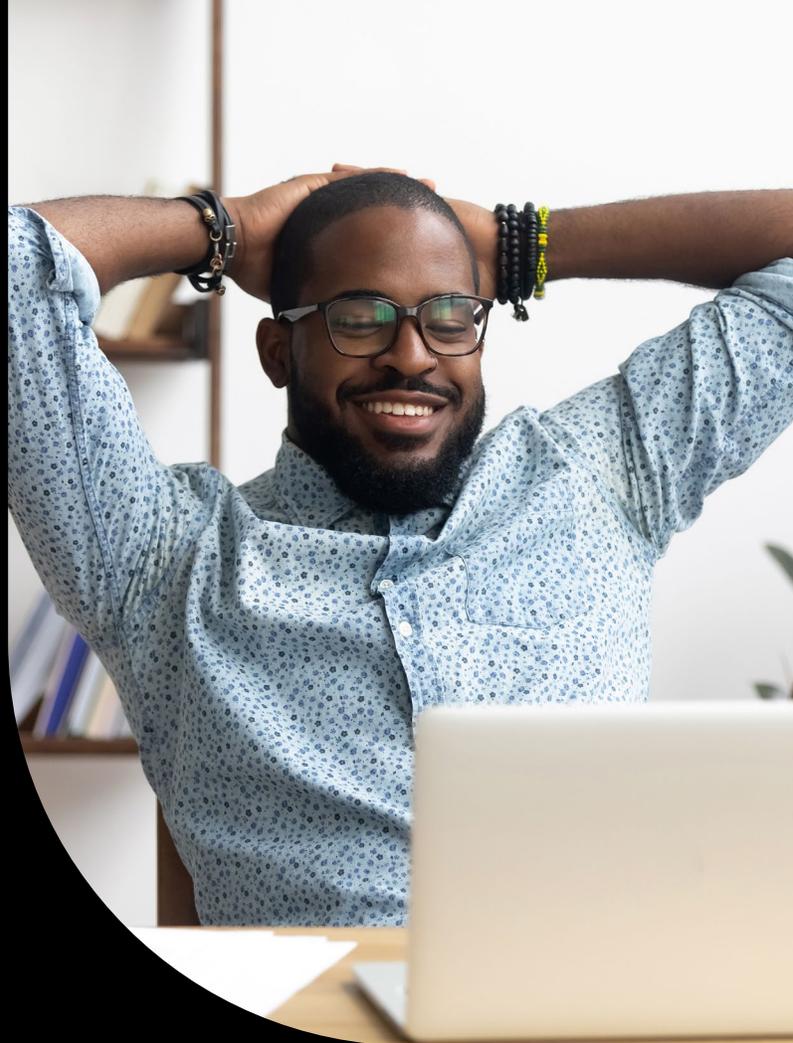


Data sheet

Sage Intacct Advanced Salesforce Integration

Accelerate your order-to-cash cycle
by up to 75%



Sage Intacct Advanced CRM Integration brings together the best-in-class cloud financial management solution with the industry-leading cloud CRM solution, Salesforce. What does that mean to you? A full view of every customer. Efficient collaboration between Sales and Accounting. A streamlined, automated order-to-cash process that saves time, reduces errors, and accelerates cash flow. And, it's all built and supported by Sage Intacct, so you can focus on your business, not your integration.

Accelerate order-to-cash cycles by up to 75%

Fully automate your order-to-cash process. Send Salesforce contracts, orders, and projects into Sage Intacct with a single click, automatically on save, or in batch. No more rekeying Salesforce data into your accounting solution.

Automatically trigger invoicing and revenue recognition from the contract, order, or project to get invoices out in minutes, not days. More timely, accurate billing helps reduce days sales outstanding, bringing cash to your business sooner.

Streamline communication and collaboration

Sales works in Salesforce—pricing, billing and payments are easily visible. Accounting works in Sage Intacct. Everyone stays up to date—without time-consuming rekeying of information, phone calls or emails, or jumping between systems. Salesforce Chatter, embedded right inside Sage Intacct, enables your sales and finance teams to communicate efficiently with each other. You can work together to expedite approvals, clarify policies, resolve exceptions, and more. Since all communication is stored in both Salesforce and your financial solution, you don't need to search through emails to find the history.

Focus on your business, not your integration

It's easy to integrate Sage Intacct with Salesforce—just point, click, and connect. Sage Intacct Advanced CRM Integration is prebuilt on the Salesforce platform, so there's no need for expensive third-party integration, IT support, upgrades, or custom consulting. And it comes with our “Buy with Confidence” guarantee. So, instead of playing go-between with vendors, you can stay focused on your business.

Sage



Automate order-to-cash

Sales and Services productivity

- Create and modify orders, projects, and contracts from within Salesforce
- One-click, automatic, or batch synchronization
- Email templates and notifications for renewals
- Automatically generate renewal sales opportunities
- See up-to-date orders and contracts, including history, inventory status, fulfillment, invoicing, payment and aging
- Support reseller workflows

Finance productivity

- Automated synchronization of orders, contracts, and projects
- Automatic initiation of billing and revenue recognition
- Automatic order, contract, billing, and payment updates to Salesforce
- Bi-directional account and contact synchronization
- Support for account merge

Efficiency and collaboration

- Common view of contact, account, product, pricing, orders and contracts, billing, and payments
- Chatter integration

Easy implementation and maintenance

- Real-time, bi-directional synchronization
- "Smart sync" triggers synchronization of accounts and contacts as needed
- Dimension and managed list synchronization
- Bulk operations
- Lightning certified
- Seamless upgrades and enhancements
- Secure OAuth certificate-based

Sage Intacct Accounts Contacts Contracts Opportunities Intacct Contracts Sales Invoices More

Opportunity **2020 Sales Invoice** + Follow Edit Delete Clone

Account Name: Star Productions Opportunity Owner: SFDC Integration User Close Date: 5/6/2020 Amount: \$118,901.44

Progress: Closed W... Change Closed Stage

Products (4)

Product	Quantity
Implementation	1.00
Onboarding	2.00
Subscription License ...	2.00
User Licenses	12.00

Sales Invoices (1)

Sales Invoice No	Date
INV-00042	5/6/2020

Order Entry Search

Sales Invoice Print/Email Pay Edit Done More actions

Transaction History Payment details Salesforce Info

Star Productions (C-0007)

Transaction date	Date due	Item totals	Subtotals	Transaction total	Transaction status
05/06/2020	06/05/2020	118,901.44	0.00	118,901.44	Pending

Date: 05/06/2020

Customer: C-0007--Star Productions Bill to: B_C-0007 Ship to: S_C-0007

Project: -- 123 Main St San Jose, CA 95125 United States

Document number: INV-00042

Converted from: Sales Order-SO-00001

Payment terms: Net 30 Message: State: Pending

Date due: 06/05/2020 Ship via: -- Customer PO number: --

Generate renewals, reprint invoices, and monitor payments without leaving Salesforce.

Synchronize Salesforce orders and projects into Sage Intacct automatically, eliminating manual rekeying of data for downstream invoicing and revenue recognition.

sageintacct.com
877-437-7765



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