



# **Top 10 Accounting/Financial Management Software for Mid-sized Businesses – 2009**

## **Profiles of the Leading Vendors**

Find the best accounting/financial management software for your company.

## About Accounting/Financial Management Software

As today's global marketplace becomes more sophisticated, the number and complexity of mission-critical financial transactions that companies conduct on a day-to-day basis continues to grow exponentially. Even small and mid-sized businesses are plagued by a rapidly increasing volume of financial processes that are highly intricate and multi-faceted. These activities, while important, are administrative in nature and often distract staff from more strategic planning initiatives that directly impact company prosperity and growth.

Additionally, as legislative pressures continue to grow, and the rules imposed by Sarbanes Oxley, BASEL II, and other regulations become more stringent, businesses need to find better ways to ensure compliance by effectively logging, tracking, auditing, and reporting their financial data.

### What is Accounting Software?

Accounting software is designed to automate the processing, recording, handling, storage, and access of various types of business financial transactions and associated information – improving efficiency, accuracy, and cost-effectiveness in finance and accounting operations. It also gives companies a powerful mechanism for streamlining their vital financial processes, as well as implementing formal procedures for the collection, maintenance, and presentation of financial data.

### Key Benefits for Your Company

An accounting software package can deliver significant value:

- \* Elimination of man-made errors, for improved accuracy and consistency of financial data.
- \* Compliance with regulatory laws and guidelines through increased speed and integrity of financial reporting.
- \* Enhanced efficiency of financial staff through replacement of cumbersome, paper-heavy manual processes with fully automated activities.
- \* Greater revenue and business growth through improved visibility into financial status, as well as more informed strategic financial planning.
- \* Increased ability to identify and leverage new revenue opportunities through in-depth reporting and analysis.

# About Accounting/Financial Management Software

## Does My Company Need Accounting Software?

Every company in every industry can benefit greatly from an accounting software package. Not only will accounting software help improve the way critical financial-related processes are managed across the business – resulting in increased efficiency and smoother execution of core business operations – it can help companies avoid the risks and severe penalties associated with non-compliance with financial reporting laws and guidelines.

## Common Accounting Software Features

The accounting software packages on the market today provide a broad range of capabilities designed to improve the way companies execute, manage, and monitor their most important financial transactions. Most available offerings provide support for:

- \* *Accounts receivable and debt collection.* With accounting software, companies can better track monies owed, payment due dates, and outstanding balances. As a result, they can facilitate faster recognition of revenues and other income. Additionally, past due balances and non-payments can dramatically impact cash flow and related activities. With accounting software, companies can better understand where outstanding debt exists and why, and accelerate time-to-collection.
- \* *Accounts payable.* Financial staff can more effectively manage bills, payments, and monies owed by the company.
- \* *General ledger.* Accounting software systems can dramatically improve the way a company manages its “books”, the primary, centralized log of all key financial activities and information.
- \* *Billing and invoicing.* With accounting software, businesses can more rapidly generate comprehensive invoices and account statements for clients.
- \* *Purchase orders.* An accounting software package can help procurement professionals improve the efficiency and accuracy of purchase order creation. This promotes better vendor relationships, while ensuring timely and effective ordering of parts, components, and other supplies.
- \* *Sales orders.* Companies can automate and improve the way they process, fulfill, and track customer orders.

## About Accounting/Financial Management Software

- \* *Reporting.* Accounting software packages provide the ability to generate complete balance sheets, profit and loss statements, and other standard financial reports. Additionally, many of them offer ad hoc analysis capabilities, so financial professionals can easily satisfy their own unique information needs.

### What to Look for When Choosing an Accounting Software Package

#### *Integration*

Financial teams interact with other business units more frequently than any other department. Therefore, seamless sharing of vital information is crucial to ensuring smooth, problem-free transactions. The accounting software you choose must tightly integrate with other business systems across your company. For example, your accounting software must link directly to your inventory management and supply chain systems, to ensure that sufficient stock levels are kept to meet all demands. And, it should tie into sales force automation systems to guarantee accurate and timely collaboration on forecasts.

#### *Support for Industry-Specific Transactions*

Some sectors, such as consulting and other service-intensive industries, face unique challenges when it comes to managing accounting and finance operations. While off-the-shelf accounting software solutions will satisfy the needs of most businesses, those that have unique vertically-oriented requirements should consider choosing a vendor with a pre-packed application specifically for their industry, or one that has extensive experience working with similar companies.

#### *Advanced Features*

Not all accounting software solutions offer the same level of functionality. Some provide support for advanced financial transactions, such as employee expense management, budget management at the departmental level, payroll and time sheet management, and purchase requisition management. If your company requires features such as these, be sure to work closely with your vendor to ensure that the appropriate capabilities are in place.

# About Accounting/Financial Management Software

## **Top 10 Accounting Vendors for Mid-sized Businesses**

You have many options when choosing an accounting software vendor. To make it a bit easier, we've featured some of the leading accounting solutions in this paper.

Review these vendors, and you'll be well on the way to finding the right accounting software package for your business.

## HIGHLIGHTS

- \* Single integrated suite for CRM, ERP and Web commerce.
- \* Hosted, on-demand software - no hardware to procure, no large, up-front license fee, and no complex set-ups.
- \* Web-based - all data is always up-to-date and available from anywhere.
- \* Award winner - eWeek, CRM Magazine, InfoWorld, PC Magazine, and The CPA Technology Advisor.

### **OWNERSHIP:**

NYSE: N

### **HEADQUARTERS:**

San Mateo, California

### **ACCOUNTING PRODUCTS:**

- \* NetSuite ERP
- \* NetSuite Small Business

### **FOUNDED:**

1998, California

### **BUSINESS MODEL:**

Hosted (SaaS, On-Demand)

### **CUSTOMER FOCUS:**

NetSuite has thousands of customers globally, spanning a wide range of industries, company sizes, and business needs.

### **SELECT CUSTOMERS:**

Oakland Athletics, NC State University College of Management, Filice Insurance Novak Conversions, Inc., China Manufacturing Network, CaseCentral

### **PRICE:**

From \$99/user/month

# About NetSuite

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Founded in 1998, NetSuite Inc. is a leading provider of on-demand enterprise resource planning (ERP) and customer relationship management (CRM) application software for small and medium-sized businesses.

NetSuite's mission is to enable its customers to make better, faster decisions in a highly competitive marketplace. This primary focus drives the features and benefits of their product line, which combine complete CRM, ERP, and Web capabilities in a single all-inclusive application. NetSuite is designed to allow companies to unite departments and automate processes, beginning with sales leads and ending with customer invoices. From there, companies can leverage NetSuite to unite departments, automate processes, and gain enhanced insight into their business.

As an on-demand, Web-based solution, the NetSuite software suite significantly reduces your total cost of ownership. It's faster and less expensive to implement than traditional software. Additionally, with NetSuite you no longer have to purchase hardware, or maintain and upgrade software. Plus, its simple user interface facilitates quick end-user adoption.

