003, QuickBooks Enterprise Solutions 2.0, QuickBooks Online Edition, and Canadian editions of QuickBooks 2003.
 - **No:** The SDK does not enable data integration with QuickBooks Basic or previous QuickBooks versions. Avoid saying that your application works with “all versions of QuickBooks.”
5. **Don’t make unsubstantiated claims about the benefits of using your application with QuickBooks.**
- **Yes:** If you make factual claims about your product (for example, “Cuts data entry by 50 percent!”), the Federal Trade Commission requires that you have reasonable prior substantiation for that claim. For further information on this requirement, see the FTC Policy Statement Regarding Advertising Substantiation at <http://www.ftc.gov/bcp/guides/ad3subst.htm>.
 - **No:** If you don’t have valid research to back up your claims, then don’t make them.
6. **Accurately describe your company’s access to Intuit’s small business customers.**
- **Yes:** When discussing this benefit to being an Intuit Developer Network Member, you can say that the program provides avenues for reaching QuickBooks users. These “avenues” include the QuickBooks Solutions Marketplace, and the QuickBooks Solutions Guide.
 - **No:** Since your product integrates only with the QuickBooks 2002 and 2003 products, this doesn’t give you access to “millions of QuickBooks customers” because not all QuickBooks customers are using QuickBooks 2002 or 2003.

Press Release and Media Relations Information and Guidelines

After obtaining approval from Intuit (and subject to the legal guidelines in chapter 7 of this book), you may issue press releases announcing the availability of your QuickBooks-integrated application.

There are two types of news releases that your company can issue regarding QuickBooks.

- **Announcement of a new product.** For this type of announcement, data integration with QuickBooks would be one of a number of features highlighted about the new product.
- **Announcement for an existing product.** The focus of this type of release would be the data integration with QuickBooks as an enhancement to an existing product.

For both types of releases, you must adhere to Intuit's general and public relations-specific guidelines, listed at the beginning of this chapter. If your press release doesn't adhere to the guidelines, Intuit won't approve it.

Intuit must approve any press release referencing Intuit, QuickBooks, or the Intuit Developer Network. Once you submit your release, Intuit needs time to review the press release and get legal approval. In general, Intuit needs:

- One month if your press release is scheduled during a major QuickBooks product launch
- At least one week if no major QuickBooks launch is scheduled in the same timeframe as your product launch

Press Release Approval

Send press releases you want to get approved to: **idnpress@intuit.com**

Note: Intuit never issues joint press releases with third-party developer companies, and Intuit does not circulate developer company press releases along with its own.

Press Release Template

Intuit suggests using the following template for press releases announcing integration with QuickBooks 2003. More information, usage examples, and approved text follow the template.

Name of Your Company's PR Contact
Company Name
Phone Number
Email Address

Name of Your Company's PR Agency Contact
PR Company Name
Phone Number
Email Address

For Immediate Release

HEADLINE (BOLD AND ALL CAPS)

**EXAMPLE: [YOUR COMPANY] LAUNCHES NEW APPLICATION TO SHARE DATA
WITH THE QUICKBOOKS® 2003 PRODUCTS**

Subhead (Italic and First Letter of Each Word in Caps)

Example: Integration with QuickBooks Helps Small Businesses Save Time and Money

City, State, Month, Date, Year — Lead Paragraph (Who, what, when, where, why, and how)

Example:

[Your Company] today announced that [Your Product] will now share data with Intuit's QuickBooks® software products—including QuickBooks Pro and Premier editions 2003, QuickBooks Enterprise Solutions, QuickBooks Online Edition, and Canadian editions of QuickBooks 2003. This exchange of critical data, such as X, Y, and Z, will help small businesses who use both products to manage their business more efficiently—saving them valuable time, money, and resources.

Paragraph 2 (Quote from your spokesperson lending personal authority to the statements in the lead paragraph—see below for more information)

Paragraph 3 (Further detail about the scope of the application—see below for more information and an example)

Paragraph 4 (Quote from Intuit—see below for valid quotes)

About [Your Company] (See below for more information)

Intuit Trademark Statement (See below for the text)

Press Release Lead Paragraph: Additional Information

The lead paragraph of the press release (no more than three or four sentences) should read like the lead of a news story, and include who, what, when, where, why, and how. All the essential information summarizing the announcement should be contained in this paragraph, including:

- Your company's name and area of expertise
- What you are announcing
- Why this is news:
 - What does this mean for your company?
 - What does this mean for your customers?
 - What are the benefits of your application?
 - What problems does your application solve?

Press Release Paragraph Two: Additional Information

This paragraph should be a quote from your spokesperson lending personal authority to the statements you make in the lead paragraph. It should also highlight the value of developing your product for the Intuit platform, or developing for the small business market. The secret of this quote is that it's often created by the writer of the press release and attributed to a company's executive spokesperson. (But don't forget to have the spokesperson approve it!).

Press Release Paragraph Three: Additional Information and Example

Use this paragraph to detail the scope of your application. Include:

- Your product's market potential
- Availability and price
- Customer benefits of your application
- The technical requirements of your product, if any

Feel free to break this paragraph into multiple paragraphs. Consider using statistics to demonstrate small businesses' need for this application and its ability to integrate with QuickBooks 2003.

Example:

Today there are more than 12 million small businesses currently using computers in the U.S. (TowerGroup, 2001). Nearly three million small businesses use QuickBooks and 80 percent of those want QuickBooks to integrate with their other software and devices (QuickBooks 2000 User Study).

Press Release Paragraph Four: Approved Intuit Quotes

You can include any one of the following quotes in your press release. You must use the quotes verbatim.

Note: Because we want to support all Intuit Developer Network Members equally, Intuit does not endorse specific member companies over others in the program.

Mark Bercow, vice president of the Intuit Developer Network, is the Intuit spokesperson quoted in all press releases, regardless of any relationships you may have with other members of Intuit's executive team.

Quote 1:

"Small businesses have varying business needs, and many use software such as [Your Product] in addition to QuickBooks to manage their finances," said Mark Bercow, vice president of the Intuit Developer Network. "By working together, Intuit and companies like [Your Company] are helping small businesses get the most out of their software in the most efficient and cost-effective way possible."

Quote 2:

"The sharing of data between applications such as [Your Product] and the QuickBooks 2003 products helps small businesses avoid having to manually enter the same data in both applications, which takes a lot of time and can result in data entry errors," said Mark Bercow, vice president of the Intuit Developer Network. "[Your Company] is a perfect example of how Intuit Developer Network Members are successfully using the QuickBooks SDK to bring valuable applications to Intuit's small business customers. The Intuit Developer Network will continue to help members like [Your Company] to address small businesses' needs for easy-to-use products that are integrated and customized for their specific business requirements."

Quote 3:

"We are thrilled that [Your Company] is participating in the Intuit Developer Network and is enabling data sharing between [Your Application] and the QuickBooks 2003 products," said Mark Bercow, vice president of the Intuit Developer Network. "Our relationship with [Your Company] will help us better meet the specific industry needs of our small business customers."

Quote 4:

“Intuit and [Your Company] both recognize that small business owners juggle many daily tasks and that they are constantly looking for ways to streamline their operations,” said Mark Bercow, vice president of the Intuit Developer Network. “Enabling the exchange of data between [Your Application] and the QuickBooks 2003 products will help small businesses save time and manage their resources more efficiently, allowing them to spend more time actually running their business.”

Quote 5:

“The Intuit Developer Network strives to help the best and brightest developers solve the business management challenges small business owners face every day,” said Mark Bercow, vice president of the Intuit Developer Network. “We are pleased to be able to work with innovators like [Your Company] to offer small businesses specialized applications that will work with the QuickBooks 2003 products. The data integration with [Your Product] and the QuickBooks 2003 products is an example of how increased efficiencies in managing financial data can give business owners more time to oversee other parts of their business.”

