

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

DOCUMENT MANAGEMENT

Personable Inc. — Workflow DMS & SmartLink 5.1

800-688-4281

Jul. 01, 2009

From the July 2009 Review of [Document Management Systems](#)

SourceLink

is a niche solution focused on direct integration with QuickBooks and Microsoft Office Accounting. The team at Personable continues to expand the breadth and depth of functionality. This year, they have released WorkFlow DMS, which can be used independent of SourceLink.

USABILITY:

The primary interface for SourceLink is through QuickBooks (QB) and Microsoft Office Accounting (MOA). Files are tagged to specific transactions such as accounts payable, customer invoices, etc. When you are viewing a specific QB/MOA transaction

screen, you can add a file or scan a document and link it directly to that transaction. You can also view the documents while you are entering the transaction, which is extremely helpful since transactions are traditionally entered directly from paper source documents.

FILE ORGANIZATION/MANAGEMENT:

The primary method for organizing files is through the linking to the QB/MOA transactions described. Therefore, searching for transactions in QB/MOA is going to drive the process. You do, however, have the ability to search for documents directly in SourceLink via the filename.

INTEGRATION:

The key integrations are with QuickBooks and Microsoft Office Accounting as described previously and the new Workflow DMS module. This new module is a big step forward for Personable to expand the functionality to manage the movement of documents through the office. The system provides an easy-to-manage workflow routing tool that graphically displays the routing path you have established for a particular type of document.

Direct integration with Outlook is provided to send and receive documents directly via SourceLink. There is no direct link to any audit or tax programs available.

RELATIVE VALUE:

The primary value in SourceLink is the direct integration with QuickBooks/Microsoft Office Accounting transactions. If you have a significant QuickBooks/Microsoft Office Accounting practice, you should take a closer look at how SourceLink can enhance your ability to manage the source documents. The new Workflow DMS module provides a nice tool for taking your paper workflow routing to a paperless model based on rules. Pricing for SourceLink is \$229 for the workstation edition. The five-user server pack is priced at \$729, and the 10-user pack is \$1,229. An optional maintenance program is available for upgrades and technical support.

2009 OVERALL RATING:

Intuit, Inc. • Document Management • Paperless Engagements • Practice Management • Product & Service Guide • Records & File Management • Article

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

