



Sage Intacct

Reviews, tips, and advice from real users



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Product Recap



Sage Intacct

Sage Intacct Recap

Sage Intacct offers comprehensive accounting solutions suitable for VAT, salary schedules, and intercompany transactions. It serves as a main ERP for financial reporting in healthcare, retail, and non-profits.

Sage Intacct is leveraged as a robust ERP system catering to diverse sectors by providing a wide range of essential accounting functions. Its cloud-based platform ensures seamless data consistency across any device, supporting multi-location reporting and complex integrations. Industries such as healthcare, retail, and non-profits benefit from sub-ledger tools, approval workflows, and API integrations, all playing roles in enhancing financial performance management. Challenges persist in mobile integration and localization outside key regions like the US and UK.

What features stand out in Sage Intacct?

- **Cloud-Based Accessibility:** Access from any device for flexible financial management.
- **Multi-Entity Structure:** Facilitates seamless transactions and comprehensive reporting.
- **Flexible Reporting:** Custom and standard reporting capabilities to suit business needs.
- **Grant Tracking:** Efficiently manage and report on available resources.
- **Channel Management:** Speeds up project turnarounds with quick execution.

What benefits do users often discuss?

- **Enhanced Integration:** Streamlined connectivity across components reduces operational gaps.
- **Effective Accounts Payable Management:** Simplifies invoice handling and reduces processing time.
- **Data Importing Ease:** Facilitates the transition to more efficient processes.
- **Automation in Reporting:** Saves time and increases accuracy during due diligence.

In healthcare, Sage Intacct facilitates the management of different service lines and patient billing, enhancing operational efficiency. Retailers benefit from its robust financial reporting and VAT calculation capabilities, while non-profits utilize grant tracking and financial transparency features supported by API integrations. Industry players express a demand for more advanced tools to meet specific market requirements such as automatic budgeting and role-based account setups.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“It's a powerhouse and it delivers. It has really great audit trails in it, which add so much value that the other systems don't have.”



Michael Fox

Sage Intacct Implementation Specialist at Maner Solutions



“The solution helps us create entity models for each acquisition as we acquire companies..”



Raj Lakhani

CFO at CORE Business Technologies



“Sage Intacct, a full-fledged ERP, can handle complexity that smaller accounting software cannot handle.”



Kirit I. Desai

Consultant



“Its custom reports feature is also noteworthy, as it provides flexibility for users to create their reports, tailored to their specific areas of expertise.”



Praveen Rd

Finance Officer at SILK Laser Clinics



“The most significant advantage of this solution is its pure cloud-based nature.”



Patience Mashilo

Senior Consultant at a tech services company with 11-50 employees



“The product is easy to use.”



Tsepo Sekete

Sage intacct implementation specialist at Times 3 Technologies



“It's a top-tier upgrade for the finance department and does extend into full ERP.”



Gene Hammons, MBA

Director at a consultancy with 1-10 employees

What users had to say about valuable features:

“In any ERP system, the ability to plan and determine the company's direction is of utmost importance. This feature is crucial as it helps a company assess its growth or lack thereof. The most significant advantage of this solution is its pure cloud-based nature. The cloud system eliminates the need for companies to be concerned about hardware, servers, and related infrastructure, as these aspects are managed by the service provider..”

Patience Mashilo

Senior Consultant at a tech services company with 11-50 employees

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“For example, a for-profit company, like a construction company, could use a module called "projects," and that same module for a nonprofit would be for grants. All these different government grants are usually something that the government reimburses. Keeping track of reimbursements based on which particular grant would be reimbursed can be a chore, and Sage is very helpful in being able to track those. Other than grants, you could also have expenses from a particular funder or foundation that Sage Intacct helps track..”

Kirit I. Desai

Consultant

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“One of the standout features is the ability to access all reports from a central location, eliminating the need to switch between entities. We can effortlessly view trial balances, pending reports, and more, regardless of the specific location or entity we're working with. Its custom reports feature is also noteworthy, as it provides flexibility for users to create their reports, tailored to their specific areas of expertise. For example, in accounts payable, we can extract purchase invoice details and item-level data, track credit applications for individual invoices, and generate custom reports to integrate into our toolkit..”

