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From the Nov. 2006 Issue

Each year, I survey tens if not hundreds of products from independent developers who add value to the QuickBooks community by solving hard problems faced by QuickBooks users and consultants. Before awarding the “awesome” label, I dig deep into each product and ask all the hard questions I think consultants and business owners will eventually ask. I usually find that the developers of these products know much more about their target customer set than I do, so I try to first satisfy myself that they understand enough about how QuickBooks works, and then I move to their solution and see if they’ve developed an easy-to-use, quality product that I would recommend to my clients.

I survey products in several vertical markets where QuickBooks may not have all the needed features, or where clients want customized solutions. Most of the winners are software products, but several are hardware and software combinations.

The result is my list of “Awesome Add-ons” for 2007. I hope you’ll look at each of these solutions as you help your clients improve their financial management systems.

Fishbowl Inventory — Comprehensive Inventory for Light Manufacturers, Wholesalers and Distributors

Fishbowl

www.fishbowlinventory.com

Pricing: \$7,995 for 10 users

This application is perhaps the most well-developed inventory solution on the market, far surpassing QuickBooks’ inventory features and providing for the mid-range wholesaler, distributor or even small manufacturing firm.

Fishbowl provides a comprehensive inventory solution that integrates tightly

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www.bqe.com

Pricing: \$395 for two users (Basic), \$795 for five users (Pro)

Simply stated, the BillQuick Time and Billing software is the most comprehensive time and billing system on the market today. From appointment scheduling integrated

with Outlook, to project management, time tracking, job costing, web-based time entry, retainer tracking, electronic and paper-based invoicing, flexible reporting and analysis, and complete, smartly designed integration with QuickBooks, this product is simply the best choice for professionals.

Acctivate! — Comprehensive Distribution and Wholesale Management Solutions

Alterity

www.acctivate.com

Pricing: \$2,995 for three users for base system. Add-on modules range from \$795 to \$895 per module.

Acctivate provides comprehensive tools for managing inventory-intensive businesses who are happy with QuickBooks but need better control of purchasing, selling, inventory control, and customer relationship management. This all-in-one system is great for wholesalers, distributors and light-assembly companies, satisfying the needs of those who handle large data sets with thousands of items in inventory, thousands of customers and multiple locations. The product is very mature, owing to the company's 25-year history of working with customers to perfect their system. Based on Microsoft's SQL server, it is very scalable and flexible for the growing company. The product integrates extremely well with QuickBooks and completely takes over the inventory management, purchasing, sales,

invoicing and vendor bills. It uses QuickBooks for all of the general ledger,

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www.legrandcrm.com

Pricing: \$350 per user, \$1,650 for five users, \$3,000 for 10-user license

No matter what business you're in, most likely you and your office colleagues are constantly in touch with prospects, customers, vendors, and partners. And if you're smart, you keep a database of some type in which you track all of your contacts. The problem is that (with most small businesses anyway) it stops right there. Just a database of contacts (address, phone, e-mail, etc.) stored in MS Outlook or something similar. And usually, each employee keeps their own contact list, with no sharing of data between employee's contact manager databases. So a common question any employee might have is, "When was the last time anyone in our company dealt with this customer and what was it about?" Of course, that's hard to answer because each employee has their own notes in their own database.

In addition to these basic contact questions, the sales force needs access to historic sales data and other financial information (balance owed, etc.) which is usually only available in the accounting system. For example, maybe you want to do a mailing to all customers who have not purchased in the last 90 days, or perhaps you want to create a list of names and phone numbers for everyone who is more than 30 days past due on their account. The technology solution to tracking all this information, centralizing it and controlling access so that sensitive data is not put at risk, is referred to as a Customer Relationship Management (CRM) system. With CRMs, you have a complete, corporate-wide solution for tracking customer (and vendor, partner or whatever) information in a centralized, secure and controlled way.

For the most part, CRM software companies target their solutions at the fortune

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Giftworks — Nonprofit Donor Management Software

Mission Research

www.missionresearch.com

Pricing: \$299 per user

GiftWorks by Mission Research is one of the most well-designed applications I've seen in a long time. This product does a great job of providing for virtually all of the donor-tracking features demanded by nonprofit organizations. GiftWorks manages donors, fundraising efforts and volunteers through a simple, well-designed user interface. Designed specifically for small to medium-sized nonprofit organizations, GiftWorks provides data management capabilities that are complete and far-reaching. The software meets and exceeds the administration needs of nonprofit organizations with donor tracking and mail production functionality and serves the needs of board members by generating insightful donor and donation reports. The unique "SmartLists" feature of GiftWorks allows customers to create lists of donors and donations based on sets of data criteria that the user defines. This feature makes it easy to create quick, automatically updating mailing lists and custom reports. In the current version of GiftWorks, the QuickBooks integration uses journal entries only but provides for complete tracking of all GL activity. Future versions will reportedly add more detailed integration with QuickBooks.

depositnow! — Automating Check Deposits – Electronically

BankServ

www.bankserv.com

Pricing: \$225 for hardware, plus monthly service fees depending on volume

DepositNow! automates the process of depositing checks from your customers.

