CRM Integration for Salesforce®

sage Intacct AICPA Business Solutions
Preferred Provider of Financial Applications

Streamline the quote-to-cash process

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**. A streamlined, automated quote-to-cash process that **saves time and reduces errors**. And **more productive communication** between the department that makes the numbers and the department that manages them.

Key benefits

Point-and-click integration

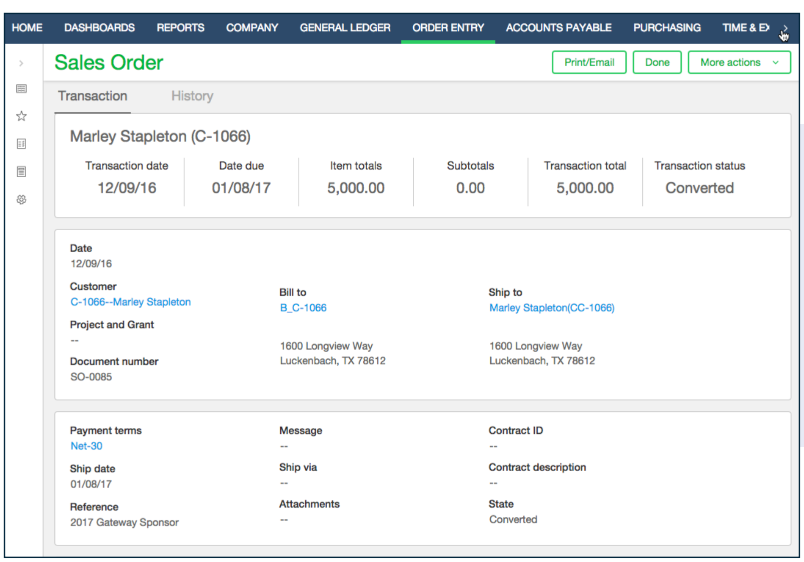
It's easy to integrate Sage Intacct with Salesforce: just point, click, and connect. The Sage Intacct CRM Integration is pre-built on the Salesforce1 platform, so there's no need for expensive third-party integration, IT support, or custom consulting.

No more blind spots

Tight and complete integration ensures Sage Intacct and Salesforce are always up to date with the latest information, including product and price lists. Sales teams can verify pricing in real time and get visibility into the timing and financial impact of revenues, renewals, upgrades, and more—all from within your CRM system. And Salesforce Chatter, embedded right inside Sage Intacct, enables your sales and finance teams to better communicate with each other.

Effortless efficiency

Get a fully automated, paper-free order-to-cash process: Convert Salesforce quotes into Sage Intacct orders with a single click, and automatically trigger invoicing and revenue recognition. Use Sage Intacct Project Accounting to create and track customer projects from the Salesforce account screen, then drill down to see individual project details.



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

Key features

Efficiency and collaboration

One-time data entry: Achieve greater accuracy and save time by eliminating the need for finance to re-enter customer and order information.

Up-to-date shared data: Work with up-to-date and consistent product, pricing, and customer data from both Sage Intacct and Salesforce.

One-click quote conversion: Easily turn Salesforce quotes into Sage Intacct orders.

One-click project creation: Create projects and tasks from a Salesforce opportunity.

Project visibility: View projects and tasks that have been booked for an opportunity, and track project status, from Salesforce.

Multi-location support: Tie Salesforce orders to the correct entities for accurate multi-entity financial management.

Salesforce Chatter integration: Help sales and finance teams communicate more efficiently—to clarify policies, resolve exceptions, and more—by extending Salesforce Chatter to Sage Intacct users (Sage Intacct Collaborate).

Sales productivity

Automatic generation of renewal sales opportunities: Keep renewal sales on track by creating opportunities based on original contract terms plus desired price adjustments.

Order visibility: Give sales teams access to order histories, inventory status, and fulfillment status from within Salesforce.

Real-time visibility into invoicing, payments, and aging: More carefully manage credit/sales situations—all from within Salesforce.

