



percipient

 DATASHEET

# SAGE INTACCT ACCOUNTS RECEIVABLE

**Accelerate your cash flow and keep your organisation strong by properly managing invoices, credit terms, and other accounts receivable (AR) tasks.**

Get paid faster and increase your cash flow with Sage Intacct accounts receivable software – part of Sage Intacct accounting.

Automate your processes, email your invoices, and offer more payment options. Generate recurring invoices for easy subscription management, attach customer documents to transactions for better record keeping, and more.

## **WHY CHOOSE SAGE INTACCT?**

- **Save time, move fast**
- **Always trust the numbers**
- **Collaborate in real-time**
- **See the full financial picture**
- **Automate & streamline processes**
- **Complete integration**
- **Future-proof performance**

# MUST HAVE FINANCE FEATURES

## Get Paid Faster

Sage Intacct accounts receivable software makes your team more efficient, so you get paid faster.

- Automate your processes, email your invoices, and offer more payment options
- Generate recurring invoices for easy subscription management
- Attach customer documents to transactions for better record keeping, and more

## Stay Connected

Sage Intacct cloud-based accounts receivable software integrates with the rest of your business systems - including CRM.

- Get a single view of quotes, sales orders, and invoices
- Streamline billing and accounting with order transactions that are automatically posted to your GL and AR ledger
- Access up-to-date, accurate sales tax calculations on demand

## Complete Visibility

Sage Intacct gives you real-time visibility with built-in and configurable dashboards, reports, graphs, and charts.

- Get a complete picture of customer aging, invoice analysis, recurring invoices, deferred revenue, and more
- Analyse AR data from a range of perspectives for a complete view of your organisation

## Stay in Control

Sage Intacct accounts receivable solution puts you in control, not the other way around.

- Create automated, configurable processes to enhance internal controls
- You define the approvals to align with the way you operate, so you have complete visibility into the entire AR process

# SAGE INTACCT BENEFITS

## SEND OUT INVOICES - FAST

Stay firmly in control of an error-free AR process and use automated dunning and collection notices to make collections painless. Sage Intacct accounts receivable automates processes and reduces manual data entry.

Greater efficiency means your organisation can get paid faster - and that means stronger cash flows. You can also generate recurring invoices for easy subscription management, attach customer documents to transactions for better record keeping, send invoices by email, and offer more payment options.

## GET CONNECTED TO STAY IN CONTROL

Connect accounts receivable to the rest of your business for consistent financial views. Sage Intacct works with leading CRM solutions, including Salesforce Sales Cloud, to give you a single view of quotes, sales orders, and invoices.

It automatically posts order transactions to both your general and AR ledgers, so billing and accounting is more efficient. And it accurately calculates all sales taxes using AvaTax for Sage Intacct.

# MUST HAVE FINANCE FEATURES

## TOOLS THAT MAKE A DIFFERENCE

**Sales tax connection:** Leverage up-to-date and accurate tax calculations via the cloud using AvaTax - or configure the Sage Intacct advanced tax engine to fit your business.

**Tax accruals:** Comply with requirements in each area where you do business using the Sage Intacct advanced tax engine.

**Customisable dashboards:** Quickly gain insights by adding reports, charts, and graphs to dashboards.

**Complete accounts receivable reports:** Gain better visibility with reports for aging, invoicing analysis, recurring invoices, active projects, and deferred revenue.

**Custom analysis:** Get more strategic insights with custom analysis across multiple attributes such as project, customer, location, and department.

**Automated dunning & collection notices:** Send automated emails based on invoice creation or past due date. Set up different email templates for each collection attempt.

**Reminder rules:** Set up reminder rules for different payment options such as net 30 and due upon receipt.

**Collection case ownership:** Assign ownership of customer records and collection cases. Send 'personal' reminders (from the individual's email address) or generic reminders.

**Collections information:** Automatically capture collection case information - shown on customer records as a separate tab so you easily access collections activities.

# SAGE INTACCT BENEFITS

## GET THE INSIGHTS YOU NEED

Now you can analyse your accounts receivable data across a variety of business drivers for a complete view from every perspective.

Configurable dashboards, reports, graphs, and charts give you a real-time view into customer aging, invoice analysis, recurring invoices, deferred revenue, and more.

## FINANCE MADE SIMPLE

Sage Intacct offers a wide range of accounting capabilities, in a modular format that gives each department within your organisation the flexibility to choose the best software applications for its needs.

If you would like to know more about Percipient and how we can help you invest in the right finance technology for your business, call the team on **01606 871332**.