



# percipient

 DATASHEET

## **SAGE INTACCT PLATFORM SERVICES**

**Extended functionality to exactly match business requirements. Sage Intacct platform services is a springboard to solutions precisely tuned to individual business needs.**

Platform services can be used to create unique, custom solutions that extend the functionality of Sage Intacct to better serve your business.

With the Sage intacct platform you can add custom fields, tabs, and reports to capture, organise, and analyse your data. And create your own workflows to process records to your own specifications.

### **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

## TOOLS THAT MAKE A DIFFERENCE

**Applications:** When you require a solution with functionality and data structures outside the standard Sage Intacct applications, platform services applications pull together and display all the objects and menus that make up your unique solution.

**Objects:** Think of data tables that include all the field display instructions, actions, relationships, workflows, templates, data maps, and menus that relate to that data. These are objects - the building blocks of solutions that add custom functionality to Sage Intacct.

**Relationships:** Unlike many data applications that require code to link data tables, relationships allow you to define object interaction within the objects themselves. With a few clicks, you can create relationships between custom objects or from custom objects to standard objects.

**Page customisations:** Add HTML and JavaScript elements to pages, including AJAX elements using internal API requests and jQuery elements. White list external resources for use in page customisations.

**Triggers:** Automated behaviour turns a data set into an application. Platform services triggers offer a wide variety of actions that you can perform on objects and related objects. You can even use JavaScript to define complex conditions, data calls, and calculations.

**Workflows:** Platform services solutions allow you to create your own workflows to process records. You can set actions, statuses, and multiple workflow paths that apply to records according to your specifications.

**Templates:** Templates share output from the functions in your solutions. Platform services provides you with HTML and XML document template and email template capabilities.

# SAGE INTACCT BENEFITS

## Accelerate Customisations

Today's businesses require infrastructure solutions to give them an extra edge over the competition, be that in efficiency and cost savings or by allowing them to make better decisions. Sage Intacct platform services is your ticket to making user expectations a reality.

## Map & Manage Solutions with Ease

Rather than building procedural programs and writing miles of code, platform services offers you an elegant object-centred solution. By centring all your actions and workflows around objects and related objects, you can build cohesive solutions that are easy to map and easy to manage.

## Trustworthy Infrastructure

Vital questions about any cloud-based system revolve around stability and security. The problems you might struggle to overcome in a stand-alone system - such as caching, error handling, permissions, and encryption protocol - are seamlessly built into custom platform solutions without any coding on your part.

# MUST HAVE FINANCE FEATURES

## TOOLS THAT MAKE A DIFFERENCE

**Data maps:** Stored data maps allow users to quickly and accurately import data into custom objects. Multiple data maps to an object allow for flexibility based on source data.

**Portals:** Using portals, you can share and update objects through external sites. You can also manage user access to portal pages.

**Custom fields:** Add custom fields to standard objects capturing additional information specific to your business.

**Custom tabs:** Through relationships with standard objects, you can add custom tabs to standard application objects, organizing related object information for easy consumption.

**Smart rules:** Create data validation rules on fields in standard objects to ensure compliance with company policy and data integrity.

**Smart events:** Embed actions into standard objects to automate field updates, communicate changes by email, or initiate external API calls.

**Smart links:** Allow users to easily click to outside sites or display information from outside sites on Sage Intacct dashboards and pages.

**Custom reports:** Create reports on standard and custom object data to provide greater visibility into your customers' unique business interests.

# SAGE INTACCT BENEFITS

## FINANCE MADE SIMPLE

Sage Intacct offers a wide range of accounting capabilities, in a modular format that gives each department within your organisation the flexibility to choose the best software applications for its needs.

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**.