

Questionnaire for Software Providers

to qualify for the
ANDERSEN AWARD
for the awarding of the
AGNES TROPHY
and to be ranked in the
SOFTWARE FINDER



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QUESTIONS SOFTWARE PROVIDERS

Name – Website of the software solution

Solution for individuals Yes No

Standard software Yes No

1 Can you invoice with this software?

Yes No

2 Is it possible to handle international business in different tax situations?
(especially Value Added Tax Act)?

Yes No

3 Can it do accounting on a cash basis?

Yes No

4 Does it have automated invoice capture using OCR (text recognition)?

Yes No

5 Can you automate processes? E.g. importing bank statements?

Yes No

- 6 Can the turnover tax advance return be sent directly to the tax office?
 Yes No
- 7 Can one prepare various business assessments?
 Yes No
- 8 Can you manage fixed assets?
 Yes No
- 9 Can the payroll accounting be handled?
 Yes No
- 10 Can one manage the digital documents in an electronic document archive?
 Yes No
- 11 Are there interfaces for tax representation or for branch specific software to import and export data?
 Yes No
- 12 How is your software support set up regarding user questions or technical issues? For example: handbooks, videos, online support and hotline support.
- | | | |
|----------------|---|-----------------------------|
| Handbooks | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Videos | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Online help | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Online support | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

Hotline Yes No

13 Automation for „partial and final billing“ available?

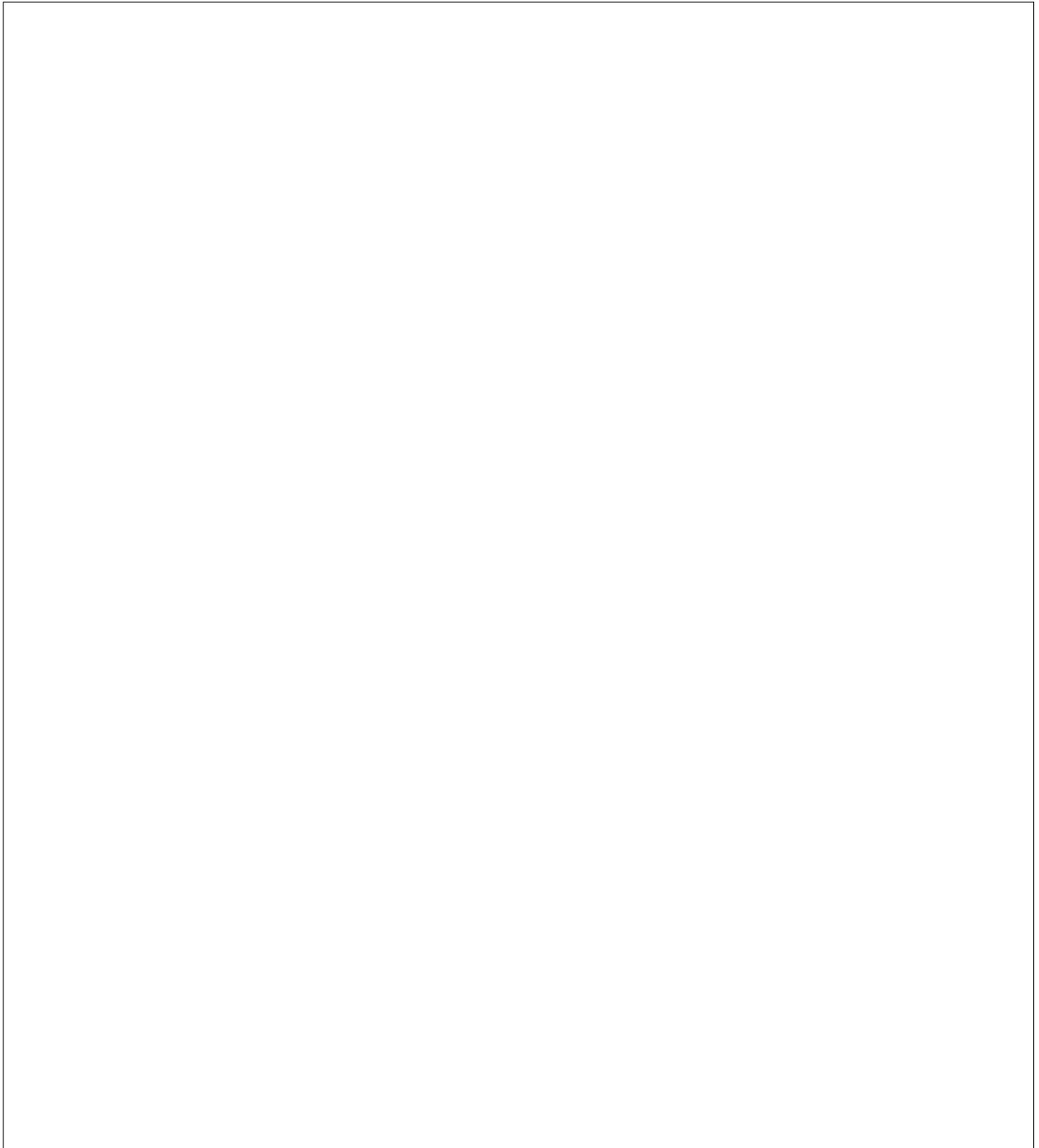
Yes No

Additional information regarding support tools

Additional features - Bookkeeping

- | | | |
|-------------------------------------|---|-----------------------------|
| Single-entry bookkeeping (EAR, EÜR) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Double-entry bookkeeping (GuV) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Annual accounts (Balance) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| E-Balance | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Different financial year | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Batch and dialogue entries | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Invoice capture | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Cash book | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Payroll accounting | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Asset management/deprication | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Online banking integration | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Turnover tax advance return | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Standard account systems | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Banking statement booking | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

Further information



Country-specific

Adaption of legislation to different countries possible?

Yes No

Please **enter** the **countries** here:

Data transfer to public corporations (tax office, health insurance company, company register)

Yes No

Is the implementation of **legislative amendments** up to date?

Yes No

Invoicing Yes No

- | | | |
|---------------------------------------|---|-----------------------------|
| Create quotations | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Recurring invoices (Reminders) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Send invoices via email | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Send invoices via post | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Invoices without logo of the software | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Personal invoice layout | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| International invoices | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

Foreign language wizard Yes No

Automatic VAT ID verification Yes No

Further comments

Cost accounting Yes No

Cost centre Yes No

Payers Yes No

Project number Yes No

Devisions Yes No

Print design Yes No

Reporting system Yes No

Additional features:

Controlling Yes No

- | | | |
|------------------------------------|---|-----------------------------|
| <u>Budgeting</u> | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Contribution margin | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Personnel cost plan | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Repayment/credit schedule | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Investment plan | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Product planning | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Goods purchase | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Target/actual-comparison | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Residual budget analysis | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| <u>Finance plan</u> | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Deposit/payout planning | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Liquidity plan | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Payment practice + solvency index | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Creditworthiness analysis | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Identify payment terms | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Plan running costs | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Target/actual-comparison (month) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Target/actual-comparison (quarter) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| <u>Planned balance</u> | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Month and quarter analysis | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Multi-year plan | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

Additional features:

Payroll accounting Yes No

Please outline the highest possible number of monthly payrolls as well as software versions in terms of price here:

Prompt software technological implementation of legal changes

- | | | |
|--|---|-----------------------------|
| | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Transmission to public bodies (i.e. tax) | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Business trip records | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Mileage allowance/Logbook | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Shift schedule/roster | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Personnel administration | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

Additional payroll accounting features

Webshop Yes No

Interface to accounting software: Yes No

Which interface to which software solutions:

Which features does the webshop cover?

