Projects

Painless projects, from start to finish

With Intacct Projects, all your time, expense, and project data—financial and non-financial—is tracked and visible in one place. Automate exactly the processes you need: from tracking costs, time, and expenses to managing resources, billing, and revenue recognition. Generate deep insights that will keep individual projects on track and your overall business growing profitably.

Key benefits

Adopt a right-sized project solution

You require project solutions that match the way your organization works. Intacct provides everything from project tracking to employee time tracking, with full-featured costing and resource management, to billing and revenue recognition solutions. Whether you just need to track expenses by projects, understand the costs around R&D projects that don't get billed, or run billable services projects for clients, Intacct has a right-sized solution for you.

Start projects the right way

Intacct shows you the true costs of past projects, so you can make smarter project bids. It integrates with your CRM system, so you can see what's coming in the pipeline, line up the right people and materials, and turn bids into projects without manual data re-entry.

Manage your resources

Find the right resource for the job, with the right skills and availability, to quickly plan and start your project. Easily identify who's overscheduled and who's on the bench to get accurate insight into resource utilization and efficiency.

Mind the delivery details

Keep projects on track and stakeholders happy. Establish the proper workflows for entering time and expenses and give team members online access to do so. Keep close watch on actuals against estimates. Tag expenses, invoices, and even journal entries to related projects. And answer questions about things like resources or invoices—without delay.

Save time on bills and revenue recognition

Intacct's billing automation helps you improve accuracy by generating project invoices in the right format, using the right terms, and for the right amounts, supporting a variety of fixed price and T&M methods. Satisfy both customer expectations and accounting requirements by keeping revenue recognition separate from billing and automatically calculating and posting based on milestones, schedule, or percent complete.

Give better answers, get better ideas

Stay up to date on project performance by consulting a single source with role-specific reports and dashboards. Give clients and colleagues answers about current status, milestones, and invoicing, while providing management insights on revenues, costs, and utilization to improve profit margins.
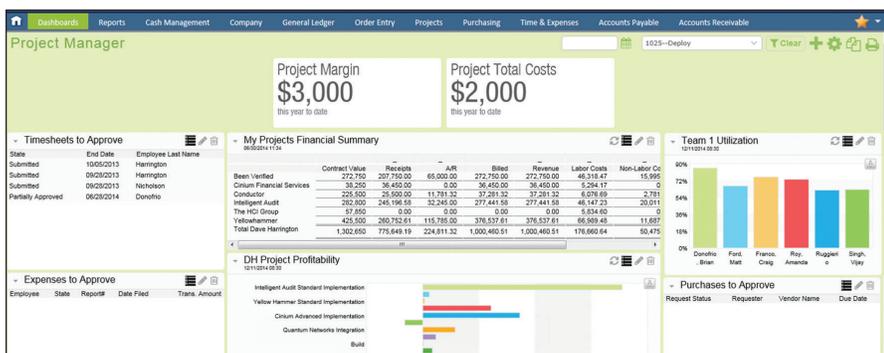
Make informed decisions, quickly. See real-time profits per project, utilization by employee, revenue by service types—anything that helps you understand and improve project performance.

Key features

Project tracking

Project dimension: Define valid projects with project-centric information and tag key transactions by project to see real-time project cost and revenue tracking in the general ledger.

Custom workflows and grouping: Define project statuses to create workflows to match the way you work and project types to group similar projects for quicker management.

Time & expense

Multiple approval levels: Design multiple levels of approval, including expense approval by amount, and automatically email supervisors about approvals, speeding up the reimbursement process.

Multi-currency reimbursements: Handle multi-currency expenses and reimbursements, as well as non-reimbursable expenses (company credit cards).

Drill down and download capabilities: Drill down into all the details associated with an entry and export a variety of formats to provide more flexible views of information.

Project profitability tracking: When used with project tracking, link hours worked and expenses incurred to specific projects, gaining a true picture of a project's margins.

Time entry rules: Set business rules such as requiring notes on time entries or setting minimum and maximum daily values.