## **NetSuite Accounting Products**

NetSuite is the first on-demand Accounting / ERP solution that supports all your back-office operations. NetSuite offers a comprehensive business suite with everything you need in one powerful solution. With NetSuite, you can manage financials, order fulfillment, purchasing, inventory, time and billing, payroll, employee self-service, Web presence, and more. The Accounting / ERP software system components are tightly integrated, giving you access to real-time business intelligence to make better decisions. And you can automate business process across the company.

What this means is your entire business can run in real time. Employees can move faster and smarter. Customers are served better. Orders can be filled and tracked more quickly and easily, with inventory levels updated in real time. And with full visibility into inventory by sales reps for order promising and by planners for purchasing, companies can lower inventory levels, analyze inventory costs and collaborate with vendors more effectively. Most important, NetSuite Accounting / ERP is seamlessly integrated with CRM and

# About NetSuite

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ecommerce for end-to-end business process management across your business. And because NetSuite is an open system, you can also seamlessly integrate with third party, industry-specific and legacy software.

## NetSuite Financial Modules

### Financials / Accounting

- ERP - Time & Billing
- ERP - Order Management & Fulfillment
- ERP - Purchasing Management
- ERP - Inventory Management
- ERP - Front & Back Office Integration

### Financials/Accounting ERP

- |                                       |   |
|---------------------------------------|---|
| General Ledger                        | Time and Billing                        |
| Accounts Receivable, Accounts Payable | Purchasing                              |
| Advanced Financials                   | Inventory Management                    |
| Revenue Recognition                   | Drop Shipment/Special Order             |
| Budgeting                             | Integrated FedEx Shipping Functionality |
| Multi-currency                        | Integrated UPS OnLine Shipping Tools    |
| Order Management and Fulfillment      | Standard, Customizable Reports          |

## NetSuite Key Strengths

- \* NetSuite, the company's flagship on-demand Accounting/ERP software application, is also the first and only toolset available to support all the back-office operations of small to mid-sized businesses—in a single hosted system.
- \* NetSuite's web-based accounting and financial applications provide real-time business intelligence on every department within your company, automate business processes across your entire business, and eliminate the majority of IT costs and complexity.
- \* NetSuite Accounting/ERP is seamlessly integrated with CRM and ecommerce for end-to-end business process management across your business. And because NetSuite is an open system, you can also integrate with third-party, industry-specific, and legacy software.



# About NetSuite

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- \* NetSuite has earned numerous awards for market leadership and innovation from such leading publications as eWeek, CRM Magazine, InfoWorld, PC Magazine, and The CPA Technology Advisor.
- \* NetSuite's end-to-end enterprise solutions provide integrated front office CRM, back-office enterprise resource planning, and ecommerce in one powerful application with the modularity and flexibility to meet your specific business needs.

NetSuite is instantly available (out-of-the-box) in multiple languages: English, German, French, Spanish, traditional Chinese, simplified Chinese, Russian and Japanese. Delivered via the Internet, NetSuite can be implemented all at once or modularly, depending on your needs.

With thousands of customers globally, NetSuite has positioned itself as a premier global player in the enterprise software application space. In 2006, UK-based Computer Business Review Magazine ranked NetSuite one of the "10 Most Influential Enterprise Applications."



## HIGHLIGHTS

- \* Fast-growing, on-demand (hosted) financial services company.
- \* Customer Retention Rate: Greater than 95%
- \* Award Winner: CPA Technology Advisor – “5 out of 5 star review”, 2007 CoDiE award for “Best Financial Software Solution”, JMP Securities Top 100 Privately Held Software Companies, Software 2008 Innovation Showcase Winner

### **OWNERSHIP:**

Private

### **HEADQUARTERS:**

San Jose, California

### **ACCOUNTING PRODUCTS:**

- \* Intacct
- \* Intacct Plus
- \* Intacct MAX™ for Salesforce
- \* Intacct MAX™ for OpenAir
- \* Intacct MAX™ for QuickArrow

### **FOUNDED:**

1999, California

### **BUSINESS MODEL:**

Hosted (SaaS, On-Demand)

### **CUSTOMER FOCUS:**

Intacct focuses primarily on small and midsize business customers with sophisticated accounting needs. Industries they focus on include: software and SaaS companies, consulting, business services, business service providers, wholesale, hospitality, nonprofit, franchises and accounting firms.

### **SELECT CUSTOMERS:**

Acceller, Bulk TV & Internet, The Carrera Agency, Ingres, JasperSoft, NetDeposit, nGenera, Platinum Hospitality Management, Popeye’s Chicken & Biscuits, Romano’s Macaroni Grill

### **PRICE:**

Not published.

# About Intacct

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Founded in San Jose, California in 1999, Intacct Corporation, a leader in on-demand financial management and accounting applications, has consistently been recognized as an innovative, technology-driven company by its peers and its expanding list of customers.

Delivered to thousands of mid-sized companies, Intacct's financial applications help their customers improve financial controls, perform reporting and analysis, shorten lead to cash cycles, reduce operating costs and improve business visibility and tracking.

Intacct provides robust functionality for core financials and accounting, purchasing and inventory, order management, contract and revenue management, financial visibility and business intelligence. They also have the ability to effectively support enterprises with multiple legal or operating units, each with its own account structures, currencies, taxes and regulatory requirements, and to perform transactions between these units.

## Accounting Applications

- \* **Intacct** – Intacct is the award winning on-demand financial management system for sophisticated small and mid-sized businesses. It includes robust on-demand financial management and accounting applications, is easy to use and configure to match your business processes and is designed to integrate easily with your other key business systems.
- \* **Intacct Plus** - Intacct Plus makes enterprise class global business management capabilities affordable for companies with multiple business units or who transact in multiple currencies. Intacct Plus features real-time financial consolidation, robust multi-entity and multi-subsidiary management and rich, FAS 52 compliant multi-currency support.
- \* **Intacct MAX™ for Salesforce** - Intacct MAX™ for Salesforce lets your sales team leverage the leading on-demand CRM system for lead, opportunity, quote and front office customer management while your finance team leverages Intacct, the leading on-demand financial management application for quote to cash and back office processing. You can eliminate manual data reentry, deploy a single, integrated lead to cash process and give each member of the sales and finance teams the information

# About Intacct

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they need, where and when they need it to operate more effectively and productively.

- \* **Intacct MAX™ for OpenAir** – Intacct MAX for OpenAir adds seamless integration with OpenAir Professional Services Automation applications. Intacct MAX for OpenAir helps project-based organizations increase profits by helping professionals perform their jobs more effectively and by providing managers and executives with clearer, more immediate visibility into the key operational and financial metrics.
- \* **Intacct MAX™ for QuickArrow** – QuickArrow’s Professional Services Automation solution helps services organizations better manage the three things that matter most: people, projects and performance. With Intacct MAX for QuickArrow, you gain automatic integration between Intacct and QuickArrow applications. Intacct MAX for QuickArrow provides businesses with visibility and control over the utilization and profitability of both internal and billable services organizations.

