



PRODUCT TOUR FOR SOUTHWARE EXCELLENCE SERIES

[By J. Carlton Collins, CPA](#)

In recent years, countless CPAs throughout the United States have encouraged me to publish a review of SouthWare Excellence Series in my accounting software web site. Those CPAs who know the product well are loyal fans of SouthWare and they believe SouthWare's merits are frequently overshadowed by the marketing hype generated by the larger accounting software companies. This year, I decided to find out what all of the fuss was about. This paper summarizes the results of my review of the SouthWare product.

Unsung (un-sung) - Not honored or praised; uncelebrated: **an unsung hero**. To me, "unsung" is the word that comes to mind that best describes SouthWare and its' Excellence Series product line. Both the company and the product are worthy of high praise, but they are largely uncelebrated – mostly because it is not their style. This year I spent some time with the people at SouthWare where I found a dedicated, hard-working staff producing a solid accounting system jam packed full of powerful features that consistently provides more features than other powerhouse products such as Solomon, Navision, and Macola. This is a strong claim and to back it up I offer the following insights so that you can make up your own mind.

BACKGROUND INFORMATION

Founded in 1984 (by President James Clemens), SouthWare has a staff of 35+ employees, 50+ active dealers, and 6,000+ customers. The company adheres to strong religious values, and there are very proud of the fact that over 80% of their employees have been with SouthWare for more than 12 years. SouthWare Excellence Series includes 34 modules which can run on more than 600 different combinations of platforms, operating systems and databases including Windows and Linux.



SOUTHWARE'S FEATURES

Using current data (*compiled as of February 2003*), we compared SouthWare Excellence Series' features to those of other top accounting software products and found that SouthWare more than passes the test. In a comparison of 862 inventory (stock) and order entry features for 154 popular accounting software products, we found that SouthWare beat out 143 other products, including popular solutions such as Macola, MAS 500, Great Plains, e by Epicor, Visual AccountMate, eBPCs, Navision, ACCPAC Advantage, JBA, Lawson and even Axapta (*see comparison report below*).

INVENTORY & ORDER ENTRY FEATURE ANALYSIS FOR 154 PRODUCTS

<u>Score</u>	<u>Product Name</u>	<u>Version</u>	<u>Vendor Name</u>	
810	94%	SAP R/3	Jan 2001	SAP
773	90%	Fourth Shift 7	7.0	Fourth Shift Corp.
769	89%	Oracle E-Business Suite	11i	Oracle Corporation
737	85%	PeopleSoft	8.0	PeopleSoft, Inc.
736	85%	SyteLine	7	Frontstep, Inc.
732	85%	One World XE	Jan 2001	J.D. Edwards, Inc.
732	85%	Mastermind Formula	8.0 Build 26	MyBusinessApp
730	85%	Syspro , ©	6.0	Syspro
727	84%	Ramco e.Applications	3.1	Ramco Systems Corp.
718	83%	MS+ - Manufacturing Systems +	7.2.6	ALN Associates, Inc.
710	82%	SouthWare Excellence Series , ©	8.24	SouthWare Innovations, Inc.
706	82%	Macola ES, ©	ES	Exact Software North America
700	81%	MAS 500, ©	6.2	Best Software, Inc.
695	81%	Great Plains Edition, ©	7.5	Microsoft Business Solutions
695	81%	e by Epicor, ©	7.3	Epicor Software Corporation
695	81%	Visual AccountMate/SQL	5.1	AccountMate Software Corp.
691	80%	eBPCS	6.1	SSA Global Technologies
687	80%	Navision, ©	3.6	Microsoft Navision
680	79%	ACCPAC Advantage Series Enterprise Edition	5.0	ACCPAC International
680	79%	ACCPAC Advantage Series Corporate Edition	5.0	ACCPAC International
680	79%	ACCPAC Advantage Series Small Business Edition	5.0	ACCPAC International
680	79%	ACCPAC Advantage Series Discovery Edition	5.0	ACCPAC International
676	78%	System 21	3.5.2	JBA International
676	78%	Macola Professional, ©	7.5	Exact Software North America
670	78%	lawson.insight	8.0	Lawson Associates, Inc.
663	77%	WinMan	5.26	TTW Incorporated
655	76%	PowerCerv ERP Plus	9.0.02	PowerCERV Corporation
651	75%	AXAPTA, ©	3.0	Microsoft Navision
647	75%	Datamodes TM/4 Solutions	TM/4	Datamodes, Inc.

Of course features should not be the only measure by which you should select an accounting software package – you should also consider important factors such as the company behind the product; the underlying technology; the reseller channel; product stability; the size of the customer base; the financial strength of the company; product support, etc. However virtually everyone agrees that features are definitely one of the key factors to consider. When compared to other top accounting software solutions, SouthWare consistently beats the competition. For example, based solely on number of features:

SouthWare's General Ledger module has more features than SysPro Impact Encore, Macola Progression, Scala, Epicor's Vantage, DataPro's Infinity, Deltek's CostPoint, Best's MAS 200, Made2Manage and more than 50 other top products.

SouthWare's Accounts Payable module has more features than Axapta, Macola Progression, JBA System 21, ACCPAC Advantage, Solomon, Ross Systems, Epicor's Vantage, DataPro's Infinity, Deltek's CostPoint, Best's MAS 200, Made2Manage and more than 60 other top products.

SouthWare's Job Costing module has more features than Navision, Axapta, Macola Progression, JBA System 21, ACCPAC ProSeries, Ross Systems, Epicor's Vantage, DataPro's Infinity, Deltek's CostPoint, Best's MAS 200, Made2Manage and more than 70 other top products.

REPORT CARD

SouthWare's Report Card screen is a simple and clever way in which SouthWare communicates the company's status at a glance. Similar to the report card format that we are all used to, SouthWare grades six key factors of business performance over the previous six month period. The formulas and grading scale used are completely defined by the user. For example, growth rates equal to 8%, 6% or 4% might equate to an A+, B, or C- for one company, while another company may establish growth rates of 20%, 15% and 10% as A+, B, and B- results. Once you have established your grading parameters, whatever they are, SouthWare consistently rates your company's performance. The report card screen is shown below:

		Period Trend						
		PTD	PTD	PTD	PTD	PTD	PTD	PTD
		12/31	01/31	02/28	03/31	04/30	05/31	06/30
		2001	2002	2002	2002	2002	2002	2002
Quality			C+	C	C	B	B	B-
Financial								
Customer		F	C	C-	C	B	B+	B
Vendor		F	C	C	B	B-	B-	B-
Employee			A	A-	A-	A	A-	A-
Future		F	C	B-	B-	B-	C	B-

The following screen shows the extensive controls which SouthWare provides over the grading calculations and parameters which is an essential reason why this tool is so useful.

Method	Value	Grade	Weight	Quality I
%	.0		1.0	
%	43.6			
%	.0			
%	74.1			
%	74.1			
%	.0			
%	7.4			
%	.9			

Grade Scale	
A	> 15.0%
B	> 10.0%
C	> 5.0%
D	> .0% <-----
F	> -99.0%

Sales Growth	
Sales- PTD 01/31 2002	2
% Change from:	
Sales- PTD 01/31 2001	2

MACROS

SouthWare provides macro capabilities that allows a user to record and playback macros to repeat common or complex tasks. For example, a user might create a simple macro to print the 26 month end financial statements, journals and reports desired by management. Thereafter the user need only play back the macro each month in order to produce those same reports. Accounting system macros are not only time savers for experienced users, but they are also particularly useful to inexperienced users who need guidance to operate the system. Several top accounting packages such as Great Plains and ACCPAC Advantage also provide macro capabilities, but SouthWare goes a step further by allowing the user to schedule macros to run at pre-defined times. For example, SouthWare could produce the various sales reports needed each Monday at 8:00am in time for the 8:30am sales meeting. To record or playback a macro, the user need only press the F4 key from any screen. Users can also schedule macros to play a specified times - this feature is shown in the screen below:

The screenshot displays the SouthWare software interface. At the top, the title bar reads "SWACTINQ SouthWare Excellence Series (DM\ Demo Company". Below the title bar is a menu bar with options: File, Edit, Approx, Search, Next, Previous, Enter, Options, Breakout, Link, Help. A toolbar with various icons is located below the menu bar. A "Status:" label is visible on the right side of the toolbar area.

The main content area shows a calendar for "September 2002". The calendar is organized into columns for the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, and Friday. The rows represent macro instances, labeled "#Auto" and "#Manual". The dates shown in the calendar are: 1, 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18, 19, 22, 23, 24, 25, 26, 29, 30. A hyphen "-" is present in the cell for Monday, 16th. The "#Auto" label is present in the first column of each row, and the "#Manual" label is present in the second column of each row.

