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Sage Intacct

www.sageintacct.com

From the July 2019 reviews of small business accounting systems.

Designed for mid-sized and growing businesses, Sage Intacct ERP offers complete financial and accounting functionality, including GL, AR, AP, Order Entry, Purchasing, Spend Management, Cash Management, and Reporting and Dashboard modules, with all modules working together seamlessly. Sage Intacct is a cloud application, with users able to access the application from anywhere, from any type of device, including desktop systems, laptops, and smart phones and tablets.

Sage Intacct is a scalable application, with users able to purchase the core financial

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Core Accounting Features – 5 Stars

Sage Intacct uses dimension values in the chart of accounts structure, offering 10 pre-defined dimensions designed to better track location, department, customer, vendor, items, and other details. User-defined dimensions are also available and can be used to track additional business details. During the setup process, users can make specific dimension values mandatory, to ensure that the proper details are being tracked across all departments and locations. An optional Budgeting and Planning tool is also available.

The AP module offers streamlined workflows, with users able to track and view all vendor payments and approvals. The module also offers vendor-specific aging reports along with bill and check registers, and the Spend Management feature allows users to create spending limits in order to maintain budget compliance in all departments. Users can pay vendors by check, ACH, or using the American Express Global Services feature that simplifies the bill payment process, and invoices and statements can be emailed directly to customers as desired.

Users can view a list of all open invoices when entering payments, entering only the payment amount, which will be automatically matched to an open invoice. The payment entry screen offers complete drill-down capability, with users able to access all original invoices if desired. Overpayments can also be processed directly in the payment entry screen, with the accompanying sales return processed through the order entry module. Users can also apply a payment to a specific customer, even if the customer does not have an open invoice. Multi-currency capability is supported in Sage Intacct, so users can bill and accept payments in a variety of currencies. An optional Sales Tax module is available to track sales tax for all customers.

Sage Intacct does not offer Payroll or Point of Sale but does include direct integration with ADP, with users able to set up and access the application directly through Sage

Intacct. Integration with numerous e-commerce, point of sale, and shopping cart

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assigned to each customer. During the setup process, users can enter an email address for each vendor and customer, making it easy to later email correspondence, invoices, and statements directly. For added CRM capability, Sage Intacct also integrates with Salesforce.

Cloud Capability – 5 Stars

Sage Intacct is a cloud application that is easily accessible from any location using any device, including desktop systems, laptops, and smart phones and tablets. The application offers easy ACH payment capability, and can accept a variety of payment types. In addition, integrations with payment applications such as Stripe and PayPal offer flexible payment capability to the application, and the Cash Management module allows users to import statements from banks and other financial institutions for easy reconciliation.

Management Features – 5 Stars

Sage Intacct includes role-based dashboards that provide an in-depth look at both operational and financial performance, including revenue, cash, operating expenses, and revenue per customer. The dashboards are customizable, with users able to choose what they wish to track and display. As a role-based dashboard, users only see the information applicable to their particular area or office.

The product also offers an excellent selection of reporting options, with the ability to view reports on screen, print a report, process and save a report for future access. Users can also add specific reports to a dashboard, save a customized report for future access, or export the report to Microsoft Word or Excel, as well as a Text file or CSV file. In addition, digital board books have been added for nonprofit organizations and software businesses, which tracks business performance across a variety of parameters.

Tech Issues – 5 Stars

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than 100 applications available through Sage Marketplace, including Dnn.com, Expensify, Stripe, Magento, PayPal, Paychex, Avalara, TSheets, and Salesforce.

Sage Intacct offers solid help functionality, including the Help Center, which is accessed directly from the application and offers access to product basics and various training options. Toll-free telephone support is available during regular business hours, and users can access support via email as well

Summary and Pricing

Sage Intacct is well suited for mid-sized and growing businesses, as well as national and international businesses with multiple locations. Sage Intacct is available via subscription, with users able to purchase the core accounting modules and add on additional modules when ready. A free 30-day trial is also available for those interested to try out the application prior to purchasing. Pricing is dependent on modules purchased as well as number and type of user, with a quote available from Sage Intacct upon request.

2019 Review – 5 Stars

Accounting • Auditing • Small Business

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