## **Intacct Financial Modules:**

Intacct Financials and Accounting

Intacct General Ledger

Intacct Accounts Receivable

Intacct Accounts Payable

Intacct Cash Management

Intacct Expense Management

Intacct Purchasing

Intacct Order Management

Intacct Insight™

Intacct Multi-Currency

Intacct Financial Consolidation and Multi-Entity Management

AvaTax for Intacct – Sales Tax Management

Intacct Inventory

Intacct Contract and Revenue Management

Intacct MAX™ for Salesforce

Intacct MAX™ for OpenAir

Intacct MAX™ for QuickArrow

Intacct Web Services

# About Intacct

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Intacct has seen strong growth in their target industry markets. To capitalize on this trend, the company has aggressively launched industry-specific product features.

The ability to add an unlimited number of users, transact in multiple currencies and consolidate and manage the financials of multiple, separate businesses units makes Intacct the last financial management system you'll ever need..

## **Intacct Key Strengths**

- \* Intacct products are gaining wide recognition by a growing customer base as easy to deploy and easy to use. Subscribers are up and running within a few weeks and training is easily accessible on the Web.
- \* Intacct provides deep and mature financial management and accounting applications that help customers streamline and automate critical financial business processes, gain full audit visibility and provide clear segregation of controls.
- \* Real-time financial visibility through pre-built and customizable reports and dashboards help customers keep track of their business.
- \* Intacct provides the strongest client satisfaction program in the industry. Free US-based support is provided to all customers, and Intacct Buy with Confidence<sup>SM</sup> promises rapid response and resolution of customer support issues.
- \* Deep integration with leading applications such as salesforce.com so customers can choose and deploy best of breed applications to run their entire business.

In addition to companies that have outgrown Intuit's QuickBooks, Intacct reports to have won most of its new customers in head-to-head competition against NetSuite, Microsoft Dynamics and Sage Software.

Intacct is a privately held company funded by Sutter Hill Ventures, Bessemer Venture Partners, Emergence Capital Partners and Sigma Partners.

## HIGHLIGHTS

- \* Named one of FORTUNE magazine's 100 Fastest-Growing Companies in 2006.
- \* Complete ERP, CRM, SCM, and PSA software solutions.
- \* Deep experience - founded in 1984, publicly traded, 20,000 customers.
- \* Focus on mid-market companies.

### OWNERSHIP:

Public 1992 (NASDAQ:  
EPIC)

### HEADQUARTERS:

Irvine, California

### ACCOUNTING PRODUCTS:

\* Epicor Financials Suite

### FOUNDED:

1984, California

### BUSINESS MODEL:

Hosted (SaaS, On-Demand)

### CUSTOMER FOCUS:

Epicor's Enterprise is designed for small businesses through mid-market organizations and corporations in industry sectors that include: manufacturing, distribution, financial services, retail, hospitality and services.

### SELECT CUSTOMERS:

Medex Global Group, Visioneer, InVision Technologies, Physician Sales and Service, TruServ, Viewpoint Construction Software, Boeing Autometric, Lason.

### PRICE:

Range: \$20,000 - \$500,000

# About Epicor

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Epicor, named one of FORTUNE magazine's 100 Fastest-Growing Companies in 2006, is a global software leader dedicated to providing integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and professional service automation (PSA) software solutions to midmarket companies and divisions of the Global 1000.

Founded in 1984, Epicor serves over 20,000 customers in more than 140 countries, providing solutions in over 30 languages. Employing innovative service-oriented architecture (SOA) and Web services technology, Epicor delivers end-to-end, industry-specific solutions for manufacturing, distribution, retail, hospitality and services that enable companies to drive increased efficiency, improve performance and build competitive advantage. The company's solutions provide the scalability and flexibility to meet today's business challenges, while empowering enterprises for even greater success tomorrow.

Epicor Enterprise is a comprehensive package of proven industry-specific solutions for the global midmarket enterprise. From CRM and professional services automation to financial and supply chain management, Epicor provides adaptable and agile solutions for real-time enterprises. Epicor solutions are complemented by a full range of services, providing a single point of accountability promoting rapid return on investment and low total cost of ownership.

## **Epicor Financial Services Products**

Epicor Financials Suite is a proven, award winning, and versatile collection of highly adaptable, totally integrated accounting applications for the midmarket.

Epicor's success began with accounting applications. The Epicor Financials Suite was the first accounting software product to receive the coveted Designed for Microsoft® BackOffice™ Logo. Readers of Windows and .NET Magazine voted Epicor "Best Financial Application," showing that strong core accounting functionality is as important as ever. Now leveraging Microsoft's .NET Enterprise Servers, Epicor Financials Suites provide enhanced flexibility, low cost of ownership and rapid implementation, with the scalability to grow with your requirements.

# About Epicor

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Most importantly, Epicor Financials Suite offers advanced multi-currency and multi-company capabilities and features to manage business in the global marketplace.

Currently, more than 2,000 customers worldwide use Epicor Financials. Features include:

- \* Feature rich ledgers with over a decade of development and enhancements to ensure your needs are always covered.
- \* Robust user security maintains control and access to the right people, delivering a core financial solution you can trust.
- \* Build the chart of accounts that matches your organizational structure.
- \* Sophisticated payment processing support for electronic funds transfer.
- \* Integration to your bank's electronic statements enables automatic bank account reconciliation.
- \* Through the provision of advanced allocation calculations and entries, customers can expect to close their books more quickly, efficiently and cost effectively.
- \* Incomparable drill-around transactional and analytic inquiry capabilities with Epicor Explorer.

## **Epicor Key Strengths**

- \* Epicor's Enterprise on-demand finance and accounting solution is a comprehensive software suite established to ensure a connected and seamless organization, with trusted financial information at the core.
- \* The company's accounting application features robust user security, which lets you maintain control and grant access to the right people, delivering a core financial solution you can trust.
- \* Epicor's financial management tool also delivers feature-rich ledgers, with over a decade of development and enhancements, to ensure your needs are always covered.
- \* With Epicor Enterprise, you can build the chart of accounts that matches your organizational structure, and you get sophisticated payment processing support for electronic funds transfer.
- \* Through the provision of Epicor Enterprise's advanced allocation calculations and entries, customers can close their books more quickly, efficiently, and cost effectively.
- \* Epicor Enterprise product was named Best ERP Solution in 2005 Windows IT Pro Readers' Choice Awards.



# About Epicor

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## **Epicor Financial Modules**

Finance and Accounting

- General Ledger

- Accounts Payable

- Accounts Receivable

- Cash Management

- Advanced Allocations

- Asset Management

- Contract Management

- Human Resources/Payroll

Sales Tax Management

Epicor spans the globe, with more than 2,100 dedicated professionals in offices across the Americas, Europe, Middle East, Africa and Asia Pacific regions. Working in a unified global services/support infrastructure operating 24x7, the company's people serve more than 20,000 customers in 140-plus countries, in more than 30 languages. Epicor support centers in all of its major operating regions, along with software development centers in the United States, Mexico and Russia, help ensure that its customers receive only the highest quality product and service.