Press Release: About Your Company

The final paragraph in the press release is your company’s “boilerplate”—a general description of your company (no more than four or five sentences) that details:

- The type of business your company is in
- The size of your company (annual revenue or number of employees)
- Location of company headquarters

Note: You should not include Intuit boilerplate company information in your press release, because your release will be distributed by your company alone and not jointly with Intuit.

Press Release: Intuit Trademark Statement

The following trademark/service mark statement must appear at the end of your press release:

Intuit, the Intuit logo, Quicken, QuickBooks, QuickBooks Pro, QuickBooks Premier, Turbo Tax, ProSeries, and Lacerte, among others, are registered trademarks and/or registered service marks of Intuit Inc. in the United States and

other countries. Other parties' trademarks or service marks are the property of their respective owners and should be treated as such.

Note: For information about using trademark and registered trademark symbols, see "Using, Referencing, and Protecting Intuit Trademarks and Service Marks" (page 71).

Press Release Distribution Services

You can distribute and publicize the announcement of your QuickBooks-integrated applications in several ways to help increase the likelihood of media coverage. The most effective methods are:

- Email the announcement directly to your own media and analyst contacts.
- Distribute your announcement using a wire service.

Information about the most important wire service organizations is listed below. You have to become a member of the organizations to be able to post your press release to their database.

Note: This information is provided as a general reference. Intuit does not endorse or guarantee the performance of these services. Available services, contact information, and costs may have changed since this document was published. Check with the organizations themselves for the latest information.

Service	Contact Information	Service Description and Cost
Business Wire	San Francisco Phone 1: 415-986-4422 Phone 2: 800-227-0845 Fax: 415-788-5335 New York Phone 1: 212-752-9600 Phone 2: 800-788-221-2462 Fax: 212-752-9698 Web address: www.businesswire.com	Cost of membership: \$100 for 12 months Cost of national distribution for a single press release: \$550 for a 400-word press release. \$100 for every 100 words over the first 400. Cost of regional distribution for a single press release: Depends on the region. Range is \$155-\$450 for the first 400 words. \$155-\$300 for every 100 words over the first 400. Distribution can also be by targeted circuit. The cost varies widely by circuit. Contact Business Wire for more information.

Service	Contact Information	Service Description and Cost
PR Newswire	Phone 1: 212-596-1500 Phone 2: 800-832-5522 Phone 3: 888-776-0942 Email: information@prnewswire.com Web address: www.prnewswire.com	Cost of membership: \$100 for 12 months Cost of national distribution for a single press release: \$575 for the first 400 words. \$150 for every 100 words over the first 400. Cost of regional distribution for a single press release: \$275 for the first 400 words. \$85 for every 100 words over the first 400. State and local distribution is also available. Cost varies by state. Range is \$95-\$185 for the first 400 words and \$30-\$65 for every 100 words over the first 400.
Internet Wire	Phone: 800-77-iWire Fax: 650-324-9918 Email: iwsales@internetwire.com Web address: www.internetwire.com	Internet-based distributor of company news. Pricing is on a flat-rate basis (no limit to number of words). Cost: \$325 for a single press release. No extra charge for including a logo and hyperlink. Distribution to selected channels is also available for \$25 per channel.

Note: Pricing subject to change without notice.

Media Relations Guidelines

Follow these general guidelines when working with media outlets.

Do:

- Work to build relationships with reporters
- Demonstrate your passion about your product and company culture
- Use examples, metaphors, and anecdotes that can illustrate your point

- Reference customers and other third parties who can support product strategy (assuming they have agreed to be references)
- Point to key differentiators between your company and your competition (but never criticize the competition)

Don't:

- Be combative or defensive with reporters
- Be offended or let your guard down when dealing with reporters who may invite informality (in the hope of obtaining confidential information) by their casual look and approach
- Make projections about revenue, potential new customers, impending partnerships, and future products and announcements
- Imply that your company is an Intuit partner or that you have any relationship with Intuit other than being an Intuit Developer Network member
- Share industry gossip about other companies or criticize your competitors

“Telling and Selling” Your Story

Here are some tips for “telling and selling” your story:

- **Target the right media outlets.** When assembling your media list, target the appropriate reporters, producers, and columnists who would be likely to write about your company and product. Include media outlets covering small business, software like yours, and your specific industry niche.
- **View the story through the reporter's eyes.** Read the publications and watch the programs of the reporters you'll be talking to so you can get a sense of their perspective. Understand the kinds of stories each reporter likes and what about your news will interest them the most—and the least.
- **Put your story in a larger context.** Use trends, research, and current news hooks to develop a bigger story angle to tie your company or product into.
- **Develop a story pitch.** Write a short email or letter “pitching” your story to reporters. In lay persons' terms (vs. “corporate speak”), tell them your news and why you think they should write about it. Make sure it strikes a balance between the bigger story or trend and your company's news. Personalize the pitch—for example, mention a specific story of theirs that you may have enjoyed reading or watching.
- **Attitude is everything.** Before you pick up the phone, you must believe in your story and be able to pitch it in one or two sentences. Use a written pitch as your guide, but don't simply read it. Be yourself. Remember that media people are just people, and they rely on you as much as you rely on them.

- **Use visual aids.** When working with print and broadcast media, consider offering visuals (for example, logos, photos, videos, or demos) that can bring your story to life. Map out ways to incorporate key visuals into the story that can make sense. For more information about creating and using demos, see “Creating and Using Product Demos” (page 56).
- **Be aware of deadlines.** It’s critical to adhere to reporters’ deadlines for submitting story information. It’s also important to avoid interrupting them during their “crunch” hours. The deadline schedule will be different depending on the type of media outlet you’re trying to reach. See the table below for more information about deadlines.

Media Type	Deadline
Online publications (for example, CNET, ZDNet)	These reporters work on constant deadlines. They also are in the business of breaking news and don’t sign or recognize non-disclosure agreements (NDAs). If they think your story is newsworthy, they will publicize it immediately (vs. waiting until your launch date).
Daily newspapers	Newspaper editors generally have deadlines every day in the mid- to late afternoon. It is best to contact them early in the morning.
Weekly publications	Contact weekly reporters early in the week. Do not contact them on the day they send their publication to the printers (generally, this is Thursday) unless you have important “breaking” news. Some weeklies have online editions that get updated often, so to avoid an “early announcement” get a signed NDA if you give a reporter a story before your announce date.
Monthly publications	Most monthly publications will sign NDAs because they require your news several months in advance. Most monthlies start working on a given publication four months before the issue date (this is often referred to as a “four-month lead time”). Some monthlies have online editions that get updated often, so get a signed NDA if you give a reporter a story before your announce date.
Broadcast media	Contact broadcast media after their early morning editorial meetings, which generally end at 9:30 a.m., and before the evening cycle of newscasts begin, which is generally around 3:30 p.m. Most broadcast reporters do not sign NDA agreements. When pitching broadcast media, make sure you have a visual element to your story and that you supply key visuals. The broadcast media like to cover events. When you pitch assignment desk editors on your announcement, be explicit about the “who, what, why” elements of your story.

Clipping and Monitoring Services

Using the services of a clipping and monitoring service can help you keep track of what the media is saying about your company in print, on the Internet, or on broadcast outlets. We’ve listed two clipping services below.

Note: This information is provided as a general reference. Intuit does not endorse or guarantee the performance of these services. Available services, contact information, and costs may have changed since this document was published. Check with the organizations themselves for the latest information.

