Sage Intacct

www.intacct.com

From the 2018 reviews of invoicing systems.

Sage Intacct is a cloud-based financial management system. Formerly known as Intacct, the product was acquired by software giant Sage in July of 2017. Known now as Sage Intacct, the product has retained the features and functionality if offered prior to the acquisition. Sage Intacct offers an excellent selection of modules, including GL, AP, AR, Order Entry, Purchasing, and Cash Management, along with a long list of add-on modules.

The Sage Intacct Customer Document Toolbar for Microsoft allows users to easily create custom documents including sales orders and invoices using Microsoft Word. Users can easily upload additional templates or use the default templates included in the product. Users can easily create a new invoice, with the option to populate the new invoice with data from the prior invoice.

Users can easily create new invoices from scratch, and can easily attach any related documents directly to the invoice created. There is also an option to create recurring invoices, with users choosing both a start and stop date, as well as invoice frequency, with options including day, week, month or year available to choose from. Both the Project and Time and Billing modules allow users to track and bill customers on a usage basis, with users able to create invoices by customer or by project.

Users can access the Apply Penalties option to apply a late charge or penalty to past due accounts. Various filters are available when running the report, so users can set late charge minimums or choose specific customers that they wish to apply a late charge or penalty to.

Users can print or email customer statements from the accounts receivable module,

European tax amounts.

Sage Intacct offers excellent invoice and AR reporting, including an Invoices Analysis Report, an Invoices Analysis Graph, a Recurring Transaction Report, a Sales Tax Report, and a Sales Register

Customizable dashboard reporting is also available in Sage Intacct, with users able to choose the reports to be displayed on the dashboard. All Sage Intacct reports can be viewed on screen, printed, created and saved in Sage Intacct, added to a dashboard, or exported to Microsoft Word and Excel, as well as to a CSV file or as a text file.

A completely integrated system, Sage Intacct offers core financial modules (GL, AP, AR, Order Entry, Cash Management) as well as a variety of add-on modules such as Purchasing, Projects, Time & Expenses, Inventory Control, and Project Accounting, along with several others. The application also integrates with third-party applications including Avalara, ADP, Bill.com, Magento, PayPal, and Salesforce, along with numerous others.

Sage Intacct is a completely integrated financial and accounting application designed for mid-sized to larger businesses that require more robust invoicing and AR capability. Sage Intacct offers those interested a 30-day free trial of the product, with users able to obtain a quote for the application directly from Sage.

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