Evaluating small business management software is always full of surprises. Some users wonder where to start the process and ask if they really need to change software, upgrade to the current version, or invest in training on the existing application. While there are many ways to evaluate these decisions, I would suggest that you consider the following items as first steps in the process:

- Look at what you are doing outside of the software to support your business needs. What are you doing in all those spreadsheets?

- Are you getting the reports to need to run your business?

- Do you want to increase marketing, organize your office, update internal controls, or gain remote access?
- Will you need to integrate your business management software with other applications?

Let's take a look at the software packages reviewed and examine how they meet the needs of your business and many other small businesses.

Basic System Functionality – All the packages were reviewed on a PC running Microsoft Windows. *Installation* of each package was completed without issues and each program was up and running in just a matter of minutes. *General Navigation & Ease of Use* was also addressed; all of the products reviewed used a forms oriented interface rather than requiring the user to understand debits and credits (with the obvious exception of journal entries). The appearance of the screen and use of navigation techniques, availability of dashboards and customizable menus varied. *Industry Specific features* were included in some programs including industry specific versions and/or reports. Platform support was also noted, and while all of the products reviewed are available in a version for Microsoft Windows, only a few support other platforms, such as MacOS or the mobile operating systems installed on most tablets and smartphones.

Accounting Capabilities – All products contained core accounting capabilities such as a general ledger, accounts receivable, and accounts payable functions. Likewise, the applications all had some support for Sales Tax, including the ability to consolidate rates for multiple jurisdictions, but none were able to support value added taxes like those levied in Canada or the European Union. *Payroll functionality* varied significantly, and while all reviewed products supported in-house payroll preparation, some also offered integrations with other providers, such as payroll service bureaus. *Audit Trail Reporting* was included in all programs with various report options. *Multi-Currency* abilities were included in some programs with

merge for collection letters. Some products included advanced functionality with Customer Relationship Management integration or add-on products. *Inventory and Purchasing* varied considerably among products, and we considered the major functions in this area, including inventory valuation, multi-location capabilities, bill of materials, and reporting.

Management Features – Many programs included *Dashboard Overviews* to give management a snapshot of the company's status. *Reporting* was also considered to identify the customization capabilities, integration with third party report writers or ODBC access, and support for exporting built-in reports to multiple file formats. Security was also reviewed to determine if individual or role based security. Establishing user rights can be complicated and it was important to understand how these rights were established and if they related to menu options, general ledger accounts or any other type of group.

Integration, Import and, Export – Programs allowed various degrees of import capabilities including lists, budgets, and transactions. Generally batch processing systems allow greater import functionality due to the ability to import to an unposted batch and then use the normal posting procedure When integrating two systems, it is important to have a pre-built integration or the option to import transactions; therefore both of these options were analyzed. In addition to importing data, integration with third party applications and portals to increase productivity and enhance Customer Relationship Management (CRM) abilities was also considered in this review.

Help & Support – All the programs included impressive help and support options. Some programs required access to the internet to read help files, and most had videos available (either on CD or online), and US based telephone support. All of the vendors offered support plans for additional guidance and payroll tax table updates.

Additional support was found on websites, user groups, community bulletin boards,

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