Invoicing in which currencies:

In which tax countries

Invoicing:

B2B Yes No

B2C Yes No

Invoicing in the European Union Yes No

B2B - Reverse Charge – IG delivery Yes No

B2C – MOSS Yes No

(Moss – Mini One Stop Shop)

Invoicing third countries Yes No

Additional comments concerning webshop and invoicing

Enterprise resource planning

Yes

No

- | | | |
|-------------------------------|---|-----------------------------|
| Offer | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Delivery note | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Invoice | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Reversal/Credit | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Due notice | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Impression management model | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Foreign-language forms | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Forms, text blocks, logo | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Stocklist data maintenance | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Product groups | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Cost of sales | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Down payment | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Partial billing/final invoice | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Incoming goods | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Inventory | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Import inventory data | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Warehouse management | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Incoming invoice controlling | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Supplier evaluation | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Order evaluation | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Sales/customer lists | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

Additional features

Interface webshop/e-commerce

Yes

No

To which webshops:

Asset management

Yes

No

Automatic depreciation accounting

Yes

No

Interface to financial accounting

Yes

No

which Features does the Asset management cover

CRM Customer Relation Management Yes No

Central management of master data: Yes No

(personal accounts – customers – suppliers – diverse people - employees)

Appointment management Yes No

Tasks Yes No

Workflow management Yes No

Templates, serial letters Yes No

Choice of shipping options Yes No

Checklists Yes No

Which features of the CRM

Archive – DMS Yes No

Categorisation Yes No

Indexing Yes No

Audit proof, guidelines, accounting compliance Yes No

Which features does the document management system cover?

Activity recording (performance-, service recording)

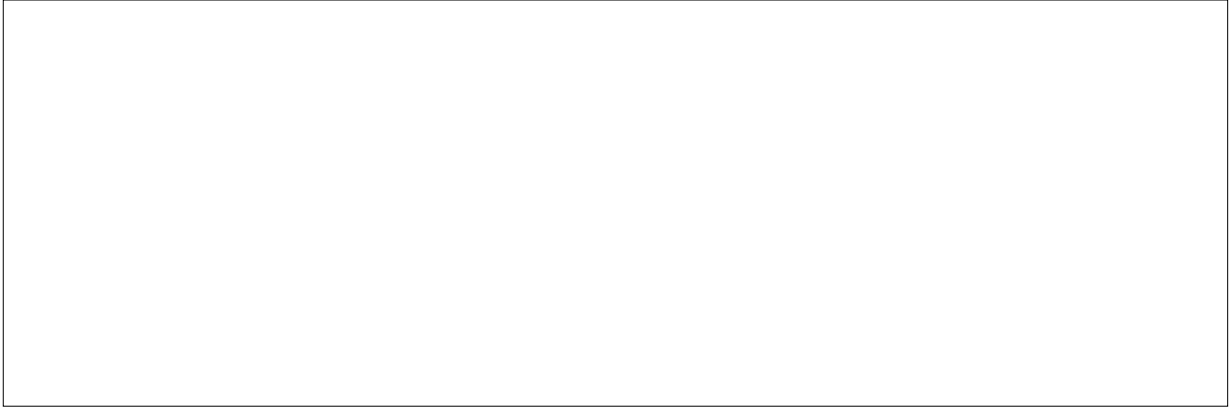
Yes No

- | | | |
|--|---|-----------------------------|
| Central registration for payroll accounting? | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| For the invoicing | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Creation of tasks | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Task groups | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Customer tasks groups | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Hourly wages | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Item prices | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Lump sums | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Cash expenses recording | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Day model employees | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Interface for payroll accounting | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| Interface for phone log | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |

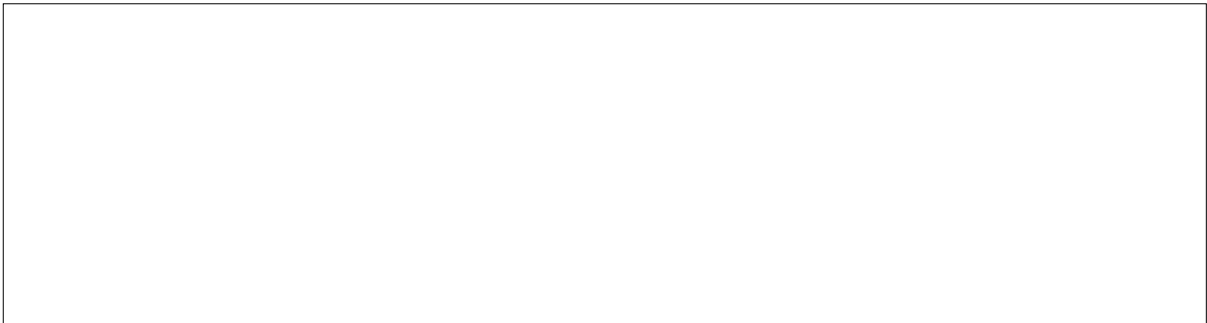
Which features does the activity recording cover:

Software solutions

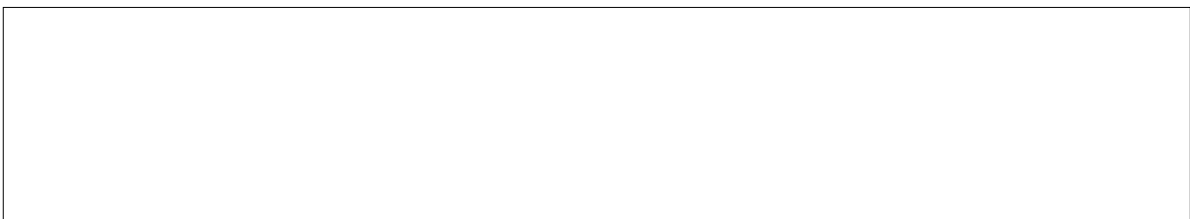
System requirements



Data and revision safety – certification (GoBD)



Print functions (Excel, PDF,)



Test software? Certifications? Contact person?



Package options

Complete inhouse solution - Partial inhouse solution (accounting)

in cooperation with external accountants and tax consultant

Please outline your package options and attach if necessary.

