

percipient

 DATASHEET

SAGE INTACCT COLLABORATE

Sage Intacct Collaborate puts everyone on the same page to improve communication and teamwork, and expedite business processes.

Open communications are vital for any organisation's performance and success. Unfortunately, companies can inadvertently develop siloed communications that slow down or even derail critical financial processes.

Overcome these barriers, increase productivity, and facilitate knowledge sharing with Sage Intacct Collaborate, a secure social layer included in your Sage Intacct cloud financial management subscription.

WHY CHOOSE SAGE INTACCT?

- **Save time, move fast**
- **Always trust the numbers**
- **Collaborate in real-time**
- **See the full financial picture**
- **Automate & streamline processes**
- **Complete integration**
- **Future-proof performance**

MUST HAVE FINANCE FEATURES

INFORM & STAY INFORMED

Easily resolve non-routine transactions: Keep your business on track by collaborating on non-routine transactions such as clarifying policies, gathering missing information, or resolving exceptions.

System of record: Receive and respond to messages through email and collaborate. Never lose a conversation since they are all stored in the transaction record.

One-click visibility: See all messages related to an issue with one click. Leave a note rather than explain the situation multiple times.

Constant visibility: Track the conversations through email notifications, the collaboration centre, and real-time feeds in your Sage Intacct dashboards.

Automated alerts: Receive automatic notifications when discounts, budgets, or other critical values change.

Group messaging: Create groups to facilitate communications among relevant parties to focus on specific tasks such as quarter close, audit, order processing, and more.

File attachments: Upload file attachments directly to your conversations in Sage Intacct and track their updates with built-in version control.

Unify conversations: Collaborate in real time on shared records inside Salesforce or Sage Intacct for clarity between sales and finance teams.

Mobile chatter notifications: Get notifications from both Sage Intacct and Salesforce via the Salesforce mobile app.

Create collaboration groups: Extend the groups you define in Salesforce to include Sage Intacct users.

SAGE INTACCT BENEFITS

SAY GOODBYE TO COMMUNICATION BARRIERS

Synchronise your various finance and sales teams by enabling transparency and promoting collaboration.

Realise the productivity gains by easily resolving non-routine transactions on a single system of record with Sage Intacct Collaborate.

- Track multiple conversations in one place, raising awareness of the issue to all involved
- Work with one click - see all related messages in a single view
- Inform and stay informed by leaving notes on tasks and issues
- Communicate about specific journal entries, accounts, projects, invoices, and more inside Sage Intacct
- For sales teams, these same conversations appear in Salesforce Sales Cloud
- Improve communication and teamwork, and make data-driven decisions
- Salesforce finance employees can easily join the Salesforce Chatter network, right from within Sage Intacct

FINANCE MADE SIMPLE

If you would like to know more about Percipient and how we can help you invest in the right finance technology for your business, call the team on **01606 871332**.