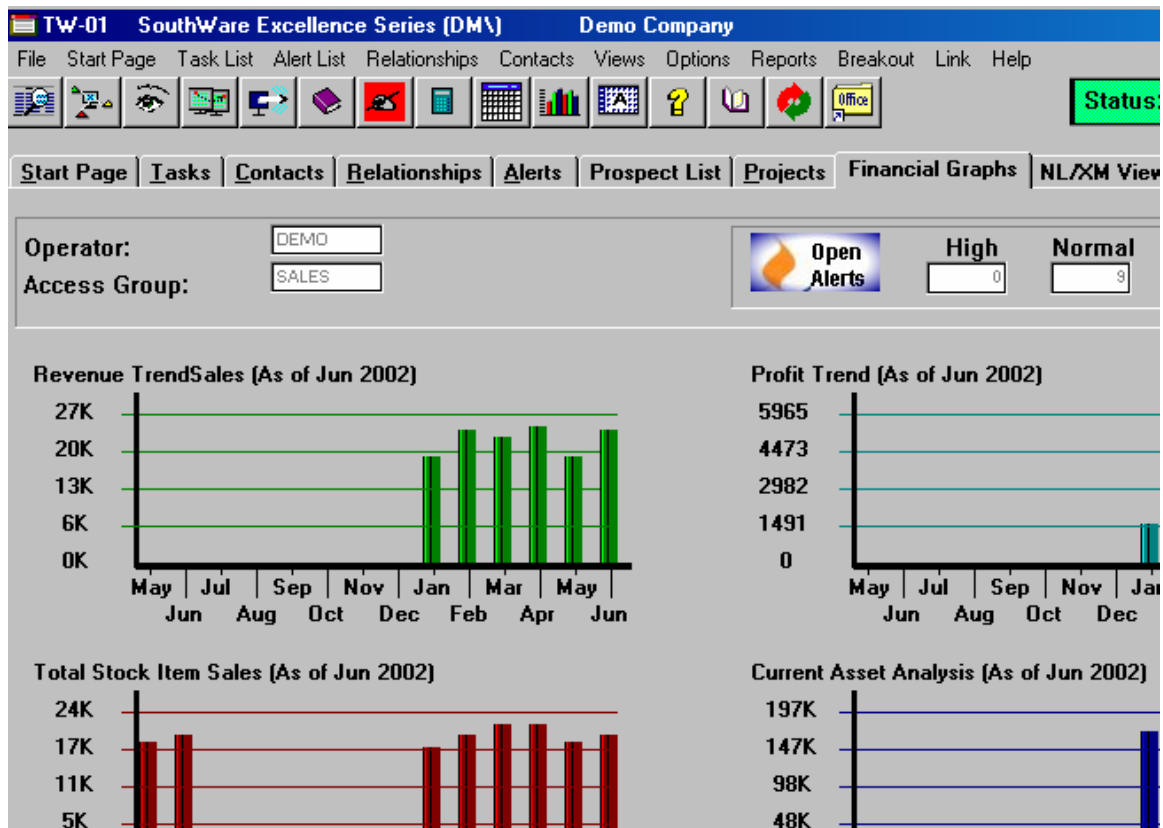
TASKWISE

SouthWare's TaskWise module is a combination "CRM Tool" and "Digital Dashboard" on steroids. It does not do the module justice to call it a CRM tool, it is much more than that. For example, here is a partial listing of the features contained in TaskWise:

- Prioritize and track all "To Do" tasks by company, department, and user
- Track all calls, meetings, and contacts
- Track all relationships (customer, vendor, employee, prospect, etc.)
- Track projects
- Display financial graphs
- Display digital dashboard
- Warehouse management
- Review sales status
- Manage service dispatch

The following screens show some of the TaskWise functionality:

The financial graphs screen (shown to the right) provides visual displays of your company's growth or decline in revenue, profits, inventory, and current assets. A single click on any graph launches that graph in Microsoft Excel so that further analysis or printing can be performed on the data.



The warehouse status page indicates the number of pending and completed orders, as well as the amount of revenue booked today and accounts receivable expected in the next 7 days. The user can also use this page to print labels, inquire on inventories, and check the shipping status using the UPS or FedEx tracking number on the built-in web browser window.

TW-01 SouthWare Excellence Series (DM\ Demo Company

File Start Page Task List Alert List Relationships Contacts Views Options Reports Breakout Link Help

Contacts Relationships Alerts Prospect List Projects Financial Graphs NL/XM View Accounting Dept

Operator: DEMO
Access Group: SALES


Open Alerts High 0 Normal 9

As of 11/30/02

# Orders to Ship Today	2
-- \$ Sched Ship Today	280
\$ Receivings Due Today	1,679
-- Next 7 Days	22,459

Unposted Transactions

# Recvgs Trx	0	➔
-- # Not Costed	7	➔
# Inv Trx	0	➔
# Counted Items	0	➔



The Accounting Department view shown to the right displays a variety of summaries for financial amounts such as sales, payables, receivables, and payroll. Drill down buttons allow the user to access the underlying details with a single click.

TW-01 SouthWare Excellence Series (DM\ Demo Company

File Start Page Task List Alert List Relationships Contacts Views Options Reports Breakout Link Help

Contacts Relationships Alerts Prospect List Projects Financial Graphs NL/XM View Accounting Dept

Operator: DEMO
Access Group: SALES

Open Alerts High 0 Normal 9

Pending A/R:

\$ Sales Trx:	.00	➔
\$ Cash Receipts	.00	➔
\$ Late Fees	.00	➔

XM View

Pending G/L:

# Unposted G/L Trx	
-- # Interfaced	
-- # G/L Adjustments	
Pending Interfaces:	A/P?
	A/R?
	P/R?

Pending A/P:

# Unposted Invoices	2	
# Unposted Credits	6	
# Unposted Prepaids	0	
\$ Unposted - Net	1,470.42	➔
- \$ On Hold	820.42	

Pending Payroll:

# Payrolls Defined		
Current Payroll:	1	
End of month payroll	07/31/02	Define

The ExecuMate view is just one click away from the Accounting Department view and it provides even more details such as aging, history, profit margins, and more.

XMVIEWAR SouthWare Excellence Series (DM\) Demo Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Gathered 11/05/02 11:45AM **A/R Summary** As of 11/30/02

\$ Outstanding	173,320,697
\$ Future	23
CURRENT	-8,321,833
1 - 30 DAYS	1,407
31 - 60 DAYS	1,707
OVER 60 DAYS	181,639,392

Recent History

Invoices
Credits
Debit Memos
\$ Credit Sales
Pymts Recv'd
\$ A/R Cash Recv'd

[30 Days]

Pending Transactions

\$ Sales Trx	0
\$ Cash Recpts Trx	0
\$ Late Fees Trx	0

Customers

Customers
Overall Customer Totals:
- Margin PTD
- Margin YTD
Top Cust YTD Margin

ExecuMate II™
Executive Summary & Analysis

Zoom Gather

This sales information screen is ideally suited for use by everyone in the sales department, from the sales manager down to the service dispatch call takers. Here you can take orders, issue quotes, inquire about existing orders and drill down into sale history.

TW-01 SouthWare Excellence Series (DM\) Demo Company

File Start Page Task List Alert List Relationships Contacts Views Options Reports Breakout Link Help

Alerts Prospect List **Projects** Financial Graphs NL/XM View Accounting Dept Warehouse Status Sales

Operator: DEMO Access Group: SALES

Open Alerts High: 0 Normal: 9

ExecuMate II Summary as of 11/30/02

Open Orders:

# Orders	35
-- \$ Value	6,962
----\$ On Hold	0
# Sales Quotes	3
--\$ Value	400

Sales Order Trend (As of 12/03/02)

Order Processing

Quote Processing

XM Sales Inquiry

Order Inquiry

NEWS FLASH REPORTER

SouthWare's News Flash Reporter provides a browser view for virtually any SouthWare data. In the example screen shown below, the News Flash Reporter presents data from the TaskWise module as well as alerts (shown in box on right) and task status and summaries. The user need only "flag" a task as being news worthy and it will automatically be displayed in the News Flash Reporter.

This same approach can be used to display any data in SouthWare. For example, the screen below shows data for a particular customer. This allows anybody in the organization to access any data desirable via their browser - which means that setting up and maintaining systems throughout your organization is much easier.

Cust # 1		Carl Sanders		YTD Grade:
All Customers		Customer Account Summary		
Summary				
Name/Address:	Carl Sanders 123 Magnolia Avenue P.O. Box 2030 again Auburn , AL 00012	Related Links: Customer Maintenance Open/Paid Item Inquiry Sales Orders Product History Reports Services Collection Calls Job Inquiry Report Card Customer Events TaskWise Relationship Info		
Contact:	Carl Sanders			
Phone:	334-821-2343			
E-Mail:	CARL@SANDERS.COM			
Salesperson:	BTR			
Current Status:	Unpaid Balance: \$1,514.78 Past Due: \$1,517.93 As of: 03/07/03 Open Sales Orders: 27 orders = \$277,414.51 Open Service Orders: 8 orders = \$446.40 Last Task: Call - Inbound on 01/14/03			
YTD Activity:	Purchases: .00 Payments: .00			

EXPLORER VIEW

With version 9.0, SouthWare's has added an improved data view similar to the explorer functionality found in Great Plains and MAS 90. This new data view, which is available in place of all look up fields throughout the system, provides a clean graphical windows style view of all data in SouthWare. Icons allow the user to display a page of records at a time, or a complete list of all records. The resulting data may be sorted by any column with the click of a button, columns may be repositions via drag and drop, and all data can be exported to Microsoft Excel by clicking on the Excel icon button.

