

AccountEdge Pro

Company Name

Acclivity

Website

accountedge.com

Headquarters

Rockaway, NJ

Developed Since

1989

What is AccountEdge Pro?

With over 25 years of uninterrupted development on the Mac, AccountEdge Pro is a premium small business accounting software for Mac users. AccountEdge Pro allows business owners to organize, process, and report on their financial information with ease so they can focus on their business. Its feature set is built to allow users to handle every aspect of their business including accounting, integrated payroll, sales and purchases, contact management, inventory, online orders, and time billing.

Who uses AccountEdge Pro?

AccountEdge is designed to work with many small business types. It is used by companies who sell, build and manage inventory items, provide professional services or bill for time spent on projects. With over 100,000 customers world-wide, here is a short list of professionals that currently use AccountEdge to run their business:

- A production company in Asbury Park, NJ
- A photographer in Boston, MA
- A cake designer in New York, NY
- A vineyard in Napa, CA
- A surfboard distributor in San Jose, CA
- A preschool in Plymouth, MI

More examples on current AccountEdge users can be found on: accountedge.com/profiles

ACCLIVITY

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AccountEdge

accountedge.com

Credit Card Processing

accountedge.com/creditcards

Payroll Options

accountedge.com/payroll

Support Options

accountedge.com/support

AccountEdge Pro

How much does it cost?

New Customers

\$399.00

Single User Upgrade

\$159.00

Multi User Upgrade

\$249.00

AccountEdge Cloud

AccountEdge Cloud allows AccountEdge users to create invoices, orders, quotes, activity slips and payroll time sheets from any web enabled device, making it easier for local and remote employees to enter transactions and submit their time sheets for payroll and then sync back to AccountEdge on the desktop.

AccountEdge Cloud is available for as little as \$10/month. AccountEdge for desktop is required for AccountEdge Cloud use.

AccountEdge Shopify Connector

AccountEdge users can sell their items online with Shopify with ease. Users can sync their existing inventory items for sale online via the AccountEdge Shopify Connector (\$10/month). AccountEdge users can sync the orders that are placed online directly to AccountEdge so there is no re-entry of data required. All information is kept up to date in a single location. Additional Shopify account fees apply.

Web Pay

AccountEdge Web Pay allows users to email their customers an invoice with a custom, secure, online payment link.

When a user emails a customer their sales invoice, it will have a custom 'Pay Now' button, allowing their customer to submit their payment online. They will also be able to see any additional open invoices on their account when they log in. An AccountEdge Cloud account is required for Web Pay.

AccountEdge Pro

Free Accountant's Copy

We offer any professionally designated accountant a free copy of AccountEdge for either Mac or Windows.

AccountEdge company files are cross platform compatible, which means a Windows-based accountant can open and edit a Mac-based AccountEdge file with ease.

Accounts

The Accounts command center houses the Chart of Accounts, the Transaction Journal, and the Company Data Auditor. The Chart of Accounts includes all the accounts a business will need to track, including assets, liabilities, equities, income and expenses. Keep track of retainer, escrow, and trust accounts and record money transfers.

Departmental accounting allows users to keep track of their accounting information based on departments in their business. Each line item on a transaction can be applied to one department or split between multiple departments so reporting is laser-focused. Each contact card is assigned a default department which can be overwritten when necessary on specific transactions for ease of tracking.

Keep track of mileage by specific vehicle or by an employee. Enter details of the trip, such as the dates, the mileage at the beginning of the trip and at the end. AccountEdge will calculate the total miles and mileage expense.

Banking

The Bank Register lets the user see their banking information at-a-glance. It also allows the user to make and receive payments not associated with a sales invoice or purchase order.

The Reconcile Accounts option allows the user to import bank statements into AccountEdge and then assists the customer in reconciling their accounts. The Prepare Bank Deposit option enables the user to group received payments held in the Undeposited Funds account and prepare them to be deposited to a specified bank account.

AccountEdge Pro

Credit Card Processing

AccountEdge users can easily process credit cards directly from AccountEdge.

The Full Merchant Account offers users a traditional merchant account with rates as low as 1.79% for a swiped credit card and service for as low as \$15/month.

The Flat Fee Merchant Account allows users to get away from monthly fees and process credit cards for as low as 2.65%.

Sales

The Sales command center in AccountEdge is where the user enters quotes, orders, and invoices; prints and/or emails invoices and statements; prints receipts; receives payments; and manages returns and credits.

The Sales Register contains all information relating to sales and receivables, organized by tabs. Each tab gives an at-a-glance look at transactions associated with quotes, open invoices, closed invoices, and returns and credits.

Keep track of sales commissions with AccountEdge the easy way. AccountEdge users can track sales commissions for employees and select if commission is earned at time of sale or time of payment.

Time Billing

Users that bill for time can enter and edit activity slips, time sheets and easily create time billing invoices. Users can bill customers for those activities by a fixed billing rate per employee or customer or bill by a custom rate for each activity.

Manage the Activities List by billable and non-billable activities as well as hourly and non-hourly charges.

Purchases

The Purchases command center is where all vendor related tasks are handled. Users can enter vendor quotes, orders, and bills; print or email payment notifications and purchase orders; pay bills; print checks; and prepare and print 1096 and 1099 forms.

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Support Options

AccountEdge offers multiple support options for users.

Free Email Support is available to users of all versions of AccountEdge.

The Telephone Support Plan is available for \$199/year.

For the customers that like to troubleshoot questions on their own, we offer an online knowledge base where the most frequently asked questions, common error messages, and general support articles can be found.

Payroll

The Payroll command center within AccountEdge contains all options necessary to run payroll, print paychecks, prepare direct deposits, pay liabilities and even prepare payroll tax forms. Users can begin by entering timesheets, similar to the Time Billing command center, and can then use those timesheets to prepare and run payroll.

The data entered on the timesheets is used to calculate the number of hours to be paid to an employee, and then the data entered on the individual employee cards will determine what deductions, accruals, and pay rates will be used to determine the final paycheck amount.

Inventory

AccountEdge's Inventory command center is where users can handle all inventory related tasks including creating new items, receiving items from orders, moving items between locations, adjusting and counting inventory, setting item prices, building item kits, and setting up product variations.

With Product Variations, AccountEdge can take a single item and then create the variation items based on size, color, style, etc. AccountEdge users can also keep track of product serial numbers and warranty information directly within the software.

To create item kits to be sold as a single unit, users can use the Auto-Build Items option. For example, a coffee shop can sell a basket of assorted coffee and a coffee press. Instead of listing these as individual items on an invoice, the user can show a single, final good on the invoice and still carry the costs of each item over to the final price on the invoice.

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About Acclivity

Acclivity develops, sells and supports award-winning small business accounting and management software for Macintosh and Windows platforms, including AccountEdge Pro and AccountEdge Basic for Mac and Windows.

Acclivity also offers a portfolio of business services (including Rerun, our recurring billing service) that help small business owners to better serve the needs of their customers, their employees, and themselves.

Card File

The Card File within AccountEdge acts as the hub for contact management within the program. The Cards Lists contains every contact within the user's Company File. Contacts are broken down into four different card types: Lead, Customer, Vendor, Employee and Personal Cards.

The Reminder Log lets users set reminders for specific cards. When the selected time arrives, the reminder will appear on AccountEdge's To Do List, prompting the user to carry out whatever action was setup as a Reminder.

Reports and Analysis

With over 200 reports, AccountEdge can help any small business owner keep on top of every aspect of their business. This includes standard financial statements, sales, purchases, payroll and inventory reports, and more. All easily exported to Excel, save as a PDF, or capable of being emailed.