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Mary Girsch-Bock • Mar. 20, 2017



Intacct ERP – www.online.intacct.com

From the March 2017 [review of Invoice Management systems](#).

Intacct ERP is a cloud based application aimed at small to mid-sized businesses that conduct business domestically or globally. Core financial modules include AR, AP, GL, Order Entry, Purchasing, and Cash Management. Additional modules are available that enhance product functionality considerably.

Intacct allows users to easily create custom templates for system invoices sales order, purchase orders and statements using Microsoft Word. Users can create a new invoice using the Quick Invoice Entry Preferences screen, which allows users to auto-populate the new invoice based on the prior invoice. Users can also create a new invoice from scratch, and can attach any relevant documents to the invoice when entering information. There is also an option to create a recurring invoice, where users can also customize start and end dates, invoice frequency, which includes day, week, month, or year. Additional modules are available to support usage-based

billing with usage information being entered in or by passing usage data through an

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credits when posting customer payments by entering the amount of the discount to apply in the column to the right of in the payment entry screen.

Users can create invoices by customer or by project. Time and billing expenses can be tracked in the optional Time & Expenses module and can be invoiced to customers as needed. Intacct supports nearly 200 currencies, so users can invoice and accept payments in multiple currencies.

Intacct offers three sales tax options, simple tax, which is ideal for those selling in a single tax jurisdiction, advanced tax, which easily handles up to four tax rules, and AvaTax, which automatically calculates both U.S. and European taxes.

Reporting options are excellent in Intacct, with users able to access a variety of system reports including an Invoice Analysis report and Invoice Analysis graphic. There is also an AR Recurring report, which lists all recurring invoices currently in the system. Customizable dashboard reporting provides users with a quick summary of vital data, and users can easily format and customize system reports to suit their needs. All Intacct reports can be viewed on screen, printed, saved in Intacct or in the cloud, added to a dashboard, or exported to Microsoft Excel or a CSV file.

Completely integrated, Intacct's invoicing and AR functionality work seamlessly with other financial modules. For companies requiring integration with other third-party applications, the Intacct Marketplace offers a list of applications that work with Intacct.

Intacct ERP is a robust financial and accounting software product that would work well for mid-sized businesses that have more complex AR and invoicing needs. The product offers excellent invoicing capability in conjunction with an outstanding accounts receivable module. Pricing for Intacct depends upon the needs of the user

and which modules are needed. Pricing generally starts at around \$400.00 per

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