Pricing please outline

Purchase

Instalment

Subscription

Service

Quantity

Users

Service

Bookings

- Accounting wizard Yes No
- Beginner friendly Yes No
- Usability Yes No
- Search function Yes No
- Accounting templates Yes No

- Limited number of possible bookings? Yes No
- Correction/rebooking - simple? Yes No
- Control – Error messages – user friendly? Yes No

Automation

- Document recognition Yes No
- OCR (text recognition) Yes No
- Rule capture Yes No
- Templates Yes No
- Depreciation Yes No

Standardisation

- Automatic account allocation Yes No
- Referencing to accounts Yes No
- Online banking Yes No

Digitisation

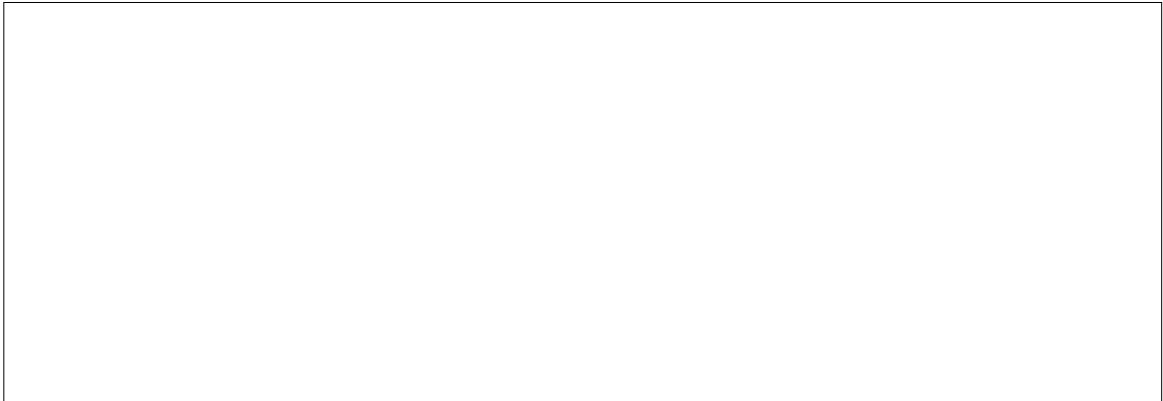
- Paperless posting Yes No
- Tamper-proof archive Yes No

Evaluations

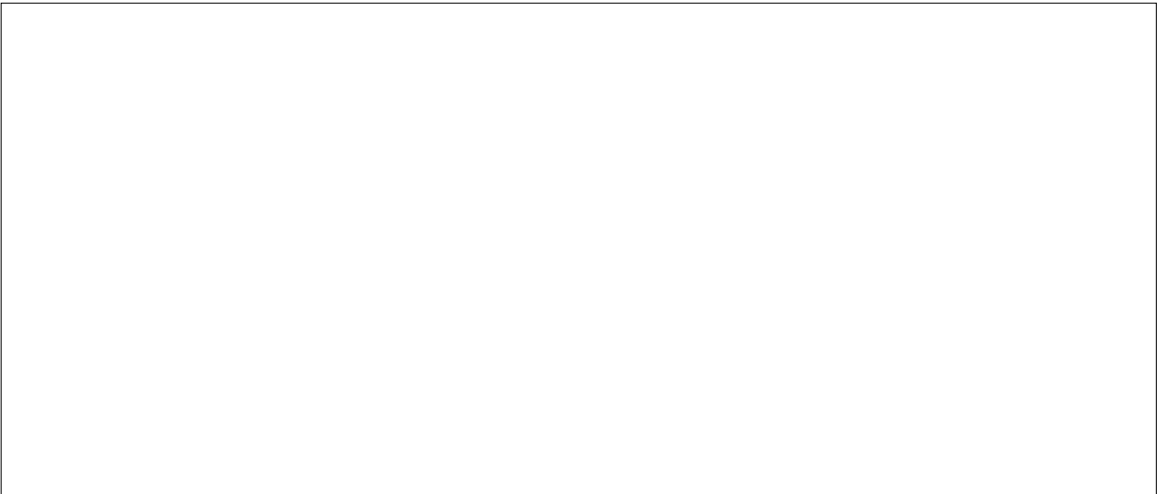
- Graphic evaluations Yes No
- Business assessment Yes No

Solutions for following business-

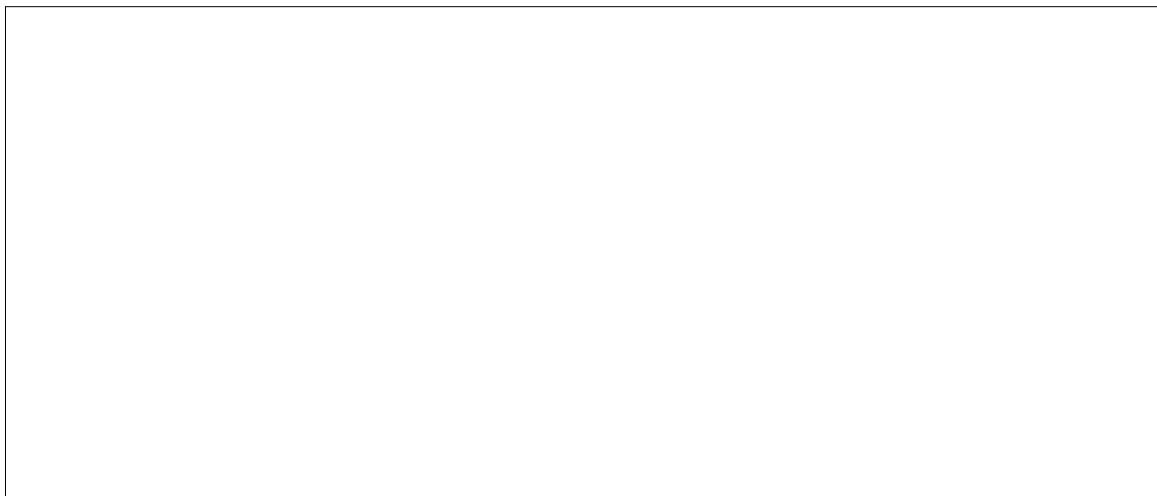
Sizes

A large, empty rectangular box with a thin black border, intended for writing solutions related to business sizes.

