

CNG-Books by Cabinet NG

Overall Rating **9.13**

Summary

CNG-Books is a middleware solution that integrates CNG Document Management (CNG-DM) software with QuickBooks to provide small to mid-sized businesses with the same document management and workflow capabilities previously only afforded to large organizations.

Product Name

CNG-Books by Cabinet NG

Cabinet NG enables companies to manage large volumes of documents, optimize workflow, enforce privacy, and improve efficiency. CNG-Books helps consolidate QuickBooks accounting data and documents, eliminate misplaced documents and lost folders, and improve office productivity. Using CNG-DM, users can scan documents, receive documents electronically or obtain information by a fax server. Vendor bills, credit card receipts or customer payment information can be scanned, filed and entered into QuickBooks in a single process with CNG-Books.

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The end-user can integrate an unlimited amount of business documents to QuickBooks, while CNG-Books streamlines data entry and filing utilizing an electronic process. The processed transactions will seamlessly be populated into QuickBooks. The end-use customer will be able to retrieve a copy of the document image from within QuickBooks or CNG-DM.

Date Reviewed

October 24, 2005

Strengths

CNG-Books is designed to work best within a server environment. This structure will allow for multiple users to access documents, which reduce filing errors and speeds up workflow. There are no limitations other than the licensing requirement associated with the number of users that can access CNG-Books.

CNG-Books utilizes the existing customer and vendor information within QuickBooks, provides the user with the same pull down and data entry fields that they are already familiar with, and the learning curve for entering billing and payment information is minimal as the application is intuitive. Other than the licensing requirement, the only additional customer requirements are a local copy of QuickBooks, CNG-Books and CNG-DM on the end-user's desktop or laptop.

Set up of CNG-Books and CNG-DM require minimal configuration and an end-user can be up and running within a half hour. Data entered into CNG-Books will flow through to QuickBooks even if the QuickBooks application is not open on the desktop. Once the integrated application preference is set within QuickBooks, no further intervention is required.

Limitations

Functionality was excellent with this product; limitations are documented in Wish List (see below).

Wish List

The system allows for the entry of Items and Expenses associated with a bill entry. There is no existing capability to access the customer invoice functionality within QuickBooks in CNG-Books, therefore, the scanned bill image cannot be linked to a customer invoice if the item or expense is eventually billed back to a customer. In addition, payment entry was easy but it must be associated directly with an invoice. If the payment received applies to multiple invoices it was not apparent that the product could support this. In addition, if a payment is received "on account" that payment cannot be entered utilizing CNG-Books as it looks for a specific invoice to associate the payment. You also cannot enter a payment if the dollar amount received is for more than an existing invoice.

Product Ratings	Rating	Ratings Definitions
<p>Setup and Installation: <i>CNG –Books provides installation instructions, and will also provide free installation assistance if implementation is handled via a Webex conference call. Set up of this product was handled utilizing Webex and installation was simple and straightforward. The CNG support team was excellent.</i></p>	9.5	<p>10.0 (Perfect): This is a very rare score is reserved for a product that is as perfect as it could be.</p>
<p>Interface: The interface is easy to navigate. Minor setup and training is required but product is intuitive. No manual synchronization is required, data links upon saving of a transaction.</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 major drawbacks.</p>
<p>Features: The most amazing feature was the ability to take a scanned document, create an entry within CNG-Books utilizing the document image, and save the entry into QuickBooks as a single process. Not only is the entry saved in QuickBooks, but also the scanned image could be retrieved while in QuickBooks. The image is also stored within Cabinet NG along with a history of other scanned images for a particular vendor or customer. A list of scanned images for a particular vendor/customer can be accessed while in QuickBooks so an end-user can easily retrieve a previously stored image without having to open Cabinet NG.</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 few drawbacks do not have much negative impact.</p> <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 users should be aware of.</p>
<p>Follow-through on Claims CNG-Books makes the following claims on the QuickBooks Solutions Marketplace: <i>CNG-Books streamlines QuickBooks data entry and document filing into one consistent and efficient electronic process. Vendor bills, customer payments and credit card statements are brought into CNG-Books as scanned or faxed images. While viewing the image, CNG Books simplifies data entry by synchronizing information directly from QuickBooks using familiar pull down menus. Only the transaction's unique date must be keyed. This saves time and improves accuracy. With the click of a button, the data is entered in QuickBooks and the image is filed. If a folder does not exist, CNG-Books automatically creates one using the customer/vendor/credit card information obtained from QuickBooks.</i> The product performed as documented.</p>	9.0	<p>6.0 to 6.9 (Good): This range represents a product that is above average. Its strengths 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>Ease of Use/Service and Support The product was easy to use and was intuitive. Minimal End-User training is required but training should be primarily focused on the utilization of CNG-DM, as CNG-Books is what allows the flow of data between CNG-DM & QuickBooks.</p>	9.0	<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>Data Security Security is determined at both the CNG-DM 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>	8.5	<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>Privacy The company has a well-documented privacy policy on the website which is comprehensive and easy to understand.</p>	8.5	
<p>Integration with QuickBooks CNG-Books integrates seamlessly with QuickBooks.</p>	9.5	