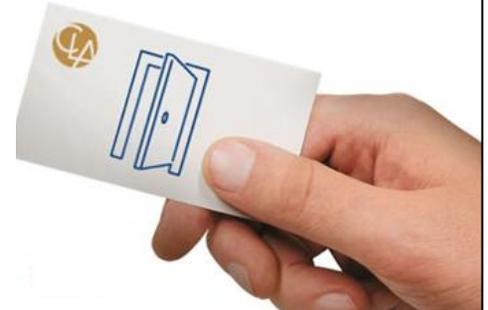


Intacct Partner Toolbox

Expand your business with the right tools

Achieve success by using the Partner Toolbox from CliftonLarsonAllen.



What's on your mind?

The ability to implement and manage an Intacct company setup is one of the most challenging areas for Intacct IAP and VAR Partners. Being able to quickly import, update, and delete records is crucial to staying under budget and meeting deadlines. Time spent on company setup becomes very exhausting if changes are needed or mistakes are made. As a result, partners need a solution that is tightly integrated with Intacct.

A unique approach

Effectively setting up Intacct from the beginning is a critical step in all implementations. The CLA Partner Toolbox enables you to focus on servicing your clients, not spending all day creating, updating, and deleting records by hand. Set up your clients faster with a standard set of tools designed for implementations. Built on top of Intacct's API, all functions follow the same rules and validations as if you were doing them manually in the system itself.

- **Get it done faster.** With mass imports, updates, and deletes, setting up new companies and importing daily transactions is a snap.
- **Easy to use.** All tools come with complete documentation and sample files. No more confusing field names and requirements.
- **No more import errors.** For import errors, just fix the original file, save it and refresh the page.
- **Unlimited external user access.** Your partner console is whitelisted to use the Toolbox on any client you have linked to it. Your clients don't need to have web services enabled.

Powerful tools for efficient company setup

- Mass import records
- Mass update records
- Mass delete records
- Easy to use
- Up-to-date documentation
- Sample templates
- Error messages displayed immediately

How we can help

CLA is one of the nation's top 10 certified professional accounting and consulting firms. From offices coast to coast, our professionals practice in specific industries to deliver audit, tax, consulting, and outsourcing capabilities best aligned with our clients' needs.

CLA has been recognized as the Intacct Partner of the Year for 2012 and 2013. Our Partner Toolbox is used by CLA professionals every day with our own clients.

The Partner Toolbox supports functions not offered by Intacct to save setup and management time and headaches. No additional subscriptions are needed. The data is saved and stored in Intacct and follows user permissions maintained in Intacct. To learn more about our Intacct solutions, contact intacctsales@CLAconnect.com.

Tools in the Partner Toolbox

Company

- Allocation import
- Class update/import
- Contact update/import
- Department update/import
- Location update/import
- Supporting document folder update/import
- Supporting document import

General Ledger/Cash Management

- Charge card transaction import
- GL account update/import
- Journal entry import
- Journal import
- Manual check import
- Statistical account update/import
- Statistical journal entry import

Accounts Payable/Purchasing

- AP account label update/import
- AP adjustment import
- AP bill import
- AP payment request import
- PO transaction import
- Vendor type update/import
- Vendor update/import

Accounts Receivable/Order Entry

- AR account label update/import
- AR adjustment import
- AR invoice import
- AR payment import
- AR summary (batch) import
- Customer type update/import
- Customer update/import
- OE transaction import
- Recurring AR invoice import

Time and Expense/Projects

- Employee rate import
- Employee update
- Expense report import
- Expense type update/import
- Project resources update/import
- Project type update/import
- Project update/import
- Task update/import
- Timesheet import
- Time type update/import

Inventory Control

- Aisle update/import
- Bin update/import
- IC transaction import
- Item update/import
- Row update/import
- Warehouse update/import

Other

- Mass record delete
- Test CSV file import

Don't see a tool listed? Request it!