The screenshot shows the 'Customer File Viewer (AR01)' window with a menu bar (File, Edit, Approx, Search, Next, Previous, Enter, Options, Breakout, Link, Help) and a toolbar with various icons. The main area displays a table of customer records. The table has columns: Customer number, Customer name, Phone number, Salesperson ID, Customer group, Zip Code, and Co. The first record is selected.

Customer number	Customer name	Phone number	Salesperson ID	Customer group	Zip Code	Co
1	Carl Sanders	123 Magnolia Avenue	P.O. Box 2030	Auburn	AL	00012
2	Manfred Morris	987 Dogwood Lane		Opelika	AL	36801
3	Ryan Chance	4647 Sports Blvd	Testing Address Line 2	Charlotte	MI	45333
4	Betty Hines	7243 Cotton Street		Highland	AL	89778
5	Willy Nilly	432 Clown Plaza		New York	NY	43567
6	Rose O'Brien	2136 Elk Street		Macon	GA	75464
7	Garth Rosen	98 Northgate Drive		Opelika	AL	36801
10	Barbara's International cust	555 Stage Rd		Dallas	TX	43372
101	Location 001 Customer	921 Terrace Acres Drive		Auburn	AL	36830
150	Appleton's Haberdashery	1st National Bank Building	Suite 210	Montgomery	AL	36532
200	Location 002	4500 Hwy 14		Union Springs	AL	34501
300	Location 003	510 Atlanta Hwy		Montgomery	AL	36109
350	Columbus Auto Parts	1505 Victory Boulevard		Columbus	GA	30050
400	SSA Consulting	25 Greenland Street		London		NW1 OND

Selecting a record in this explorer-style look up window also displays more details about that particular record, as shown below:

The screenshot shows the 'Customer File Viewer (AR01)' window with a menu bar and toolbar. The main area displays a table of customer records. The first record is selected, and a detailed view of that record is shown on the right side of the window.

Customer number	Customer name	Phone number	Salesperson ID	Customer group	Zip Code	Co
Cust#	Name	Phone	Flags	Sma		
1	Carl Sanders	334-821-2343	BTR			
2	Manfred Morris	205-749-5741	BTR			
3	Ryan Chance	313-234-2983	BTR			
4	Betty Hines	205-776-2342	BTR			
5	Willy Nilly	455-987-1234	AEM			
6	Rose O'Brien	404-563-2278	BTR			
7	Garth Rosen	205-749-4315	4			
10	Barbara's International cust		AEM			
101	Location 001 Customer		LOC			
150	Appleton's Haberdashery	205-262-5841	BTR			
200	Location 002	205-756-2300	LOC			
300	Location 003	334-271-3245	LOC			

Cust #:	1
Name/Address:	Carl Sanders 123 Magnolia Avenue P.O. Box 2030 again Auburn , AL 00012
Contact:	Carl Sanders
Phone:	334-821-2343
E-Mail:	CARL@SANDERS.COM
Salesperson:	BTR

This data view may also be altered by adding other data fields to the view, or by grouping the data by category as shown below:

AR-07-01 SouthWare Excellence Series (DM/) Demo Company - Rev 9.0

File Edit Approx Search Next Previous Enter Options Breakout Link Help

TIMW 03/07/03
A/R Customer Maintenance

Customer File Viewer (AR01)

Customer number Customer name Phone number Salesperson ID Customer group Zip Code Co

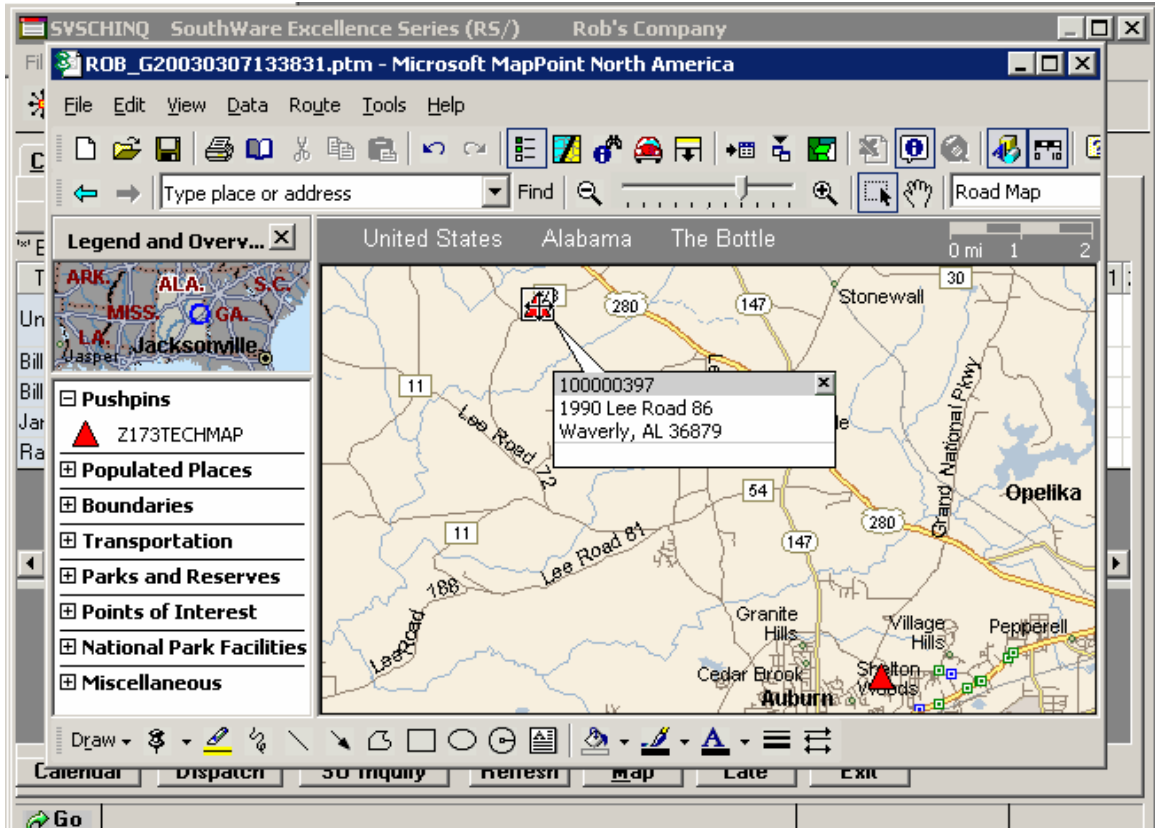
S...

Cust#	Phone	Name	Flags	S...	Group	Email Address
- Sman:1 (5 records)						
5555...	8888888	Tim	1			tim@southware.com
8877...	8888888	Tim	1			tim@southware.com
2050	206-664-8512	Tick Tock Clocks	1			
3362	205-873-5681	Lost Horizons Travel	1			
3350	205-321-4424	Jackie's Beauty School	1			
- Sman:2 (3 records)						
3364	205-963-4785	Buttons & Bows	2			
810	205-862-5296	Harrelson's Computer Centre	2			
1150	205-749-5536	Kleen Karpet	2			
- Sman:3 (5 records)						
2250	404-562-8523	Victoria Church of Christ	3			
3352	205-963-6363	Jerry's Auto Supplies	3			

[Cust]

MAP POINT INTEGRATION

Version 9.0 integrates SouthWare's customer data with Microsoft Map Point - an add on tool that provides a database of every street, hotel, bank, restaurant, museum, etc in the United States, and throughout the world. Map Point updates itself on line and SouthWare customers can use Map Point to plan driving routes, obtain directions, plan where to stay and where to eat on the road, etc. Map Point also contains the United State census data allowing users to overlay the resulting maps with critical population data such as average household income, age, etc.



Customization

Anyone who has followed my reviews in the past will know that the ability to easily customize an accounting system is the most important functionality I look for when evaluating an accounting system. There is no way for an accounting software vendor to provide every conceivable field and feature a given company might want, and those that try only end up producing bloated software that is too difficult and cumbersome to use. Today's best products strive to provide solid core accounting functionality along with easy to use tools that allow the company to customize the product to their particular needs. SouthWare follows this philosophy and Excellence Series delivers. The Extended Data and WorkFlow module allows users to add new data fields to files and change the flow of data within the program without being locked by custom programming. Your customized changes will continue to work automatically even as you upgrade the core SouthWare product to new versions.

The Extended Data module is fairly simple to use, you certainly don't have to be a programmer to add simple enhancements to the system. With this tool you can add new data fields that become part of the normal entry and reporting for your system. For more advanced needs, you can also use Extended Data to create stand-alone databases. For example, a boat marina owner might use a separate database to keep track of all docks, slips, or boats for rent. As you add extra data fields, you can also print these fields on invoices, purchase orders (POs), picking tickets, and service orders, etc. You could also create your own prompts and defaults, or add new ways to search through your master data files.

The Extended Data module does not allow for full program development – there are limitations to the amount of customization that can be performed. However, these limitations are considered to be far beyond the levels of customization most normal companies would experience. Specifically, Extended Data allows you to add fields to more than 20 different master files, with up to 26 fields per file. You can link up to 20 additional screens for a maximum of 546 new fields per file. You can also add fields to more than 20 different transaction files, with up to 15 fields per file. Thereafter you can link up to 20 additional screens for a maximum of 315 new fields per file. Added fields can accommodate manual or automatic entry, user-defined names, prompts, and defaults. Data for a field can be validated against your existing data files (ie: customer names), or a list of valid values. You can create up to 8 new search fields per file (new fields are automatically integrated into the standard search feature.)

