SuccessWare®21 FAQs

ABOUT SUCCESSWARE®21

Do you sell the program as a whole or by individual modules?

SuccessWare®21 is offered as an entire business management system. So, as your needs as a business grow, you simply begin to use those additional modules at no extra cost.

Do you integrate with QuickBooks or other accounting software?

SuccessWare®21 is a standalone business management solution with its own accounting software solution! All of your finances (such as Accounts Receivable, Accounts Payable, credit card account management, income statements, and balance sheets) are managed within SuccessWare®21. We do not integrate with third-party accounting software.

SERVER-BASED OR IN THE CLOUD?

Do I install SuccessWare®21 at my office or is it "in the cloud?"

The answer is ultimately up to you. You can choose to install SuccessWare®21 on your own server (note: your server and workstations must meet our minimum hardware requirements), or you can operate SuccessWare®21 as an internet cloud-based application.

What are the benefits to hosting in the cloud?

SuccessWare has partnered with Advance2000 to deliver our users an unparalleled experience. Hosting SuccessWare®21 at Advance2000 means:

◆ Your software is available from anywhere in the world, as long as you can access the internet (including your home!)

◆ Dedicated service desk that is available 24/7/365

◆ 99.9% uptime service level

◆ Multiple data centers with secure offsite backup of data

◆ Redundancy of data

◆ Data center security (e.g. biometrics authentication and video surveillance)

◆ Management and support of your private Advance2000 cloud

◆ Coordination of future upgrades to SuccessWare®21

◆ IT support, hosted phones, email, cloud computing, and more

◆ Security is handled by IT professionals

You will be hosted on the cloud free of charge for the first two months. At any time during that two-month period, you can move to your own server or continue to contract with Advance2000 for a low monthly cost per user.

FAQs

GETTING STARTED AND LEARNING THE PROGRAM

How long does it take to get started?

There is no exact amount of time. Some companies are up and running within a week of returning from training; others take longer. Setting up SuccessWare®21 is comprised of two main tasks: setting up your codes and setting up your opening balances.

Setting up your codes typically consists of things specific to your company (e.g. your employees, what job types they each do, what hours they work, what cities/zip codes you service, what departments you want set up, what lead sources your customers come from, etc.).

Setting up your opening balances include your open Accounts Receivable, Accounts Payable, and starting General Ledger balances. This isn't difficult to do and usually only takes a few hours. To make the process as simple as possible, we've developed a "Quick-Start" module right in SuccessWare®21 that takes you step-by-step through the whole process. In addition, our support staff is always eager to help you with questions you may have.

How do I learn how to use the program?

SuccessWare®21 has developed the most comprehensive training program in the industry today: a full four days of hands-on training held in Buffalo, NY. The cost of the class is part of your initial investment and allows you to send two attendees from your company.

Who should I send to training?

Training is intended to help you get set up and running as quickly as possible. It is recommended that the attendees are involved in daily accounting functions (AR, AP, Bank Account Processing) and customer/job processing. All day-to-day functionality of the software will be covered with the exception of Inventory Management and Payroll Processing. Both of these topics are available in an overview format via live web-based training, which is available to you after the training class at no additional cost.

We also have web-based training modules available for members of your staff to utilize to aid in learning SuccessWare®21 (or just refresh their skills).

Do you offer any type of on-going training?

Yes! Our most popular option is our web-based training classes. Using teleconferencing along with an Internet-based browser, your staff can learn from the comfort and convenience of your office — no travel required.

Each month we have different classes covering various topics. Classes generally run 90 minutes each. Some topics are two-part classes, one 90-minute class on the first day and a second 90-minute class the next day. We also offer personal one-on-one telephone training and specialized "live" classroom training in Buffalo.

Can someone come to our office and help us set up SuccessWare®21?

Yes! To get you set up quickly and easily, you can take advantage of our on-site implementation service. After your four-day training class in Buffalo, we can send a member of our support team to your business to get you up and running.

On-site implementation does not take place of the four-day training class — you still must attend the class.

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Data Conversion

Can you convert my data from my current software to SuccessWare®21?

Data conversion is a very important part of getting started with SuccessWare®21 and can help you save hours of work! There are two important steps to a successful data conversion: getting the data out of your current software (the export) and bringing the data into SuccessWare®21 (the import). Once you provide us with the data, we'll work on the import. Then when you're registered with us, a member of our data conversion team will reach out to help you through the process.

Typically, we can import your customer list, service history, equipment, flat rate pricing, and inventory items if they can be exported from your existing software.

Using SuccessWare®21

How often can I call for support?

As often as you need! Unlimited support is included in your monthly license fee. Our support team is available to you Monday-Friday from 8am to 8pm EST.

How often do updates come out?

We're constantly working on the program itself. Sometimes we'll have minor enhancements, little tweaks, or brand new features to roll out. Getting updates is a snap because they're available online. We'll send out emails when there are major updates available, and if you use the hosted version of SuccessWare®21 you'll be updated automatically. And all these updates and new modules are included in your monthly licensing fee!

Will this work for both service and new construction?

Yes! We have comprehensive job costing capabilities — including a full project management module — at no extra cost.

Do you Process Payroll?

SuccessWare®21 will fully accumulate, calculate, and post gross earnings, but we do not maintain tax tables necessary to generate your employee's net pay. To accommodate this, we offer direct import/export features with both ADP and QuickBooks, as well as have customers who use numerous other payroll services with SuccessWare®21.

VISIT US

successware21.com

CALL US

877-899-3995

EMAIL US

support@SuccessWare21.com

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