www.salesorder.com

Salesorder.com is a fairly new addition to the online small business accounting space, with its self-named system providing a full complement of business management tools for entities ranging from one or two users, up through dozens or more. The system includes all traditional accounting modules, along with cashflow features, lead and prospect management, and additional sales functions. As such, it is best suited to organizations with more extensive sales force management and CRM concerns.

Basic System Functions

Salesorder.com, the company, is a U.S. and British technology vendor, but it has businesses around the world as users of the salesorder.com web-based accounting system. For U.S. businesses, all data is hosted in secure data centers in Germany, and the company is in the final stages of commissioning a U.S.-based data center run by RackSpace.com. The primary reason for mentioning the British origin is because of occasional language quirks between U.K. and U.S. English. These are minor, however. For instance, one of the core areas of the program is the calendaring and communication functions, called the "Organiser."

The primary interface opens to a split-screen view that offers multiple menu choices, including an Explorer-style collapsible option and table-based option that appears in the main work area. A more task-specific icon menu across the top offers quick access to tasks such as entering sales, invoices, quotes, purchases, expenses, managing customers or vendors, and dashboard overviews of expenses, cashflow and other key business data. The program's core feature areas include accounting, banking, products/services (inventory), sales, sales forecasting, expenses/timesheets, purchasing, reporting and the aforementioned organizer. These function areas and

menus can be customized by users, and access to them can also be limited depending

A traditional Help utility is included within the program, along with task- and field-specific Help from most areas of the system. The company's online support center includes documentation, multiple videos, quick "how-to" demonstrations and FAQs. Users can also access live, chat-based Help from within the program using the "live help" button that stays at the top of the screen (during normal tech support hours). Phone-based technical support is also included with system pricing. 4.5

Core Accounting Capabilities

The central financial management tools in salesorder.com are a full GL and journal, along with AP and AR back-end, with a full-time audit trail tracking all transactional details. The program supports all U.S. and international accounting standards. Additional security features include user-based access permissions and IP logging, which can determine where a computer or user is located. The system also includes multi-currency capabilities with conversions automatically applied when producing quotes and invoices. Salesorder.com can manage sales taxes or VAT, depending on business needs, with rate tables manually maintained. Tax rates can be set per customer, or tax groups can be set up.

Within the customer management section of the program, users can assign credit limits and other special terms on a per-customer basis as well as those that require supervisor overrides. Likewise, special rules can apply to vendor relationships. Among recent features added to the system is support for multiple warehouses and locations. 4.25

Day-to-Day Operations

For their everyday use of the system, business staff would focus on their role-based functions, so sales staff would be entering leads, quotes and sales, while administrators or management would oversee business management functions,

including cash flow, expenses and reporting. The system's dashboard views make it

streamlined with good overviews of all activity, plus the ability to assign purchasing expenses directly to customer projects or jobs.

Salesorder.com includes job tracking and timesheets for service-based firms, enabling users to bill based on time or service. The time management functions also interface with the estimation and invoicing tools. Employee expense reporting features are simple to use and include structured supervisor approval features and expense policies. Other employee management functions include group calendaring and scheduling features and productivity measurement. Staff profiles include many data-tracking options and the ability to customize data fields, along with options for quickly searching for transactions processed by individual staff and even login details. 4.5

Management Features

Salesorder.com is process-focused, with primary user interfaces offering quick access to tasks, but also to dashboard overviews and visual reports for items like cash flow, sales forecasts and AR aging. Reporting is available from virtually every data screen, as well as from the main reports center, with the ability to quickly output lists, financials and reports to Excel or PDF format, or to email them to users or clients from within the program. Reports can be customized and saved for future use, and invoices also offer extensive customization options on a per-customer basis. For customer emails, the system includes a really impressive communication editor that is about as functional and easy to use as Outlook or Word. Security features include IP logging (which shows the location of the PC a user logged on with), as well as user-based permissions at a very task-specific level, allowing managers to strictly control the information that specific users can see based on their role. 4.75

e-Features

The developers of salesorder.com truly looked at the system as a tool for not only

but the potential benefit for many other types of businesses is just as dramatic. We're talking about businesses being able to share documentation and work product or collaborate with their customers, too. In salesorder.com, the business' management determines if a client will be able to have access to a portal. If so, the customer receives a login, but will only be able to access information specifically shared by the business. While it depends on the nature of each small business, this is a great new step, and one that we anticipate seeing in other SaaS-model small business accounting systems. 4.75

Integration/Import/Export

Salesorder.com can import data from most accounting systems, as well as from Excel and text-based files, and can export to Excel and XML. All reporting is available in Excel and PDF format, as well. While no direct integration with payroll vendors is currently offered, data import functions enable fairly simple transfer into the accounting system. The program does integrate with electronic payment processors and, by mid-summer, is expected to offer integration with ecommerce shopping carts. With the addition of another user seat, external accounting professionals can be given login rights for full access to live data for write-up or other periodic services. 4

Summary & Pricing

Salesorder.com is pretty new to the market, but quickly feels very comfortable. The developers continue to add new features and are among the first to market with an SMB accounting system that includes customer portals at no additional cost and as a native part of the program. The system is strongest at sales for service or technology-focused businesses, but isn't as strong at the workflow processes involved in manufacturing, wholesaling and volume retail. Pricing for salesrder.com is based on the number of users, with a single-user system costing $47 per month; a three-user

system $97 per month; six users $197 per month, and additional packages for larger

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