Service	Contact Information	Service Description and Cost
Luce Online	Phone: 800-518-0088 Email: info@luceonline.com Web address: www.luceonline.com	Key services offered are First Alert and CyberClipping Service. First Alert Monitors more than 5,000 daily newspapers, international newspapers, magazines, business publications, trade publications, and wire services. You provide Luce with your search terms, and they provide matches. Cost: \$245 per month for a single user for full text and abstract delivery by email. \$3 each for clips. CyberClipping Service Monitors more than 4,000 Web-based publications. Cost: \$320 per month for each service you select. There is a limit of three search terms.
eWatch	Phone: 800-776-0942 Email: ewatchsales@prnewswire.com Web address: www.ewatch.com	Owned by PR Newswire. Tracks what is being said in more than 4,000 Internet publications about your organization, competitors, or industry. Various types of service are available, for example: - Web Pubs monitors thousands of news sites - WebWatch alerts you to changes on sites you specify - Investor Message Boards monitors discussion about your company on the top sites for financial commentary - Newsgroups monitors public opinion in online discussions - Online Service Forums scans public discussion areas of the major Internet service providers Cost: \$3,600 per year for ten users in your organization.

Note: Pricing subject to change without notice.

Approved Copy for Public Relations Activities

On the next couple of pages, you'll find approved copy you can use in any public relations material. When you use it, you still have to follow the general business and legal guidelines in chapter 7, and the press release guidelines in "General Public Relations Language and Style Guidelines" (page 31) and "Press Release and Media Relations Information and Guidelines" (page 33) (if they apply).

Please don't use the text in this section for general marketing activities, advertising, or other promotional purposes. For that kind of copy, take a look at "Approved Copy for Marketing" (page 19).

Approved Copy for the Intuit Developer Network

Launched in February of 2001, the Intuit Developer Network helps developers deliver the solutions that small businesses are asking for, including industry-specific solutions, by allowing developers to create applications that integrate with Intuit's core products. Intuit allows developers to have access to the application programming interfaces (APIs) for QuickBooks, a suite of applications designed to simplify small business accounting needs, and QuickBase, the company's web shareable database service. Providing small businesses with industry-specific solutions that meet the specialized requirements of vertical segments is part of Intuit's "Right For My Business" strategy to address the \$17 billion small business market.

Approved Intuit, QuickBooks, and Intuit Developer Network Key Messages

For public relations-related communications about Intuit, the QuickBooks 2003 products and the Intuit Developer Network, please use the following:

- Intuit is proud of its heritage in providing technology solutions that are drop-dead simple. We understand that small businesses need solutions that are not only easy to use, but also integrate with other applications and can be tailored to meet the specific needs of their own businesses and vertical markets.
- The Intuit Developer Network makes it possible for millions of small business customers to access a wide variety of third-party applications that work with their existing Intuit financial software.
- The Intuit Developer Network provides valuable marketing and distribution channels to developers, such as the QuickBooks Solutions Marketplace.

Facts about QuickBooks Premier 2003

QuickBooks Premier 2003 is a desktop financial management solution that meets the needs of more complex small businesses with up to 20 employees by providing flexibility and advanced accounting functionality. QuickBooks Premier 2003 has the same core features and enhancements found in QuickBooks Pro 2003, and the key new features listed below.

New & Enhanced Features:

Look More Professional:

- **More Than 100 Professional Form Design Templates** help small businesses look more professional without having to purchase expensive stationery by allowing users to choose from industry- and business-specific forms, such as sales order, invoice and estimate statements.
- **More Form Customization Options** enable users to easily and more quickly modify forms they create to present a high-quality, highly-customized image. Small businesses can create invoices, customer statements, and more with new options, such as shaded boxes, multiple text comments and multiple fields, rounded corners and logos or images, which make them look like they were professionally printed.
- **More Printing Form Options** allow users to save their print settings on a form-by-form basis.

Planning & Analysis:

- **Easy To Use Business Plans** allow users to create a written plan with full color charts from automatically generated three-year pro forma financials in a format recommended by the U.S. Small Business Administration for loan applications or a bank line of credit.
- **Automatically Create a Budget** with one click by populating the budget from the actual income and expense data in QuickBooks. An additional P&L Budget Performance report shows users a snapshot of the current month and year-to-date versus the corresponding actual numbers. New spreadsheet format makes it easy to review and edit.
- **Easier Budgeting** means an easier-to-use interface that allows users to quickly see the big picture of their budgets.
- **Create an Annual Forecast** of expected income and expenses based on actual QuickBooks data. Easily adjust forecast numbers by applying a percentage increase or decrease to a line item and later compare the forecast to the actual results in order to better plan for the future.
- **Better Analysis** through a feature that allows small businesses to identify important performance trends for their business over time and to check how

their business is doing vs. other businesses in their industry. Current data is available for more than 130 different industries. An easily-generated expert analysis report includes both written explanations and numerical charts and data.*

Note: Recommended use by 12/31/03. Recommendations may not take into account all critical factors of specific businesses.

Solutions to Run Business Essentials All in One Place:

- **Track Inventory Assemblies** with more accuracy. Now users can track both individual inventory items and combined inventory assemblies (finished goods), and save time by being able to create customized assemblies in QuickBooks rather than track them manually. Users can set rebuild points to remind them when to build new assemblies.
- **Ability to Track Sales Orders** helps users more accurately track their inventory and customer orders without affecting accounts receivable. Also provides a great way to partially invoice and track back orders when a customer orders something and it is out of stock.
- **Integrated Shipping** allows users from within QuickBooks to create and print FedEx® shipping labels, receive information about the nearest drop-off location, schedule a pickup, track and cancel packages, and ship at discounted rates.*
- **Advanced Backup Options** allow users to automatically backup data when exiting QuickBooks or conveniently schedule backups either locally or online. Additionally, data verification is now part of the backup process, allowing users to double-check the integrity of their data file before the backup.*
- **Easier to Use Help Feature** is now conveniently available in many more places throughout the product, making it easier to get answers to more questions right away. Instead of browsing through help files, users can simply type in a question in their own words for answers to detailed help, tips and troubleshooting information.

Facts about QuickBooks Premier 2003: Accountant Edition

Intuit's QuickBooks® Premier: Accountant Edition 2003 creates a great opportunity for accountants to win with their clients. It is designed with advanced accounting functionality to help them better serve their clients and manage their own businesses. With remote access*, new multiple journal entry view, new condensed reports, new reports and enhanced closing procedures, QuickBooks Premier: Accountant Edition 2003 offers accountants the tools they need to more efficiently manage their clients' QuickBooks 2003 files. QuickBooks Premier: Accountant Edition 2003 is a fully-integrated solution that is fast and easy to use,

allowing accountants to better service their clients by saving them time on core accounting tasks.

Remote Access, Enhanced Reporting

QuickBooks Premier: Accountant Edition 2003 includes all of the new features and enhancements that small business owners will find in QuickBooks® Basic, Pro, and Premier 2003 editions, as well as unique finance features designed especially for accountants. These accountant-specific features and enhancements include:

- **Remote Access** offers the flexibility to work on clients' files from office or home via the Internet, without the hassle of exchanging disks or driving to clients' offices.*
- **New Multiple Journal Entry View** provides a split view so accountants can scan and edit journal entries without leaving the screen.
- **New Condensed Reports** allow accountants to combine details from each individual transaction into a one-line transaction summary for an easy view.
- **Reports Designed for Accountants** save time by displaying Debit and Credit columns rather than simply showing the Amount column. The Income Tax Preparation Form also gathers the information needed to create clients' tax reports.
- **Accountant Navigator** gives accountants one-click access to the features they use most.