## HIGHLIGHTS

- \* Full-featured, end-to-end financial solution for the enterprise.
- \* Deep experience - founded in 1983, publicly traded, behind trusted brands, QuickBooks, Quicken, and TurboTax.
- \* QuickBooks is recommended by more accountants than any other package.
- \* Money back guarantee.

### **OWNERSHIP:**

Public (NASDAQ (GS):  
INTU)

### **HEADQUARTERS:**

Mountain View, California

### **ACCOUNTING PRODUCTS:**

\* Quickbooks Enterprise  
Solutions 8

### **FOUNDED:**

1983, California

### **BUSINESS MODEL:**

On Premise (pre-packaged  
software)

### **CUSTOMER FOCUS:**

Quickbooks for small businesses, Quickbooks Enterprise for fast-growing small businesses and mid-size companies. Quickbooks Enterprise is available in contractor, manufacturing and wholesale, nonprofit, professional services, and retail editions.

### **SELECT CUSTOMERS:**

Don Shula's Steak Houses, South Bay Boat Yard, North American Electric Motors, Pollution Control Financing Authority, Bubbles Car Wash, Lil' Guys Foods

### **PRICE:**

Enterprise Solutions starts at just \$3,000 for a 5-user license and a one year membership to the Full Service Plan, which includes training, a support engineer dedicated to your company, 24x7 product support, automatic upgrades, reporting services and more.

# About Intuit

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With its origin dating back to 1983, Intuit has grown to be the pre-eminent small business and personal finance software developer, with its Quicken family of products. Initially designed to simplify a common household dilemma: balancing the family checkbook, QuickBooks has established itself in little more than two decades, to be a market leader for Intuit, with revenue topping \$2.6 billion. Intuit is publicly traded on the NASDAQ stock exchange, and recognized as America's most-admired software company and as well as one of the country's best places to work.

Intuit's traditional flagship products – Quicken, QuickBooks, and TurboTax – are showcased as testament to the company's commitment to revolutionize the way people manage their small businesses and personal finances. Intuit's lineup of tax preparation products helps individuals and small business owners easily and accurately do their own taxes with confidence. And working with accountants, Intuit's products have become a staple of American small business.

While the company is now respected for QuickBooks accounting software that makes accounting and business management tasks fast and easy for small businesses. They are doing the same for larger, growing businesses with QuickBooks Enterprise Solutions - the most powerful QuickBooks product ever.

Enterprise Solutions has the power and flexibility to meet the unique needs of your business as it grows, for thousands less than other more complicated accounting software systems.

## **Intuit Key Strengths**

- \* Intuit's QuickBooks Enterprise Solutions is a full-featured, end-to-end financial solution for the enterprise. The tool performs in-depth financial analyses, tracks inventory parts and BOMs, and controls user permissions for over 115 activities.
- \* Currently, more than 25,000 businesses are using QuickBooks Enterprise as an alternative to their current business management systems. Revenue at Intuit is up 116 percent over last year as more companies recognize the power of the product.
- \* The power of QuickBooks Enterprise is reflected in the latest upgrades, including a new powerful SQL database and faster multi-user performance. For companies looking for increased scalability.

# About Intuit

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- \* The QuickBooks Enterprise tool lets you know where your business stands with 120 built-in reports, or you have access to the included ODBC driver to retrieve Enterprise Solutions data with ODBC-compliant applications such as Microsoft Excel or Access for even greater reporting capabilities.
- \* Enterprise Solutions integrates with more than 400 QuickBooks-compatible business applications, including job costing, e-commerce, and customer management systems, to solve your unique needs. You can also work with one of over 100 software professionals in QuickBooks' Developer Network to custom-design a solution to your exact specifications.
- \* Best for multiple users, the company's Enterprise Solutions Industry Editions are available in Contractor, Manufacturing and Wholesale, Nonprofit, Professional Services, and Retail editions.
- \* Low cost of ownership. Enterprise Solutions starts at just \$3,000 for a 5-user license and a one year membership to the Full Service Plan, which includes training, a support engineer dedicated to your company, 24x7 product support, automatic upgrades, reporting services and more. Other systems can cost tens of thousands of dollars more for the software licenses, implementation, training, and support.

## Financial Modules

- |                          |                          |
|--------------------------|--------------------------|
| Performance and Capacity | Sales and Customers      |
| Accounting and Finance   | Purchasing and Vendors   |
| Accounts Payable         | Payroll and Employees    |
| Accounts Receivable      | Controls and Permissions |
| Reports and Analytics    |                          |
| Inventory                |                          |

Intuit's breakthrough products reach 22 million customers with nearly 5,000 employees in 13 states and four countries. Intuit has been named America's most-admired software company for two consecutive years, topping Autodesk, Adobe Systems, and Microsoft.

## HIGHLIGHTS

- \* Designed for the needs of small businesses.
- \* Exceptional, unlimited customer support - all levels of management get involved.
- \* Hosted software - affordable, no additional hardware, easy to get started, no need for additional IT staff.
- \* Invented by the visionary behind the original QuickBooks.

### **OWNERSHIP:**

Private

### **HEADQUARTERS:**

Rohnert Park, California

### **ACCOUNTING PRODUCTS:**

- \* NetBooks Business Management System

### **FOUNDED:**

2003, California

### **BUSINESS MODEL:**

Hosted (SaaS)

### **CUSTOMER FOCUS:**

Small businesses of two to about 25 employees (or at the most 50).

### **SELECT CUSTOMERS:**

PayCycle, Inc., Paromi Tea, YourCostCenter.com, ConnectWise

### **PRICE:**

\$200 per month for up to 5 users. During the first year, you may choose to pay quarterly or annually. With the quarterly option you'll be billed \$500 to cover the cost of importing your business data and configuring NetBooks for your company. On-boarding is free for annual customers. Additional users are \$20 per month. Your bookkeeper and accountant are free.

# About NetBooks

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NetBooks Inc., a privately held company based in Rohnert Park, California, is steadily building its reputation and position in the area of accounting and business management software development by taking the best practices from thousands of businesses and incorporating them into its NetBooks product. Netbooks' financial and accounting software solution is accessed via Web browsers and hosted on servers maintained by the company.

Founder and CEO Ridgely Evers, the man behind the original QuickBooks and a small business owner for more than 30 years, carefully selected the company's management, board, and advisors. This team has a rare perspective that spans big and small business, and enterprise and start-up technology, enabling them to create and deliver a solution optimized for the needs of the TSB (owner-operated firms with fewer than 50 people).

Using a Software as a Service (SaaS) delivery model, NetBooks addresses the long-standing need for a comprehensive, easy-to-use business management system for America's small businesses.

The NetBooks application is targeted toward a true small business (TSB), which has anywhere from two to about 25 employees (or at the most 50), is owner-managed, and does not have a professional-management layer of vendor capital (i.e., growth is organic).

To help its expanding customer base get the most out of its accounting solution, NetBooks delivers an impressive level of personalized support. Everyone at NetBooks — including the management team — does customer support. The company is continuously drawing from customer feedback and lessons learned to improve NetBooks in response to a company's unique and specific requirements.

