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**BizAutomation – BizAutomation.com**
www.BizAutomation.com
**408-786-5116**

**Best Fit:** Small organizations who need a process-oriented business management

- Built on the latest Microsoft .NET development tools, so it should scale well to Windows Azure and other cloud-based technologies in the future.
- Very capable feature set in many areas

**Potential Limitations:**

- No third party add-ons, and has less than 1,000 total users. Support for specialized industries may be limited.
- Highly regulated businesses (e.g. banks, insurance companies, healthcare entities) may need to do extra due diligence to ensure that the Company's data center and operations comply with regulatory requirements.
- The product does not currently include audit trail functionality, and may require a more sophisticated end user to take advantage of the wide range of options.

BizAutomation is an integrated suite of web-based business management applications which are designed to provide a small to mid-sized organization with marketing, accounting, service management, project management, and customer relationship management. The marketing capabilities of the application are largely beyond the scope of this review, and are as substantial as any CRM product serving the small business market. The application's portal has tight integration with Google Apps for Business, and will display a user's Gmail and Google Calendar from a tab within the product.

**Basic System Functions – 4.5 Stars**

BizAutomation.com's suite of applications is designed to replace existing manual systems for most, if not all, of a company's processes. While this approach is employed in many global enterprise applications such as SAP R/3 and NetSuite, it requires users to think in terms of the flow of transactions through a process instead

of thinking solely of the debits and credits on the balance sheet at the end of the

hand side of the screen, with the subitem currently selected displayed in an active window which takes up most of the screen. The menu structure is fully customizable using a web-based menu structure, and users will most likely want to remove options from the menu which are not needed to make the user interface look less cluttered.

The Company reports that it offers customizations for a wide array of industries, including project management, multi-warehouse inventory, service and work order management, bills of materials, and fund accounting.

**Core Accounting Capabilities – 4 Stars**

The product includes a very limited number of accounting reports, although custom financial reports can be created using the financial reporting wizard. Custom reports can be created with a web-based report writer, and there are a number of tools for creating custom calculations, including automated commission reporting.

Sales taxes can be calculated using user-updated tables or by using the Company's integration with the Avalara sales tax calculation engine. The product supports payroll data entry, although withholding calculations and tax compliance capabilities are not included.

Consolidated financial statements are supported, and the company reports that multiple currency and multiple language support (English, Chinese, French, Spanish, and German) is included in the application. The application can also be used to create an integrated online store which pulls information from the item listing, and automatically posts sales activity to the CRM system and accounting transactions to the general ledger.

**Day-to-Day Operations – 5 Stars**

The system is very process oriented, and each accounting transaction is created as

method. The product has some manufacturing capabilities, although manufacturing accounting and reporting does not appear to be a core focus for the product.

## Management Features – 4 Stars

WYSIWYG interfaces in this product are impressive, and this web-based application includes features like drag and drop which are traditionally included only in on-premises solutions. The product includes a limited number of financial and accounting reports, although there are tools users can use to create their own custom reports.

## Integration/Import/Export – 4.5 Stars

The entire BizAutomation suite of accounting, CRM, and business management tools is tightly integrated, and offers interfaces for credit card processing, point of sale, shopping carts, vendor and customer portals, and workflow automation. Third party solutions are very limited due to small installed base, although the Company reports that the product is based on the Microsoft .NET platform, which would simplify the process of creating a custom interface.

Integration with Google Apps (Gmail and Google Calendar) is impressive, and the ability to pull information directly into the CRM and push appointments into the Google Calendar will be helpful to most users.

## Help/Support – 4 Stars

The company has eight employees (some offshore) dedicated to development and user support, and all telephone support is included with the monthly subscription fee. The help documentation is somewhat limited, and many common accounting questions are not addressed in the help file. The vendor's implementation and support staff includes accounting professionals.

**Summary & Pricing**

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Pricing for BizAutomation starts at $149 per month for three users, plus a one-time setup charge of $495. Shopping cart integration is available for an additional charge of $50-$100 per month based on traffic, and custom EDI interfaces can be created for an additional charge.

## 2012 Overall Rating: 4.25 Stars

Small Business

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