New fields created with Extended Data are automatically accessible with ImportMate™ and ReportMate™ and WorkFlow. Some example uses for Extended Data include, Adding alternate phone numbers to the customer file; Adding additional description fields to the inventory stock file; Add more shipping and credit information about your vendors; Add more reference dates to customer equipment records; Add a “Date Inactivated” and “Reason Codes” to G/L Accounts.

Modules

All together, SouthWare Excellence Series offers 36 separate modules. These modules and selected key benefits for each module are summarized below.

- 1. ACCOUNTS RECEIVABLE INVOICING ADAPTER** - Maintain detailed invoice histories, supports service codes, returns, price adjustments, retainage, credit limit checking, unlimited lines of text on the invoice, miscellaneous charges, added fields, invoice notes, and end of day sales register.
- 2. ACCOUNTS PAYABLE** - Maintains 5 years of history for each vendor, supports multiple discounts, one-time vendors, payments on hold, customer refunds, check voiding, 1099 forms, and recurring transactions.
- 3. ACCOUNTS RECEIVABLE** - Maintain 5 years of history for each customer, supports customer notes, invoice notes, added fields, multiple bill-to and ship-to addresses, open item or balance forward invoicing, commissions based on profit, automatic late fees, reprinting of invoices and vendor refunds.
- 4. ACUODBC VISION DRIVER & ACUXFD TECHNOLOGY** - ODBC Connectivity provides the ability to export data to ODBC compliant applications such as Microsoft Excel.
- 5. ASSEMBLY WORK ORDERS** - Component features include tracking number, multi-location, conversion U/M, Fixed or Variable quantity, Confirmation option, W/O Effective Date; Up to 9999 components per assembly ; creates a stock item from multiple stock items - components can be sub-assembled for multi-level assembly.
- 6. CASH FLOW** - Reconciliation report; unlimited number of bank accounts; check number audit report.
- 7. COLLECTIONS ADAPTER** - Manage collections by scheduling collection calls and entering collection call information. Supports automatic selection of customers who need a call, review previous calls, record who you talked to and what they promised, call date and promised date tracking, and zoom into the details of any invoice.
- 8. CONTRACT MANAGEMENT** - Contract assigned to service location, territory, and route sequence; handles contracts based on meter usage; create proposals / turn into contracts; generate scheduled service orders.
- 9. DATABASE DIRECTOR™** - Store or replicate your data in MS-SQL, Oracle, Informix, ISAM, Microsoft SQL Server, Oracle and Sybase (for history files), Btrieve, C-ISAM, generic ODBC.
- 10. DOCTRANSFER™** - Directly exchange documents with customers and vendors who also use the SouthWare Excellence Series™. Exchange EDI documents with customers and vendors.
- 11. EQUIPMENT SERVICING** - Track by serial #, tag #, or system; specific warranty dates based on model; loan, rent, out-of-service indicator; up to 10 schedules per equipment model; based on time elapsed or metered usage.
- 12. EXCELREPORT™** - The ExcelReport allows you to produce a report card summarizing six success factors; trend analysis, GPA analysis using an A-B-C-D-E-F grading scale.
- 13. EXECUMATE II™** - ExecuMate provides a window into the financial health and activity of your business and includes a summary of the following data: company totals or profit center detail; cash and aging totals; trigger “Alert” warnings; financial statement totals current balance; cash worksheet; last 10 weeks actual cash flows; next 10 weeks projected cash flows; actual trends; A/R and A/P aging; today’s sales; activity statistics per day, week, month, etc.; trigger “Alerts” for G/L accounts or financial ratios.

- 14. EXTENDED DATA™** - Add new data fields to standard files. Create your own prompts and defaults, add new search keys.
- 15. FIXED ASSETS** - Tracking, valuing, and depreciating your assets. Supports 15 character asset ID numbers, property tax report locations, cost basis, salvage values, replace costs, insurance coverage amounts, usage, owned, leased, or borrowed indicators, straight-line, declining balance, usage-based, sum-of-the-years digits, statutory, ACE, and non-depreciable, and partial period conventions.
- 16. GENERAL LEDGER** - 16 column reporting, source and use of funds report, cash flow in compliance with FASB 95, multi-company consolidation, 4 segment account numbers, 5 year comparisons, and on-screen zoom to detailed transactions.
- 17. IMPORTMATE II™** - ImportMate II is an add-on module you can use to automatically input data into selected Excellence Series files. ImportMate II prompts you for all the information it needs and checks to make sure that the data you are bringing in is valid.
- 18. INTERNATIONAL TRANSACTIONS™** - Record, track, and report multi-currency transactions involving international trading partners. Features include unrecognized gain/loss report, history of gain/loss report toggle display between natural currency and base currency (dollars)
- 19. INVENTORY CONTROL** - Comprehensive line of modules for your inventory-related operations. Sophisticated Inventory Control includes tracking numbers (serial/lot/etc.), various costing methods, multi-location flexibility and many related capabilities to help you manage inventory levels and information. Purchasing features help you buy what you need, when you need it, and at the right price. You can track the assembly of items from inventory, returns to vendors and returns from customers. Sales options include Point of Sale, Order Entry (and related shipping processes) and Rentals. Plus, powerful management tools ensure that you always know where you stand in reaching your goals for profitability and service.
- 20. JOB COST** - Completed contract or percentage complete; copy function to quickly duplicate a job; AIA Invoicing option; subcontractor retainage; change order; overhead allocation; and up to four breakdowns such as phase and cost category.
- 21. ORDER ENTRY** - Customize the keystrokes and security features per operator ; text and notes for the order ; special purchase, drop ship, and handle as surplus; backorder, substitute and cancel options; sell from multiple locations on an invoice.
- 22. PAYROLL** - Distribute salary to multiple G/L accounts ; employee notes; added fields; pre-check authorization report; direct deposit; retirement, review, leave reports; 401-K, cafeteria plans, and garnishments.
- 23. POINT OF SALE** - Numerous pricing options; serial, lot, or other tracking numbers; option to display suggested related items; allows miscellaneous add-on charges; calculates proper sales tax; any combination of cash, check, credit card, or on account payment; calculates change due; optional interface to electronic cash drawer.
- 24. PURCHASING** - Suggested order quantity based on EOQ, movement class, quantity discounts, prior usage, min/max; safety stock - fixed or based on usage; option to "freeze" order controls for items; Info about out of stock situations; seasonal indicator and movement class generates POs for stock based on current item status and order controls replenishment, expedite, exceptions, review cycle, scheduled receipts, vendor performance, and other reports.
- 25. RENTAL DEPARTMENT** - Ideal solution for the business that both rents and sells items; multi-location option, base rate for rental table, serial number tracking option, Cost/Value/Price info; other info such as bin location, turnaround requirements; rentals, sales, and service in single transaction; option to sell or exchange rental items; grace period, cutoff times and weekend pricing; security deposits.
- 26. REPORTMATE™** - Access the data in any major file in SouthWare and produce a report. Relationships between files are already set up; test a field to be less than, greater

than, equal to, not equal to, greater than or equal to, less than or equal to, or match on masking characters ; report formats include printer, screen, or file, HTML file, browser table, DIF, delimited, merge file, XML data, fixed-position or fixed-length text, a file to use with ImportMate, as ExecuMate II statistics; "WYSIWYG" entry lets you see and edit what the report will look like, up to 264 columns per line.

27. RETURN AUTHORIZATIONS - Lets you manage your inventory in conjunction with items being returned from customers and items being returned to vendors; Tracks item/serial#/equipment info; estimated cost; return status info.

28. SALES MARK® - Integrated contact management system 36 user-defined record types; multi-screens per record; up to 10 search fields per record; client data linked to A/R customer; territory masking; conversation records; hot keys; history of letters, literature; mailing lists and labels ; automatic phone dialing; data import to create prospect records from purchased databases; create selective call campaigns.

29. SERVICE INVOICING - System for service businesses that handles credits, special orders, pricing adjustments, and payments on account credit limit checking; generate invoices from contracts, service orders, equipment service pricing.

30. SERVICE ORDERS - Option for multiple service locations problem description, problem codes, estimates, comments, and actions taken, track dates and times for each step; option to service multiple equipment on one service order, multiple technicians per service order; display service orders to be dispatched along with a list of possible technicians; check technician skills, territory, priority.

31. SHIPPING INTERFACE - Send order-related information to and from a third-party shipping software package; interface to/from StarShip™ (by V-Technologies); interface to/from Clippership™ (distributed by Evcor); open interface can be utilized by other shipping software that supports ASCII file transfer/polling.

32. SOUTHWARE NETLINK™ - Provide partners controlled browser-based access via the Internet to review and update your business data. Valid requestor logins; security masking per requestor and request.

33. SOUTHWARE THIN CLIENT - Provides graphic interface via UNIX or LINUX servers. Faster and easier to set up and administer. Performs faster, even on slower computer workstations. Results in tighter security. Reduces network traffic. Reduces total cost of the system.

