

Reviews



SEE Finance 2 vr. 2.1.6

by Joe Staten

A few years ago, I reviewed an earlier release (0.9.14) of the SEE Finance product (SF). I began that review with one objective in mind – to determine if SEE Finance was suitable for me as a replacement for Quicken for Windows (QFW). I did not intend to try all of the options of SF but rather to import my QFW data file and use it in the same manner I used it in QFW. I did not then, nor do I now expect SF to be a clone of QFW and fully expected some “learning curve” on my part. At that time, I saw potential in SF especially for a user just setting up a financial program. However, I determined SF was not suitable for me.

As a result, I am still using QFW (running under the Parallels emulator) and it continues to serve my needs. The only issues I have with it is it not a native macOS product which when using emulation software will not be as responsive and it now is an annual subscription product.

I followed that same process for this review. I neglected to time the installation process for the new version of SF but it went smoothly and fairly quickly. During the installation I reviewed parts of the online documentation and afterwards I practiced inputting some dummy transactions into a test file prior to importing my QFW data file. If my memory serves me, I believe the documentation is much improved in this release.

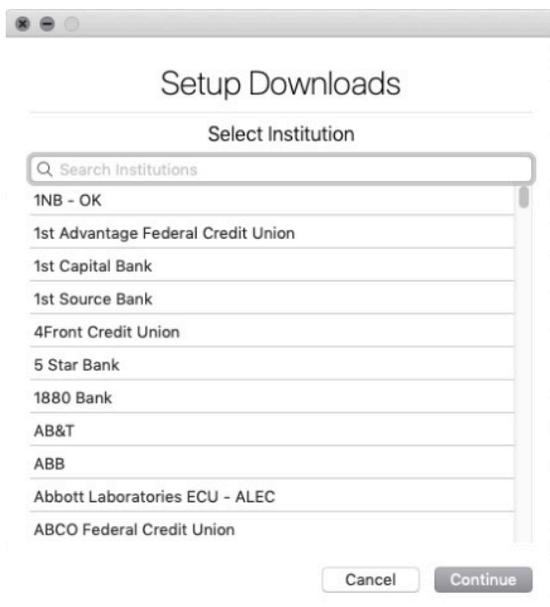
I exported a complete data file from QFW (banking, credit card and investment accounts from multiple sources) to be imported it into SF. I started SF and the import went smoothly but I immediately noticed that the SF data (.scsf – 285.8 MB) file was somehow more than twice the size of the QFW (.qfx -139.8 MB) file. Unlike the .qfx file which can be opened with a text editor, I was unable to find any other program that would open the .scsf file for comparison. **NOTE:** SF, being a native macOS program takes longer to load than QFW running under an emulator. Could this be because the data file is twice as large as that from Quicken?

Upon further inspection of SF I found that it had not imported my complete QFW file. None of the Scheduled Transactions (monthly deposits and periodic electronic payments) that I had defined in QFW were imported and that in all the banking accounts there was a column for ‘Check Number’ but no data was transferred. In QFW this column also may contain other data such as “ATM”, “Transfer”, etc. All other banking information (“payee”, “amount”, etc.) was transferred.

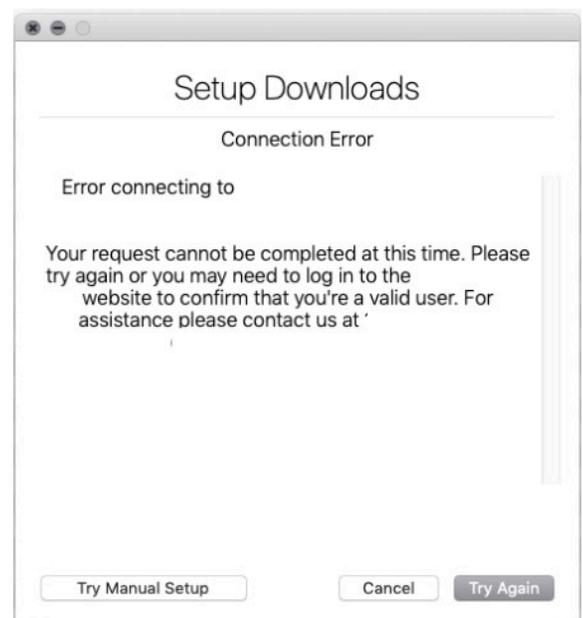
Since I did not get a complete data transfer from QFW into SF I realized SF is still not the solution for me. Using the test file I had created, I did retry the functions that I found “*less than optimal*” in the earlier release.

Download transactions:

The interface has been updated but the “Direct Connect” process still did not work for me (see error message at right). I subsequently learned my financial institution does not support the “.ofx” format for downloads although it is listed on the “Setup Downloads” screen (a portion of which is shown to the left).