Praveen Rd

Finance Officer at SILK Laser Clinics

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“The solution helps us create entity models for each acquisition as we acquire companies, so we can put them into a different entity in Sage Intacct with all the entities having the same chart of accounts. Then, the solution rolls up at the top level. It automatically provides reporting in a manner where a highly leveraged company will have to offer the reporting to the banks.

Apart from that, it's easy to create many new automated reports. When a company goes through a due diligence process, they already have so many automated reports. Also called pre-packaged reports..”

Raj Lakhani

CFO at CORE Business Technologies

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“Reporting is very flexible. We can choose how we report. We can create channels when we do bank reconciliation with the product. We can set up the tool to detect when certain descriptions come up and create a channel automatically. It is a very good feature.

I also liked the business form templates. The product is easy to use. It's very simple to go into each journal with a few clicks and record it. When paying the supplier with the Accounts Payable module, we can link our bank fees to it. We just need to upload it.

The fact that we can import stuff is very interesting. We do not have to go line to line when recording transactions. We can just put them on an Excel sheet, sort it out, and import it into the system..”

Tsepo Sekete

Sage intacct implementation specialist at Times 3 Technologies

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“The most valuable feature is that it is a cloud-based system so I can access it from anywhere, with any browser, on any device. It's the only major accounting ERP system on the market that was designed specifically for the cloud, the other ones were adapted to the cloud. Intacct was always designed with the cloud in mind, and it shows.

Additionally, its multi-entity design is elegant, intuitive, and easy to master. Transacting and reporting across all entities from a single log-in is fantastic

The user interface is sleek and consistent throughout the software, enabling users to adapt quickly and to work efficiently.

The financial report writer is comprehensive and designed to enhance the user experience. I eliminated all of my Excel-based financial reports.

The sub-ledgers are well designed and provide the user with tools and functions that improve efficiency..”

MichaelFox

Sage Intacct Implementation Specialist at Maner Solutions

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Other Solutions Considered

“We were using a very outdated ERP system before this. Once I became the company's CFO, the Board of Directors wanted to switch to something scalable. I looked at many ERP systems, and this was exactly what we needed..”

Raj Lakhani

CFO at CORE Business Technologies

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ROI

Real user quotes about their ROI:

“The ROI is great. Things that used to take a long time to do like daily AP things and AP processing are so much easier. Closing the books every month is so much faster. Sage Intacct is so intuitive and I can see all of my entities from a single login. I don't have to log in, log out, or switch around. I can just run a general ledger report and switch which entity I want to see, and I'm able to close the books up fast..”

MichaelFox

Sage Intacct Implementation Specialist at Maner Solutions

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Use Case

“It is an accounting software used for accounting purposes but has many more features. We can use the solution for reporting. There are standard and custom reports. The tool also provides interactive reports. The dashboard shows our key performance indicators..”

Tsepo Sekete

Sage intacct implementation specialist at Times 3 Technologies

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“We used the solution for a nonprofit, which was a pretty robust implementation there. Nonprofits are unique compared to for-profit companies. They have their own accounting needs, so the stage is unique because it uses dimensions. To categorize different expenses in multiple different ways..”

Kirit I. Desai

Consultant

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“As a user, it was used as our primary accounting and financial reporting system. It provides superior sub-ledger tools equipped with excellent approval workflows. I was able to move data into Intacct using CSV imports and API integrations that cut staff time in half..”

MichaelFox

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Sage Intacct Implementation Specialist at Maner Solutions

“I work as an implementation consultant, where my role involves configuring and supporting users in adopting an ERP system. In this capacity, I assist businesses in setting up, customizing, and training their staff to use the system effectively. Within this ERP system, businesses conduct daily financial transactions, including those with customers and vendors. These transactions are recorded in the system, and it facilitates the generation of reports for various time periods, such as monthly, annually, or over several years, providing insights into their financial performance which is what I use Sage Intacct for..”

Patience Mashilo

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Senior Consultant at a tech services company with 11-50 employees

“We use it for a wide array of accounting functions, encompassing accounts payable and receivable, general accounting tasks, fixed asset management, banking interactions, and reconciliation, as well as the generation of standard and customized financial reports. Our company handles the recording of transactions, particularly focusing on purchase-related transactions like RCTIs, and we perform recurring journal entries for month-end closings. Due to our intercompany system, we don't engage in traditional AR and AP; instead, we initiate ARAP and make use of the built-back approach. We have configured the built-in feature, which seamlessly facilitates our intercompany financial transactions within the Sage Intacct platform..”