Real-time timesheet management: Quickly find and email users about missing, late, or unapproved timesheets, eliminating inaccuracies that might be affecting the true profitability of your project.

Project costing

Parent-child project and task relationships: Break projects into tasks, budget tasks, and assign resources to tasks, to setup almost any work break-down structure (WBS) you require.

Cost tracking: Budget and track all project-related costs with integrated general ledger posting in real time to get up-to-the-minute visibility into whether a project is staying in budget and greater control over the financial success of a project.

Varied labor costing: Support hourly and salaried employee labor costing, as well as cost rate overrides by project for contractors.

Multiple time types: Specify time types for additional granularity in tracking and costing time, such as regular time and overtime.

Indirect costing: Improve profitability reporting by automatically allocating and posting indirect costs to projects and using multiple layered cost pools.

Detailed number of hours posting: Report on resource utilization for your projects.

Automate revenue recognition to gain flexibility and control over complex processes.

Key features

Project billing

Efficient integration: Simplify billing and revenue recognition with integrated time and expense data.

Automatic billable and non-billable data capture: Minimize revenue leakage and understand total costs of a project.

Automated billing: Support time-and-materials, time and materials to a maximum, or fixed price billing and trigger billing based on milestone, schedule, percentage completion, and project completion.

Unified billing: Generate invoices that include time, employee expenses, and any other company charges and purchases related to a project.

Flexible invoicing: Generate consolidated invoices or multiple invoices per project or customer, using custom or preconfigured templates.

Flexible rates for billing: Use your choice of multiple, flexible billing rates and price lists by employee, project, item (type of work), or customer.

Automatic markups: Ensure profitability by automatically applying a percentage markup on any billable transaction.

Separate billing and revenue recognition: Improve customer satisfaction with a system that decouples billing from revenue recognition.

Automated revenue recognition: Use milestones, schedules, percentage completion, and project completion to drive revenue recognition and gain accurate forecast visibility into a project's impact on revenue.

Support for schedule modification: Pause, resume, modify, and cancel in-progress revenue recognition schedules with complete flexibility and accuracy.

Support for automated revenue WIP or unbilled accounting: Track revenue work in progress (WIP) for fixed price projects, unbilled accounts receivable, and deferred revenue.

Project resource management

User-configurable portfolio and detailed Gantt charts: See real-time project operational status in user-configurable Gantt charts with drilldown capability, so you have greater visibility into the resource planning and progress of your projects.

Talent tracking: Associate positions, skills, and other criteria with your resources or employees, then quickly identify and assign the right resources to a project by searching by skills, availability, location, and more.

Comprehensive resource visibility: Combine employee assignments, out of office, and company holidays to give a complete picture of a project schedule and instantly see the status of resources allocated to a project, task, department, location, or manager, keeping you constantly aware of how resources are being utilized.

Multi-segment scheduling: Assign a resource to a task in non-contiguous segments to match up with other project influences, like interdependencies or facility availability.

Resource budgets: Set budgets on resources to keep projects within scope.

Placeholder resources: Create place-holder resources to generate labor cost estimates where final resource assignments haven't yet been made.

Configurable routing rules: Automatically notify managers of pending actions or add T&E report approvals to each manager's dashboard.

Automatic notification: Get updated project completion status when project time is approved.

Reporting and dashboards

Project-specific dashboards and reports: Get up-to-the-minute financial, managerial, and operational reports as soon as timesheets and expenditures are submitted and view current backlogs, project status, and revenue streams.

Key features

Report filters: Filter or breakout financial reports by projects to better understand profitability by project.

KPI reports and graphs: Analyze key performance indicators—including project and client profitability, project delivery costs, average revenue per service delivery, and employee utilization—with more than 25 reports designed specifically for projects.

Integration

Business system integration: Easily integrate with external systems including Salesforce, other CRM solutions, and industry-standard time and expense systems.

Take the next step

Find out how the Intacct best-in-class cloud ERP solution streamlines operations and provides real-time insights, boosting productivity and growth.

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Intacct.

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