

ShopWorks



OnSite vs QuickBooks White Paper

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This white paper is intended to be an evaluation tool for OnSite software. Although we will be comparing OnSite to QuickBooks, the arguments here would in general apply for OnSite vs. any accounting package.

What Is OnSite?

Before comparing ShopWorks OnSite to QuickBooks, it is important to understand what OnSite is. OnSite is a complete business solution, meaning that it manages every aspect of your business ...not just accounting. All the functions and departments of your company are integrated into a single product. OnSite is a multi-user database that runs over your existing network.

Because it is a client-server application, it is fast and allows multiple users to use your system simultaneously. All information is real-time...changes made by one employee are immediately seen by others.

OnSite is sold in one "flavor" only...when you purchase OnSite you get all of our features and modules. However, our software is fully configurable to your business model.

Most importantly, OnSite was designed specifically for companies that manufacture or sell the following products:

1. Screen printed apparel
2. Embroidered apparel
3. Promotional product distributors
4. Promotional product manufacturers
5. Awards and trophies
6. Digital printed products

Why is this important? Simply put, software that is designed specifically for your business is going to work better than software designed for every business.

What Is QuickBooks?

QuickBooks is an accounting package that has been around for many years and is available in many different “flavors”:

1. QuickBooks Pro – General business package.
2. QuickBooks Accounting – For use by accountants.
3. QuickBooks Premier – Pro with a few additional forecasting features.
4. QuickBooks Contractors – Pro with additional features for contractors.
5. Enterprise Solutions – Pro with multi-user capabilities.
6. Others are available...

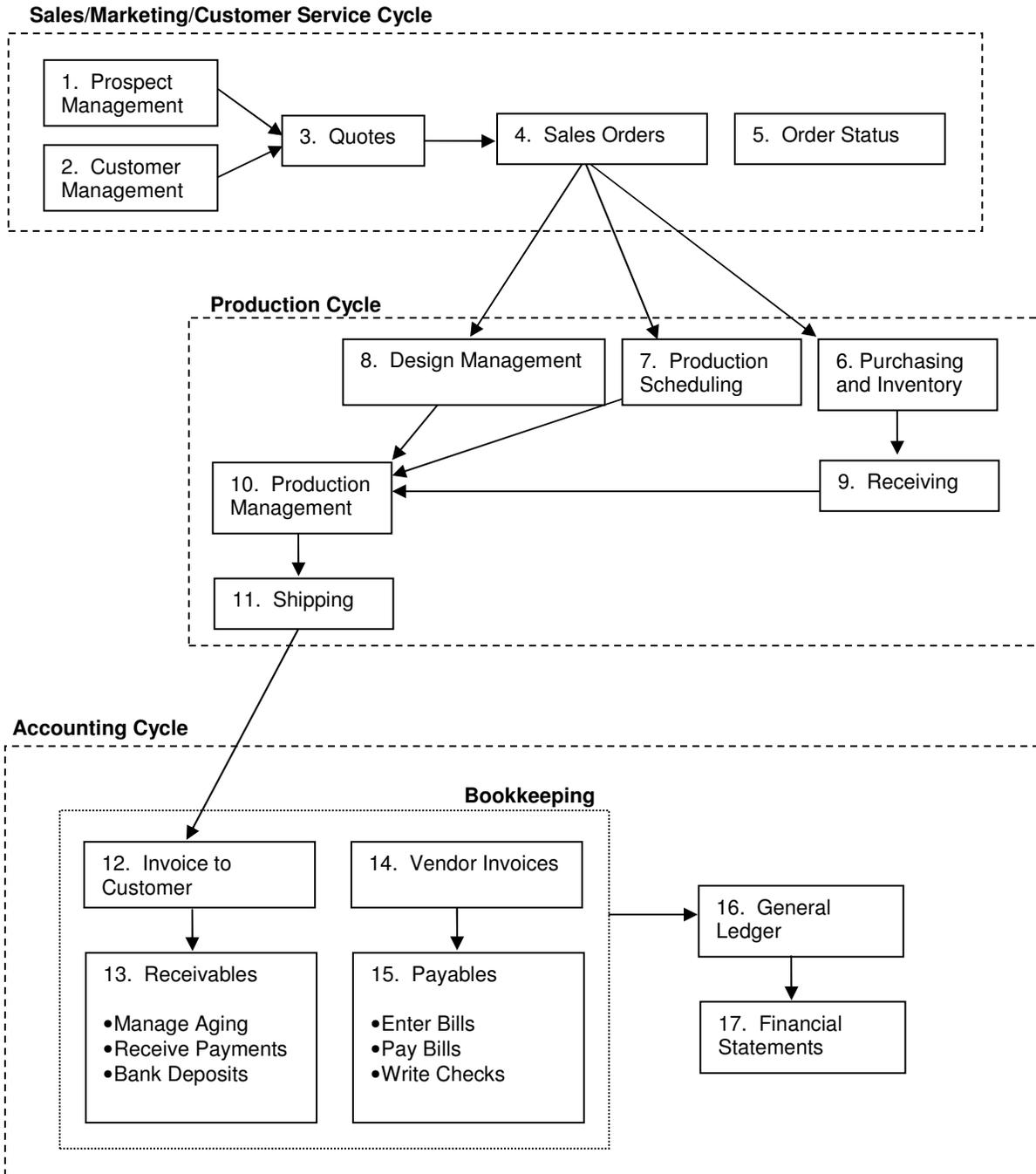
Each of these products has separate pricing and capabilities. A detailed discussion of each is beyond the scope of this document, but you can find more information at www.quickbooks.com.