Key Product Enhancements

- **Enhanced Class Tracking** allows accountants to quickly find discrepancies in their clients' files and help ensure more accurate tracking of bills and invoices.
- **Advanced Inventory Features** help manage client inventory more efficiently and increase the accuracy of clients' financial data.
- **Expert Analysis Tool** helps accountants analyze their clients' business performance with an easy-to-understand written assessment of a client's financial performance, as well as showing how clients are performing compared to others in the industry.**
- **Enhanced Closing Procedures** allow accountants to more effectively close periods in their clients' QuickBooks files by setting a date and tracking changes with a closing date-specific password.
- **Helps Clients Create Business Plans** by easily building pro-forma financials using clients' historical QuickBooks data
- **Creates a Budget** faster and easier and generates reports to compare clients' actual income and expenses to their budget

- **Integrates with more than 140 Third-Party Business and Industry-Specific Applications**, reducing and/or eliminating the need to duplicate data entry into numerous software applications. For more details, visit <http://marketplace.inuit.com>.
- **Better Integration with ProSeries** makes it easier for accountants to transfer their clients' ending balances to the appropriate tax lines in ProSeries Professional Tax Software (sold separately).

Facts about QuickBooks Premier 2003: Contractor Edition

QuickBooks Premier: Contractor Edition 2003 is the first QuickBooks product custom built for contractors with up to 20 employees. Currently there are 350,000 contractors that rely on QuickBooks to manage their finances.* Contractor Edition 2003 contains all of the features found in QuickBooks Financial Software, with the added functionality contractors need to manage their business more effectively and better serve their clients.

Contractor-specific features include improved job costing, faster and more accurate job estimates, and specialized reports that help contractors stay on top of their business. Customized help and templates also help contractors eliminate costly errors, which are often caused by improper setup of their business' finances. These and many more features can quickly be found using the new, streamlined contractor Navigation tool and Menu. Both walk users step-by-step through common tasks such as estimating, purchasing, payroll process and invoicing.

New Job Costing and Contractor-Specific Reports; Enhanced Estimate Tracking

- **Improved Job Costing:** Contractor Edition 2003 offers five new job-costing reports, each designed to help contractors better track and bill expenses, as well as evaluate the profitability of a job. The reports can show where every dollar is spent or quickly summarize all material and subcontractor expenses. In addition, contractors can use the reports to quickly search and find unassigned expenses and bill them to the appropriate job.
- **Create More Accurate and Complete Estimates:** Creating, changing and tracking estimates are critical parts of managing a successful and profitable job. Contractor Edition 2003 makes this process easier by allowing users to quickly create and add change orders to estimates. Users can also create multiple job estimates per job and duplicate estimates to help save time. This functionality helps eliminate any surprises or disputes by ensuring that the entire billing process is tracked completely and accurately.
- **Contractor-Specific Reports:** Contractor Edition 2003 features nine fully customizable reports that were designed by contractors for contractors. These

reports include an overall job status report; a report to track open purchase orders; and a report to track and monitor billable time for any particular job.

Faster & Easier For Contractors

- **Customized Templates:** Easy-to-use templates and contractor-specific sample files within Contractor Edition 2003 help users get up and running quickly. The templates and sample files also help ensure that users set up their books correctly the very first time.
- **Customized Help:** Help functionality within Contractor Edition 2003 has been custom tailored to address the most common contractor questions and problems. Topics cover a wide variety of topics, ranging from general accounting issues to contractor-specific items like job costing and estimating. The tips and information contained within the help section were drafted by Karen Mitchell, a financial consultant to contractors for over 15 years and author of QuickBooks for Contractors.
- **Contractor Navigator and Menu:** The Navigator and Menu features have been designed to give contractors one-click access to the activities and reports they use most. Common activities performed by contractors, such as creating estimates, are graphically displayed showing the entire workflow process from start to finish.

Facts about QuickBooks Enterprise Solutions 2.0

QuickBooks Enterprise Solutions Business Management Software (<http://www.quickbooks.com/qbes>) is a comprehensive business management solution designed to meet the unique needs of growing small businesses with 20-250 employees. Today, there are more than 250,000 QuickBooks customers who are outgrowing QuickBooks and, as a result, are stretching the limits of the software. These growing businesses have more complex needs than those with fewer employees—including more complex finances, more customers and multiple locations. They often rely on more than one application to run their business. And, their daily workflow involves multiple people and functions. QuickBooks Enterprise Solutions addresses these complex needs by providing:

- Increased capacity
- More simultaneous users than QuickBooks Premier/Pro/Basic 2003
- Improved performance of finance and company reports
- Added employee management capabilities, such as HR and payroll
- Integration with other business applications

Product Details

QuickBooks Enterprise Solutions v 2.0 has the same core features and enhancements found in QuickBooks Premier 2003, plus these key features:

- **Up to 10 Users with Simultaneous Access:** Allowing up to 10 users simultaneous access to QuickBooks Enterprise Solutions helps to increase productivity and streamline workflow, so that all users can complete their tasks
- **Increased Capacity to Support Growth:** QuickBooks Enterprise Solutions allows customers to record up to 29,000 customer, vendor, and employee names and track up to 29,000 inventory, non-inventory, and service items—nearly double the capacity of any other QuickBooks financial software product.
- **Improved Simultaneous User Performance:** Run reports or search for transactions with fewer conflicts between multiple users
- **Faster Generation of Standard Balance Sheet Reports:** As a business grows, its QuickBooks file likely becomes larger. Now these businesses can save time by running standard balance sheet reports faster.
- **New Solution to Better Manage Employees:** The QuickBooks Employee Organizer organizes critical employee information—including emergency contact records and salary details—all in one place. The Employee Organizer also provides HR compliance information and updates to help employers stay in compliance with state and federal employment laws and regulations. Updates included free for one year.*
- **Greater Insight with Enhanced Reporting Options:** Automatically combine different financial reports from multiple company files to get a complete picture of your business. (Microsoft Excel required.)
- **Compatible with More Vertical Industry Software:** QuickBooks Enterprise Solutions integrates with more than 140 third-party applications. These vertical and business applications are available for purchase at the QuickBooks Solutions Marketplace (<http://www.marketplace.intuit.com/>).
- **More Accuracy with Inventory Management Tools:** Easily track sales orders, as well as individual inventory items and "assemblies."
- **Seamless Migration, Ease of Use, and Familiarity:** QuickBooks Enterprise Solutions has been created as an easy next step for larger QuickBooks customers, featuring the same ease of use and familiar forms and processes of QuickBooks.

*Internet access required for compliance updates. Fees may apply after one year.

Facts about QuickBooks Online Edition

QuickBooks® Online Edition (<http://www.quickbooks.com/products/web/>) is the fast, easy way to manage small businesses finances, with all the freedom and convenience of the Internet. It offers small businesses the flexibility to manage their finances whenever and wherever they want. The office manager at work, partners on the road, employees working from home, and accountants at their own office all can be set up to securely log in and use the software at the same time. Small businesses can get more control by having all of their financial information organized in one place. And getting started is easy. There's nothing to install—a 10-minute startup interview customizes the program for each business. Getting started is just a click away.

Fast and Easy to Set Up and Use

- **Fast to Get Started**—Simply type the URL to try or start using the product. Features a 30-day free trial and low monthly payments, starting at \$19.95.
- **Easy to Get Started**—Set-up and tailor QuickBooks Online Edition to meet your specific needs by answering a few simple questions. Use only the features you need—and "turn off" those you don't.
- **Easily Convert Data from QuickBooks**—Easily convert data from other versions of QuickBooks Financial Software.*
- **Easy to Use**—Features the same ease of use and familiar forms and processes of the QuickBooks desktop products.