Praveen Rd

Finance Officer at SILK Laser Clinics

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“We have services groups, smaller healthcare clinics, data providers, warehousing and distribution, home goods internet retailers, and other clients that are using Intacct.

The implementation team is critical – as always – so we make sure we maintain a close relationship with top Intacct channel partners.

One of the tougher assignments was a franchise restaurant with 40 locations throughout the US/Canada/Caribbean. POS (point of sale) and credit card processing went through a system maintained by the franchisor and reporting back to the individual stores took a couple of days to reconcile, as it was combining 40 different store-level reports (which was a pain).

Intacct's cloud-based connectivity worked best to replicate the data flows so both the corporate franchisor got their data and the franchisee had overnight reporting broken down by hourly totals. It was an integration we would not have wanted to tackle on a more proprietary system. .”

Gene Hammons, MBA

Director at a consultancy with 1-10 employees

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Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

“ The most difficult component was not the setup, but the training associated with the product. That took more time then the setup, from a technical perspective. It was not exorbitant, it was done within a reasonable amount of time. I didn't feel that it was too difficult to get up and running..”

Verified user

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Management Consultant at a consultancy with 501-1,000 employees

“The initial setup is not at all difficult. It is a really nice software. It makes you want to use it more. The solution is deployed on the cloud. The time taken for deployment depends on the project. It ranges from four months to six months. It depends on how big the company is. We had a client that had many entities under it. It was quite a challenge to configure. It took time..”

Tsepo Sekete

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Sage intacct implementation specialist at Times 3 Technologies

“The initial setup will be complex. You cannot suddenly transfer everything from another ERP platform to Sage Intacct. Having said that, when we acquired companies, it was easy to get the data from other companies' ERP systems and transfer it to Sage Intacct. It did not take that long. That's one thing I'm very thankful to Sage Intacct for. They made the platform in a manner where migrating data from other acquirees' ERP systems into Sageintact to start doing transactions becomes fairly easy..”

Raj Lakhani

CFO at CORE Business Technologies

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“The initial setup is easy. The user interface and Sage Intacct are really easy to adapt to, and it's really easy to migrate from one platform to another. We moved from QuickBooks and it was really easy. It's a highly structured, intuitive system. I've also worked with migrating clients from Microsoft Great Plains and other systems to Sage Intacct and every single one of these migrations was very straightforward. When we have our closing meetings after the implementation is done, users always say how easy it was to migrate from their current system to Intacct..”

MichaelFox

Sage Intacct Implementation Specialist at Maner Solutions

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“Sage Intacct can add different entities. The company I worked for had a separate foundation, with the endowment on a separate account. The funds are in there, and we were not supposed to touch them. And they usually invest it somewhere, and all that work was being done in QuickBooks. We moved that into Intacct and set up the whole entity with its own EIN, so it had separate accounting and reporting, even though it was part of the same organization. That was pretty easy to accommodate in Sage Intacct. I set that up, mapped some of the chart of accounts based on what was used prior, and exported all the QuickBooks data into Excel format. I had to work in Excel, recode things, etcetera, to make it importable into Intacct. I could do all that, and every transaction from life to date on QuickBooks was brought in Intacct. It wasn't easy. It was a little time-consuming, but it was awesome to see everything in exact detail in Intacct, including historicals..”

Kirit I. Desai

Consultant


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Customer Service and Support

“It offers a strong advantage when it comes to system maintenance and support. Users have access to a dedicated support team, they can log support requests when needed, and within a few hours, users can expect a response and a resolution, although the exact response time may vary depending on the complexity of the question..”

Patience Mashilo

Senior Consultant at a tech services company with 11-50 employees

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“The technical support is excellent. Like everywhere else, there's a lot of churn in the support area. They lose highly experienced people and have to replace them, but they do a really good job of training. Sage Intacct has an excellent Help Center that provides comprehensive documentation for all facets of the software. It's easy to read and provides "how to" instructions and videos. it. It's easy to kind of self-diagnose an issue before you have to actually get any technical support..”