The bottom line is that QuickBooks is an excellent accounting package, but does NOT provide you with the tools that you need to run the bulk of your daily business.

This means that you, the business owner, end up using several other software packages or manual systems to “fill in the gaps” that are left by QuickBooks.

The Business Flowchart

Shown below is a typical operational model for someone in our industry. Each business will vary somewhat but the basics are the same for everyone...



Notice that we have broken our chart into 3 different "Cycles". Now compare OnSite to QuickBooks in each Cycle. Below is a summary chart followed by a detailed comparison for each section.

		
1. Prospect Management		
2. Customer Management		
3. Quotes		
4. Sales Orders		
5. Order Status		
6. Purchasing and Inventory		
7. Production Scheduling		
8. Design Management		
9. Receiving		
10. Production		
11. Shipping		
12. Invoice Sent to Customer		
13. Receivables		
14. Vendor Invoices		
15. Payables		
16. General Ledger		
17. Financial Statements		

The Sales/Marketing/Customer Service Cycle

This cycle encompasses the tasks that your salespeople and customer service people do everyday. This is the area of your company where you “touch” the customer on a daily basis.

1. Prospect Management



QuickBooks has no built in prospect management. To manage prospects while using QuickBooks you will need to use ACT!, Goldmine, or another CRM (Contact Resource Management) tool. Neither of these software packages can work or integrate with QuickBooks.



OnSite has an integrated Contact Manager. This powerful marketing tool allows you to break prospects into different audiences or databases. Activity management is included. Schedule meetings, make notes on conversations and copy emails from your prospects. See all activities on a calendar. Create Alarms to remind yourself of appointments or other tasks.

Once a prospect is ready for a quote or an order you simply click a button...no double-data-entry.

2. Customer Management



QuickBooks allows you to manage customer accounts. You can see quotes, invoices and payments that are related to a customer.



OnSite allows you to manage customer accounts. You can see quotes, invoices and payments that are related to a customer. In addition, the same Contact Management tools that are available for a prospect are available for customers. Salespeople can now actively manage their accounts and keep track of all activities...now and in the future...related to a customer.

3. Quotes



QuickBooks allows you to create quotes in a generic format.



OnSite allows you to create quotes in 4 different industry-specific formats. In addition, you can use one of three different pricing models so that quotes can be automatically priced based on product, quantity, and the design being used for the quote. Consistent pricing no matter who is doing the quote.

Quotes are sent to customers and prospects via fax or emailed as a PDF document and are easily converted to sales orders with the click of a button.

4. Sales Orders



QuickBooks allows you to create sales orders that are generic and do not have much functionality past order entry. You must use other software and/or manual systems for any processes between purchasing and invoicing. This is a large part of your business!



OnSite allows you to create your own "Order Types". These "types", along with product settings, control how your order flows through your system. What kind of product is used? What kind of embellishment? What production processes? Are they produced in-house or out of house? Is purchasing required or are these customer supplied product? You control all of these variables and more for as many different order types as you need.

5. Order Status



QuickBooks has no built in Order Status. To get this functionality most companies use a combination of spreadsheets, magnet boards and printed or hand-written paperwork.



OnSite allows you to track the status of a sales order automatically as people are using the system. New in OnSite 7 is the ability to have up to four additional customizable statuses for your company. All status indicators are updated real-time, so changes on an order are reflected instantly to everyone using the system. With our OrdersLink service this information can even be projected onto the web where customers can login and see their order status.

The Production Cycle

This cycle encompasses everything that is involved with getting an order produced and shipped. Typically, this involves many departments at a company.

6. Purchasing and Inventory



QuickBooks has built-in purchasing and inventory features. However, they are not industry-specific and lack most of the advanced inventory management tools needed to manage a product intensive business. No size-matrix is available.



OnSite has integrated inventory modules for managing both blank and finished inventory. All inventory supports a size-matrix...which prevents you from having to enter every size as a different part number or line item.

Purchasing is fully industry-specific and supports bulk purchasing, issuing PO's to subcontractors and managing promotional product purchasing. Our contact manager is fully integrated with purchasing so you can leave yourself reminders to call a specific vendor on a PO. PO's can be sent to vendors via fax or PDF email attachment.

Our Inventory Management System lets you proactively manage inventory levels and drive purchasing off of predicted future shortages or needs.

7. Production Scheduling



QuickBooks has no built in Production Scheduling. To get this functionality most companies use a combination of spreadsheets, magnet boards and printed or hand-written paperwork.



OnSite has built-in Production Scheduling and Management tools. You create production departments, production machines and production processes. A single sales order can be scheduled on multiple days for multiple production processes. Calendars and Gantt charts are used by your staff to actively manage a production schedule that other employees can access. No more operating in the dark...your production floor is fully integrated with the rest of your business processes.

