

percipient



 DATASHEET

SAGE INTACCT PROJECT COSTING & BILLING

Sage Intacct project costing and billing software simplifies billing processes for project-based professional service organisations with a diverse mix of customers and projects.

Keeping track of project financials, contract, and resources can be complex and cumbersome - especially if your workflow is spread out across numerous systems.

Sage Intacct's project costing and billing software can manage all your financial data in one place. Take the pain out of your financial management, start and finish projects on time, stay on top of project costs, and keep projects productive and profitable.

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

Automated billing processes: Capture billable and non-billable transactions to minimise revenue leakage and support automated invoicing of time and expense or fixed fee billing. Calculate costs using cost codes and automatically route billable time information to approvers. Then easily generate custom or preconfigured invoices that include time, materials, and other company charges to bill based on milestones, scheduled dates, or percentage completion. After the job is out the door, you can always access invoice information with a detailed audit trail of any overrides made to billing rates, quantities, and amounts.

Flexible revenue recognition: Improve forecast accuracy by decoupling billing from revenue recognition. Set revenue recognition schedules by project phase using milestones, schedules, percentage completion, and project completion methods. If things don't go according to plan, you can always pause, resume, modify, or cancel in-progress revenue recognition schedules with complete flexibility and accuracy.

Actionable reports & dashboards: Role-based real-time dashboards and reports deliver fast, visual updates on all aspects of the business with up-to-the-minute financial, managerial, and operational reporting available as time, expenses, and subcontractor/vendor costs are entered. Custom and ad-hoc reporting takes your data even further with insights such as operational reports, financial statements, and current backlog details. You can also use historical data to analyse key metrics including past project profitability, job costs, and estimate vs actual data. Then compare this information by project, customer, or other key business drivers.

Integration with external systems: Don't risk vendor lock-in and settle for an all-in-one suite that may not be the best solution for all areas of your organisation. Discover the power of choice in CRM solutions like Salesforce, professional services automation, or field operations tools. Sage Intacct's open API provides an easy connection to existing and future third-party systems.

SAGE INTACCT BENEFITS

Get Projects Off to a Great Start

See the true costs of past projects so you can create smarter estimates to protect and improve profit margins.

Improve Project Workflows

Keep projects on-track with proper workflows for tracking time and managing costs while providing online access to critical job data.

Automate Billing

Billing automation helps you to generate project invoices in the right format, using the right terms and the right amounts. Sage Intacct also keeps revenue recognition separate from billing and automates the calculations and postings.

Actionable Insights

Consult a single source for role-specific reports and dashboards. Easily inform stakeholders about the job status, milestones, and invoice information.

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**.