Convenient and Simple Accounting Solution

- **Bill Customers When You Want, How You Want**—Create, print, and email customizable invoices and statements. Schedule recurring charges and automate billing.**
- **Easily Pay Bills**—Manage and pay your bills using the easy bill pay feature. Track check, cash, and credit card purchases.
- **Gain More Control of Business Finances**—Gain more control of your business finances by creating and tracking budgets.** Gain more insight by viewing the more than 65 customizable reports wherever you are, and see the "numbers behind the numbers" with the QuickZoom® report data feature.
- **No Need for Duplicate Data Entry**—QuickBooks Online Edition remembers your entries, so you only need to enter data once. It also integrates data with third-party applications, developed through the Intuit Developer Network.
- **Track Employee Time**—Easily track time and bill customers for that time.**

All the Freedom & Convenience of the Internet

- **Access Anytime, Anywhere**—The Online Edition works just like your other software, but instead of installing it on your computer, your colleagues and you can access it from any high-speed Internet connection. And because there is no program to install, you can work when you want, where you want.
- **Multiple, Simultaneous Users**—Different permission levels that can be granted to various users and multiple users can log in and use the Online Edition at the same time; there's no copying of files or synching of data necessary.
- **No Installation, Upgrade, or IT Hassles**—No installation, upgrading and managing multiple versions—upgrades happen automatically and are included in the subscription fee, along with technical support.*** No servers to buy, no IT expertise needed.
- **Automatically Back-Up Data**—QuickBooks Online Edition is backed up automatically every night, helping small businesses avoid worrying about losing critical business data. QuickBooks Online protects your data using the same technology used by banks: a password-protected secure log in, 128-bit Secure Sockets Layer encryption technology (SSL), and firewall-protected servers.

*For QuickBooks versions QuickBooks 2001 and later.

**Additional fees apply for Plus Package features.

***Service consultants are available business days, 8 a.m. to 4 p.m. PT, and will otherwise usually respond by 9 a.m., the next business day.

Terms, conditions, pricing, features and service options subject to change without notice.

Creating Case Studies About Your Customers

We're very interested in case studies about your customers. If you can provide information that shows how small businesses are successfully using your QuickBooks-integrated application, we'll consider using these case studies for various purposes, including:

- Public relations efforts promoting the Intuit Developer Network program and QuickBooks products
- Content on the QuickBooks Solutions Marketplace
- Email newsletters, including the Intuit Developer Network and Pro Advisor newsletters

A case study is an excellent opportunity to showcase your application. Contact us if you're interested in participating: **idnpres@intuit.com**.

Why Write a Customer Case Study?

Customer case studies are a great tool for getting reporters to write about your product. The third-party endorsement of an actual user carries more credibility than the word of a company employee. In addition, customer case studies paint a clearer picture of how your product is used in everyday situations.

Customer case studies can also be repurposed as marketing collateral for your sales team, or they can be posted on your company's web site, providing compelling content for site visitors.

Creating a Case Study: Tips

Start with the Basics

Gather:

- **Contact information.** You'll want to keep track of your interviewees' contact information so you can reach them with follow-up questions and review copies of the case study. Be sure to collect:
 - Name
 - Title
 - Email address
 - Phone number
 - Fax number
- **Company information.** You may be able to get most of this information from your customer's web site.
- **Reference contact.** Ask your interviewees if their company will serve as a reference for reporters. (If not, consider finding another subject. Since the purpose of the case study is to use it for media relations, the customer's willingness and availability to talk with media is essential.)
- **Graphics.** Reporters are often interested in graphics, such as a company logo or a picture (for example, of the business or employees). One of these graphics could also be featured at the top of the case study. Encourage your contact to submit these things, if applicable.

About Your Customer

Write an introductory section giving a description of your customer's business (no more than two paragraphs long). We suggest you collect all the information listed

below, even if it doesn't fit into the introduction. You may be able to use it other places in the case study.

- Company name
- Division (if applicable)
- Street address
- City/State/Country/Zip code
- Web address
- Number of offices and their locations
- Number of employees
- How long the company has been in business
- What type of customers they serve
- Type of business (what they do and how they do it)
- Position in the industry (optional)
- Competitors (optional)

Business Challenge

This section should describe the problem your customer needs to solve. It should “set up” the following section, which tells how the customer uses your product and QuickBooks to solve the problem. Examples:

- High administrative costs due to time needed for double data entry
- Clerical errors caused by entering data twice
- Geographically-dispersed staff
- Dramatic slip in quality of customer service due to lack of time spent focusing on customers vs. time spent on administrative tasks and accounting

Getting the Information

To get the information you'll need to write this section, ask your contact the following kinds of questions:

- What was the business problem you needed to solve?
- How critical was solving the problem to your business? (Can you quantify in terms of time and money?)
- How were you addressing this problem prior to using [Your Product] with QuickBooks? If you were using another application, please mention specific products/versions/year.

- How was this solution failing to address your business needs? (Can you quantify in terms of time and money?)
- What finally prompted you to make a change?
- Were you a QuickBooks user prior to implementing your current solution? If yes, how long have you been using QuickBooks and which version are you using?
- Do you have an accountant on staff or do you use an outside accountant? How long have you been working with your accountant?
- Before installing both [Your Product] and QuickBooks 2003, how much time would you say you spent on double data entry?

Solution: Your Product

List the choices your customers had for solving their problems and why they chose to your product and QuickBooks. Include the pros and cons of each possible choice and how they made a decision.

Some reasons why a customer might choose your application and QuickBooks include:

- History and reputation of your company
- Known for customer service
- Great software features
- Recommended by company accountant
- Only solution that integrates with QuickBooks

Getting the Information

Ask your contact the following kinds of questions:

- What were your options for solving your problem?
- What kind of software were you thinking about purchasing?
- Why did you choose [Your Product]? Why was it better than the alternatives? Please be specific.
- If you hadn't used QuickBooks prior to this time, why did you choose QuickBooks? Which version did you choose and why?
- How did you find out about [Your Product]?
- How did you find out about QuickBooks?
- When and how did you learn that QuickBooks 2002 products and [Your Product] could be set up to exchange data?

- Have you used other products from our company? Have you used any other Intuit products or services?
- What elements were included in your selection criteria?
- How long did it take you to install and learn QuickBooks?
- How long did it take you to set up [Your Product]?
- How long did it take you to learn how to share data between the two products?
- Have you needed to consult the [Your Product] support team? How helpful were they?
- How easy was it for you to learn to use this solution?

Results: The Bottom Line

The closing section of your case study should describe your customer's successes that are a direct result of using your application in conjunction with QuickBooks. Examples:

- Business increased by x% since installing both QuickBooks and [Your Product]
- Company has reported x% increase in sales since using your software combined with QuickBooks
- Reporting errors have decreased by x% in the last year
- Company has reduced administrative overhead by x% since installing both QuickBooks and [Your Product]
- Productivity has increased by x% since establishing the data integration between QuickBooks and [Your Product]

Getting the Information

Ask your contact the following kinds of questions:

- What are some examples of how [Your Product] helped to solve your business challenge?
- What kind of savings has the QuickBooks/[Your Product] software solution provided? (Can you quantify in terms of time and money?)
- What can you do now that you couldn't do before?
- Have you achieved any particular milestones in your business due to the fact that QuickBooks 2003 and [Your Product] now share data (for example, company passed the million dollar mark in sales)?

Creating and Using Product Demos

Product demos that showcase the integration of QuickBooks 2003 and your application are excellent sales tools and an easy way to explain your solution to the press, analysts, and customers.

You can use the Intuit-produced QuickBooks Automated Tour to demonstrate how QuickBooks works. Depending on how you want to use it, you can link to it or download the file. You can also create a custom demo that shows how your application works with QuickBooks.

QuickBooks Automated Tours

The QuickBooks Automated Tours are self-running demos that can help people understand the QuickBooks products. Consider using one along with your own product demo for your public relations activities.