Sectors

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Languages

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Legal entities

Accountability (countries, laws)

Multitenancy

Yes

No

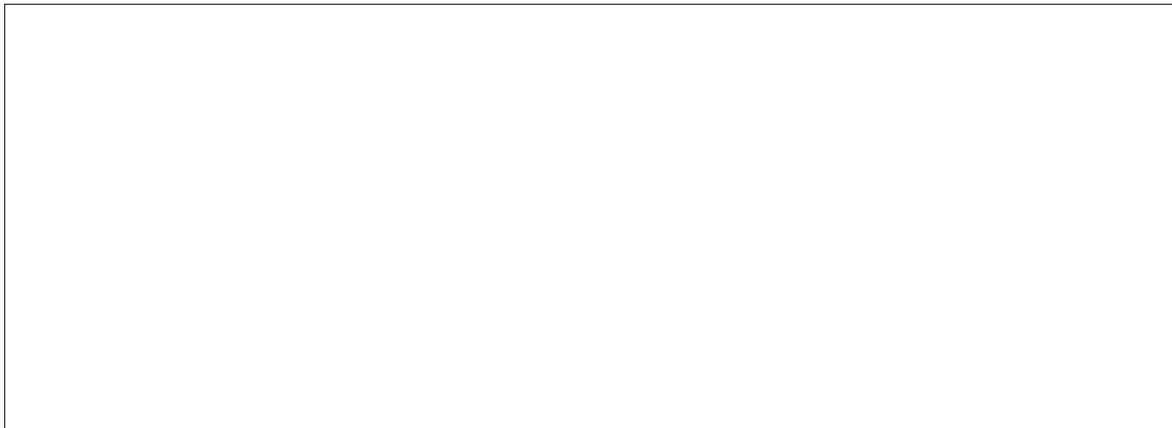
Possible maximum number of users/logins/profiles – please outline here

Performance

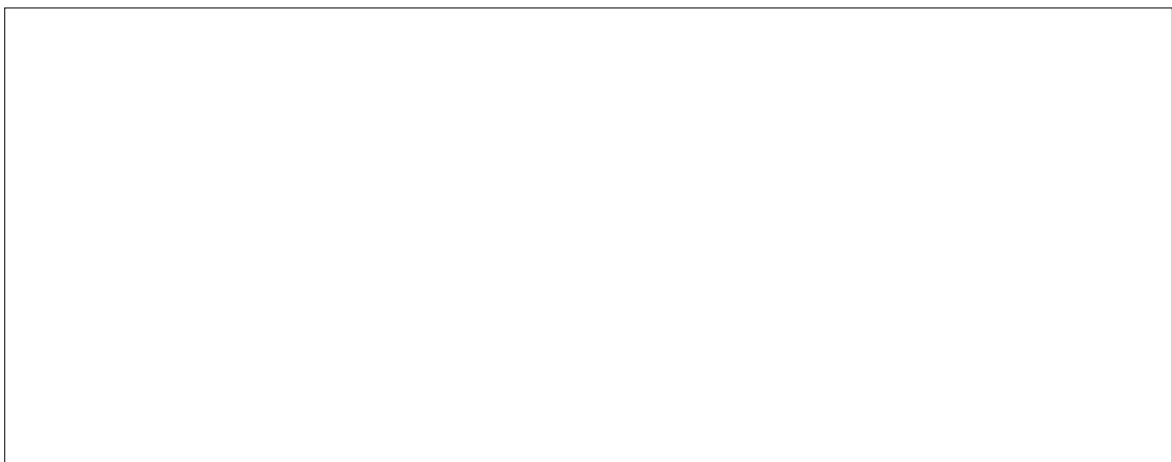
Interfaces? If yes, for which software solutions – please also planned or already in progress and when available.



Interfaces for sector specific management software



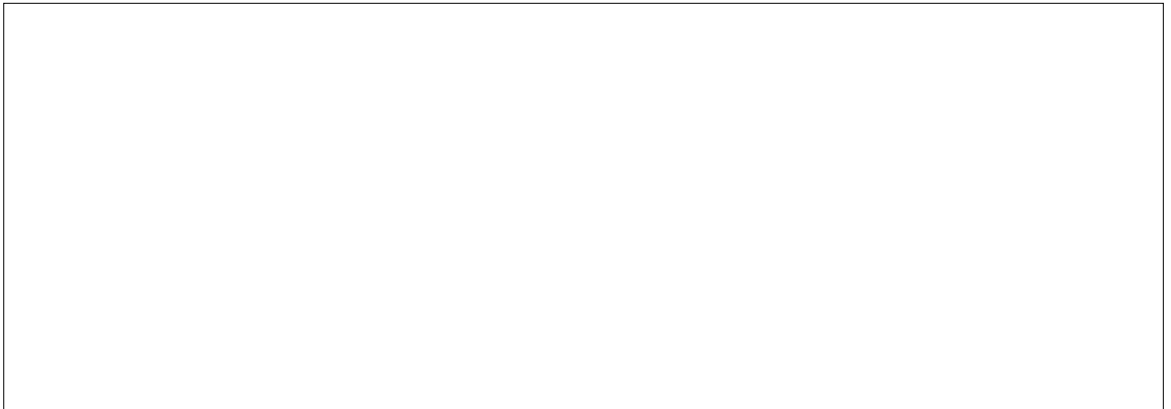
Interfaces for follwing webshops



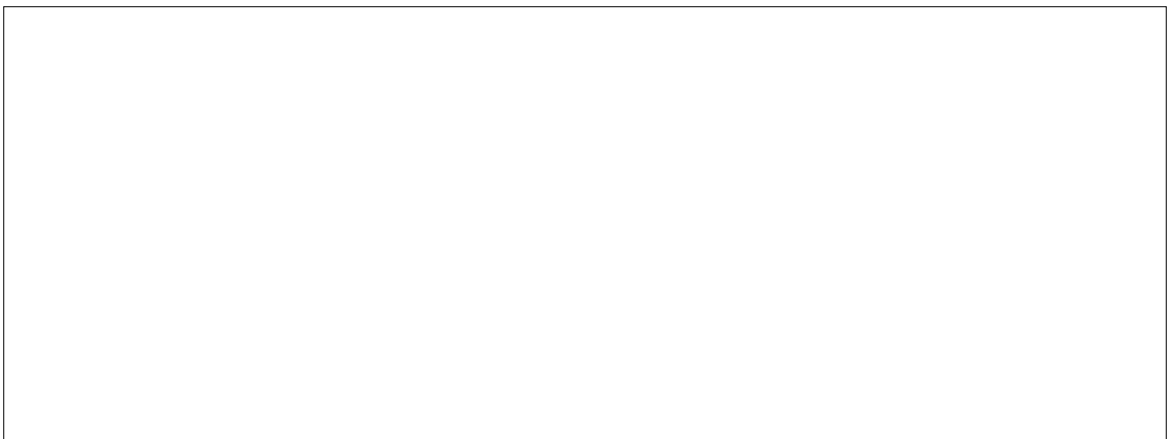
Interfaces for cost accounting/controlling software