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data center, allowing you to receive images of any check you've deposited within the previous 120 days. Upon request, you can have any check image pulled from the previous two years. You will save the checks for a couple weeks or until you receive the bank statement (to guard against technical problems), but after that you just shred the checks that have been deposited.

ProfitCents — Business Analysis Tools

Sageworks

www.profitcents.com

Pricing: \$199 per year for individuals; organizational pricing available directly from vendor

This web-based tool converts financial statements into plain language reports that include graphical analysis, trend and ratio analysis, and industry comparisons. It's a full-featured analysis suite that includes analyzers for individuals, businesses and nonprofits. It provides projection and forecasting, valuation, benchmarking and analytical procedure documentation.

Adagio FX — Professional Financial Statements and Data Analysis tools

Softrak Systems Inc

www.softrak.com

Pricing: \$199 for standard edition, \$475 for pro edition

Adagio FX is a financial statement presentation tool that integrates directly with QuickBooks. Flexible tools allow you to create presentable financial statements and reports from QuickBooks data. This product is aimed at accountants and controllers

who need professional, publishable financial statements as well as detailed

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If you've been thinking about adding client payroll services to your firm, I recommend taking a close look at PayCycle. The impressive online payroll solution includes everything you need to automatically manage client payroll, from paychecks to W-2s, for an all-inclusive price of \$14.99 per client per month. It integrates with QuickBooks and QuickBooks Online Edition, so you don't have to enter data twice. PayCycle's co-founders Rene Lacerte and Martin Gates, built QuickBooks Payroll functionality before leaving to start PayCycle in 1999. Since then, the company has added over 20,000 customers and is well-known in the profession for making client payroll easy and profitable for accounting professionals.

AvaTax ST — Web-based Sales Tax Solution Linked to QuickBooks

Avalara

www.avalara.com

Pricing: \$10 to \$500 per month based on transaction volume, \$50 to \$2,000 activation fee

AvaTax ST is a hosted Web service that works behind the scenes of QuickBooks to validate customer addresses, provide a correct sales tax calculation for each transaction, automatically generate sales tax returns, and provide detailed sales tax reports. For businesses selling into multiple jurisdictions, this product provides enterprise-level sales tax automation using TaxWare sales tax data services.

Cabinet NG — Automated Electronic Document Management

Cabinet NG, Inc.

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data entry by displaying the electronic document and allowing the user to enter data directly into QuickBooks using simplified data-entry screens. CNG-Books also allows you to link electronic documents to existing transactions and vendor or customer records. This allows instant access to supporting documents directly from within QuickBooks. This product is especially suited for clients who want to improve the efficiency of data entry in high-volume transaction environments.

SourceLink — Electronic Documents Attached to QuickBooks Forms

Personable, Inc.

www.personable.com

Pricing: \$189 single-user, \$589 for five users, \$989 for 10 users

SourceLink is best suited for the smaller business whose needs are focused on storing electronic documents linked to QuickBooks transactions, and for those who don't have other need for data retrieval, data entry, or storage and retrieval of documents outside of the QuickBooks system. SourceLink is a cost-effective

electronic document management solution, integrated with QuickBooks. It allows users to link electronic files to their QuickBooks records from within the QuickBooks application itself. SourceLink lets users instantly store and retrieve financial records — bills, invoices, customer agreements, etc. — directly from QuickBooks. SourceLink also lets users attach electronic “sticky notes” directly to 25 different record types in QuickBooks.

Count Me In — Biometric Timecard Replacement Technology

Count Me In, LLC

www.countmeinllc.com

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clerk or the employees. What's more, this system virtually eliminates all problems surrounding timecard accuracy, "buddy punching" (when a friend punches another friend's timecard), and addition errors on timesheets.

About QuickBooks Add-ons

In 2003, Intuit released its Application Programming Interface (API), provided free to developers in a Software Developer Kit (SDK). This SDK opens up the 3 million-plus user base to software developers who add value to QuickBooks by creating add-on products for QuickBooks. Even a casual programmer using Microsoft

Office and Visual Basic for Applications (VBA) can develop an application to read from and write to a QuickBooks data file.

Intuit is even using the SDK to write add-on applications that are bundled with QuickBooks. For example, the Financial Statement Designer (included with QuickBooks

Premier: Accountant Edition) uses the SDK to allow you to create GAAP-formatted financial statements.

To search for QuickBooks add-ons, visit the Intuit marketplace site

(<http://marketplace.intuit.com>)

or Mike Block's independent site located at www.quickbooks-add-ons.com.

For more information about developing add-ons for QuickBooks, visit

<http://developer.intuit.com>.



Mr. Sleeter is the founder of The Sleeter Group, a national provider of

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