You can use the QuickBooks Automated Tours either on your company web site, by linking to one of them, or you can downloading the files to include on your trial CD and run at tradeshow. Both the links and the downloadable files are available in the Marketing Tools section of the developer web site.

Note: You'll need to have Macromedia Flash installed to use the QuickBooks Tours.

Guidelines for Creating Custom Demos

The target audience for your demo could be one more of the following:

- Members of the press
- Marketing and industry analysts
- Your customers or potential customers

Content

If you're going to be distributing demo CDs for your target audience to look at on their own, consider using self-running demos. They're more stable than live demos and are easier for people to learn. A product that creates self-running demos is HyperCam, from HyperIonics. It allows for both sound and annotations. For more information, see <http://www.hyperionics.com>.

Note: This information is provided as a general reference. Intuit does not endorse or guarantee the performance of this service. Contact information and costs may have changed since this document was published.

If you're going to be in a sales or presentation situation, you'll probably need a live demo. For this type of demo, the presenter should be experienced at working with a live audience and able to correct technical difficulties "on the fly."

In general, product demos should be structured to last no more than 2.5 to 3 minutes. A demo of that length will not bore your audience and, for live demos, allow your audience time to ask questions.

Be sure to show the most compelling application benefits, and how the application integrates with QuickBooks.

Presentation

When creating and delivering your presentation, keep your audience's interest in mind. Tell them what they want to hear, and try to tailor your presentation to each different audience. Your goal should always be to convince your audience that small business owners will benefit from your product, whether you're talking to reporters or small business owners.

Planning and Preparation

- Focus on your application's top three or four benefits.
- Ask yourself:
 - What problems customers have that your product can help to solve
 - How you can describe these problems and solutions so press people can relate to them
 - What is relevant to the daily life of a reporter's audience
- For live demos, try to be completely prepared well ahead of the actual demo date.

Developing the Demo Presentation

- Lead with the most compelling part of your demo. First impressions are lasting impressions.
- Use real company names and statistics to prove your points. For example, if speed is key, don't just say it's faster, show that it's five times faster.
- Use real user stories that bring your application's benefits to life. Mention these anecdotes during your demo and use them as examples for answering questions. (For more information about creating and using case studies, see "Creating Case Studies About Your Customers" (page 51)).
- Design the demo in "benefit-based" modules. Following these four steps, each module should be self-contained and convincing:
 - Give the benefit or concept ("See how easy 'the benefit' is ...").

- Set up the situation (“Let’s say you want to ...”).
- Begin the demo (“Here’s what you would do ...”).
- Conclude by repeating the benefit or concept (“So you can see how easy ‘the benefit’ is ...”).
- Set up a situation or example at the beginning of your demo and reference it throughout, giving your audience a scenario they can relate to.
- Familiarity drives 80% of what makes something “easy.” Since the audience may not be familiar with what you’re showing, it won’t look easy to them. Following these visual tricks can help make your points seem easier:
 - Pick a screen that is your “home base” and start each module from there. That will establish familiarity and a sense of ease.
 - Minimize context changes because it hurts the familiarity you’ve created.
 - Simplify the screen area being shown. If the screen is hard to read, it looks difficult to use.

Delivering the Demo

- Demo one concept at a time.
- Incorporate your top three messages throughout the demo by making your focus clear at the beginning, and then refer to that focus throughout the demo and at the end.
- If you are doing a live demo, your enthusiasm speaks volumes. Use an anecdote about your application to engage the interviewer and leave a lasting impression. Also, make sure to scroll through screens using the “scroll bar” feature, not the “page up/down,” “home,” or “end” features, which can be disorienting for viewers.

CHAPTER 5

QUICKBOOKS SOLUTIONS MARKETPLACE

The QuickBooks Solutions Marketplace is a searchable web site that showcases applications built with the QuickBooks SDK. In 2002, the Marketplace averaged more than 100 thousand visitors every month.

This chapter explains why the Marketplace is such a valuable marketing tool, and offers tips on writing an effective application description for your product and submitting your application to be listed.

While you're reading this chapter, you'll want to be able to reference the web site. Open an Internet browser window, and go to <http://marketplace.intuit.com>.

QuickBooks Solutions Marketplace Overview

QuickBooks customers (and potential customers) can find QuickBooks-integrated applications for their small businesses on the QuickBooks Solutions Marketplace. Intuit helps drive qualified visitors to the web site, but keep in mind that the Marketplace itself only provides information. Responsibility for billing, fulfillment, and support of your QuickBooks-integrated applications lies with your company.

Also, the Marketplace only lists applications built with the QuickBooks SDK.

Site Organization

Take a look at the home page of the QuickBooks Solutions Marketplace. It lists applications by vertical industry categories like Construction, Legal, and Retail, and by horizontal categories like time management, contact management, and project management. Your application can appear in two categories: one vertical, one horizontal.

When users click on a category, they go to a page that lists the applications in that category. Clicking an application name or the "more" link following the short description gives users a more complete description of a particular application.

Users who want more information or to buy can click from the Marketplace directly to your web site.

Promotion of the QuickBooks Solutions Marketplace

Intuit promotes the Marketplace as the best place to find QuickBooks-integrated applications to QuickBooks customers and potential customers both.

For current customers, we promote the Marketplace:

- On QuickBooks installation billboards
- In menu items and messages
- Through a desktop icon

When users click on any of these links, QuickBooks launches promotional pages in Microsoft Internet Explorer that link to the Marketplace.

For potential customers, we promote the Marketplace:

- On www.quickbooks.com
- On www.intuitadvisor.com/products_services
- In the QuickBooks 2003 Trial (a free trial version)
- In ProAdvisor newsletters (QuickBooks ProAdvisors are financial consultants who advise small businesses, and could easily recommend a product like yours.)

Note: Promotion of the QuickBooks Solutions Marketplace may change over time.

Writing an Application Description

The description of your QuickBooks-integrated application that appears in the Marketplace is your main opportunity to sell your product. Customers skim through the descriptions as they search for the product that will best meet their business needs. Your copy should give the most compelling benefits of your product, and tell why small business owners why they should buy from you and not your competitors.

Application descriptions in the Marketplace are divided into two layers. The first layer is the “short description,” which is the first 50 words of the “long description,” and is displayed within a list on a category page alongside descriptions of other applications. Your potential customers see this when they choose a category from the main site organization. Be sure to put your most

compelling benefits and quickly describe how your product integrates at the top of this description.

Potential customers see the second layer, or “long description,” if they choose to read more about your application after they see the short description. This full description should provide customers with further details about key benefits and features.

Identifying Benefits

The benefits of your application are the problems that it helps solve. Small business owners aren't necessarily interested in all the details of how your product works. They're interested in how it will help them save time and money. Talk about exactly what information your product exchanges with QuickBooks as proof of how it will help them save time and money.

Include answers to the following questions in the description of your application:

- What typical problems do your customers have that can be solved by using your product?
- How does your product solve these problems?
- How does your product save time, money, or both?
- What types of companies use your product?
- Who in your customer companies (by job title or position description) uses your product?
- Why is your product better than competing products?
- Exactly what information does your application exchange with QuickBooks, and what does a user have to do to make that happen?

Tips on Writing a Good Description

- Communicate the top three or four benefits of your product in a way small business owners will understand. Leave out the technical stuff.
- Successful sales writing isn't about your company. It's about what your customers need.
- Show potential customers that you understand the problem you say your application will solve.
- Be clear, but brief.