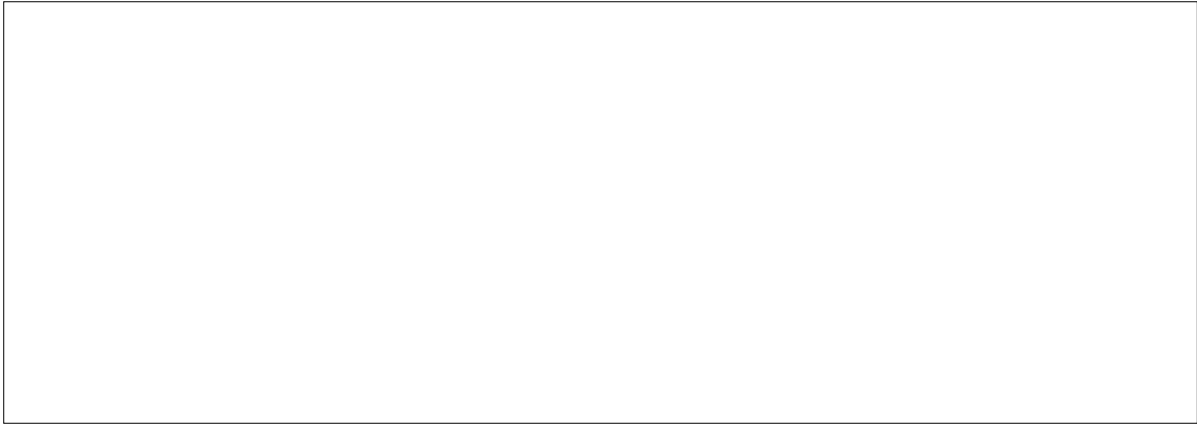
Interfaces for enterprise resource planning software



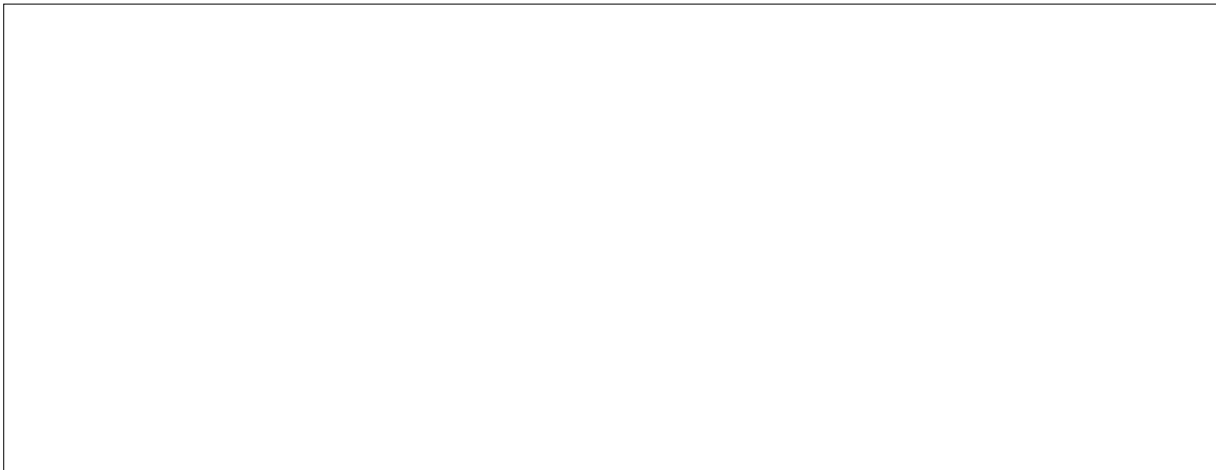
Interfaces for invoicing and e-commerce software



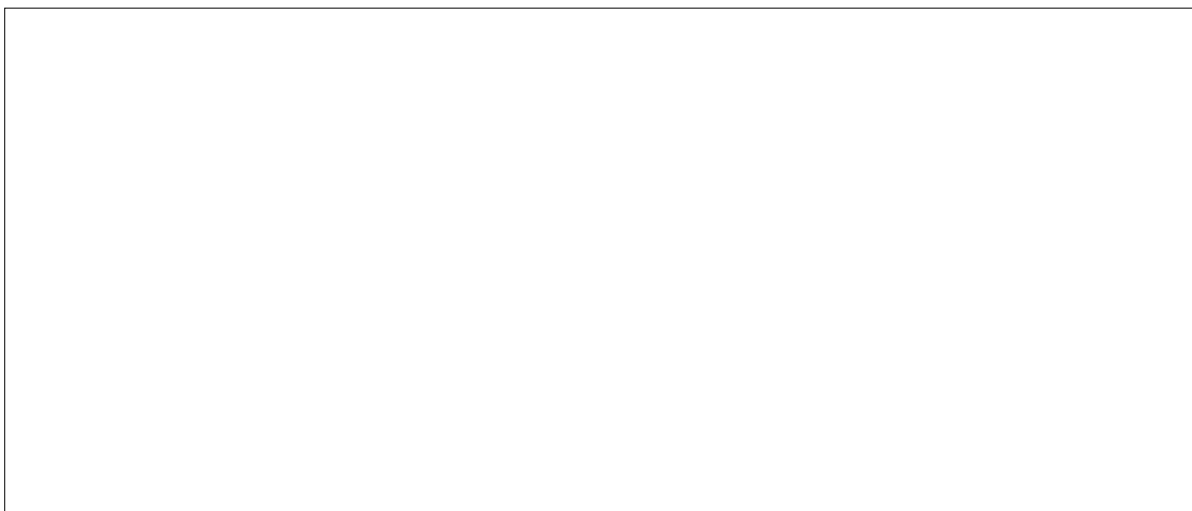
Interfaces for document managemet system/archive software



Interfaces for common user software for tax consultants



Interfaces for common tax consultant software solutions



Tax consultant access (web-based cooperation)

Yes No

Data transfer

Data import CSV Yes No

Data export CSV Yes No

Data export PDF Yes No

additional formats:

