DATASHEET

Advanced Salesforce Integration for Your Software Business

Accelerate quote-to-cash by 30 to 75% and free thousands to millions in cash for growth

sage Intacct salesforce

The Sage Intacct 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 quote-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.

Save time on every deal and scale up to 400% without additional finance headcount

Immediate, bi-directional synchronization between Salesforce and your financials allows you to maintain billing, revenue recognition, and receivables in your financial solution while maintaining orders, contracts, projects, changes, and renewals in Salesforce. Pricing, billing and payments are easily visible to salespeople. Everyone stays up to date—without time-consuming rekeying of information, phone calls or emails, or jumping between systems.

Salesforce Chatter in Sage Intacctmeans Sales and Finance can communicate efficiently—to expedite approvals, clarify policies, resolve exceptions, and more. Since all communication is stored in your financial solution, you don't have to search through emails to find the history.

Shorten quote-to-cash cycles by 30 to 75% to increase cash flow

Fully automate your quote-to-cash process. Convert Salesforce quotes into Sage Intacct orders with a single click, and automatically trigger invoicing and ASC 606 revenue recognition and expense amortization. Automated billing eliminates errors and enables you to generate invoices in minutes, not days. More timely, accurate billing helps reduce days sales outstanding. So, you bring cash into the business sooner to invest in growth.

Connect your business, not third parties

It's easy to integrate Sage Intacct with Salesforce—justpoint, click, and connect. Sage Intacct Advanced CRM Integration is pre-built 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.

		alesforce				¢ + 0	
ACCOUNT Moon Rise, LLC	ontacts •	✓ Contracts ✓ Opport	unities 🗸 In	tacct Contracts V + Foll	ow Edit Sync	More to Intacct	
Intacct Customer ID Intacct Sync	HOME	DASHBOARDS REPORTS	COMPANY	GENERAL LEDGER	ORDER ENTRY ACC	OUNTS PAYABLE P	URCHASING TIME & EX
	>	Sales Order				Print/Email	Done More actions ~
(0) Opportunities		Transaction History					
	ेत्र <u>च</u>	Marley Stapleton (C-1066)					
Es Contacts (0)		Transaction date 12/09/16	Date due 01/08/17	Item totals 5,000.00	Subtotals 0.00	Transaction total 5,000.00	Transaction status Converted
Intacct Contracts (0)		Date 12/09/16					
Intacct Contract Lines (0)		Customer C-1006Marley Stapleton Project and Grant		Bill to B_C-1066		Ship to Marley Stapleton(CC-1066)	
() Sales Invoices (0)		 Document number SO-0085	1600 Longview Way Luckenbach, TX 78612		1600 Longview Way Luckenbach, TX 78612		
Eclas Orders (0)		Payment terms Net-30	Me: 	aange	Contrac	t ID	
Generate renewals,		Ship date 01/08/17	Shij	o via	Contract	t description	
eprint invoices, and		Reference 2017 Gateway Sponsor	Atta	ichments	State Converte	ed	
nonitor payments		2017 Galeway Sponsor				· · ·	
vithout leaving							

Convert Salesforce quotes into Sage Intacct orders with a single click, eliminating manual data reentry.

Automate quote-to-cash

Sales and Services productivity

- Create and modify orders, projects, and contracts from within Salesforce
- One-click quote conversion

Salesforce.

- 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 ASC 606 revenue recognition and expense amortization

- Automatic order, contract, billing, and payment updates to Salesforce
- 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
- "SmartSync" 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 authentication

To learn more about how Sage Intacct can help you grow your SaaS business, visit: https://www.sage.com/uk/intacct or contact us at 0800-923-0340.

sage Intacct