## **NetBooks Key Strengths**

- \* NetBooks has gained wide recognition for its NetBooks solution tool, a powerful new Web-based business management system for the True Small Business (TSB) market.
- \* NetBooks delivers easy ways to implement, sound financial controls, comprehensive reporting capabilities, easier compliance with state and federal requirements, as well as accurate, up-to-date view of the whole business.

# About NetBooks

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- \* NetBooks leverages the Internet to deliver complete business management software, integrated partner services, a knowledgeable support organization, and a high-powered computing environment — all through your web browser.
- \* The NetBooks product is gaining a strong following for its availability and its ability to allow customers to tie together everyone in their organization, with secure anytime, anywhere access to only the people they designate.

Other powerful and high-demand features of NetBooks include quality, (a single, always-current version in a standard web browser environment makes it easier to produce high quality software), support (unlimited, at no additional cost), affordability (NetBooks is responsible for servers, bank grade security, redundant systems and power, 24x7 maintenance, and continuous data backup at no additional cost) and upgrades (enhanced continuously in response to specific customer requirements).

## **Accounting Software**

The company's end-to-end accounting and financial management package, the NetBooks Business Management System, provides accounting software along with additional modules for managing sales and marketing, inventory, purchasing, shipping and manufacturing.

## **NetBooks Accounting Modules**

NetBooks Business Management System's integrated functionality spans the full range of activity necessary to manage a small business. Activity-based modules include:

- \* Sales management
- \* Customer relationship management
- \* Vendor relationship management
- \* Production and inventory management
- \* Fulfillment and shipping
- \* Bookkeeping and reporting

The NetBooks suites currently include bookkeeping, sales, customer, inventory, shipping, production, marketing, and compliance-management applications.

# About NetBooks

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## **NetBooks Pricing**

NetBooks is priced at \$200 per month for up to 5 users. During the first year, you may choose to pay quarterly or annually. With the quarterly option you'll be billed \$500 to cover the cost of importing your business data and configuring NetBooks for your company. On-boarding is free for annual customers.

Each additional user is \$20 per month. Your bookkeeper and accountant are free. If you work with part-time accounting resources, like a bookkeeper and accountant, have them contact NetBooks and register as independent accounting professionals. You won't pay for them to use NetBooks.

You can save over 15% when you purchase a two-year NetBooks subscription for \$4,000.





## HIGHLIGHTS

- \* Backed by the strength of Microsoft.
- \* Familiar look and feel of Microsoft Office Outlook.
- \* Complete business management software: e-commerce, supply chain, manufacturing, CRM, HR, project accounting.

### **OWNERSHIP:**

Public (NASDAQ (GS):  
MSFT)

### **HEADQUARTERS:**

Microsoft Corporate  
Headquarters: Redmond,  
Washington

### **ACCOUNTING PRODUCTS:**

Microsoft Dynamics

- \* Microsoft Dynamics GP
- \* Microsoft Small Business  
Financials
- \* Microsoft Office Small Business  
Accounting 2007
- \* Microsoft FRx

### **FOUNDED:**

1981, Fargo, South Dakota  
A division of Microsoft, Inc.  
(founded in 1975)

### **BUSINESS MODEL:**

On-Premise (licensed software)

### **CUSTOMER FOCUS:**

Small to mid-sized business and corporate enterprises, with special focus on service providers in the insurance, banking, and financial sectors

### **SELECT CUSTOMERS:**

BRE Bank SA Group, RDT, Relevance Software, Raymond James Financial, H&R Block, Raiffeisenbank Kleinwalsertal, SunGard, Addison Avenue Federal Credit Union

### **PRICE:**

Price range: \$50,000 - \$250,000

# About Microsoft Dynamics

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Founded in 1981, Microsoft Business Solutions, Inc. is a global provider of enterprise business solutions for the midmarket. Microsoft Business Solutions offers e-business applications for financials, distribution, project accounting, electronic commerce, human resource management, manufacturing, sales and marketing management, and customer service and support.

Named for the third time to the “Top 100 Companies to Work for in America” list, Microsoft Business Solutions employs more than 3,800 employees worldwide. The company’s products and services automate essential business functions and enhance the strategic value of financial and operational information. Microsoft Business Solutions products are sold and implemented by a unique worldwide network of independent partner organizations that share the company’s commitment to lasting customer relationships.

Microsoft Dynamics GP, formerly known as Microsoft Business Solutions—Great Plains, is the corporation’s cost-effective solution for managing and integrating your finances, e-commerce, supply chain, manufacturing, project accounting, field service, customer relationships, and human resources. Backed by the world-renown presence of Microsoft, Microsoft Dynamics delivers a set of dynamic and robust financial management tools that enables businesses to make financial decisions with greater confidence.

The Microsoft Dynamics suite of products, built on familiar and widely used Microsoft technologies, offers several solutions for financial management. Key financial and accounting management products include:

- \* Microsoft Dynamics GP
- \* Microsoft Small Business Financials
- \* Microsoft Office Small Business Accounting 2007 (Professional and Standard-- available as an integrated application in the Dynamics GP solution suite)
- \* Microsoft FRx for financial reporting and analytics

As recently as September 2007, the Microsoft Dynamics CRM application was named a leading solution in the Small Business Suite and Midmarket Suite categories as part of CRM Magazine’s 2007 CRM Market Leader Awards. The awards come on the heels of another stellar year for Microsoft Dynamics in terms of sales.

# About Microsoft Dynamics

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## Microsoft Dynamics Strengths

- \* Microsoft Dynamics GP gives your operations a way to raise the visibility of financial metrics and the effectiveness of financial management throughout your organization—all using familiar tools and existing skills.
- \* Strong financial management enables companies to establish a firm foundation to realize the potential of their business through strong, manageable growth.
- \* Dynamics GP lets you view more than 150 samples of general reports including: Bank Reconciliation, Bill of Materials, General Ledger, Inventory Control, Invoicing, Multidimensional Analysis, Multicurrency Management, Payables Management, Payroll, Purchase Order Processing, Receivables Management, Sales Order Processing, and more.
- \* GP Analytical accounting features let you analyze financial data by whatever criteria you require, introduce greater reporting flexibility and extensibility, and analyze transactions efficiently.
- \* Dynamic GP's intelligent accounting and analysis capabilities, including greater point of sale visibility and back-office operations management, empower you to oversee and control the financial heart of your business, giving you the vital information you need to make your finances work for you and improve business operations.
- \* Dynamics GP also delivers better payables and receivables management, giving you better control over your accounts with capabilities that help you track invoices, process receipts, and analyze customer activity, so you can manage sales made on account more effectively and yet maintain lower overhead costs.

## Dynamics GP Enterprise Financial Modules

Accounts Receivable

Accounts Payable

Analytics and Reporting

Point of Sale

Payroll

Purchasing Management



www.aplicor.com | info@aplicor.com | 1-561-347-0300

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## HIGHLIGHTS

- \* Focused on serving mid-market, global and large organizations.
- \* On-demand CRM suite including sales, marketing, service and partner relationship management (PRM).
- \* Internationalization includes 16 languages, multi-currency management, global taxing methods (such as VAT & GST) and data center delivery locations in the US, UK and Asia.
- \* Winner of 24 independent industry awards in last four years. 100% hosted uptime since April 2003 with 98.1% client renewal since January 2005.

