

PROADVISOR review

SourceLink, by Personable, Inc.

Overall Rating **9.44**

Product Name

SourceLink[®] by
Personable, Inc.

Reviewed By

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Summary

SourceLink[®] Standard Edition is a fully integrated and seamless document management system for QuickBooks users. SourceLink[®]4.1 Standard Edition gives you the ability to file, retrieve and organize source documents associated with QuickBooks records. The end-user can attach, detach, view and e-mail linked documents in QuickBooks with a click of the mouse. The process is as simple as adding an attachment to an e-mail.

SourceLink[®] Management Edition (ME) includes all document management features of the Standard Edition in addition to features which will allow QuickBooks Managers to set up rule and/or role-based policies into QuickBooks.

Strengths

SourceLink[®] works in both a single and multi-user environment allowing for multiple users to access documents which will eliminate redundant tasks, reduce filing errors and better organize workflow. SourceLink[®] does not affect the size of the QuickBooks data file since SourceLink[®] does not make copies of the source files. Multiple file types can be added to Source Link including images and zip files. SourceLink[®] has the ability to automatically detect and operate with multiple company files, supports QuickBooks Pro, Premier, & Enterprise versions of QuickBooks 2004 and higher, can add exiting documents previously stored on your computer or created on your scanner, and gives you great control over seeing pending or “hot notes or action items” when opening QuickBooks.

Limitations

There are no limitations other than the licensing requirement for each individual user, which are currently priced at \$189.00 for the standard addition and \$289.00 for the management addition. Support is limited to the first 30-days of purchase, but a support package can be purchased for \$99.00 per year and includes upgrades and releases. SourceLink[®] requires minimal configuration, but to fully understand the benefits of the product, the end-user should thoroughly review the tutorial, clearly understand the configuration choices, and take advantage of the company’s 30-Day free training in order to get the best benefit from the product.

Wish List

Product documentation needs to be reviewed. A sample company set up describing an implementation scenario would better help identify all the great features of this product.

Product Ratings	Rating	Ratings Definitions
<p>Setup and Installation:</p> <p>Set up and installation required some assistance from the Personable team. They responded immediately and were quick to answer any questions and resolve any issues.</p>	9.0	<p>10.0 (Perfect): This exceedingly rare score is reserved for a product that is as perfect as it could be.</p>
<p>Interface:</p> <p>The navigational menus reside within QuickBooks. The menu choices were easy to work with once you know what the icons mean, and what the menu selections support.</p>	9.5	<p>9.0 to 9.9 (Spectacular): A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.</p>
<p>Features:</p> <p>SourceLink® enables you to link source documents to support QuickBooks bills, invoices, purchase orders, payments, or any of the 26 different record types available in QuickBooks. SourceLink® has many wonderful features including attaching up to 10 files or 10 folders that may contain an unlimited number of files to a single record, simple naming conventions, managerial approval or denial rules based requests, MyNotes for communication among multiple users, etc.</p>	9.5	<p>8.0 to 8.9 (Excellent): A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.</p>
<p>Follow-through on Claims</p> <p>The product follows through with its claims. Product claims made on the QuickBooks Solutions website were verifiable.</p>	9.5	<p>7.0 to 7.9 (Very good): While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.</p>
<p>Ease of Use/Service and Support</p> <p>The product is easy to use. An end user has the ability to take a scanned document and open the image directly in QuickBooks for entry into any of the 26 record types, or has the ability to scan an image on the fly while working on a particular process. The images are easily retrievable in QuickBooks. Personable provides 800-toll free telephone support 8:00 a.m. to 5:00 p.m. (PST), Monday through Friday.</p>	9.5	<p>6.0 to 6.9 (Good): This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.</p>
<p>Data Security</p> <p>Security is determined at both the SourceLink® and QuickBooks levels. The end-user will only be performing the functions, or have access to the areas that have been defined by the system administrator.</p>	9.5	<p>5.0 to 5.9 (Average): A product that scores in this range is functional but unremarkable.</p>
<p>Privacy</p> <p>The company has a well-documented privacy policy on the website which is comprehensive and easy to understand.</p>	9.5	<p>4.0 to 4.9 (Mediocre): Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.</p>
<p>Integration with QuickBooks</p> <p>SourceLink® integrates seamlessly with QuickBooks.</p>	9.5	<p>3.0 to 3.9 (Poor): A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.</p>
		<p>2.0 to 2.9 (Terrible): A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.</p>
		<p>1.0 to 1.9 (Abysmal): A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.</p>