34. SOUTHWARE WORKFLOW™ - Create customized program changes for your needs while remaining compatible with the standard version.

35. SWIFTMATE™ - SwiftMate is SouthWare's system manager module which allows users to configure menus, security, styles, hardware, etc. SwiftMate keeps track of who's logged into the system and what they are doing. It can send e-mails between users. SwiftMate enables you to program new features with Objects, Field-Level Objects, and Field Filters. You can also create "Zoom Views" to provide unique summaries of your data.

36. TASKWISE® - Combines the functions of task management, relationship management, exception management, and information sharing into a single company-wide system. Tracks contacts, opportunities, prospects, alerts, financial graphs, trends, tasks, etc.

SouthWare's Technology

SouthWare was originally written in the Cobol programming language – the most widely used programming language in the world. In past years, I have generally considered the Cobol program language to be antiquated; however, improvements to Cobol in recent years has forced me to reconsider my position. You see, a few years ago, SouthWare used a San Diego, California-based technology called AccuCobol to re-compile the entire SouthWare product to produce a 32-bit, windows-based product. This is similar to what Best Software did years ago when they used ProvideX technology out of Canada to recompile MAS 90 from a 16-bit DOS-based product into a 32-bit windows-based product. In both cases, the product's proven business logic remains primarily unchanged while the underlying technology is brought to date. The programmers at Best Software then re-worked all of their user screens over a number of years to give the product a fresher windows-based "look and feel". The programmers at SouthWare were slower to rework their user screens because a large percentage of their customer base used dumb terminals and monochrome monitors which could not support a windows-based look and feel. At the time, SouthWare's management made decision to keep the older screen designs rather than force their users to implement newer hardware to accommodate newer Windows-based screens. In 2003, SouthWare finally made the decision to upgrade it's look and feel and the resulting screen design is representative of the new look and feel you can expect to see in SouthWare.

Even with the older look and feel, SouthWare is a 32-bit application that will run on virtually any database and any operating system platform in the world. Virtually no other accounting software company can make this claim. As examples, SouthWare has many customers running it's products on the following databases: MS-SQL, Oracle, Informix, ISAM, Microsoft SQL Server, Oracle and Sybase (for history files), Btrieve, C-ISAM, or any generic ODBC database. SouthWare Excellence Series also runs on virtually any operating system or platform such as UNIX, Linux, Windows, DOS, and even OS/400. This is a strong capability that should not be ignored when evaluating a product's technology. All things being equal, I think that most people would prefer a product that provided such options. There is more to a product's technology than just looks. Up until this year, SouthWare could be compared to a solid, dependable Cadillac that runs great and simply needs a new paint job – a good, dependable product underneath its' rustic exterior. Now that SouthWare has updated the product's look and feel, the product leap frogs up to a top twenty product by any account. It has the good track record, proven product, 6,000 customers, wide breath of modules, deep features, good customization, profitable company, and good future outlook.

SouthWare's Legacy Hardware Benefits

SouthWare is lower priced than comparable systems. Additionally SouthWare will run on legacy hardware including dumb terminals and monochrome monitors. For these two reasons SouthWare is typically less expensive up front than other comparable products. However, the fact that SouthWare runs on legacy hardware often means that on going maintenance is less expensive as well. This means that a company employing SouthWare will be more likely to utilize it's current hardware should it choose to do so. Additionally, because SouthWare can operate in virtually any environment and atop virtually any database, companies are able to deploy the platforms and database solutions that best match their budget, needs, and personnel skills. It should be pointed out that in many cases, newer, faster computers can offer improved time savings significant enough to pay for themselves – the reader should take this into consideration.

Solid Product Code

SouthWare enjoys a reputation for producing good solid code with fewer bugs. SouthWare's product maturity, larger customer base, and positive feedback from customers, resellers, and the CPA community support the premise that SouthWare deserves recognition as a top product. To keep a product stable and relatively bug free requires a consistent effort on the part of the publisher. Great Plains is legendary for compiling and testing its product nightly using 700 computers and 3,200 macros to produce 174,000+ reports that are electronically checked. There is no doubt that Great Plains sets the standard in this area. However many publishers seem to do very little to root out bugs and problems with the software. In SouthWare's case, a formal procedure is in place that seems to work well. The SouthWare code is compiled each week and programmers gather together each Monday to review the product testing results and bug reports received from dealers and end users. All bugs are documented and efforts are made to recreate the bug issue in house. Once identified the software bugs, if any, are prioritized and efforts are begun to solve these problems. As bug issues are resolved, SouthWare posts the bug fixes to their dealer web site and notifies all dealers accordingly. I am told by SouthWare's management that some weeks there are no bugs identified and that in other weeks all bugs that are identified are typically resolved within 8 hours. It should be noted that software bugs are common place for every company – even Microsoft admitted about 4 years ago that there were more than 60,000 known bugs in Windows NT. With extreme stories like these it is easy to understand the importance of a consistent approach to identifying and handling these pesky problems.

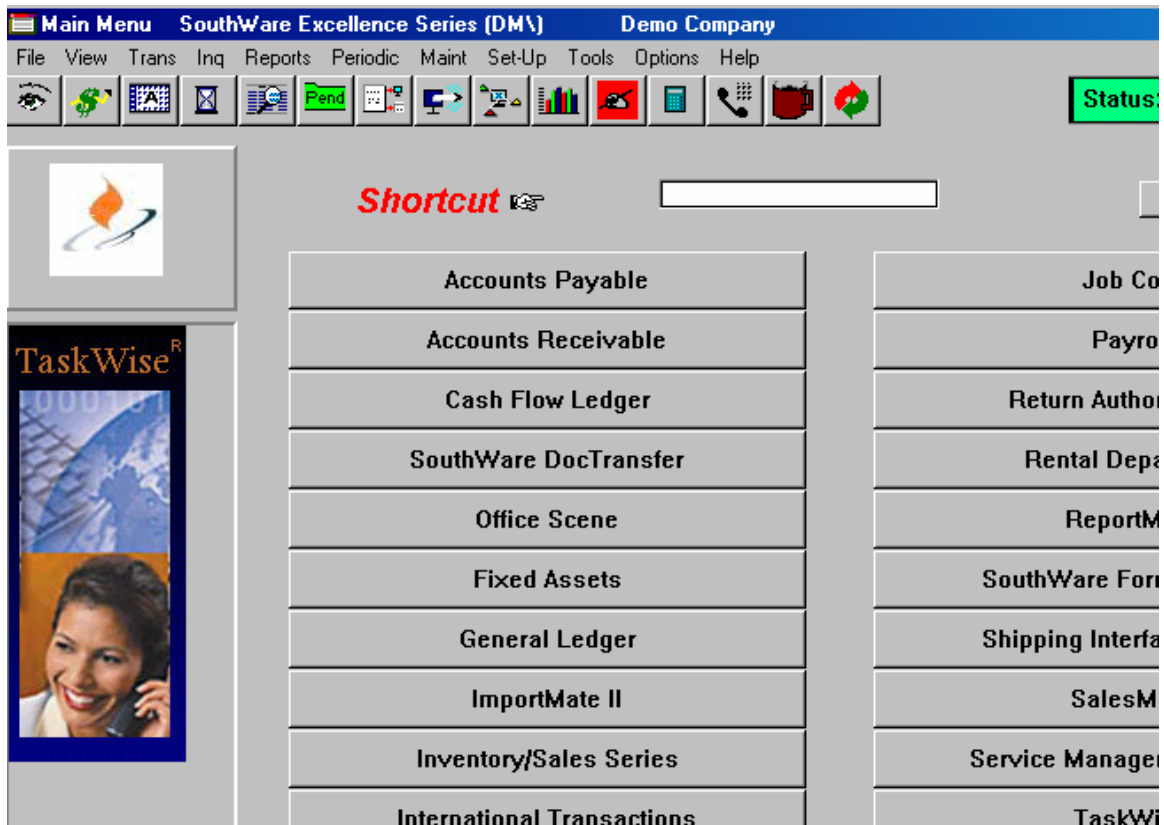
SouthWare Excellence Series Pricing

Comparing the prices of accounting software can be confusing, especially for SouthWare because the company does not release retail product pricing. We do know that SouthWare's pricing is graduated based on the size of the company. The table below includes typical pricing for SouthWare, although the actual pricing you find may be higher than the amounts reported below. For pricing purposes, we compiled pricing for some of the top accounting software products for eight core modules (general ledger, accounts receivable, accounts payable, payroll, inventory, order entry, job costing, and system manager) for 1 user, 5 users, 10 users, 25 users, and 100 users. In almost every column, SouthWare Excellence Series is the lowest priced product, despite having more features than many of the other products included in this listing.