Rather than “Direct Connect” I could import data in a two-step process. I could login to my financial institution via a browser and export the data in “.qfx” format to a file on my computer and then import it into SF. But my previous comments about missing data still apply. I couldn’t determine if my comments about having to do a separate download for each account is still valid as I was unable to setup the



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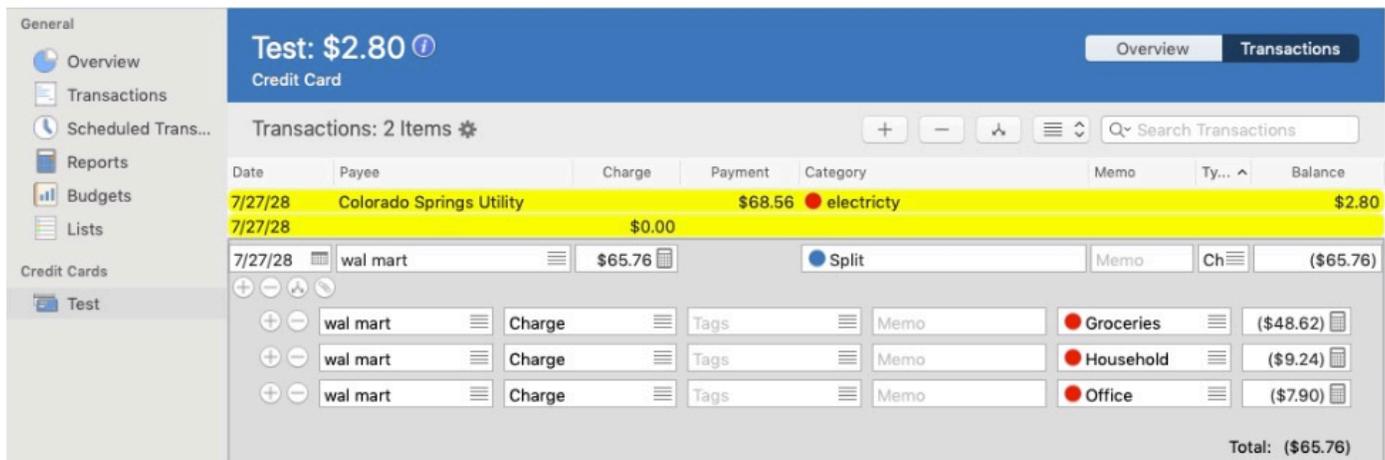
download. **Recommendation:** Update the login process to ask what format (.ofx, .qfx, .txt) you wish to download. That would eliminate the extra step of downloading a file and then importing it thereby making it more universal.

Memorized payees/securities, etc:

This area is much improved. My data import did include my memorized data including some I had (supposedly) deleted in Quicken. Unlike QFW, I could not find the list of these in SF or determine how long they are kept. In QFW one can edit the list or define a time period to keep a payee if it is not used. Since older ones were imported into SF, they are apparently not deleted – just no longer displayed in the list.

Split transactions:

Having done the review of the earlier version several years ago I can't remember the former process for entering split transactions. In the current release, this function is now similar to QFW. Enter 'split' as the type, a total amount in either 'charge' or 'payment' and two transaction lines open below. If, after you have entered two splits, the combined amounts do not match the total entered, additional split lines will open until the splits equal the total.



The Skinny

Evaluation: I believe the application is much better than the previous release. They have added support for the iCloud Drive and also have a version for iOS. With the exception of the inability to totally import my admittedly large and complex data file and the load time, Scimonoco Software has addressed my previous concerns. If they can resolve downloading and/or importing issues I think I could learn to use it.

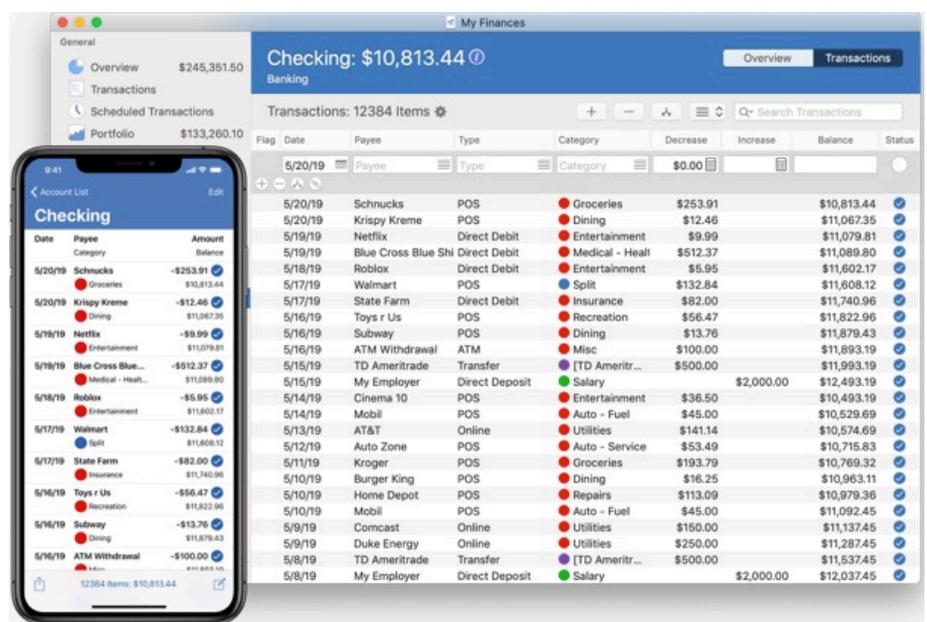
I know some of our members have reviewed other financial software and made presentations to the group. I recommend any members of SMMUG looking for this type of application to check out the 30-day trial.

Requires: MacOS 10.12 or Higher; iOS 11 or higher

Company: [Scimonoco Software LLC](#)

Price: \$49.99; [iOS App Store:](#) \$4.99

[Available 30 day trial copy](#)



Now Supports iCloud Drive