MichaelFox

Sage Intacct Implementation Specialist at Maner Solutions

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“The technician support is very good. There were many occasions where we needed some help. Sage Intacct has a very good ecosystem of companies that they use to help implement the solution. Those companies are very good. They know the product well, making it easier for you. On top of that, there are some other third-party vendors as well who use Sage Intacct. And they know how to easily create reports, migrate data, and do everything. It's not Sage Intacct itself, but the ecosystem they've created that's very useful..”

Raj Lakhani

CFO at CORE Business Technologies


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“We contacted technical support very infrequently. There was only one time that we had to contact technical support. That was because there was a payment issue. We made the payment but it was allocated to the wrong location. That was more of an accounting error that occurred instead of a technical issue. Even though we needed to contact technical, it wasn't a technical issue.

That was the only time I certainly had to contact the technical perspective. They didn't really need to contact technical. They were good. We got in contact with them. They were very proficient, so we didn't have any problems in that regard..”

Verified user

Management Consultant at a consultancy with 501-1,000 employees

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“Our experience with tech support was good. They were prompt. They fixed the errors within a couple of days, but it wasn't anything that was so pressing that we were down or not able to function. A couple of days was a reasonable amount of time for us.

We contacted tech support several times, but Sage does not sell to you directly. They have value-added resellers that you go through, so, traditionally, any time you have any problem, you wanna just talk to your VAR, and they're the ones that either figure it out or move it to Sage Intacct tech support. But they handle all that. There are positives and negatives. If you end up with a VAR that's not as good, you end up with a service that is not as good. VARs also do end up charging a pretty penny for support.

Regarding service and support, I rate VARs a six out of ten and Sage Intacct's support an eight out of ten..”

Kirit I. Desai

Consultant

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Other Advice

“It's a good fit for us, especially as we operate within a multi-entity franchise system and the customization options are excellent, allowing us to add screens and tailor the software to our specific needs. From an accounting perspective, it's a top-notch product, offering comprehensive end-to-end automation. The banking features are particularly impressive, making back-office tasks much more time-efficient. The flexibility and customization options are a big plus, and the use of templates further streamlines processes. Overall, I would rate it nine out of ten..”

Praveen Rd

Finance Officer at SILK Laser Clinics

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“The suitability of Sage Intacct depends on the industry you operate in. If your business is finance-focused, I wholeheartedly recommend it. However, for industries involving stock management, manufacturing, and other aspects, I'd suggest considering alternatives. The software is quite user-friendly and accessible, as long as you are comfortable navigating web-based applications. Help resources, including manuals, are readily available, and pressing F1 can provide on-the-spot assistance. In terms of a rating, I would give Sage Intacct a seven out of ten..”

Patience Mashilo

Senior Consultant at a tech services company with 11-50 employees

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“Before choosing this solution, I advise you to understand the product well. Don't

take it lightly when they offer a couple of days of training in the beginning. Listen to everything very carefully. When working with the implementation company, be more involved in understanding how to set up the system because you may have something like an architecture in mind. There are a lot of online resources for Sage Intacct to help you learn about it. The better You understand the tool, the more it will give back to you.

I rate Sage Intacct a ten out of ten..”

Raj Lakhani

CFO at CORE Business Technologies

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“Rating the solution depends on the budget. If you have the money, Sage Intacct could be a ten out of ten. If you don't have the money, it's more like five or five and a half. It can do a lot of integrations. Overall, I would rate the solution an eight out of ten.

One of the things that would be advisable for medium to large organizations is to have a dedicated admin person for Sage Intacct. Somebody who knows the administration of the software, the ins and outs of how it works, and can train people, and be able to implement newer solutions, and be able to study problems in the organizations that can help streamline things..”

Kirit I. Desai

Consultant

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“My advice to new users would be to identify the things that are most important to you when you're evaluating the solution and seeing the demo. Identify the things

that will have the most meaning to you as an alternative in Intacct. Try to make sure that you provide the salesperson with the information you want to see and spend a little bit of time thinking about it. Otherwise, they will just show you the basic functionality.

Sage Intacct has issues just like any other system but it's a powerhouse and it delivers. It's fast and accurate. It has really great audit trails in it, which add so much value that the other systems don't have. Overall, I would rate it a nine out of ten. I'm very pleased with it..”