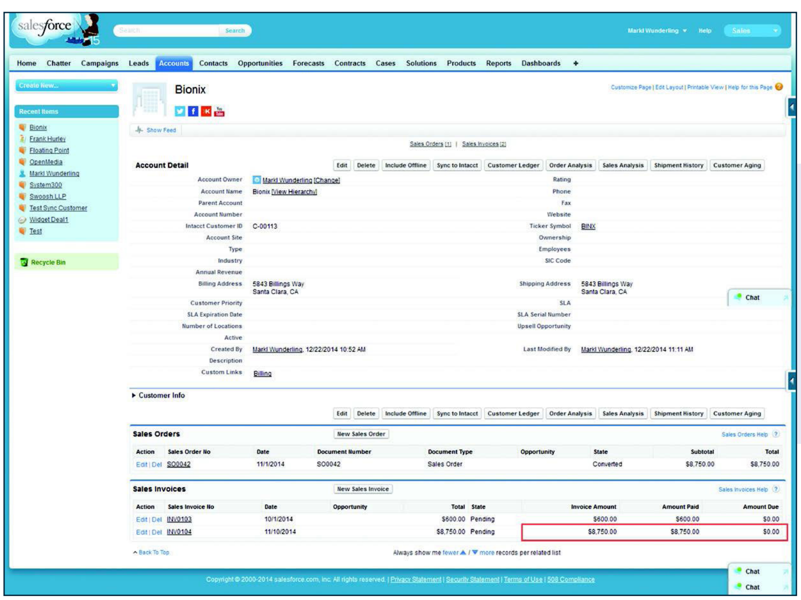
Finance productivity

Automatic initiation of finance processing: Trigger invoicing and revenue recognition when an order from Salesforce is recorded.

Automatic order/billing/payment updates: Automatically update Salesforce with the latest information to reduce ad-hoc information requests from sales.

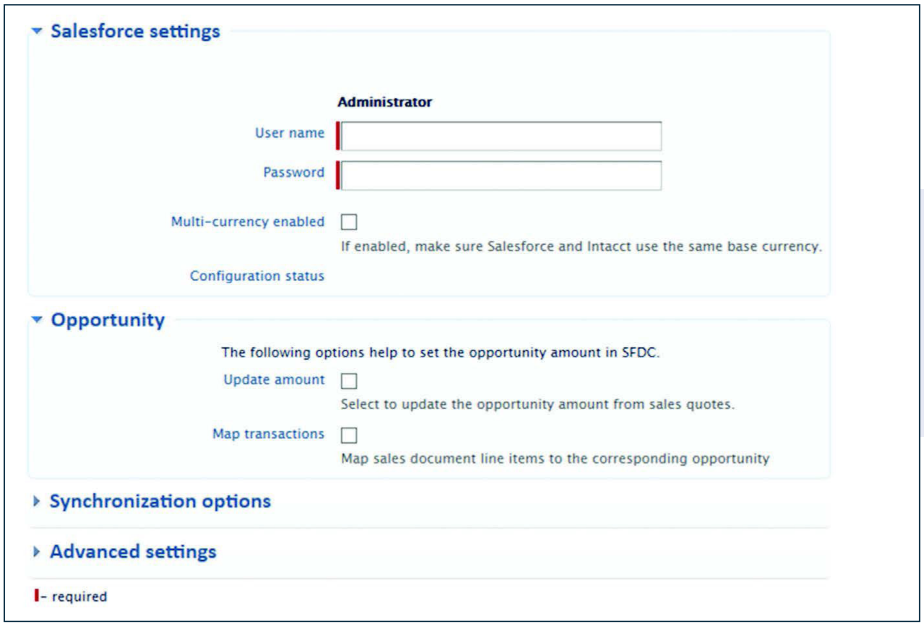
Account details synchronization: Give the finance department visibility into account details from within Sage Intacct.

Email templates: Ensure better communications—use built-in email templates to notify your sales reps and your customers about pending renewals.



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

Key features



Visually configure the connection to Salesforce right from within Sage Intacct.

Take the next step

Find out how the Sage Intacct cloud financial management solution streamlines operations and provides real-time insights, boosting productivity and growth.

www.sageintacct.com

877.437.7765

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