

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

May. 29, 2008

Note: This is a sidebar from the June/July Review of Document Management Systems

SourceLink is a good example of a niche solution for document management. Unlike the other products in our review, which are designed as full enterprise systems that can meet all of the DMS needs of a tax and accounting firm, SourceLink is focused on direct and deep integration with QuickBooks. If you utilize QuickBooks for client accounting and bookkeeping, this is a great solution for managing the source documents related to the transactions.

More importantly, it is a great solution for your clients who are using QuickBooks to manage their business if they want to start getting control of their paper files. The SourceLink Standard Edition is fully integrated into QuickBooks as a menu option. Whenever you add a transaction to QuickBooks, you can link directly to a file or scanned image through SourceLink. You can even link to an entire folder of documents.

The TurboFolder feature allows you to view your SourceLink files in the same format as QuickBooks (i.e., vendors, customers, etc.), and you can navigate directly to a hit list of linked files. SourceLink ME (Management Edition) provides workflow functionality that lets you route transactions and linked documents for approval based upon rules you establish (i.e., all invoices over \$500 go to the Controller for approval).

You can add an e-mail address for the person to whom the document(s) is routed, and they will receive an e-mail notice that a transaction is awaiting their approval. SourceLink supports QuickBooks Pro, Premier and Enterprise from 2004 to present. Pricing for the Standard Edition is \$229 for a single user, \$729 for five users and \$1,229 for a 10-user license. The Management Edition is \$299

for a single user, \$999 for five users and \$1,699 for 10 users. Personable also

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

© 2024 Firmworks, LLC. All rights reserved