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## CONSTRUCTION

# 2009 Review of Cougar Mountain Software — CMS Professional Accounting

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*From the July 2009 Review of [Construction/Contractor Accounting Systems](#)*

Cougar Mountain's CMS Professional Accounting is a mid-range business accounting suite anchored around a GL, with available modules for AR, AP, Inventory, Payroll, Point-of-Sale, Bank Reconciliation, Sales and Purchase Orders. The system's Job Cost module used with the CMS Professional suite, offers direct integration with other program modules, providing management capabilities for tracking costs, productivity and project/job status. The Job Cost system is sold as an add-on component to the suite costing \$799 for a single user, \$999 for a multi-user license. The core CMS Professional system (GL, AP, AR, Inventory Order, Entry and Data Exchange) costs \$1,900 for a single user, with other modules priced separately.

### LEARNING CURVE/EASE OF USE:

After a generally simple installation process and guided setup of the chart of accounts and company information, the master interface for CMS Professional opens to an uncluttered screen that includes an icon menu for accessing key system areas and add-on modules that the user has installed. Security features enable management to limit user access to specific features and modules based upon their role.

Within the individual modules, the program displays icons and pull-down menus specific to the function area, such as accessing the chart of accounts, posting journal entries, year-end tasks and other options in the GL module. Transaction and data-entry functions use tabbed information screens with selection lists for multiple data fields, along with some smart entry functions.

The Job Cost module provides automated tracking of jobs for contractors and manufacturers, with integrated inventory capabilities (when used in conjunction with the Inventory module), and the ability to track phases while keeping detailed cost figures using an overhead calculator. Users can easily process invoices and payments, including progress-based billing, and track change orders and other factors. Job codes can be up to 20 characters.

Cougar Mountain's Job Cost module integrates closely with the vendor's Payroll module as well, thereby allowing Payroll to process daily/unit entries from the Job Cost module for employees and projects.

#### **KEY MODULES & MANAGEMENT TOOLS:**

As an accounting system designed for mid-sized businesses that have outgrown most off-the-shelf small business solutions, the CMS Professional Accounting suite can be used to manage multiple companies and divisions, and provides a host of strong and flexible key modules, including a compliant GL with 36-period calendaring, industry-based chart of accounts templates and budgeting capabilities. The inventory module also provides a notable feature set, with support for FIFO, LIFO, Standard Cost and Weighted Average costing methods, the ability to apply changes across all or selected items, kit and assembly units, and multi-location warehousing. The accounting system also offers full-featured AP, AR and Order Entry/Sales applications, while add-on modules are available for Payroll, shipping, credit card acceptance and CRM.

Most of the program's construction/contractor functions are housed in Cougar Mountain's Job Cost module, which provides cost tracking, including overhead, materials, labor and indirect costs. Costs can also be transferred or split between jobs. The system also gives the ability to manage projects and jobs by multiple phases, while easily adding additional phases, cost codes or jobs on the fly. Management can track productivity by job, customer or salesperson. The system does not offer mobile/remote access capabilities.

Cougar Mountain also offers an Advanced Bill of Materials module that expands the capabilities of the program's inventory, enabling the creation of kits from other kits,

as well as subkits, more detailed component pricing, and additional reporting options.

### **REPORTING:**

The accounting package can generate hundreds of traditional reports, including account summaries and details, financials, period comparisons, profitability, cash flow projections, billing histories and other options. Users also have access to Snapshot Reports, which offer a summary view of specific module areas (such as receivables, payables, payroll or jobs), with top-level data offering insight into key business information. Job management reporting options include job schedule, listings and tickets, along with job cost, cost analysis, WIPs, profit margins, and a Snapshot summary. Reports are customizable using Report Works Infinity writer or the Report Generator add-on module, which offers additional data searching capabilities. Reports can be saved to text, Excel, and PDF formats.

### **IMPORT/EXPORT/INTEGRATION:**

CMS Professional automatically posts appropriate transactions and distributes data throughout the program's various modules, providing a comprehensive and unified management system. The program can pull data from most other accounting packages and can also import and export into Access, Excel, dBase and other file formats using its Data Exchange feature.

### **SUPPORT & TRAINING:**

CMS Professional offers traditional in-program assistive functions along with a useful Help utility. The company's support website provides additional tools, including FAQs, program updates, a news center and training options that include web-based options as well as live training at the user's location, at CMS' training facilities or at one of several "road show" seminars across the country. Technical support is offered through Standard and Premium Software Assurance Plans. Additionally, Cougar Mountain's customer support operation is entirely handled out of its corporate headquarters located in Boise, Idaho.

### **RELATIVE VALUE:**

CMS Professional is a very capable mid-level business management and accounting package with numerous available add-on modules and great support options. The program's job costing module provides more than the basics, but is best suited toward mid-sized and smaller construction-oriented entities.

### **2009 OVERALL RATING:**

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