Receipt upload Yes No

via email inbox directly into the system Yes No

APP

Android-App Yes No

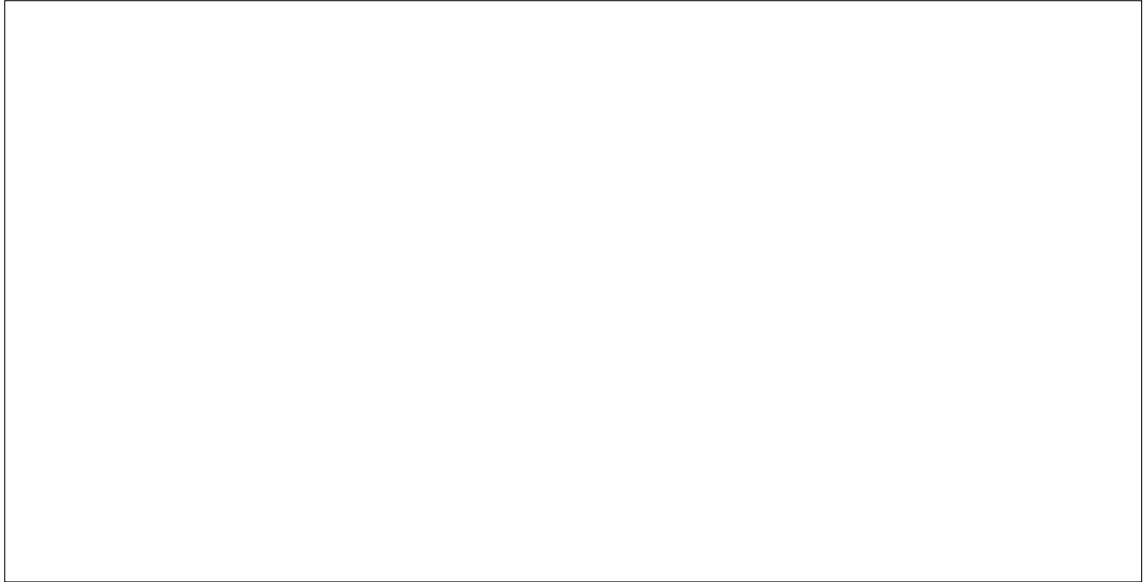
iOS-App Yes No

API Yes No

Documentation and support

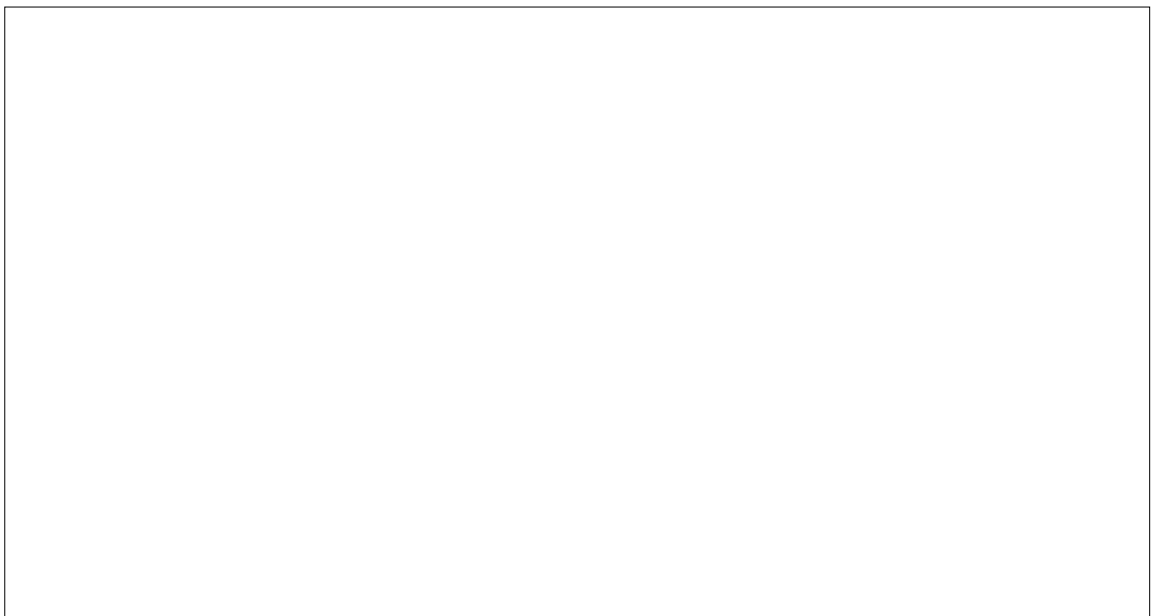
Consultants

Availability and fee (daily rate, hourly rate)



Support costs

Support and maintenance - costs



Documentations

Manual Yes No

Up-to-dateness Yes No

Quality

Video Yes No

Online Yes No

Communication

Phone Yes No

Email Yes No

FAQ section Yes No

Web form Yes No

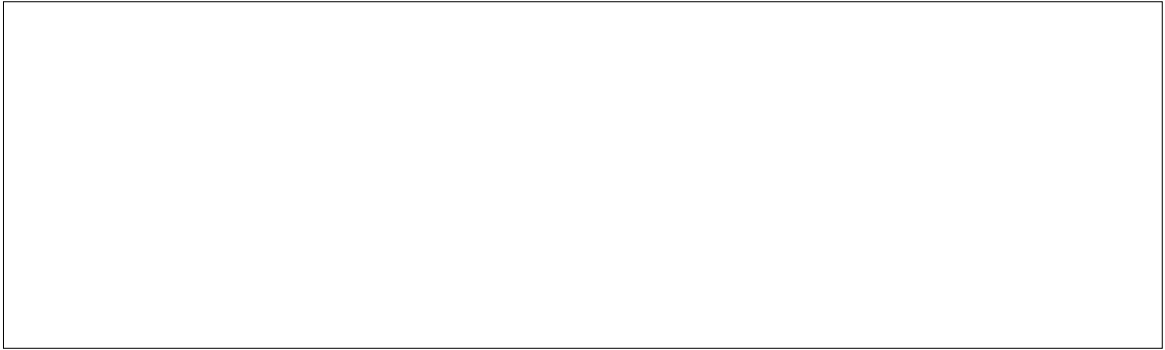
Forum Yes No

Social media Yes No

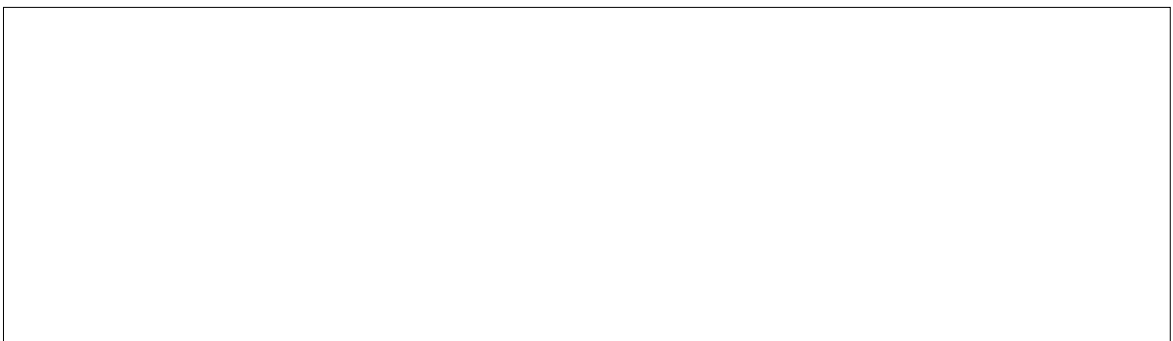
Additional selection criteria

Reference projects

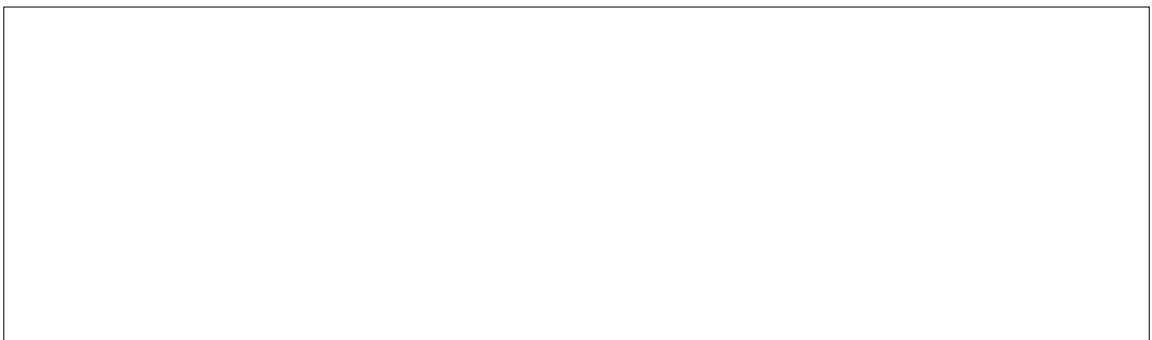
How easy to obtain price lists? Link? Sale?