Product Name	1 User	5 Users	10 Users	25 Users	100 Users
ACCPAC Adv. Series Corporate Edition (Pervasive)	\$16,500	\$21,500	\$26,500	\$41,500	\$116,000
ACCPAC Adv. Corporate Edition (SQL Server)	\$24,000	\$34,000	\$44,000	\$74,000	\$224,000
ACCPAC Pro Series	\$9,600	\$12,600	\$15,600	\$24,600	\$69,600
Macola Progression	\$12,550	\$13,250	\$15,950	\$28,050	\$80,874
MAS 90	\$10,775	\$14,375	\$16,375	\$22,375	N/A
MAS 200	N/A	\$18,500	\$23,500	\$37,500	\$88,500
Navision ⁽²⁾	\$13,000	\$19,000	\$32,000	\$53,000	\$160,000
Platinum for Windows	\$14,960	\$17,455	\$19,950	\$32,425	\$94,800
Solomon IV 4.x	\$9,300	\$13,500	\$17,400	N/A	N/A
SouthWare Excellence Series (mid-range databases)	\$7,360	\$11,200	\$13,840	\$21,120	\$49,980
SouthWare Excellence Series (high-end databases)	\$11,780	\$17,920	\$22,144	\$33,800	\$79,970
Syspro IMPACT Encore	\$14,880	\$22,290	\$27,860	\$50,010	\$124,600
Traverse 10.0	\$12,000	\$13,600	\$15,600	\$21,600	\$51,600
Visual AccountMate 5.0 - LAN5.0	\$10,955	\$10,995	\$13,445	N/A	N/A
Visual AccountMate 5.0 - SQL Server or AS 400	\$13,950	\$13,950	\$18,925	\$35,925	\$110,850

Navigation

It is always revealing to explore a product's navigation. Most accounting software packages have 6,000 to 10,000 user screens and SouthWare is believed to fall within this range. With so many screens, getting around efficiently becomes an important issue. In SouthWare's case, there are numerous ways to navigate the system. The most obvious method is to use the main menu which cascades down into more detailed menus – this option works quite well.



One complaint that I have is that the escape key in SouthWare does not continually return to the previous menu. Instead, SouthWare uses the F8 key to accomplish this task. (*I realize that this issue is really just a pet peeve of mine, and that this complaint is not commonly shared by others.*) This approach was fine years ago when most keyboards located the F8 key conveniently in the left hand corner – but today's newer keyboards place the F8 key at the top of the keyboard in a row. This placement makes it harder to pick out and use the F8 key. I asked SouthWare's programmers about this issue and they reported that the escape key is used for other numerous functions throughout the system, and changing the system now would play havoc with the tens of thousands of users who have learned an approach different than mine.

My favorite navigation features in SouthWare Excellence Series are the Jump Buttons that allow the user to jump directly to any screen in the system. The user need only type in the number to the corresponding screen they wish to jump to, and SouthWare takes you to that screen instantly. Of course you must memorize the screen numbers to take advantage of this feature – but most users pick up on this functionality quickly. For example the user would enter AP0201 in the shortcut field to jump directly to the screen where checks are printed on demand.

SouthWare also utilizes the function keys (F1 thru F12) nicely. These keys allow the user to access help, customization utilities, extended help, logon procedures, system e-mail, etc. SouthWare also provides a series of Icons designed to provide the user with quick and easy access to commonly used areas in the system. These icons are shown in the screen below.



The Acucobol platform allows the user to control the actual functionality of the icons, function keys, and short cut keys. The screen shot below shows this functionality as well as additional functionality over the menus, windows, colors, buttons, etc.

Acucobol Runtime: 5.2 Term #: 001

Hot Keys

Ctrl-N	Notes
Ctrl-X	XData
Ctrl-O	Chg Oper
Ctrl-V	Events
Ctrl-P	Pulldown
Ctrl-Z	Zoom
Ctrl-R	Rapid

GUI Config

Boxed Entry?	Y
Frame Style	R
See Change#?	Y
ListBox?	Y Y Y
Alpha Cell	.90
Numeric Cell	.80

Mode/Style

Mode:		
Help	<input type="checkbox"/> N	Normal
Guides	Doc <input type="checkbox"/> Y	Optional <input type="checkbox"/> Y
Bell	<input type="checkbox"/> Y	Bell On Messages
Style Preference:	<input type="checkbox"/> E	EUI
Menu Style	<input type="checkbox"/> B	BUI
Menu Mode	<input type="checkbox"/> N	Normal
Function Access	<input type="checkbox"/> G	GUI
Button Bar?	<input type="checkbox"/> Y	
StopCheck Display?	<input type="checkbox"/> Y	Update? <input type="checkbox"/> Y
TaskWise Update?	<input type="checkbox"/> N	
Late Actions?	<input type="checkbox"/> Y	
Auto Accept Mesg?	<input type="checkbox"/> Y	
Display Bitmaps?	<input type="checkbox"/> Y	
Color Override	<input type="checkbox"/> 04	

But

[Icon]	S
[Icon]	X
[Icon]	R
[Icon]	S
[Icon]	Z
[Icon]	A
[Icon]	S
[Icon]	B
[Icon]	M
[Icon]	G
[Icon]	E
[Icon]	C
[Icon]	P
[Icon]	C
[Icon]	V

CPA Support for SouthWare Excellence Series

In recent years, numerous CPAs throughout the United States have asked me why I had not included a review of SouthWare Excellence Series in my accounting software web site. I first installed SouthWare in 1988 and was well aware that SouthWare was a decent solution, but I must confess that nearly a decade had gone by since I had taken a good look at this product. It seems that those CPAs who know the product well are loyal fans of SouthWare and they believe SouthWare's merits are frequently overshadowed by the marketing hype generated by the larger accounting software companies. Under the pressure of so many CPAs that I've known for many years, I decided to take a look at the latest developments from SouthWare.

No product is perfect – they all have problems. Even the best products in the land suffer from missing features, missing modules, bugs, etc. For example, Great Plains is a highly respected product but it does not utilize tabbed dialog boxes and reports are slow to print from the system. Solomon is a superior product but many of the user screens are cluttered and difficult to read. By the same token, SouthWare Excellence Series has its share of shortcomings as well – but none more so than other top ten products. Some of SouthWare Excellence Series shortcomings that bother me most are: search dialogs require three clicks instead of just one; entering records on the fly requires an extra click of a button to open a new record dialog box; and the escape key does not always close the current window (although the F8 key does). While I have my complaints about SouthWare Excellence Series, dollar for dollar, SouthWare Excellence Series appears to be a good value, and I appreciate the fact that CPAs take the time to provide feedback on various products.

SOUTHWARE'S BEST FIT

With 36 modules, SouthWare is well suited for a wide variety of industries. The industries where I believe SouthWare fits best are indicated in the following table of industries by SIC code as being an "Average Fit" or "Good Fit":

AGRICULTURE FORESTRY, AND FISHING SICs (01XX-09XX)	
Agricultural Production Crops (111-191)	AVG
Agriculture Production Livestock (211-291)	AVG
Agricultural Services (711-783)	AVG
Forestry (811-851)	AVG
Fishing, Hunting, and Trapping (912-971)	AVG

MINING SICs (10XX-14XX)	
Metal Mining (1011-1099)	Good
Coal Mining (1221-1241)	Good
Oil and Gas Extraction (1311-1389)	Good
Nonmetallic Minerals, except Fuels (1411-1499)	Good

CONSTRUCTION SICs (15XX-17XX)	
General Building Contractors (1521-1542)	Good
Heavy Construction, Except Building (1611-1629)	Good
Special Trade Contractors (1711-1799)	Good

MANUFACTURING SICs PART 1 SICs (20XX-29XX)	
Food and Kindred Products (2011-2099)	AVG
Tobacco Products (2111-2141)	AVG
Textile Mill Products (2211-2299)	AVG
Apparel and Other Textile Products (2311-2399)	AVG
Lumber and Wood Products (2411-2499)	Good
Furniture and Fixtures (2511-2599)	Good
Paper and Allied Products (2611-2679)	AVG
Printing and Publishing (2711-2796)	AVG
Chemicals and Allied Products (2812-2899)	Good
Petroleum and Coal Products (2911-2999)	AVG

MANUFACTURING SICs PART 2 SICs (30XX-39XX)	
Rubber and Miscellaneous Plastic Products (3011-3089)	AVG
Leather and Leather Products (3111-3199)	AVG
Stone, Clay, and Glass Products (3211-3299)	AVG
Primary Metal Industries (3312-3399)	AVG
Fabricated Metal Products (3411-3499)	AVG
Industrial Machinery and Equipment (3511-3599)	AVG
Electronic and Other Equipment (3612-3699)	AVG
Transportation Equipment (3711-3799)	AVG
Instruments and Related Products (3812-3899)	AVG
Miscellaneous Manufacturing (3911-3999)	AVG

TRANSPORTATION COMMUNICATION, UTILITIES SICs (40XX-49XX)	
Railroad Transportation (4011-4013)	AVG
Local and Interurban Passenger Transit (4111-4173)	AVG
Trucking and Warehousing (4212-4231)	AVG
United States Postal Service (4311-4311)	AVG
Water Transportation (4412-4499)	AVG
Transportation by Air (4512-4581)	AVG
Pipelines, Except Natural Gas (4612-4619)	AVG
Transportation Services (4724-4789)	AVG
Communication (4812-4899)	AVG
Electric, Gas, and Sanitary Services (4911-4971)	AVG

WHOLESALE TRADE SICs (50XX-51XX)	
Wholesale Trade - Durable Goods (5012-5099)	Good
Wholesale Trade Nondurable Goods (5111-5199)	Good