- Find your product's unique benefits. All of the applications in the Marketplace exchange data with QuickBooks, so "double-data entry elimination" won't set your application apart.
- Be wary of factual claims or assertions. If your description contains any (for example, "Application A will cut your data input time by 30%!"), take into consideration that the Federal Trade Commission requires that you have reasonable substantiation for all such claims.
- Avoid typos by writing your description in a word processing program first. That way, you can spell check.
- Type your description in plain text (for example, don't apply bold or italic formatting).

Examples of Application Descriptions

We wrote up a couple of sample application descriptions for two fictitious companies.

Acme Construction Helper

Application Name

Acme Construction Helper

Application Description

Manage your construction projects from beginning to end with Acme Construction Helper. It's the complete construction management software for warehouse and industrial construction companies. Only Construction Helper, a robust, end-to-end project management software, eliminates all the paperwork and invoicing hassles created by the constant changes of large-scale construction. Now integrated with QuickBooks Pro and Premier editions 2002 and 2003, QuickBooks Enterprise Solutions 2.0, QuickBooks Online Edition, and Canadian editions of QuickBooks 2003. Construction Helper saves you even more time by exchanging vendor, employee, payroll, and many more types of data!

Target Users

Acme Construction Helper was created for project and accounting managers in construction companies who build warehouses and industrial complexes.

Key Benefits

- The only construction management software that manages projects from beginning to end

- By exchanging data with QuickBooks, Acme Construction Helper keeps all your records up to date with the click of a button.
- Handles constant changes with ease, and applies new data to your entire project file, so you don't have to

Key Features

- A sophisticated set-up wizard that easily creates a new construction management project or converts project data from other construction management software
- Daily, weekly, and monthly status indicators that can also easily be expanded into detailed, comprehensive reports
- Mobile Helper that allows critical project data to be downloaded into hand-held PDAs or other mobile equipment for on-site project management

Integration Details

Construction Helper integrates with QuickBooks by tracking project costs from initial to final payment, automatically updating account information, assessing profitability of accounts and projects, and much more!

Cambridge Contact Manager

Application Name

Cambridge Contact Manager 2003 For Use With QuickBooks® 2003

Application Description

Cambridge Contact Manager (CCM) is an award-winning contact manager used by millions of people, and is one of the best-selling contact managers on the market. It is easy to use, quick to set up, and now provides integration with QuickBooks 2003 to allow users to view invoices, purchase orders, payments, and account history, all within CCM. Additionally, Cambridge Contact Manager's contact information can be viewed in QuickBooks.

CCM is superior to other contact management software because it provides complete control over the sales process.

Target Users

Companies who manage sales contacts and need to integrate the information in contact management software with QuickBooks.

Integration Description

Cambridge Contact Manager integrates with QuickBooks Pro and Premier editions 2002 and 2003, QuickBooks Enterprise Solutions 2.0, QuickBooks

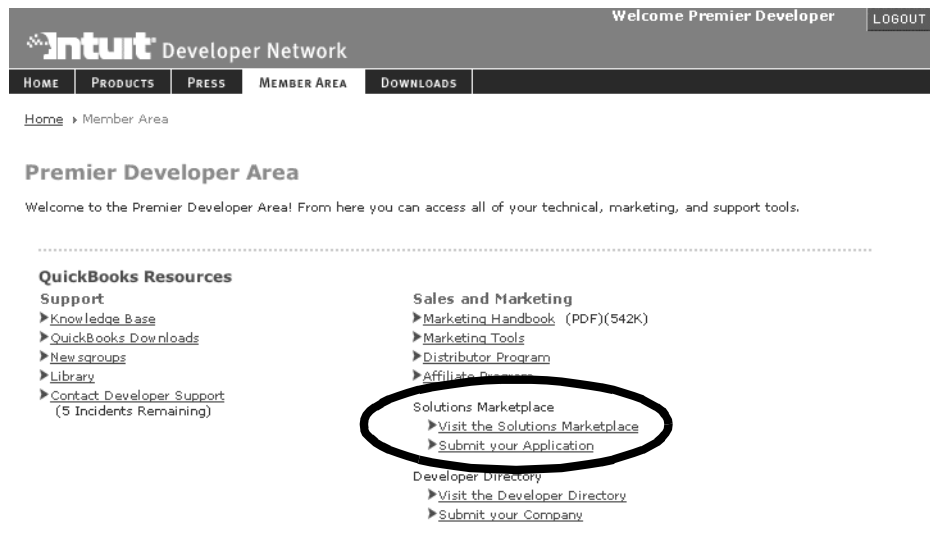
Online Edition, and Canadian editions of QuickBooks 2003. By establishing a unique identifier shared between a given CCM contact and a QuickBooks record, contact details are instantly integrated into QuickBooks for invoicing or other kinds of accounting activities.

Product Features

- Instantly imports CCM contacts to QuickBooks
- Instantly imports QuickBooks contacts to CCM
- You can view QuickBooks account activity for each contact within CCM
- You can generate invoices in QuickBooks directly from within CCM

Submit Your Application to the Marketplace

Once you've written your application description, you're ready to submit it to the QuickBooks Solutions Marketplace. Start at the Member area of the developer web site, at (<http://developer.intuit.com>).



1. Choose the Submit your Application link beneath the Marketplace heading in Sales and Marketing section.
2. Fill in the required information, which includes:
 - Company and contact information
 - Application description (see “Writing an Application Description” (page 60)) and category

- Minimum system requirements to run the application
- Exactly which versions of QuickBooks your product integrates with
- Application price and sales information
- The web address where people can buy your application, or a sales contact telephone number
- Technical support information

3. Click Submit.

If you need help as you fill in the form, click one of the Help links. Once the application is approved, its description is listed in the QuickBooks Solutions Marketplace.

Note: Intuit reviews application submission forms as soon as possible. If there's a problem with any of the information you submit, you'll receive an email explaining what the problem is. You can then correct the form and resubmit.

Avoiding Rework or Rejection

Here's a list of common reasons why applications are rejected, or delayed because of an edit request.

- **Integration:** The application was integrated with QuickBooks using IIF. The Solutions Marketplace does not accept applications that use IIF in any way.
- **Name:** One company names its application "QB Widget" and another company named its "QuickPay." These names violate the naming guidelines in "Naming QuickBooks-Integrated Applications" (page 27).
- **Incomplete product:** A company's submission form could be filled out correctly, but its application wasn't ready for sale. You can only submit finished products.
- **Target audience:** One application was a game targeted for users under the age of 18. Intuit doesn't accept applications targeted to that age group.
- **Missing "buy" information:** A company's submission form contained invalid web addresses. Intuit rejects submissions that don't contain enough information for customers to purchase the product or that don't link directly to a "buy" page.
- **Incomplete or truncated description:** One company's description exceeded the character limit on the form and was truncated. Intuit doesn't post incomplete descriptions.

CHAPTER 6

QUICKBOOKS SOLUTIONS GUIDE

The *QuickBooks Solutions Guide* is a direct mail catalog of products from Intuit Developer Network Premier members like you, sent to QuickBooks customers and QuickBooks ProAdvisors.

