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### **Acclivity — AccountEdge Pro 2013**

**800-322-6962**

**[www.accountedge.com](http://www.accountedge.com)**

Acclivity's AccountEdge Pro is a U.S. small business accounting software application for both Windows and MacOS which originated as the U.S. version of global small business management system MYOB. Two former MYOB executives purchased the exclusive rights to sell the application in the U.S. in 2005, and then set up a development company to create new versions of AccountEdge and additional solutions in 2008.

AccountEdge is now available in three versions (AccountEdge Basic, AccountEdge Pro, and AccountEdge Network Edition) with three localizations (U.S., Canada, and a generic international version). Acclivity also offers solutions for point of sale, a free mobile version of AccountEdge (AccountEdge Mobile for iOS), a web store service, and a web based time tracking application.

The application has historically been known as one of the stronger accounting applications available on Mac OS X, but the Windows version of AccountEdge Pro offers advanced features to small business users such as multiple currency support and multiple-warehouse inventory support.

### **Basic System Functions: 5 Stars**

The application was simple to download and install onto an instance of Windows 7 Pro. Acclivity allows users to have a thirty day trial of the software, and we used this trial to complete our review. The Command Center is the main point for navigating the application, and this screen has tabs for common functions, including Accounts, Banking, Sales, Time Billing, Purchases, Payroll, Inventory, and Card File. The screen

has drop-down menus, there are drop down menus across the bottom of the screen,

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initial use of the application.

As mentioned earlier, the application is available for both the Windows and Mac OS platforms. Data files are designed so that they can be accessed on either Windows or Mac versions of AccountEdge. An iOS mobile app is also available which connects to data stored on Acclivity's servers that has been uploaded from a desktop instance of the software. The application supports backup to external media or a DropBox account from within the application. Unfortunately, the file stored on DropBox does not have encryption or other security measures implemented on it. Since DropBox does not comply with common regulatory requirements like those under HIPAA and other statutes, we believe that using DropBox for backup of confidential data is inappropriate for all users, but especially for accounting professionals.

### **Core Accounting Capabilities: 4 Stars**

The product has strong modules for general ledger, accounts receivable, and accounts payable. The general ledger has either 12 or 13 periods per year, and periods can be closed to lock out accidental postings. Invoices can be printed, e-mailed, or faxed to customers. The application also supports e-mail delivery of statements to customers as well. Accounts payable bills can be entered and checks printed through the Purchases module.

AccountEdge Pro includes support for multiple-rate, multiple payee sales tax calculation, and offers a Canadian localization of the software which supports Canadian payroll and GST calculations.

Payroll can be processed in house; a support agreement is available to insure that the payroll tax tables are current. Payroll support agreements start at \$249.00 per year which include upgrades and payroll tax updates for one user or \$299 for all users. Time can be entered manually or use the Time Tracker add-on to support web time

entry, costs for this add-on are based on the number of users and range from \$10.00

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be accessed through remote access or a hosting provider. Different divisions of a company can be tracked using “categories” within the application. (The Categories field, which is associated with each transaction, breaks out transactions into groups similar to “classes” in QuickBooks.)

The product's audit trail function is turned off by default, and must manually be enabled. Once enabled, the Audit Trail Report shows changes to settings, standing data, and transactions. There is also an optional preference which requires that transactions be reversed and reentered once posted that enhances the product's internal control.

The application supports simultaneous access by up to 15 users on the network edition of the application, which is available only for the Mac OS X platform.

### **Day to Day Operations: 5 Stars**

AccountEdge Pro includes sales tax calculation with multiple rates/payees, and integrates with Acclivity's point of sale application for Mac as well as the company's hosted shopping cart/eCommerce platform for web sales. The software does not offer integration with UPS and FedEx shipping tools.

The application includes a feature called “Card File” which is a basic contact management tool. A number of business management tools, including CRM, appointment management, timekeeping tools, human resource management, and reservation management are linked on the AccountEdge add-ons page at <http://accountedge.com/addons/>. The add-ons page does not list integrations to Salesforce.com or other major hosted CRM applications.

Inventory and Purchasing features included the support of multi-location inventory and committed inventory (pending orders). The Auto Build feature enables the user

to create a bill of materials that can be used to “build” and item for sale. AccountEdge

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providers could host the application if needed.

### **Management Features: 4 Stars**

A Dashboard Overview is not included as a home page in the application, however, charts and graphs are available as menu options from the reports menu.

Reporting is available from the command center and is organized by category. Reports can be filtered, report fields can be or removed, and reports can be printed, e-mailed, saved in various formats including PDF, Excel, CSV, HTML. Reporting capabilities are further enhanced by ODBC capabilities built into the product, so third party report writers like Crystal reports would be able to access the data on the Windows platform.

Security is organized by two levels; system wide which includes locking open periods and user security that is restricted by access to specific menu options. When closing a year the user has the ability to purge data to reduce the file size.

### **Integration and Import/Export: 4 Stars**

Data Transfer uses the import/export feature listed on the file menu using Tab-Delimited or CSV files. The AccountantLink feature also allows transfer of accounting data to the outside accountant. Acclivity supplies a free copy of AccountEdge to the accountant to facilitate this transfer of information.

External Integration is not supported and there are no Acclivity sanctioned cloud solution or hosted solutions available at this time.

### **Help & Support: 4 Stars**

Built-In Support features and help menu link to the Acclivity website. Additional

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\$159 for single user upgrade or \$249 for a multi-user upgrade version.

Acclivity offers separate partner program for bookkeepers and accountants. Members receive a copy of the software, technical support, updates, product discounts, and listing in a database of accounting professionals who support AccountEdge.

Membership is free for licensed public accountants, and is \$299/year for members of the bookkeeping program.

## 2013 Overall Rating: 4.25 Stars

Small Business

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