### OWNERSHIP:

Private

### HEADQUARTERS:

Boca Raton, Florida

### ACCOUNTING PRODUCTS:

\* Aplicor Online Accounting

### FOUNDED:

1999, Boca Raton, Florida

### BUSINESS MODEL:

Hosted (SaaS)

### CUSTOMER FOCUS:

Focus on high growth, mid-market, global and enterprise organizations.

### SELECT CUSTOMERS:

US Department of Commerce, Intel, Tyco, Synovus, Suncorp, Irwin Home Equity, Microsoft, France Telecom, Cargill, Ford, Virgin Atlantic, Jaguar, Infosys

### PRICE:

\$89 per user/month

# About Aplicor

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Based in the United States with international offices in the United Kingdom and Costa Rica, Aplicor is a global software publisher of subscription-based and hosted CRM and ERP web-based software solutions for high growth, mid-market and enterprise organizations.

The CRM software application includes Sales Force Automation (SFA), Marketing Automation, Customer Support and Partner Relationship Management (PRM). The CRM application improves marketing effectiveness, increases sales win rates, grows customer share and decreases customer churn. The on-demand accounting software and ERP software application provide full back office financial accounting, distribution, project accounting, human resources, payroll, manufacturing and multiple currency management.

Aplicor's "Online Accounting" was the first online financial system capable of meeting the business needs of high-growth, mid-market and enterprise organizations. The Online ERP suite consists of fourteen integrated back-office software modules and excels over any other online, on-demand or web-based financial system in achieving the benefits of ease-of-use, staff productivity and business intelligence.

In addition to award winning ease of use, the company's business applications distinguish themselves by providing a unique and fundamental shifts from data management to business process automation, from static reporting to Business Intelligence (BI), and from a one-size-fits-all shared hosting platform to an isolated tenancy hosting model which includes System Autonomy.

Since 1999, Aplicor has pioneered easy-to-use and feature rich CRM & ERP accessibility at a price point that continues to be the most aggressive in the industry. Today, Aplicor is one of the top global software publishers of on-demand CRM and ERP software solutions. Aplicor is the most independently awarded hosted CRM & ERP software solution, has achieved the highest average user count in the hosting industry and has achieved a 100% uptime history since April 2003.

# About Aplicor

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Aplicor product strengths include an integrated front-to-back office CRM and ERP suite, the ability to easily customize the system for company specific objectives and processes, workflow creation for business process automation and the ability to deliver visual information reporting and business intelligence (BI). Aplicor is unique in providing hosted solutions for mid-market and enterprise organizations which require deeper functionality and prefer isolated tenancy over multi-tenancy and highly configurable applications over commodity systems.

The Aplicor Difference? While one-size-fits-all online CRM and ERP systems satisfy small business objectives, Aplicor delivers the feature sets, business process automation, business intelligence and flexibility required by middle market, high growth and enterprise organizations.

## **The Online Accounting & ERP Modules**

- \* General Ledger (G/L)
- \* Accounts Receivable (A/R)
- \* Sales Order Entry (O/E)
- \* Accounts Payable (A/P)
- \* Purchase Order (P/O)
- \* Inventory Management
- \* Manufacturing

## **Human Resources & Payroll**

- \* Customer Relationship Management (CRM)
- \* Job Cost (J/C) and Project Accounting

## **Cash Management**

- \* Fixed Assets
- \* Multi-Currency Management

# About Aplicor

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## **Aplicor Online Accounting Key Strengths**

- \* Aplicor's Online Accounting was the first online financial system capable of meeting the business needs of high-growth, mid-market and enterprise organizations.
- \* The Online ERP suite consists of 14 integrated back-office software modules and excels over any other online, on-demand or web-based financial system in achieving the benefits of ease-of-use, staff productivity, and business intelligence.
- \* Delivering an intuitive system with "one-click to anywhere" navigation, Online Accounting is renown for its ease of use and a fast, high level of user adoption.
- \* Aplicor's Online Accounting enhances staff productivity through increased business process automation.
- \* Easy to use reports writers, data warehousing and custom dashboards get the right information to the right people for better decision making, Online Accounting improves a company's overall level of business intelligence.
- \* What's more Online Accounting's Content Management System (CMS) further facilitates ease of use by permitting non-technical staff to create instruction, policies and best practices within richly formatted Web pages and insert them at the screen or process where they will be most easily referenced.
- \* Aplicor has been cited as providing the "greatest ease of use" in multiple software comparison evaluations and Aplicor is the only four-time winner of the Users Choice Awards, the only award competition where actual users of the online systems cast the votes.

## **Pricing**

Aplicor's hosted software applications are designed for organizations who prefer to avoid high-dollar capital expenditures in favor of a pay-as-you-go subscription purchase which includes all software, IT, support staffing and equipment.

Aplicor's subscription pricing model is all inclusive and software delivery options include private hosting, multi-tenant hosting, on-premise, or any combination of the three. Subscription pricing is \$89/user/month.



## HIGHLIGHTS

- \* Backed by the strength of SAP, one of the largest software companies in the world.
- \* Single system for financial, customer relationship management, manufacturing, and management control capabilities. Embedded CRM.
- \* Highly customizable.

### **OWNERSHIP:**

Public (NYSE: SAP)

### **HEADQUARTERS:**

Newtown Square,  
Pennsylvania

### **ACCOUNTING PRODUCTS:**

- \* SAP Business One

### **FOUNDED:**

1972, Mannheim, Germany

### **BUSINESS MODEL:**

On-Premise

### **CUSTOMER FOCUS:**

Small to mid-sized businesses and corporations.

### **SELECT CUSTOMERS:**

Gary Player Group, Australian Sign Supplies, Inflight Logistic Services, Montana Tractors, Emblemtek Solutions Group, MAS Elektronik, Kimberly-Clark, Pacific Cycle

### **PRICE:**

Not published. Range: \$11,250+



# About SAP

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Founded in 1972 as Systems Applications and Products in Data Processing, SAP is the recognized leader in providing collaborative business solutions for all types of industries and for every major market. Serving more than 41,200 customers worldwide, SAP is the world's largest business software company and the world's third-largest independent software provider overall.

SAP America represents its German parent in the United States, providing world-renown enterprise software and services for managing accounting, distribution, human resources, and manufacturing functions. The company's products include end-to-end applications for business intelligence, enterprise resource planning, customer relationship management, and supply chain management applications.

SAP America offers industry-specific solution sets for markets ranging from aerospace and defense to wholesale distribution. Its services include consulting and support, as well as custom development and application hosting.

## **SAP Business One**

SAP Business One is affordable, easy-to-use business management software designed specifically for small and midsize businesses. It enables you to manage your critical business functions across sales, distribution, and financials, all in a single integrated system. With SAP Business One, you can instantaneously access a complete and up-to-the-minute view of your business, so you can respond to customers faster and grow your business more profitably.

