2011 OVERALL RATING ★★★★★

Rating	Category
★★★★☆	BASIC SYSTEM FUNCTIONS
★★★★☆	CORE ACCOUNTING CAPABILITIES
★★★★★	DAY-TO-DAY OPERATIONS
★★★★★	MANAGEMENT FEATURES
★★★★★	INTEGRATION & IMPORT/EXPORT
★★★★☆	HELP/SUPPORT

Biz Automation

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From the June 2011 *Review of SaaS Accounting Systems for Small Business*

BizAutomation is a comprehensive business management suite comprised of fully featured multi-business accounting, sales, distribution and inventory modules. It was designed and built to be an online system and offers strong ecommerce and

partner management portals. Multi-layer project management, task management,

tool highlights the key areas of business activity related to each user's role (e.g. sales, management, accounting, shipping, etc.). End-user customizations can be made with drag-and-drop tools.

Strengths:

? Excellent dashboard overviews/customization

? Customer/partner portals for collaboration

? Document sharing/invoicing

? Multi-part inventories, including manufacturing

? Extensive sales & purchase fulfillment tracking

? Shipping management

? Strong contact management

? Built-in payroll, benefits & HR

? Multi-company, location & currencies

? Consolidations

? Free support

Potential Limitations:

? Sales tax rates are manually managed

? No built-in payroll

? No mobile apps

At the top level, management can view key business indicators, budgeting performance, forecasted results, prior period comparisons, sales performance versus goals, aging, as well as current assigned tasks and scheduling. Security is role based, with users only able to access functions to which they are assigned. Primary navigation tabs at the top permit quick navigation to each area of the business for which the user has access rights. Customizable sub menus appear for each of the main tabs, and can be customized to include links to frequently used tools and features. The program also offers search and advanced search utilities that can look for data throughout the program, including transactions, notes and invoices.

User roles are assigned during initial system installation and vendor-guided setup. The chart of accounts can be created either by using standard templates or with custom

account configurations.

Specific industry-focused features include the following:

- project management with unlimited sub-components/tasks with parent task

and strong reporting and integration with all areas of the program.

This fully web-based system can be used on Mac or PC, with support for all major browsers, as well as web-enabled smartphones and tablets, although no specific mobile apps have been designed for it yet.

Core Accounting Capabilities:
BizAutomation offers full GL, AP and AR, with support for multiple companies and subsidiary units, including departmental and geographical. With the system's OmniBiz function, it can also perform inter- and intra-company accounting processes, including consolidations. It has extensive multi-currency capabilities, with integrated conversion tools and functions for realized gain and loss due to fluctuations. It also can be deployed into multiple languages, including English, Chinese, French, Spanish and German.

The system offers payroll accounting and can import data from major payroll programs and service providers, but it does not have its own payroll, compliance or checkwriting capabilities. The system can manage sales, use and VAT taxes for all jurisdictions, with the ability to import tax rate tables or integrate with SaaS third-party transactional tax applications. The vendor does not offer tax tables directly, however.

The system is designed to offer multi-location accounting management, and can track, report and consolidate any number of business entities and sub entities. Although the vendor notes the best fit is usually with businesses between five and 20 users, the application can be used by a larger number of concurrent users. A full-time audit trail tracks all interaction with the program, and even more advanced features allow users to see when customers and affiliates have accessed their portals to view electronic copies of their invoices.

Day-To-Day Operations:

duties.

BizAutomation has excellent integration with FedEx, UPS and USPS for integrated shipping. Rates can be calculated in real time when orders are in-progress, and shipment of multiple items in a single box is allowed, with built-in tracking related to each box within a shipment. Shipping costs can be automatically added to customer invoices, and invoices can be emailed from within the program. BizAutomation has strong inventory features, including multi-site warehouse management and automatic reorder tracking, which is integrated with the sales and order fulfillment areas of the program. The integrated web store provides real-time product availability information. The system also offers integration with third-party point-of-sale systems.

Management Features:
As previously noted, the system's customizable dashboards provide great supervision, especially for management-level users, offering quick access to key business data and drilldown access. BizAutomation's reporting options can be accessed from any of the module areas and include full financial sets, consolidated reports, forecasting tools, budgeting, customer-focused output, marketing results, web-store analysis, visitor metrics and a host of other options. All reports offer extensive customization and can saved to PDF or Excel. The system's security features are user- and task-specific, with the ability to restrict or grant access to any features and functions, customers or reports.

Integration/Import/Export:
A core component of BizAutomation is its customer and partner portals, which allow these parties to log in and view their histories, documents and other materials, including invoices. They also allow for quick access to online payment functions, with the program supporting major merchant services accounts, such as Payflow Pro and Authorize.net. At the business' discretion, a user login can be provide to their

outside accountant, providing them with full access for write-up, tax, consulting or

is included with program usage, and the vendor's staff includes accounting and finance professionals.

Executive Summary & Pricing

BizAutomation is essentially an enterprise-level accounting and management application for small and mid-sized businesses, providing exceptional e-commerce integration and customer and partner portals that further strengthen business relationships. Recent enhancements to the system's project management capabilities, along with its distribution and inventory functions also make it a strong solution for construction and service-based entities, as well as manufacturers and distributors. After implementation, pricing is $49 per month for each full-access user, and partial access user seats start at $25 per month.

2011 Overall Rating: