



## Case Study: Compare Tool

Intuit needed a more efficient process for reviewing and getting approval on various versions of product promotions, and for managing the setup in their existing QuickBase application, in order to avoid missing the window of opportunity. They determined that a tool allowing them to easily compare the different versions in relation to their associated data sets would solve this problem.

### Customer Profile:

Intuit is a publicly-traded U.S. computer software company based in Mountain View, California. The company was founded in 1983 by Scott Cook and Tom Proulx. Intuit currently employs around 8,000 people and reported earnings in fiscal year 2011 of \$3.9 billion.

The company makes software applications for individuals and small businesses, primarily relating to accounting (QuickBooks), personal finance (Quicken) and tax reporting (TurboTax). In 1999 the company created QuickBase, a database program that allows users to create their custom applications without having to understand programming languages. Other product lines include the Lacerte and ProSeries applications for professional tax preparers.

The company continues to innovate. Through their Intuit Health division they provide user-friendly online portals to simplify communication between patients and health care providers. And, in February 2012 Intuit Financial Services introduced an iPad application for bank and credit union customers to facilitate mobile online banking.

### The Problem:

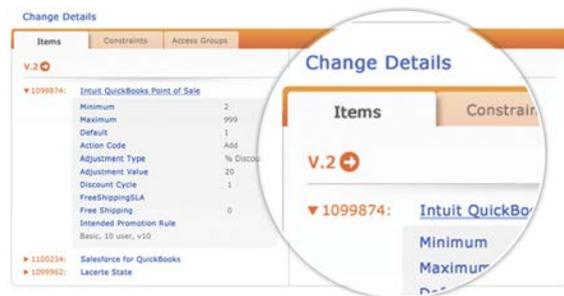
Each year Intuit plans sales campaigns to promote their product lines. Promotions are created as purchase incentives to help generate sales. Promotions typically have a specific beginning and ending date with associated costs and revenue goals and as such are time sensitive. In addition, there can be multiple versions for a single Promotion, making the approval and setup process even more complex.

The difficulty is in getting the approval and setup process completed in a timely manner so that the window of opportunity for the Promotion does not pass or result in a financial impact of revenue not being recognized in the proper quarter.

Reducing the time for Promotion approval and setup was the goal, and the most efficient way to accomplish that was by finding a more efficient method of comparing changes in versions. The primary challenge was that there were large sets of data in multiple tables relating to each version and there was not an easy graphical way to compare the various versions of a single Promotion.

### The Solution:

MCF solved the problem by creating a Compare Tool using Intuit's QuickBase software, enabling the user to compare any version with another version side by side to easily identify what changed. Changes were categorized three ways: Additions identified in green, changes identified in yellow, and deletions identified in red.



To further simplify the comparison, the tool was separated into sections for a quick visual reference.

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## The Solution:

**Promotions Compare Tool** Versions to Compare: V.2 V.3 Compare

Siebel promotion #	Edit Request Submit Date
V.2	V.3
Promotion Name Test access group clone and Constraints compare	Promotion Name Test access group clone and Constraints compare
Requested Start Date 1-1-2012	Requested Start Date 1-1-2012
Actual Start Date 1-9-2012	Actual Start Date 1-9-2012
Expiration Date 1-15-2012	Expiration Date 1-15-2012
Promotion Type Coupon	Promotion Type Coupon
High Risk No	High Risk No

**Change Details**

Items	Constraints	Access Groups
V.2		
▶ 1100234: Salesforce for QuickBooks		
▶ 1099962: Lacerte State		
V.3		
▶ 1099874: Intuit QuickBooks Point of Sale		
▶ 1100234: Salesforce for QuickBooks		
▶ 1099962: Lacerte State		

**Change Summary**

Change Location	Details
Request Item 1099874	Nothing changed Request Item Intuit QuickBooks Point of Sale
Request Item 1100234	Nothing changed Request Item Salesforce for QuickBooks
Request Item 1099962	Nothing changed Request Item Lacerte State

- ◆ **Header Section** is data that is common to the entire Promotion.
- ◆ **Change Details:** consists of tabs of the various child tables to a Promotion.
  - Items are child records and contain the product that is being promoted. There can be multiple items on a Promotion.
  - Constraints are child records to Items and contain how that item/product is restricted depending on the Promotion.
  - Access Group is a child table to Header.
- ◆ **Change Summary:** is quick summary in text as to what has changed.

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## Development and Training:

The Compare Tool was built using a QuickBase database platform and JavaScript pages. MCF application developers met with stakeholders from Intuit to identify their needs. MCF then developed mockups of the proposed visual interface to help the team refine their vision. As the Compare Tool is very intuitive for users and the Intuit staff already knows QuickBase, minimal training was needed. MCF simply demonstrated it to stakeholders in their weekly meeting.

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## The Benefits:

Implementation of the Compare Tool has reduced the cycle time for approval and setup of promotions. This new efficiency ensures that Intuit can meet designated deadlines required by Service Level Agreements and not miss out on potential revenues.

The application has worked so well that a Compare Tool for Campaigns has also been developed using the QuickBase platform and the same basic requirements.

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Publication Date: April 2012