

HIGH-END ACCOUNTING

SouthWare Excellence Supports Over 600 Hardware/Operating Combinations

By Robert L. Wolff, Jr.

Offering 30+ modules to companies with annual sales of \$2 to \$100 million, SouthWare Excellence Series (Excellence), Revision 9 from SouthWare Innovations, Inc. (800-547-4179; www.southware.com)



targets wholesale/distribution, retail, rental and services industries. Excellence supports over 600 hardware/operating system combinations, including Windows, Linux and Unix. Users can choose various databases, including Visual ISAM, C-ISAM, Microsoft SQL Server and Oracle. This robust, mature solution delivers far more than can be discussed here.

The General Ledger (GL) offers statistical and financial accounts with up to four segments, six digits per segment, and 15 characters total. Allocations use either percentages or values. You can maintain current, original and pending budgets by period for each account. Financial statements can be customized, including variance, trend, departmental and multi-

company comparisons. One report compares amounts for up to five years. GL also consolidates multiple companies.

Accounts Receivables (AR) tracks not only sales, cost of goods sold, discounts and number of late payments, but also number of collection calls and much more. These latter features plus number of errors, number of testimonial comments and other events feed into ExcelReport, a unique module that lets you set excellence goals, grade your progress, and train your people to excel by managing the financial and statistical results. Collections Adapter identifies customers requiring calls, schedules follow-up calls, captures collection call information and tracks customer commitments. AR Invoicing Adapter streamlines handling of complex situations, ensures standard pricing is used, and more. Accounts Payable (AP) mirrors AR.

Inventory Control offers typical features, plus bar codes; imported scan data; size, color and other breakdowns; multiple units of measure; and unlimited replacement, customer, substitute and related part numbers. It forecasts inventory based on prior usage, minimum/maximum, economic order quantity and seasonality. A perpetual ledger of all quantities

in and out is maintained. Pricing options range from multipliers of list prices and markups to cost to promotional pricing and override schemes. Other Excellence modules further extend this module's capabilities.

Order Entry (OE) supports typical capabilities. Little things like automatically checking customer credit before *and* after an order, and automatically displaying suggestions to encourage add-on sales, demonstrates subtle understanding of real-world needs. OE supports special orders, shipping from alternate locations and dropshipping. You can e-mail and fax acknowledgments and shipping notifications. With Shipping Interface, the correct shipping charge automatically computes. You can pass it through or mark it up. OE also supports scheduling ship dates by line item. Commissions can be calculated on the net sale or gross margin. They can be paid on booked orders or paid invoices. OE supports different rates per line item, and up to nine sales reps can split a commission.

Purchasing automatically generates purchase orders based on current item status and order controls. Drop-ship sales orders also automatically generate purchase

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Exceptional Depth & Breadth Of Features

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orders. When making purchasing decisions, the module identifies the vendor with the best performance for each item. Purchasing also supports vendor catalog information, and optional price checking optimizes vendor selection.

Excellence offers ReportMate, a WYSIWYG report writer that supports up to 264 columns per line, up to five criteria per record or per field, and Boolean logic. Logos, lines, boxes and so forth can be added to highlight information. Report output options include e-mail, *.PDF and export to HTML and various formats. You can also stack reports to print, save a group of reports with filters, and schedule reports by date/time and repeat frequency.

Excellence's web-based tool is NetLink. It provides self-service access to customers, vendors and employees via the Internet. ExecuMate delivers key performance indicators to managers such as today's sales, ratios, past and future cash flows with trends, and much more. Drill-down is available,

and you can set warning levels as desired. Finally, business alerts are available through TaskWise. This module delivers task management, relationship

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management, exception management and information sharing. It allows you to define rules for monitoring data, values or other information. When triggered, an e-mail is sent, a message displays, and/or a tickler can be added

to a person's to-do list. TaskWise includes many other capabilities, as well.

Menu navigation belies Excellence's long heritage. Choices from nuevo tree-style and drop-down menus to web view and character-based menus are available. Menu shortcut codes jump you directly to tasks and display on each screen. Data-entry screens are clean and easy to follow, though tabs would improve things. You can add custom fields (and use them as index keys), remove sections of screens via security (without modifying screens), and add business rules (workflow) as needed. Excellence supports both GUI (Windows-like) and text interfaces with strong keyboard and mouse efficiency.

Help is very good. In addition to typical features, Excellence offers automatic help display, extended help, hints, and a question/answer database. Manuals are also well done and available in printed and *.PDF format. SouthWare has delivered an outstanding solution with exceptional depth & breadth of features. ■ ★★★★★

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Ranking	Description
★★★★★★	<i>The program has outstanding functionality. Innovation is evident. Product may set standards within its category. Legacy support, where applicable, is available, but not at cost to current functionality. Interface takes good advantage of environment and is intuitive. Product has an appropriate level of user customizations while providing a consistent and well-ordered design that clearly contributes to a good learning curve. Development tools are widely supported. Product is in the early middle to middle of the product life cycle, and the vendor's track record with this product demonstrates continued support and ongoing revisions as necessary.</i>
★★★★★	<i>The program is well suited for task(s) at hand and has some flexibility and features that extend its functionality. Some innovation is evident. Legacy support, where applicable, may be included, but not at cost to functionality. Interface utilizes current environments. May take advantage of some more recent features. Product uses state-of-the-industry technologies as well as currently available and supported development tools. Product may be at the beginning to middle of the product life cycle.</i>
★★★★	<i>The program performs at a base functional level. Will do all of the basic functions necessary for tasks at hand, but no more. Results from product may require additional processing for any specialized, yet expected, tasks. Probably only has minor new innovations. While most basic functions are available, there may not be a great depth of features. Very little leveraging of newer technology benefits. The product is somewhat out of date but not at the cost of functionality.</i>
★★★	<i>The program has marginal functionality. This product does what it is supposed to do, but why would you use it? It is based on interface designs 2 or 3 generations old, and it may be developed using tools that are no longer supported. It is in a very mature part of its product life cycle and is part of a dying breed because of Darwinian principals, not work ethic. It has a large enough customer base to maintain, but not one that can provide enough cash flow to innovate or upgrade to current technologies.</i>
★	<i>There is no functionality, and the user interface really doesn't work. It uses technologies that are 2 to 3 generations old. The product is dead: the vendor just hasn't realized it yet. The program, according to its vendor, will maintain its current design at all costs because "that is what the users want; they will scream if we change." It is at a version dead end. The software vendor may be also.</i>



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