RETAIL TRADE SICs (52XX-59XX)	
Building Materials and Garden Supplies (5211-5271)	Good
General Merchandise Stores (5311-5399)	Good
Food Stores (5411-5499)	AVG

Automotive Dealers and Service Stations (5511-5599)	AVG
Apparel and Accessory Stores (5611-5699)	AVG
Furniture and Home Furnishings Stores (5712-5736)	Good
Eating and Drinking Places (5812-5813)	Good
Miscellaneous Retail (5912-5999)	Good

FINANCE, INSURANCE AND REAL ESTATE SICs (60XX--67XX)	
Depository Institutions (6011-6099)	AVG
Non depository Institutions (6111-6193)	AVG
Security and Commodity Brokers (6211-6289)	AVG
Insurance Carriers (6311-6399)	AVG
Real Estate (6512-6553)	Good
Holding and Other Investment Offices (6712-6799)	AVG

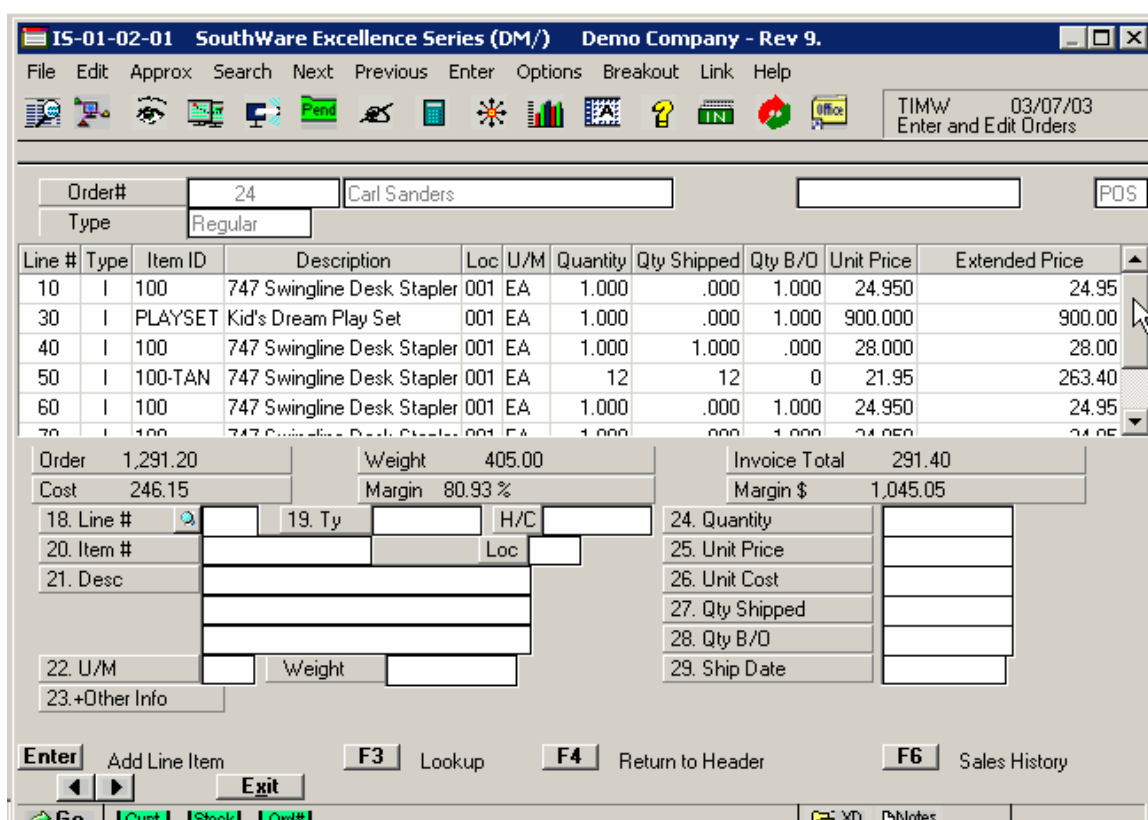
SERVICES SICs (70XX-89XX)	
Hotels and Other Lodging Places (7011-7041)	AVG
Personal Services (7211-7299)	Good
Business Services (7311-7389)	Good
Auto Repair, Services, and Parking (7513-7549)	Good
Miscellaneous Repair Services (7622-7699)	Good
Motion Pictures (7812-7841)	AVG
Amusement and Recreation Services (7911-7999)	Good
Health Services (8011-8099)	AVG
Legal Services (8111-8111)	AVG
Educational Services (8211-8299)	AVG
Social Services (8322-8399)	AVG
Museums, Botanicals, Zoological Gardens (8412-8422)	Good
Membership Organizations (8611-8699)	Good
Engineering and Management Services (8711-8748)	Good
Private Households (8911-8911)	AVG
Services, misc (8999-8999)	Good

PUBLIC ADMINISTRATION SICs (91XX-97XX)	
Executive, Legislative, and General (9111-9199)	AVG
Justice, Public Order, and Safety (9211-9229)	AVG
Finance, Taxation, and Monetary Policy (9311-9311)	AVG
Administration of Human Resources (9411-9451)	AVG
Environmental, Quality and Housing (9511-9532)	AVG
Administration of Economic Programs (9611-9661)	AVG
National Security and International Affairs (9711-9721)	AVG
Non-classifiable Establishments (9999-9999)	AVG

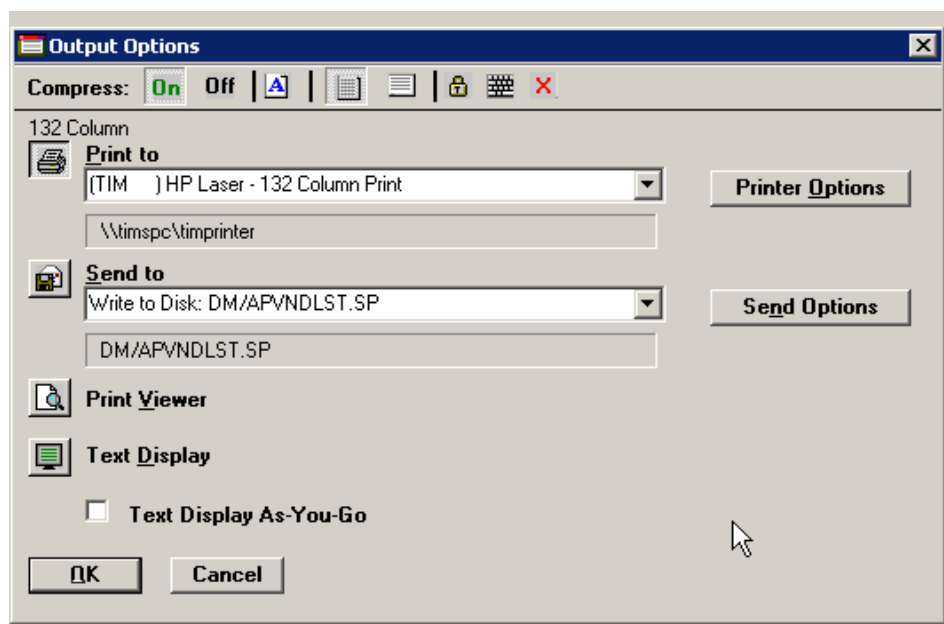
SOUTHWARE EXCELLENCE SERIES WEAKNESSES

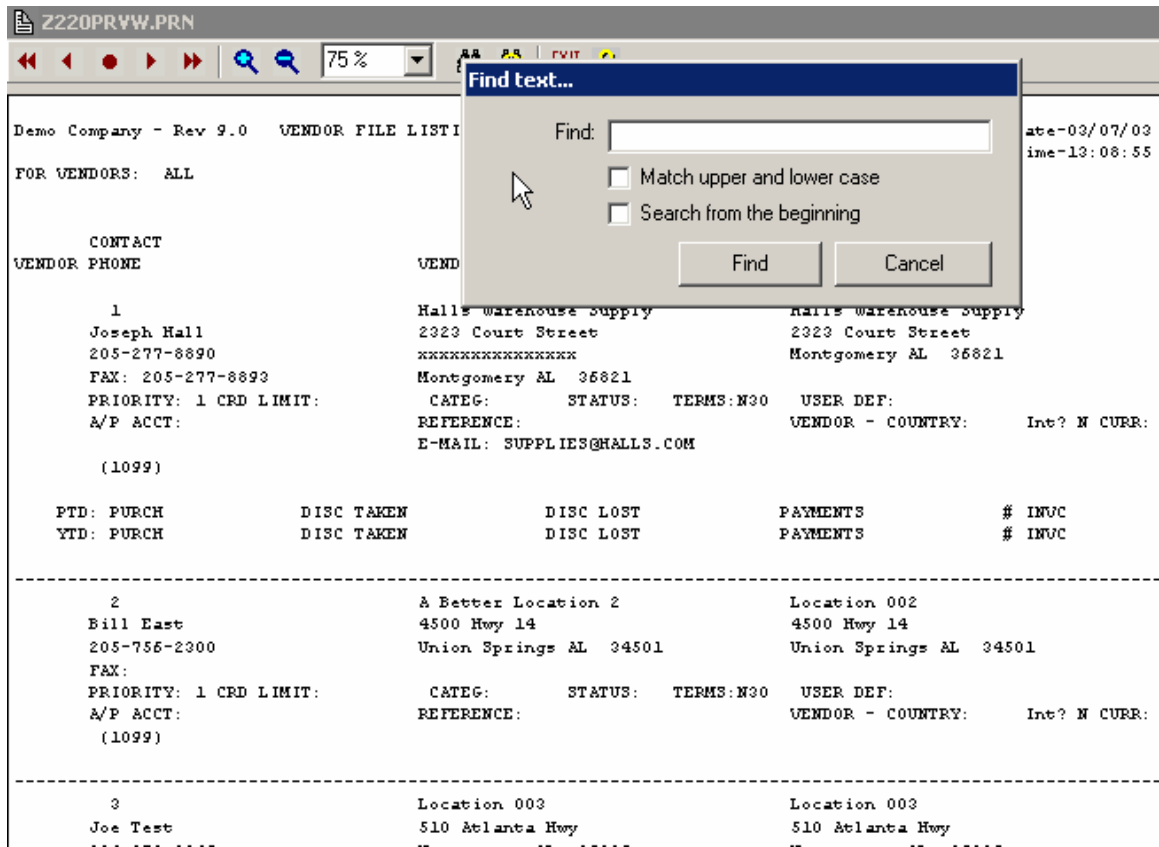
All products have weaknesses and shortcomings and often, those weaknesses and shortcomings are in the eye of the beholder. I've not yet seen a perfect product from any vendor and I doubt that I ever will. In this spirit, SouthWare Excellence Series does have some weaknesses and shortcomings as well. Presented below is my list of the more significant problems I found while reviewing SouthWare Excellence Series:

