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Personable Inc. — SourceLink Management Edition

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[From the June/July 2007 Review of Document Management Systems](#)

Personable provides two solutions in this space: SourceLink Standard Edition and SourceLink Management Edition. SourceLink is a “niche” solution designed specifically to integrate with QuickBooks.

Usability — 4 Stars

The system is very simple and easy to use. The most attractive feature is the ability to access documents directly from within the QuickBooks transaction entry screen. Documents are stored by established document types in separate folders. Folders can be set up individually or the “TurboFolder” setup will create a root folder with a pre-defined set of sub-folders. The folder structure is aligned with the QuickBooks transaction types.

Integration — 4 Stars

Due to the nature of this application as an integrated solution for QuickBooks, that is the extent of the integration capabilities. The integration between QuickBooks and SourceLink is virtually seamless and offers the ability to access documents linked to specific transactions. Scanned images and electronic files can be attached to

QuickBooks transaction records. SourceLink is compatible with all versions of QuickBooks from 2004 to 2007.

Records Management — 4 Stars

The system provides an audit trail of the transaction approval process. There is no automatic document retention feature, which is appropriate due to the objective of keeping the application simple — the cornerstone of the QuickBooks platform.

Scanning — 4 Stars

Documents can be scanned directly into SourceLink via the QuickBooks interface. Scanned documents are indexed automatically based upon the associated transaction type.

Workflow Automation — 4 Stars

SourceLink Management Edition is designed to provide workflow automation in terms of electronic routing of documents for review and approval. Users can establish rules that will trigger the routing of documents. An e-mail notice will be sent that requests an electronic approval and may include automated routing for a second level of review. An example of such a rule would be to require the AP manager to approve any invoices from AT&T that are over \$500. When the user logs in to SourceLink, it will display a list of transactions/documents pending approval.

Portal — n/a

Pricing/Value — 5 Stars

SourceLink's most attractive aspect is its price, which is consistent with the pricing model you would expect for a QuickBooks-compatible application. Pricing for the Standard Edition starts at \$189 for a single-user version, \$598 for five users and \$989 for a 10-user license. Pricing for the Management Edition starts at \$289 for a single-user version, \$889 for five users, \$1,498 for a 10-user license and \$1,989 for unlimited users. Free web training and technical support are included.

Summary

The most important point to understand about the SourceLink solution is that it is a niche solution designed specifically as a QuickBooks add-on. From that perspective, it earns a five-star rating. However, it is not designed to be the exclusive document

management solution for an accounting and tax practice. As a very simple and easy-to-use solution, SourceLink very effectively serves the market for which it is targeted.

2007 Overall Rating: 4 Stars

Intuit, Inc. • Article

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