

DATASHEET

Accounts Receivable

Accelerate your collections cycle

Accelerate your cash flows and keep your organization strong by properly managing invoices, credit terms, and other accounts receivable (AR) tasks. Sage Intacct Accounts Receivable streamlines AR management by automating the invoicing and collections process. That shortens the cash cycle, enhances business performance, increases accuracy, and improves customer satisfaction.

Key Benefits

Send Out Those 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 organization 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 recordkeeping, 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 Accounts Receivable 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.


Get the Insights You Need

Now you can analyze 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 analyses, recurring invoices, deferred revenue, and more.

HOME DASHBOARDS REPORTS COMPANY GENERAL LEDGER **ACCOUNTS RECEIVABLE** ORDER ENTRY ACCOUNTS PAYABLE PURCHASING TIME & EXPENSES >

> **Invoice** Post Print/Email Edit Duplicate Done More actions v

Helene Franckworth (C-1079)
Customer ID balance: 1,000.00 USD

Invoice date 08/22/17	Due date 08/31/17	Invoice total 120.00 USD	Amount paid 120.00 USD	Amount due 0.00 USD		Paid in full on 08/22/17 Printed Check: #5765
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Date 08/22/17	GL posting date 08/22/17	
Customer C-1079--Helene Franckworth	Bill to B_C-1079	Ship to Helene Franckworth(CC-1079)
	100 Main St Bastrop, TX 78612	100 Main St Bastrop, TX 78612
State Paid		
Invoice number AR_Inv-00430	Reference number Annual Drive Contribution	Description --
Message --	When modified 08/22/17 12:43:15	

Term --	Attachments --
Due date 08/31/17	
Document ID Pledge Reminder Invoice-AR_Inv-00430	

Get real-time visibility into summary and detailed AR activity.

Key Features

Invoicing

Email option

Send invoices faster.

Multiple payment receipt options

Accept payments in your customers' preferred forms including check, cash, credit card, and funds transfer.

Advance payments

Receive and apply payments at any time for added convenience.

Quick invoice import

Enjoy easy, after-the-fact bulk invoice entry.

Transaction documentation drag-and-drop

Drag and drop supporting documents directly to transactions; cut paper use and filing, and instantly access backup documentation.

Integration with PayPal Merchant Services and Authorize.net

Simplify payment receipt, and support recurring bills and scheduled payments.

Accounts Receivable Management

Extensive history

Keep track of transaction details forever, and maintain secure access to complete customer histories.

Post-payment control

Ensure that paid invoices cannot be deleted or edited.

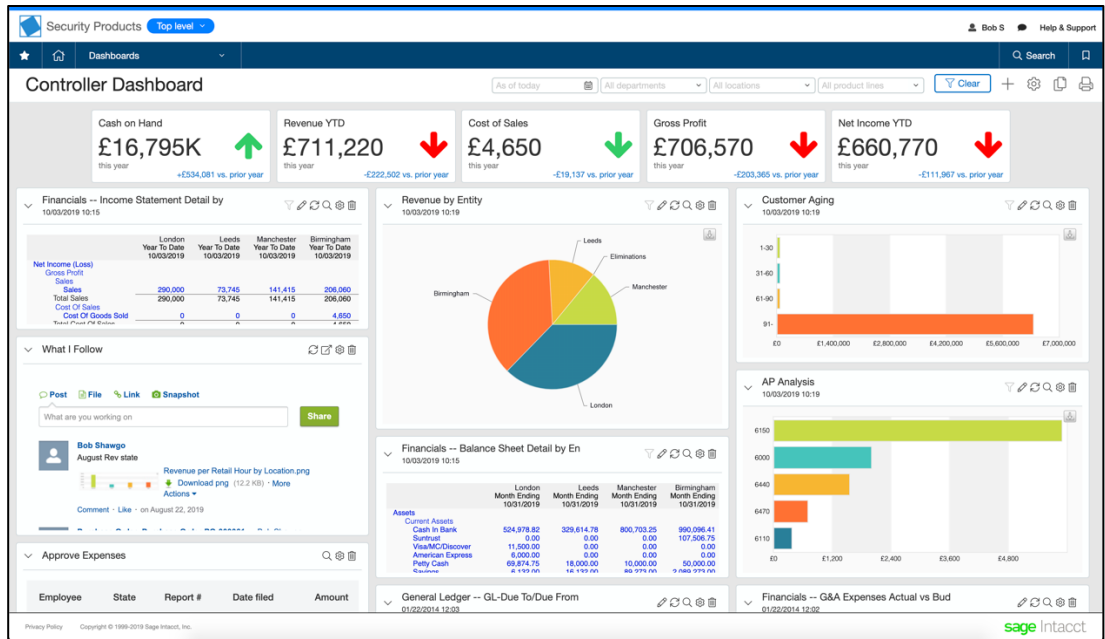
Granular access control

Strengthen your segregation of duties with control over which individuals and roles can access which data and processes.

Integration Across All Accounting Processes

Order management integration

Keep everyone up-to-date by automatically posting Sage Intacct Order Management transactions to Intacct General Ledger and Accounts Receivable; provide sales staff with quotes, sales orders, and invoices.



Use reports, charts and graphs to gain quick insight into your financials.

Key Benefits

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.

Comprehensive Reporting

Customizable 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 analyses

Get more strategic insights with custom analyses across multiple attributes such as project, customer, location, and department.

Collections (Optional Module Required)

Automated dunning and 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.

Take the Next Step

Find out how the Sage Intacct cloud financial management solution streamlines operations and provides real-time insights, boosting productivity and growth.

To learn more about how Sage Intacct can help you achieve your mission more efficiently, visit: <https://www.sage.com/uk/intacct> or contact us at **0800-923-0340**.

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