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Customer ratings

A large, empty rectangular box with a thin black border, intended for content related to the question above.

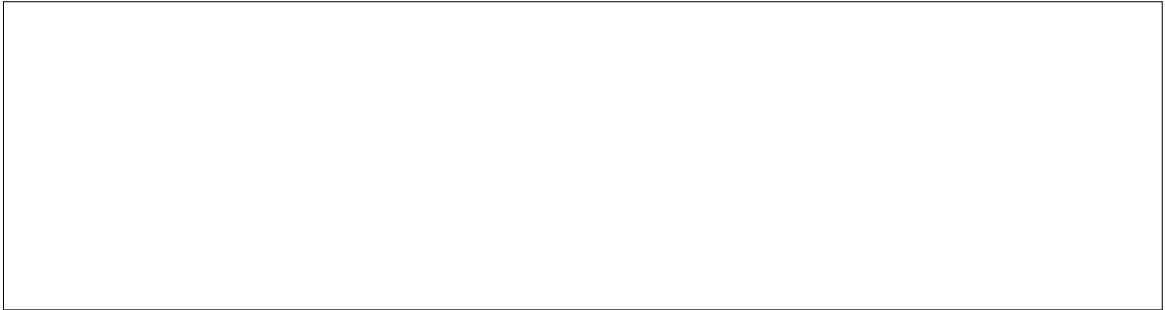
Customer satisfaction

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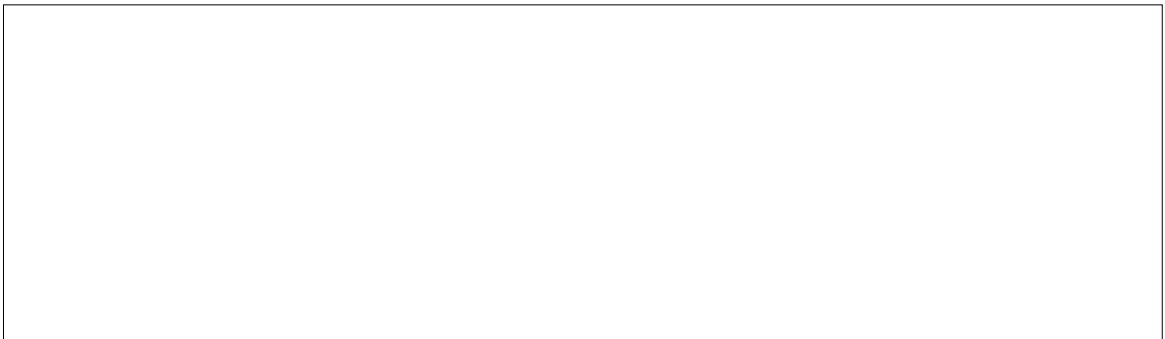
Product support

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Recommutation rate

A large, empty rectangular box with a thin black border, intended for a drawing or diagram related to the 'Recommutation rate' section.

User interface

A large, empty rectangular box with a thin black border, intended for a drawing or diagram related to the 'User interface' section.

Functionality

A large, empty rectangular box with a thin black border, intended for a drawing or diagram related to the 'Functionality' section.

Value for money

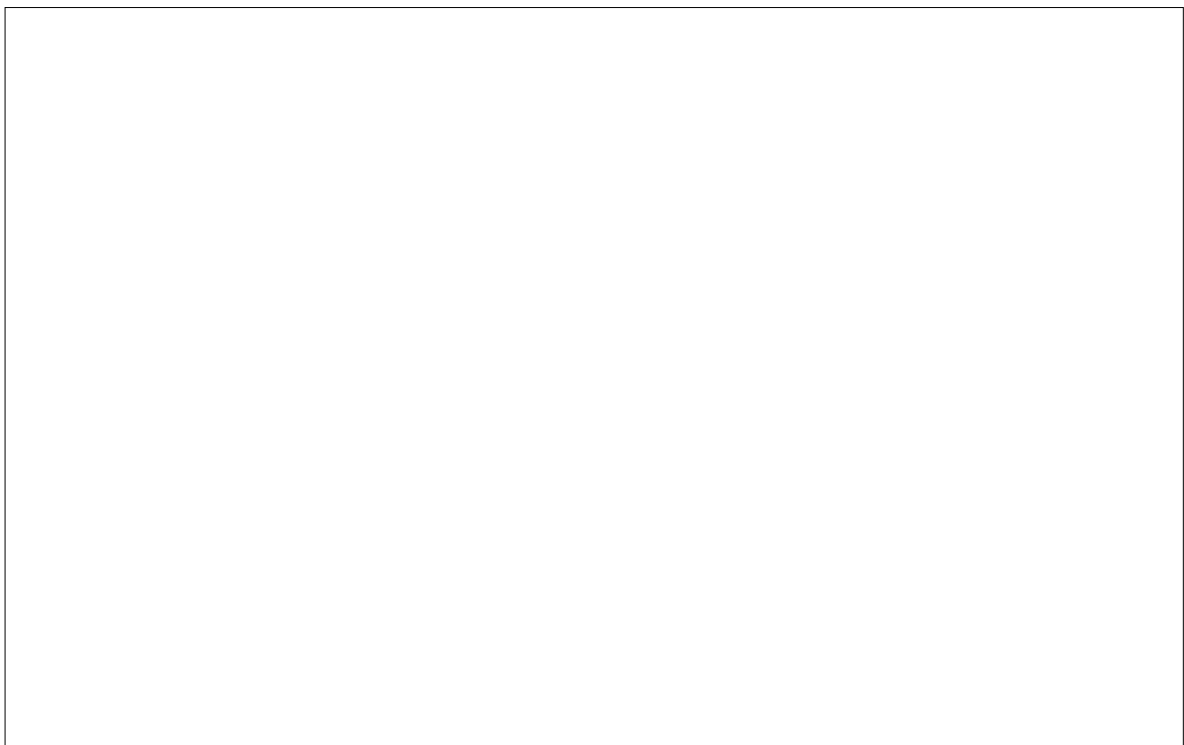
A large, empty rectangular box with a thin black border, intended for a drawing or diagram related to the 'Value for money' section.

for specific sectors – if yes, for which?