MichaelFox

Sage Intacct Implementation Specialist at Maner Solutions

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“I would strongly recommend any entity that has a need for software that is easily implementable and that's already structured to use the services. It covers a vast range of capabilities and it is something that's implementable in an organization without too much of a technical price because they offer the services that assist them.


It's something that should be implemented for an organization. There are not too many negatives that I personally saw within implementations. I don't really have anything bad to say.

In the next release, I would like to see greater integration with the RPA software that's been created. I think that's something that can be quite interesting because it will also enable organizations to make bigger changes in certain circles. That can be interesting, but that's something for the future to consider.

I was quite happy, personally, with the software that we used. I never encountered any problems that I saw as detrimental, so I'd rate it a nine out of ten because I am personally satisfied with it..”

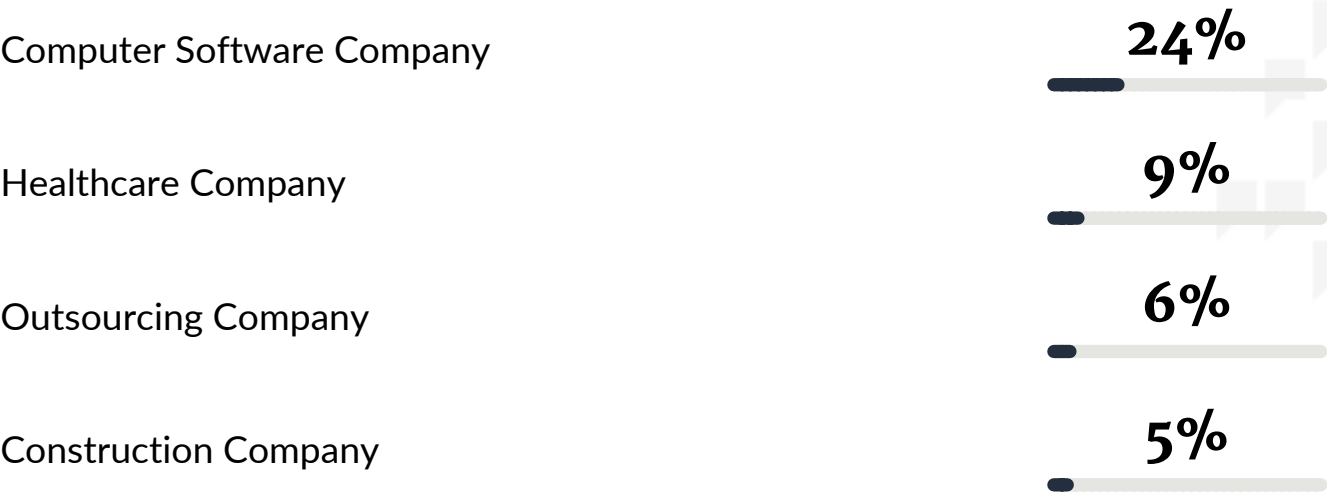
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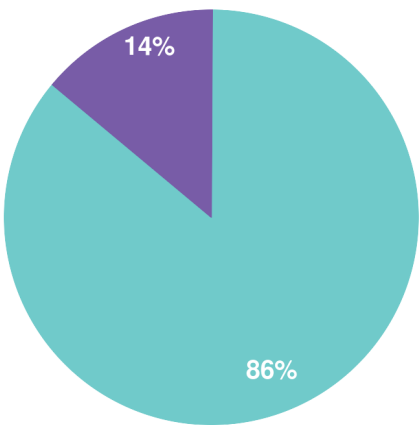
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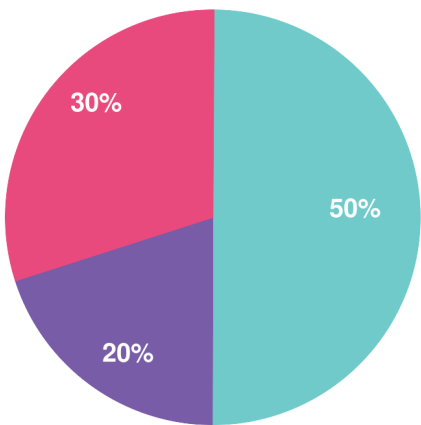


Company Size

by reviewers



by visitors reading reviews



Large Enterprise Midsize Enterprise Small Business

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