The SAP Business One application offers a comprehensive and integrated set of tools to effectively manage all financial processes in your organization. As the core functionality of SAP Business One, financials management incorporates all key accounting processes, such as journal entries, accounts receivable, and accounts payable. Real-time accounting functions trigger accounting postings automatically when relevant business events occur.

SAP Business One supports automatic tax calculations as well as multi-currency transactions. Posting templates and recurring postings further streamline and simplify your accounting processes.

# About SAP

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Controlling software in SAP Business One allows you to define and manage budgets and compare actual and planned figures at any time to get an accurate and up-to-date picture of your business. Profit or cost centers are easily created and let you allocate revenue and expenses according to distribution rules – which are customizable and specific to your business.

The banking software in SAP Business One provides all the tools and functionality necessary to manage all your payment processing, including checks, cash, credit cards, and bank transfers. The reconciliation tool allows you to easily reconcile incoming and outgoing payments with vendor and customer invoices.

SAP Business One offers powerful financial reporting tools such as balance sheets, profit and loss statements, cash flow statements, and aging reports. The XL Reporter tool in SAP Business One enables the seamless integration of financial reports into Microsoft Excel templates.

## SAP Business One Accounting Modules

### Accounting and Financials

- General ledger
- Accounts Receivable
- Accounts Payable
- Journal entries
- Budgeting
- Account setup and maintenance
- Comprehensive tools and reports.

### Budgeting

### Reporting

### Banking

- Advance payments
- Credit card payments
- Account reconciliation.

### Financial reporting

- Balance sheets
- Profit and loss statements
- Cash flow analysis
- Transaction reports
- Multi-period comparisons
- Budget reports

## SAP Business One Strengths

- \* The SAP Business One application offers a comprehensive and integrated set of tools to effectively manage all financial processes in your organization.
- \* As the core functionality of SAP Business One, financials and accounting management incorporates all key accounting processes, such as journal entries, accounts receivable, and accounts payable.

# About SAP

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- \* Real-time accounting functions trigger accounting postings automatically when relevant business events occur. SAP Business One supports automatic tax calculations as well as multi-currency transactions. Posting templates and recurring postings further streamline and simplify your accounting processes.
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- \* Profit or cost centers are easily created and let you allocate revenue and expenses according to distribution rules – which are customizable and specific to your business.

SAP boasts a rich history of innovation and growth that has made the company a true industry leader. Today, SAP employs more than 41,900 people in more than 50 countries. Its professionals are dedicated to providing the highest level of customer service and support. SAP has leveraged its extensive experience to deliver a comprehensive range of solutions to empower every aspect of business operations.

By using SAP solutions, organizations of all sizes – including small businesses and midsize companies – can reduce costs, improve performance, and gain the agility to respond to changing business needs.



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### **HIGHLIGHTS**

- \* Fully Integrated Suite of ERP solutions for professional services and public sector organizations.
- \* Agresso Business World offers customers unrivalled post-implementation agility – the ability to alter the system and get new information out when requirements change, without having to call in external help.
- \* Flexible and agile solution adaptable to your organization’s needs; perfect for evolving organizations.

### **OWNERSHIP:**

Public  
(EURONEXT: U4AGR)

### **HEADQUARTERS:**

Victoria, BC Canada  
Dallas, TX USA

### **ERP SOLUTIONS:**

Agresso Business World: Fully  
Integrated Suite of ERP  
Applications

### **FOUNDED:**

1980

### **CUSTOMER FOCUS:**

Agresso Business World provides all of the essential functions needed by professional services and public sector organizations. Its focus on people-centric organizations and its deep understanding of their inherent business challenges and opportunities has led the company to achieve a top 5 position in the ERP mid-market space.

### **SELECT CUSTOMERS:**

Alvarez & Marsal, Destiny Resources Services Corp., Eidos Interactive, HSB, Skookum, Systra, Saab

# About Agresso

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Agresso ([www.agresso.com/usa](http://www.agresso.com/usa)) is a \$480 million enterprise resource planning (ERP) company, listed in the Netherlands as Unit 4 Agresso (EURONEXT-U4AGR) and one of the top five providers of ERP solutions for professional services and public sector organizations. Agresso offers a uniquely integrated data/process/delivery architecture designed specifically for Businesses Living IN Change (BLINC™).

Agresso is known as “The ERP Market’s Definition of Agility” as it allows an unlimited amount of ongoing, post-implementation changes without the typical external IT costs and intervention that nets billions of dollars in revenue to the market leaders. Over 2,750 companies and organizations in 100 countries deploy Agresso Business World for both operational support and strategic management.

The company’s role-based, Web Services and Services-Oriented Architecture (SOA) enabled solutions include: Financial Management, Human Resources and Payroll, Procurement Management, Project Costing and Billing, Reporting and Analytics, Business Process Automation, Field Services and Asset Maintenance, and CRM.

Today, Agresso’s unique underpinning architecture, which offers a tightly-integrated data/process/ delivery model that moves in lockstep, is being enjoyed by thousands of BLINC™ organizations, with over 1,500,000 worldwide users. The company is focused on correcting the CxO’s longstanding and expensive “re-architecting is a must” assumptions promoted by the ERP leaders. Their lack of post-implementation agility is cutting deep into corporate margins. Agresso is ERP ... with NO Expiration Date™.

## **Agresso Key Strengths**

- \* Agresso Business World gives organizations the ability to interactively blend your business and analysis model with the organization’s process model giving your people the information needed to increase the value of your service delivery process.
- \* Agresso Business World provides the flexibility you need to create performance metrics reflecting the reality of your business and provides accuracy in showing how the organization is performing.
- \* Post-Implementation Agility differentiates Agresso from its competitors; providing organizations the ability to adapt and grow without any limitations from your ERP Solution.

# About Agresso

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\* Agresso's long shelf life saves businesses the cost and trouble associated with re-implementation or replacement of an existing ERP system.

## **Agresso Technology**

Agresso Business World is different both architecturally and substantively from other ERP products. Its unique VITA architecture combines its data model, process model and delivery model into a cohesive unit. Any change made in any one of these areas automatically flows intelligently and makes associated changes and adjustments throughout the system. This combination not only has a positive impact on the bottom line, but it impacts the corporate strategies selected by management, by enabling change.

## **Agresso ERP Modules**

*Agresso Business World: Fully-Integrated ERP Suite*

Financial Management, Project Costing and Billing, Human Resources & Payroll, Reporting and Analytics, Business Process Automation, Procurement Management, Field Service Management and Asset Management, Student Information Systems and Travel Management.

## **Agresso ERP Highlights**

### **How *Post-Implementation Agility* Benefits an Organization**

Accommodating future needs is what post-implementation agility is all about. Most ERP vendors offer all the flexibility an organization requires... prior to implementation. But once the system is signed-off and live, any further changes incur additional (and often substantial) costs.

With Agresso, the ability to change your own system at the User level is its greatest advantage.