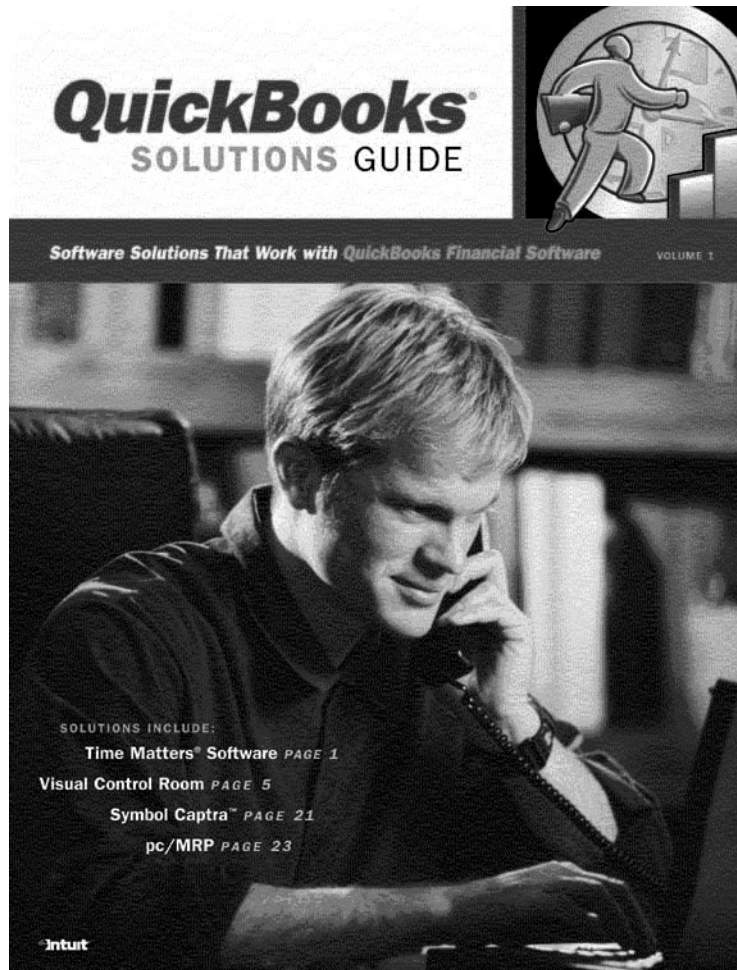
Overview

Intuit's own research shows that QuickBooks customers want to know about integrated applications that will help them get business results faster, better, and at a lower cost.

Published twice a year, the full-size, four-color catalog will help you market your products—directly and repeatedly—to selected QuickBooks customers. Plus, we'll also send special editions of the catalog to over 20,000 highly influential QuickBooks ProAdvisor members, financial consultants who advise small businesses, and could easily recommend a product like yours.

Only Premier members can advertise in the *QuickBooks Solutions Guide*, and there are a number of advertising options available to fit your needs and budget.

Be sure to take a look at the *QuickBooks Solutions Guide* that we included in your membership kit.



Advertising Options

Solution Profile™ Ads

Solution Profile Ads include a headline, body copy, four-color graphic and optional caption, call-out box to highlight a special feature or promotional offer or second graphic (not available for 1/4-page ads), your application or company logo, plus phone and web address.

Display Advertising

Available in both premium and run-of-book positions, display ads provide maximum exposure and flexibility.

QuickBooks Solutions Matrix

This matrix-style locator lists companies by product category and includes company name, phone number and web address, plus a reference to the ad page (if applicable). One Solutions Matrix listing is included free with each Solution Profile or display ad.

For More Information

Learn more about the *QuickBooks Solutions Guide* on the developer web site, in the Member Area, under the Sales and Marketing heading.

CHAPTER 7

GENERAL BUSINESS AND LEGAL GUIDELINES

This chapter provides general business and legal guidelines on referencing both Intuit and QuickBooks, and target market restrictions for QuickBooks-integrated applications.

Following these guidelines as you market QuickBooks-integrated applications is a contractual requirement of membership in the Intuit Developer Network.

Referencing Intuit and QuickBooks

Here are the legal guidelines that describe how you can use Intuit's trademarks and service marks, and how you can refer to your relationship with Intuit as a third-party developer.

Using, Referencing, and Protecting Intuit Trademarks and Service Marks

Use the names and legal symbols listed below when referencing Intuit product and service names. Be sure to use the ® symbol the first time you mention Intuit products in any document. For the remainder of the document, you can use the name without the corresponding symbol.

- Intuit® Inc. (note that there is no comma between "Intuit" and "Inc.")
- INTU (NASDAQ symbol for Intuit Inc.)
- Intuit® Developer Network
- QuickBooks®
- QuickBooks® 2003

When referencing the specific products, please use the following names the first time you mention them in a document. (Shortened names can be used in the remainder of the document.)

- QuickBooks® Financial Software Pro Edition 2003

- QuickBooks® Financial Software Premier Edition 2003
- QuickBooks® Financial Software Premier: Accountant Edition 2003
- QuickBooks® Financial Software Premier: Contractor Edition 2003
- QuickBooks® Enterprise Solutions Business Management Software 2.0
- QuickBooks® Online Edition
- QuickBooks® Financial Software Pro Edition 2003, Canadian edition
- QuickBooks® Financial Software Premier Edition 2003, Canadian edition
- QuickBooks® Financial Software Premier: Accountant Edition 2003, Canadian edition

Shortened names, for use after the first reference to the product:

- QuickBooks Pro Edition 2003
- QuickBooks Premier Edition 2003
- QuickBooks Premier: Accountant Edition 2003
- QuickBooks Premier: Contractor Edition 2003
- QuickBooks Enterprise Solutions 2.0
- QuickBooks Pro Edition 2003, Canadian edition
- QuickBooks Premier Edition 2003, Canadian edition
- QuickBooks Premier: Accountant Edition 2003, Canadian edition

Don't use Intuit trademarks or service marks on other products, services, or trade names. Don't mention such trademarks or service marks in any way that implies any formal endorsement or partnership between Intuit and your company, other than the limited relationship of SDK provider and developer, and manufacturer and distributor (if those relationships apply).

Additional information, requirements, and restrictions:

- Nothing in this document or on the developer web site gives developer companies any right, title, or interest in any Intuit-owned trademarks or service marks.
- Intuit reserves the right to object to:
 - ❖ Unfair uses or misuses of its trademarks and service marks
 - ❖ Unfair, false, or misleading statements regarding product integration
 - ❖ Other violations of applicable law

- When engaged in any of the marketing activities described in this document or on the developer web site, developer companies agree not to attack the ownership of, or to register, or to attempt to register, or to obtain the following:
 - ❖ Trademarks
 - ❖ Domain names
 - ❖ Other signifiers containing Intuit-owned trademarks, service marks, or elements thereof

Developer companies also agree not to use or register any marks, domains, or other signifiers that could cause confusion, or be likely to cause confusion, with Intuit's marks.

Referencing Relationships Between Intuit and Developer Companies

When you promote your company or your QuickBooks-integrated application, the following guidelines apply:

- Third-party developer companies cannot make any specific representations that Intuit officially endorses or “authorizes” a particular developer company, or that Intuit recommends any particular developer company over any other.
- Intuit Developer Network Members and developer companies whose applications are listed in the QuickBooks Solutions Marketplace cannot call themselves Intuit “partners.” The relationship between Intuit and these companies is not a “partnership” or “alliance.” The only acceptable term (if applicable) is “Intuit Developer Network Member.”
- Intuit may, from time to time, provide input to developer companies about whether and how goods they are offering for sale conform to the guidelines, requirements, and restrictions described in this document. These goods could be both QuickBooks-integrated applications and Intuit-owned and -produced materials, if the developer company is part of an Intuit third-party distribution program.

Target Market Restrictions for QuickBooks-Integrated Applications

QuickBooks-integrated products can be marketed and distributed only in the United States and Canada. This is because QuickBooks-integrated applications created using the QuickBooks SDK interoperate only with QuickBooks Pro and Premier editions 2002 and 2003, QuickBooks Enterprise Solutions, QuickBooks Online Edition, and Canadian editions of QuickBooks 2003.

Legal Agreements

For your reference, here are the web addresses of the two legal agreements on the developer web site.

Intuit Developer Network Terms of Service:

- https://developer.intuit.com/legal/devsite_tos.html

Designed for QuickBooks Logo License Agreement:

- <https://developer.intuit.com/legal/qbla.asp>

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