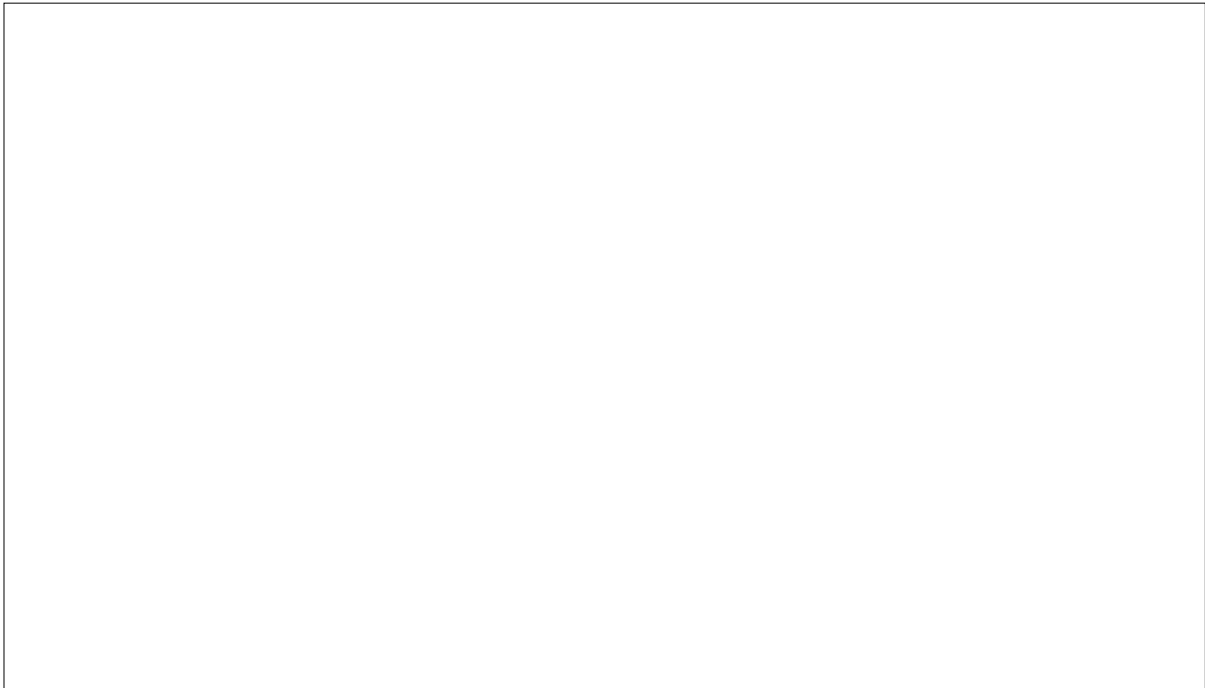
List of sectors



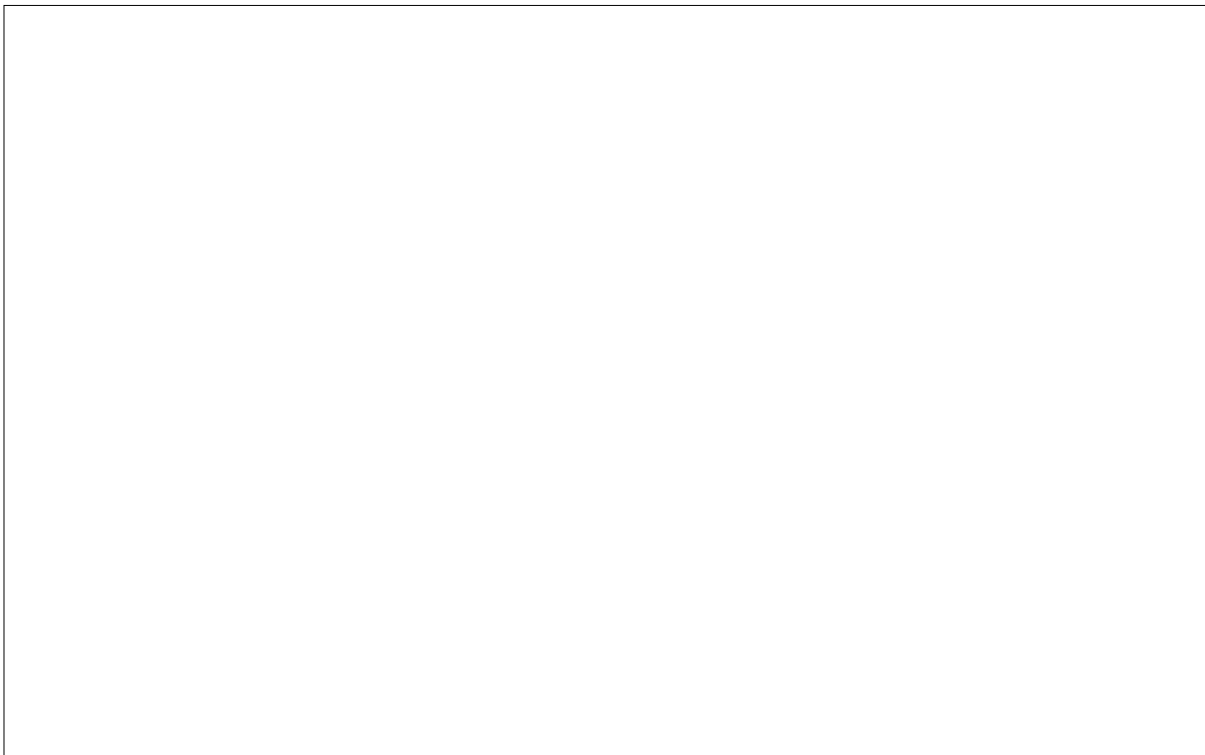
Sector suitability: User rankings (by which industries/sectors/businesses most used)



Contact person and contact data (name, email address, phone number)

A large, empty rectangular box with a thin black border, intended for providing contact information such as name, email address, and phone number.

Company name – country – town – street

A large, empty rectangular box with a thin black border, intended for providing company details such as name, country, town, and street address.

Please outline an **example project** here

- Size and sector of the company
- Solution for the company
- Project duration
- Project cost
- Important details from your experience:

Your letter of motivation

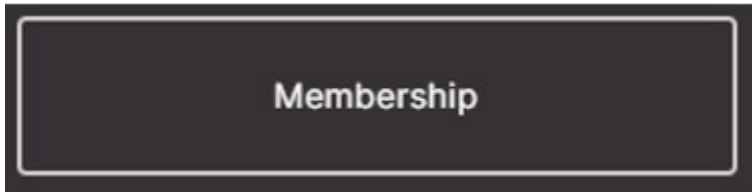
Why you as an applicant for the Andersen Award should be awarded the Agnes Trophy and be added to the software finder:

What about your software solution is outstanding:

Membership

I invite you to visit [agnesandersen.com](https://www.agnesandersen.com/) and sign up for a **Membership**.

That way you will receive the latest news on the subject of accounting:



Welcome to the future of accounting!

Saving time, money and stress together with a digitised and automated accounting!



Thank you very much for the submission of the questionnaire –

The qualification for the ANDERSEN AWARD, the awarding of the AGNES TROPHY and the ranking in the SOFTWARE FINDER:

For optimal networking between outstanding software solutions and those companies which look for them!

Because together we are the future of accounting.

THANK YOU,

Yours



Agnes Andersen