Technology Evaluation Centers (TEC) published a paper comparing the ability of different ERP vendor's products to manage change. Below is an excerpt from its findings: The majority of IT professionals surveyed in this report said that the ability to easily, quickly, and cost effectively manage ongoing change was their single overriding concern.

# About Agresso

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Technology Evaluation Centers (TEC) published a paper comparing the ability of different ERP vendor's products to manage change. Below is an excerpt from its findings:

*The majority of IT professionals surveyed in this report said that the ability to easily, quickly, and cost effectively manage ongoing change was their single overriding concern. Specifically, they referenced the following factors:*

- \* Changes based on new government regulations. In the financial area, they referenced International Financial Reporting Standards (IFRS) and SOX, as well as emerging environmental rules and guidelines.*
- \* Changes affecting the structure of their charts of accounts (to accommodate new lines of businesses, for example, or for future reporting requirements).*
- \* Changes tied to analytics or historical projected data.*
- \* Changes associated with segmented and global account structures that require compiling multiple currencies, varied tax accounting, and even multilingual needs, into one format for final statutory purposes.*

In almost all cases, responding to these types of change scenarios could be accomplished in Agresso Business World directly in the graphical user interface (GUI). This means the business users themselves could effect the necessary changes. In contrast, other vendor solutions required application-level programming and external consultants (or internal IT staff) were necessary to make the required changes.

Because Agresso Business World users enjoy an incomparable degree of power over their own system, it is critical that they are included, educated and mentored early on in the implementation process. An apt analogy can be found in transportation: while other vendors chauffeur you to where you want to go (at your expense), Agresso teaches you to drive, stays with you as a navigator and then lets you take the wheel.

For this reason, the goals of AIM2 start with the delivery of an as-specified system, on time and on budget and further include as a "deliverable" the transfer of knowledge and expertise to customers.

# About Agresso

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## **Minimizing the “Total Cost of Change”**

Organizations often talk about total cost of ownership, or TCO. But this metric usually fails to include the on-going costs associated with future changes to the implementation. More often it deals with maintenance costs – upgrades, patches, etc. The costs associated with a system modification (for example, a change to the structure of the chart of accounts to accommodate new reporting requirements) are not included in TCO.

Because these costs are so significant, organizations are better to concern themselves with Total Cost of Change (TCC). In practice, that is usually where their money is spent.

With the majority of substantial changes - from restructuring and reorganization to responding to Government regulations - getting accomplished in-house, Agresso customers spend a fraction of what other organizations spend on re-implementations.





## HIGHLIGHTS

- \* Sage offers both hosted and on-premise solutions.
- \* Broad range of world-class products to fit businesses of all sizes and support your business as you grow.
- \* Supported by over 40,000 accountants and 23,000 business partners worldwide.

### **OWNERSHIP:**

Public (LSE:SGE)

### **HEADQUARTERS:**

Scottsdale, AZ

### **ACCOUNTING PRODUCTS:**

- \* Sage Accpac
- \* Sage BusinessWorks
- \* Sage Business Vision
- \* Sage MAS 90 / Sage MAS 200

### **FOUNDED:**

1981, England

### **BUSINESS MODEL:**

Hosted and On-Premise

### **CUSTOMER FOCUS:**

Complete set of solutions for small and medium sized businesses.

### **SELECT CUSTOMERS:**

Sage Accpac Clients: County of Essex, Ed Morse Automotive Group, Body 'n Scents,

Sage BusinessWorks Clients: Cable X-Perts, Inc, Herschal Products, Inc. Island Soap Co.

Sage Business Vision Clients: Casa Loma, Heys International, Response First Aid Systems.

Sage MAS 90 / Sage MAS 200 Clients: Automotive Investment Group, Hauser Chocolatier.

### **PRICE:**

From \$2,000 to \$100,000, Sage's pricing range reflects the diversity of their product offerings.

# About Sage

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With a wide range of front-office and back-office solutions — including accounting, human resources, payroll, fixed asset management and customer relationship management (CRM) software — Sage Software offers award-winning products and services that have revolutionized the way companies do business in today's marketplace.

Sage Software offers leading business management products and services that give more than 2.3 million small and medium-sized customers in North America the insight for success throughout the lives of their businesses. Its parent company, The Sage Group plc (London SGE.L), supports 4.3 million customers worldwide across a broad spectrum of industries ranging from small privately-owned businesses to large nonprofit organizations.

For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable applications through its portfolio of leading brands, including Sage Abra, Sage Accpac, ACT! by Sage, Sage CPA Practice Manager, Sage FAS, Sage MAS 90, Sage MAS 200, Sage MAS 500, Sage MIP Fund Accounting and Sage Fund raising, Peachtree by Sage, Sage SalesLogix, and Sage Timberline Office, among many others.

## **About Sage's Accounting Products**

*Sage Accpac ERP (formerly ACCPAC Advantage Series)* is an advanced accounting application built on a world-class, object-oriented, and multi-tiered architecture. Designed for companies of all sizes, Sage Accpac can be deployed both as a Web-based and desktop application, and is the foundation for an integrated set of end-to-end business management applications.

You choose the solutions that work best for you: the applications, database, and deployment options, the user interface and languages, the network environment or operating system, the add-on software developed by Sage Software or independent experts, and the customized features that help you operate efficiently and profitably.

*Sage BusinessVision* has provided premium real-time business management and accounting systems since 1987, Sage BusinessVision offers robust, user-friendly tools for small and mid-sized companies. Sage BusinessVision systems are complete, scalable solutions to meet the needs of growing companies, and are the most powerful tools available for small businesses.

# About Sage

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BusinessVision offers several editions, from a single-user edition to 100+ user Client Server Edition, and ships complete with 18 modules (16 modules in Limited Edition and Small Business Editions).

*Sage BusinessWorks Accounting* bridges the gap between off-the-shelf, entry-level products and complex high-end systems. Its modular design is ideally suited for growing small and mid-sized businesses that require more muscle than basic bookkeeping software can provide. With over 250 presentation quality management reports, serial number tracking, and warehouse management capabilities, Sage BusinessWorks Accounting is applicable to a wide range of industry applications.

*Sage MAS 90 and 200* systems offer a broad selection of feature-rich solutions including core accounting, business intelligence tools, customer relationship management, e-commerce, HR and payroll, manufacturing, and distribution.

Sage MAS 90 and 200 work the way you do with flexibility that enables you to choose the modules that best suit your business needs. Sage MAS 90 is an industry-leading accounting and business management software solution for small to medium-sized companies. Recommended by more CPAs than any other application in its class, this product suite offers a broad selection of feature-rich modules that empower managers with the information they need to make profit and growth driven decisions.

At the heart of every MAS 90 and MAS 200 solution is a robust, yet easy-to-use accounting system. From the General Ledger and Bank Reconciliation to Accounts Payable and Accounts Receivable, MAS 90 and MAS 200 offer the features and functions you need to streamline all bookkeeping and accounting processes.

Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of accounting and business management software solutions and related products and services for small and midsized businesses.