8. Design Management



QuickBooks has no built in Design Management functions. To get this functionality most companies use a combination of spreadsheets and printed or hand-written paperwork.

OnSite



Your business operates in a world of "designs". A customer orders an award from you...it gets an engraved design. Another customer orders some embroidered apparel...it gets an embroidered design. Another customer wants a coffee mug with yet another design.

OnSite gives you the tools to manage these designs. You can create your own "design types" with different formats. One or more designs are associated with sales orders. Each design can have thumbnail images associated with it...so everyone in your shop knows what a product should look like. Designs are part of the production process and are managed accordingly. Your design calendar is used to manage the schedule of when designs have to be done.

9. Receiving



QuickBooks has no built in Receiving functions. To get this functionality most companies use a combination of spreadsheets and printed or hand-written paperwork.

OnSite



OnSite has a built-in Receiving Department. Once purchase orders are issued...a queue is created for the receiving department. As they receive jobs in they are checked in the system and the order status is automatically updated.

10. Production Management



QuickBooks has no built in features for managing production or subcontracted sales orders. To get this functionality most companies use a combination of spreadsheets and printed or hand-written paperwork.

OnSite



In OnSite you have the option of having orders produced in-house or sent to a subcontractor. OnSite has the tools you need for managing production schedules as well as sales orders that are being sent to other manufacturers. You know at all times what is on your production floor, what outstanding orders you have with vendors, and times employees are logging on jobs.

All of this is managed through a single, integrated user interface. Production status is clearly visible to sales, customer service and other departments and changes real-time as employees use the system.

11. Shipping



QuickBooks has no built in Shipping functions. To get this functionality most companies rely upon paperwork, spreadsheets or 3rd party shipping software like UPS WorldShip.

OnSite



OnSite has a built-in Shipping Department. Once orders are completed, the shipping department can be used to print labels or mark when an order is shipped. Unlike QuickBooks, OnSite actually integrates with UPS WorldShip, FedEx, and other shipping companies. Package tracking information is brought into OnSite automatically where packages can be tracked. Key an order # into WorldShip and the shipping address from OnSite is automatically pulled in. No longer is your shipping department operating in a "separate world" from the rest of your company.

The Accounting Cycle

This cycle encompasses everything that is involved AFTER an order is invoiced.

12. Invoice Sent to Customer



QuickBooks requires you to enter an invoice.



OnSite has seamless integration between Quotes, Orders and Invoices. Data is entered only once. Quotes are converted to Orders. Orders actually "become" invoices and retain the same numbering system making tracking even easier. Invoicing is integrated with the General Ledger and allows driving revenue off of products, order types or both.

13. Receivables



QuickBooks has receivables tools, but lacks a contact manager. Most "management" is done through reports. Process customer payments via credit card or check.



OnSite has a full suite of receivables tools. Process customer payments via credit card or check.

Use our contact manager to actively manage receivables. Note conversations with customers, emails sent or received, and schedule reminders to call people back. Give customers real-time information as you are making receivable calls.

Invoices and statements can be sent to customers via PDF email attachments, for each individual customer or in bulk. Put a hold or warnings on customer accounts based on receivable status.

14. Vendor Invoices



QuickBooks has full functionality for receiving vendor invoices.



OnSite has full functionality for receiving vendor invoices. Compare invoices to the originating purchase order and check for duplicate invoices as you are entering them in the system.

15. Payables



QuickBooks has full functionality for payables. Use industry standard checks for paying bills. Pay bills online.



OnSite has full functionality for payables. Use industry standard checks for paying bills. Cannot pay bills online.

16. General Ledger



QuickBooks is a double-entry accounting system with fully functioning General Ledger.



OnSite is a double-entry accounting system with fully functioning General Ledger. The General Ledger can be queried directly for data and reports.

17. Financial Statements



QuickBooks has excellent reporting for financial statements in multiple formats. Statements can be customized.



OnSite has good reporting for financial statements in both a basic and comparison format. Statements can be customized and reports can be exported or brought into Excel for additional formatting.

Is Integration Really That Important?

Hopefully this document has helped you to understand that OnSite is a single integrated solution. Using QuickBooks, you need other paperwork or software packages to really run your business. It's not that QuickBooks is a bad program... it isn't. It is an excellent program for what it was designed to do...basic accounting for a broad range of small business types.

OnSite is different. It was designed specifically for this industry with a focus on integration. We believe that this integration is the key ingredient to running your business better.

Our 350+ customers tell us that we are right. They get efficiencies in their business because sales, production and accounting all communicate and work seamlessly...

Less...

- Paperwork
- Miscommunication
- Errors on orders
- Data entry
- Confusion

More...

- Time to do the important work
- Information at your fingertips
- Departments working together
- Faster response time for customers

Please call us for references. We would love for you to speak with or meet one of our customers to find out how OnSite has enabled them to run their business better.

To register for a demo of OnSite 7 please visit our website.

www.shopworx.com/shopworx/onsitedemos.html