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financial management product that also contains excellent inventory and retail/sales management capability, making it an excellent software solution for smaller ...

Mary Girsch-Bock • Jun. 14, 2016



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- Product can be used with both Windows and Mac users
- Electronic and online payment processing available

Potential Limitations:

- Cloud and mobile add-on need to be synced with desktop product

AccountEdge Pro, from Acclivity offers small business owners the flexibility of a financial management product that also contains excellent inventory and retail/sales management capability, making it an excellent software solution for smaller retailers, and others offerings goods and services. Available in two versions; Basic and Pro, Acclivity offers potential users a free, 30 day trial, with no credit card necessary, so users can try the product out for themselves. AccountEdge is available for both Windows and Mac OS x operating systems, and for those who need anywhere access, AccountEdge Cloud offers various data entry and product function options that will sync back to the installed version of the product.

The 2016 version of AccountEdge offers a long list of new features and product enhancements, including the addition of Web Pay that allows business owners to be paid online, the ability to create leads with the new Lead Tracking feature, and an updated look to both the Sales and Purchases windows. Various enhancements have also been added to increase program functionality.

Basic System Functions: 5 Stars

A free, 30- day demo is available to be downloaded, so potential users can try out the system at their leisure. The default screen when installing the product provides the user with several options, including creating a new company, accessing the included demo company, product support, and process credit cards. The main interface screen is easily navigated, with a drop-down menu at the top of the screen, as well as access

to system functions such as Accounts, Banking, Sales, Time Billing, Purchases,

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The New Company Assistant is available to guide users through company setup, where users can also choose preferences during the company setup process. The product includes 100 Chart of Accounts templates that users can choose from, or a custom list can be created if desired. While suitable for all business types, those managing inventory and sales will be particularly pleased with the product's ability to sync with Shopify Connector to offer online sales to customers. AccountEdge is compatible with both Windows and Mac operating systems, and a mobile app is available that allows users to access the system remotely and later sync data between the desktop and mobile versions.

Core Accounting Capabilities: 4.75 Stars

Along with Banking, Sales, Inventory, and Time Billing modules, AccountEdge offers solid GL, AP, and AR functionality. Users can choose from 100 charts of accounts templates or create their own custom chart of accounts, using either a 12 or 13 period year. The accounts list offers users an easy way to enter a new account, edit an existing account, or create a budget for specific accounts. The budget shortcuts option allows users to update budget amount for selected months, and users can also choose to copy budget totals from previous year budgets for quick setup.

Users can easily setup recurring transactions in Acclivity, using daily, weekly, monthly, quarterly or yearly frequencies. AP functionality is completed in the Purchases menu, with users able to pay bill, prepare electronic payments, print checks, and process payment notifications as well as enter purchases, access the purchases register, and print or email or purchase orders in the system. The comprehensive Sales module allows users to process both regular and web orders, track and enter payment details, and even calculate salesperson commissions. Multiple sales tax rates are supported, including Canadian payroll and GST calculations.

Day-to-Day Operations: 4.75 Stars

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and for those wishing to outsource payroll, Acclivity offers payroll tax service at a reasonable price. The Card File module allows users to track clients, customers, and vendors, and both personalized letters and mailing labels can be created for quick, easy mailing.

AccountEdge offers users excellent inventory management capability, offering multiple pricing levels. When setting up new inventory items, users can specify whether the item is bought or sold, what the buying and selling details are, the product history, and assign the inventory to multiple locations. The product also features several new features that are designed to increase productivity, including lead tracking, to ramp up sales, the ability to accept online payments from customers, and additional fields and filters for more intuitive system navigation.

Management Features: 4.75 Stars

Analysis reports are available that provide management current data for vital areas such as company cash flow, inventory, profit and loss, and total receivables. A solid selection of standard reports is available in each system module, with users able access the lookup option below to find the report they desire. All reports are categorized by module, and users can quickly view a sample report, customize it to suit their needs, and print the report as needed. Reports can also be exported in a variety of formats including Excel, PDF, HTML, CSV, and Text files, as well as emailed to recipients directly from the report interface.

Integration and Import/Export: 4.75 Stars

AccountEdge offers a variety of add-on options that integrate with AccountEdge, including AccountEdge Cloud and AccountEdge Mobile, which both sync with the core product. Other add-ons include credit card processing, a Custom Report option for Windows, Point of Sale Checkout for Mac, and integration with Shopify. Users

can easily import data from other applications using tab-delimited or comma-

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solutions, as well as share tips with other users. Support is free for 30 days after purchase, and annual telephone support plans runs \$199 per year. Email support is also available for less urgent issues, with response time typically 24-48 hours.

Summary & Pricing

AccountEdge from Acclivity offers small to mid-sized businesses an affordably priced, easily navigated accounting solution that is particularly well suited to retailers. AccountEdge Basic runs \$99, and AccountEdge Pro is a bargain at \$399, and includes up to 10 user licenses.

2016 Rating – 4.75

Small Business • Software

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