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**[www.bizautomation.com](http://www.bizautomation.com)**

BizAutomation.com offers its self-branded web-based suite of small and mid-sized business management programs, including full accounting, CRM, ecommerce, project management, marketing and purchasing applications. The system has been on the market since 2005.

## Basic System Functions

The core interface for BizAutomation.com is structured on a tabbed website environment, with a totally customizable home dashboard that allows users to view a collection of panels for key business data, such as critical sales information, revenue, period comparisons, orders, leads and aging. This information can be presented in numerical or graphical formats, with additional options for thresholds or alerts that notify users to specific details. Depending on the user's access rights, the interface offers tabs for accessing the program's core modules, including the base accounting (GL, AR, AP) elements, as well as relationships (customers and vendors), marketing, orders (sales), forecasting, documents, projects, contracts, reporting, Outlook integration and the user's customizable home page. In addition to these tabbed interfaces and the customizable screens, the BizAutomation.com interface allows users to create shortcut links to specific functions they use most frequently, such as sales orders, leads, etc. The program can be configured for virtually any industry type and has functions often sought after by technology developers, wholesale distributors and project-based contractors.

The program has substantial capabilities and is really geared toward the top of the small business market, with formal training necessary to become familiar with the basics and more advanced features in the system. Implementation is required and performed by the vendor.

The program includes a fairly traditional indexed and searchable Help utility, but do-

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The BizAutomation.com interface is very customizable and based on access rights, which allows accounting and senior staff to set up dashboards and shortcuts to manage detailed accounting areas. When working in the core financial modules, an expandable menu on the left gives access to the chart of accounts, journal entry tasks, revenue functions, expenses, AR and AP aging, bank reconciliation, and payroll expenses. The system does not include a payroll module, but offers import from a variety of formats, including Excel, thus enabling the transfer of data into the program. The accounting modules also include the ability to automate recurring transactions, and offers broad reporting capabilities. A full-time audit trail tracks all transactional events.

BizAutomation.com offers good capabilities for businesses with multiple locations, divisions, warehousing and other geographically dispersed units. It also provides multi-currency conversions and the ability to manage all types of transactional taxes. Sales tax rates can be applied to customers and transactions in several ways, but the tables themselves must be manually managed. 4.5

## Day-To-Day Operations

The customizable snapshot screens on the dashboard make it easy to keep up with key business data, while the additional user-definable shortcuts and system functions further streamline many workflow processes. Although BizAutomation.com does not currently offer point-of-sale hardware, it has very strong sales management functions, particularly with ecommerce capabilities, including the ability to set credit terms and credit limits for customers and the ability to require supervisor approval for overrides. Sales and purchase fulfillment features help automate inventory reordering, and the product integrates with shipping systems from UPS, FedEx and USPS, including shipping option presentation and the ability to ship multiple items to a single receiver either in combined shipments or separately.

The system offers excellent customer relationship management functions, with sales

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## Management Features

Once again, the dashboard overview screens offer great utility, with summary data quickly and intuitively displayed on the user's customized interface. Reporting options, which can be accessed from module screens or from the main report center, include full financial sets, as well as advanced budgeting and forecasting tools, CRM-focused output, marketing results and web analyses. Reports can be output to only PDF and Excel, and users can create custom reports and save reports as templates. BizAutomation.com allows very specific task-based control over user access rights, along with secure hosting of data. 4.75

## E-Features

BizAutomation.com is a true SaaS product developed specifically for web-based business management and provides cutting-edge technology, including customer and vendor portals for both continuing support and service, as well as for collaboration and document sharing. The portals can also be used in conjunction with the approvals processes, enabling customers to electronically approve of changes or other issues, with the customer being notified of action items by email. Invoicing and reporting can also be emailed directly from the program. While no smartphone apps have been specifically designed for BizAutomation.com, the system is fully functional on web-enabled smartphones. Integrated electronic banking and payment options are available. The system includes shopping carts, and users can set up hosting through BizAutomation.com. 4.5

## Integration/Import/Export

BizAutomation.com can easily import data from Excel files, thereby allowing data acquisition from payroll systems and other accounting and bookkeeping programs, but as previously noted, reporting output is limited only to Excel and PDF. No direct integration with outside programs is yet available, although the vendor is working

towards integration with a payroll system, and advanced configuration and

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management capabilities, and includes good forecasting tools, reporting and dashboard views. The system is not as well suited toward volume brick-and-mortar retail businesses or professional services firms. It requires training (included in implementation costs) to gain basic proficiency, and it lacks a DIY support site. Pricing is \$49 per user per month for the all-inclusive system (three-user minimum), plus implementation costs that start at \$3,000.

## 2010 Overall Rating 4.5

### Technology

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