

PROADVISOR review

SMP by High 5 Software

Overall Rating **7.42**

Product Name

SMP by High5 Software

Reviewed By



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Summary

SMP is a software product designed to support field service businesses, including interconnect companies, information technology support, plumbing and heating contractors, electrical contractors and others.

Strengths

This product has many features specific to the type of business it supports. The vendor also offers customization specifically for your business. This is a unique service and could influence your decision to purchase this software. Some of the other features that distinguish this product include:

- 1 - Takes you from lead tracking to completed order.
- 2 - A web based interface to track customer issues and report the status of customer service orders.
- 3 - Nice security features.
- 4 - A solid QuickBooks interface.

Limitations

- 1- No interface with map-point to track location of technicians.
- 2- Documentation was not updated to reflect some features in most current release of the software.
- 3- Interface is confusing and difficult to learn.

Wish List

See limitations

Product Ratings	Rating	Ratings Definitions
<p>Setup and Installation:</p> <p>There were no problems installing the software from the information and disk provided by the vendor. There were two programs to install, the SQLink program and the SMP5 program each of which are represented as icons on my desktop. I must start the SQLink program each day first before I open SMP5 in my standalone environment. The product is written mostly in Delphi and uses a proprietary database called DBISAM. It licenses a report writer called "Report Builder" by Digital Metaphors for its report writer. You can preview these reports and also print them to an Excel File.</p>	8.0	<p>10.0 (Perfect): This exceedingly rare score is reserved for a product that is as perfect as it could be.</p> <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>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>Interface:</p> <p>The interface is similar to Outlook with icons along the left side grouped according to their functions. Generally master record data displays in the top half of the screen with details displayed as tabbed panels below the master data. There is a tool bar at the top of the screen where options can be chosen and buttons in the middle of the screen for some options.</p> <p>The interface is somewhat busy and confusing to learn. There are options in multiple places and I was often confused on where to go to perform various functions. For example, look-ups are on a separate menu at the top of the screen. If you want to create an invoice there is a button in the middle. If you want to print the invoice there is a button on the tool bar. I was often confused about what I was seeing on the screen because the naming of items was not consistent. In one place they refer to a service call and in another they call it a service order but you are really looking at the same thing. Finally, the documentation was not consistent with the version of the software I was using and this created even more confusion.</p>	6.0	<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>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>5.0 to 5.9 (Average): A product that scores in this range is functional but unremarkable.</p> <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>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>Features:</p> <p>If you are in one of the industries listed above and have been using QuickBooks exclusively but would like to add more industry specific functionality to control the operations of your business then you should consider this package.</p> <p>This product has functionality to support all the major aspects of your business including the sales process, from lead, to proposal, to the customer service process where you take orders for services. You can track prepaid maintenance contracts and sub-contractors you use in the business. Functions that are redundant with QuickBooks but are tailored to the industries above include invoicing, receiving payments, tracking receivables and tracking inventory. In the inventory area there is an RMA(Returned Materials Authorization) function and a purchase order function.</p> <p>Vehicles and other assets used in the business can be tracked along with their maintenance histories.</p>	7.5	<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>



Other useful features include:

- 1- Five different price levels.
- 2- Inventory packages or kits for withdrawing parts from inventory.
- 3- Over 100 predefined reports.
- 4- Tracks prepaid hours and services..
- 5- 359 page user manual that is well organized and well written.
- 6- Tracks multiple warehouses and serialized stock.
- 7- Support for Help desk and sales desk knowledge-bases.
- 8- Web portal interface to gather customer feedback on service issues.
- 9- Ability to e-mail proposals directly from the system.
- 10- Report print packets can be defined to include multiple documents for proposals and invoices.
- 11- Tracks multiple sales tax rates by cost component, i.e. labor vs. materials.

Ease of Use/Service and Support

7.0

I did not find this product easy to use and spent some time with the vendor when I got lost in the learning process. They were able patiently to get me back on track. Once I got familiar with some of the peculiarities of the interface I was able to do more in the software. The features are there but learning the flow of the software was not intuitive for me.

The vendor uses Go to Meeting to do training and support and this works really well. You should budget some installation and training support time when you purchase this software. It will make a huge difference in the success of your implementation.

Data Security / Privacy

8.0

The system supports setting up multiple users with various security profiles that restrict the users to just the portion of the system you want them to use. You can establish administrators that have limited ability to set up users with only limited access functions. Passwords and credit card numbers are encrypted. Backups can be scheduled within the system.

Integration with QuickBooks

8.0

The following data is synchronized between SMP and QuickBooks:

Customers to Customers in SMP

Invoices – created in SMP and sent to QuickBooks or vice versa.

Payments – created in SMP and sent to QuickBooks or vice versa.

Credits – created in SMP and sent to QuickBooks.

Employees to Technicians in SMP



QuickBooks®

PROADVISOR

Time – goes to QuickBooks Timesheets.
Labor rates do not synchronize but must be manually updated in each program.

Vendors to Vendors or Sub-Contractors SMP
PO results in bill in QuickBooks when received in SMP.
Bills also generate for subcontractors when service items are used on an invoice in SMP.

Inventory can be synchronized or tracked separately in SMP. However SMP uses LIFO for their costing method and QuickBooks uses average cost so the inventory valuations will be different.

The interface must be initiated by the user and is usually run at the end of the day. You must make sure the SQLink is running, the processes are started within SQLink and then choose synchronize with QuickBooks from the tools menu within SMP.