The Screens Look Older – As discussed, some of SouthWare Excellence Series screens use a system font and a look and feel that makes them usable on older green screen monochrome monitors. The result is that the system looks older, even though the underlying technology has been updated and the feature set and module offerings are current and strong. **2003 UPDATE** - Version 9.0 introduces new user screen designs that reflect the more current Windows style look and feel. This improvement can be seen in the screen shot below:

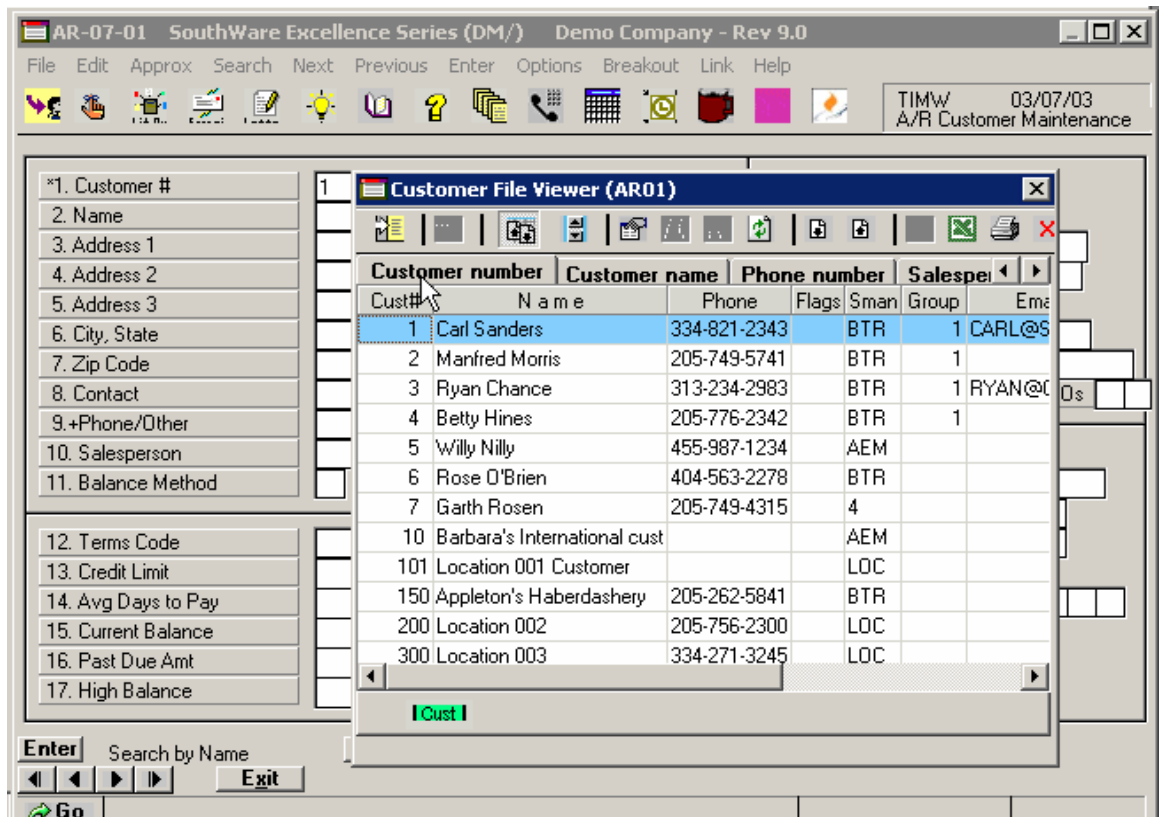


Reports Look Older – For the same reason mentioned above, reports print to the screen and to paper look older. Other popular products provide a more graphical view. **2003 UPDATE** Version 9.0 also offers improved report screens as well, including improved dialog boxes. See for yourself in the screens below:





Extra keystrokes Are Sometimes Needed to Navigate Screens – If you have not yet learned how to use the jump buttons, you will need to use the menu buttons instead. Some of these buttons force the user to click several times instead of just once to arrive at the desired screen. Most notably the look up screen does not automatically drill to a list, two additional clicks are required. **2003 UPDATE** - Version 9.0 has corrected this problem, particularly in the look up screens. Now SouthWare provides much improved look up dialog boxes that respond properly on the first click. Here is an example:



Report Headings Scroll off the Page – To be most useful, reports printed to the screen should scroll the data only, leaving the row descriptions and column headings visible to the reader. Without this feature, users are forced to print reports far more often – wasting time, paper, toner, and causing wear and tear on the printer.

Can't Easily Send E-mail From Reports Printed to Screen – I like the ability to click only one button to automatically forward a report to another person or persons. In

SouthWare Excellence Series, you can write to disk and attach the file, and you can write to HTML format, but I am still looking for that print to e-mail option to appear in this product. **2003 UPDATE** - Version 9.0 still does not provide this functionality as an icon in the reports screen, however it is worth noting that the improved printer options box (shown two screens above) does adequately provide this functionality.

Escape Does not Always Work – While more of a personal peeve of mine, I wish the escape key would return to the previous menu, instead SouthWare uses the F8 key to accomplish this function.

Cumbersome Customization – While the customization of SouthWare Excellence Series is powerful, it can be more cumbersome than customizing some other popular products, depending on the task at hand. To be fair, this is a complaint I have about almost every top accounting software package – I should just be happy whenever I find customization capabilities.

Pricing is Too Low – I think that SouthWare Excellence Series is priced too low. The product's features and functionality, reputation, support, company backing, and channel all warrant a higher price. If I owned the company, I would increase SouthWare's pricing by 25% to 30% immediately, and use some of the resulting increase in revenues to fund to resolution of these problems mentioned above.

Corporate Marketing Needs Improvement – As a company, SouthWare has done a relatively weak job marketing this product in the past – despite being a great product, fewer people know about it than other inferior products which have become household names. In 1990, President and CEO Bill Goodhue told me that he “would rather have an inferior product and superior marketing than the other way around”. I think that what Bill would say today is that you would want superior marketing no matter what. There is evidence that SouthWare is taking serious steps to maintain a higher profile in the industry.

Strategic Relationships – Most top products have strategic relationships in place with many of the top add-on solutions such as FRx, Crystal, F9, BrioQuery, Radio Beacon, Star Ship, Intermec, Sales Logix, Goldmine, and others. While I agree that forming and managing these strategic relationships can be difficult, I think that overall it strengthens the product and the product image. It also allows for marketing synergy to compound a product's name recognition within the industry and among prospective customers.

Number of Dealers - There are currently about 50 to 60 active SouthWare dealers, which means that some areas of the country are not adequately served by a local representative. There is evidence in the industry that it takes about 140 to 200 dealers to provide complete coverage including competitive choices in dealers. While this may not be a problem in your area, some locations are forced to use an outside dealer to meet their needs.

EXECUTIVE SUMMARY

Based on customer base and product features, SouthWare Excellence Series is easily a top twenty accounting software product by all accounts. With 6,000 current customers, SouthWare ranks among the top 20 accounting products in the world in the mid-market arena. More impressive is SouthWare's feature set which is very strong compared to other top mid-market products, particularly when it comes to the general ledger, accounts payable, accounts receivable, inventory, and order entry modules. When you consider these factors along with the relatively low cost of the product, dollar for dollar SouthWare is a very good value for the money – especially for the budget conscious company who values features and performance over looks. SouthWare is not a perfect product – no product is. In my opinion, SouthWare's top weakness has historically related to the product's older DOS-type screens and reports; however, version 9.0 introduces a new improved look and feel to address this issue. Pound-for-pound, SouthWare is a formidable product that offers good value. This product definitely deserves to be mentioned as a top product.

- END -