

percipient



 DATASHEET

SAGE INTACCT SALESFORCE INTEGRATION

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 this mean for 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.

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

Sales and services productivity

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

Finance productivity

- Automated synchronisation of orders, contracts, and projects
- Automatic initiation of billing and ASC 606 revenue recognition and expense amortisation
- Automatic order, contract, billing, and payment updates to Salesforce
- Account and contact synchronisation
- Support for account merge

Efficiency & collaboration

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

Easy implementation & maintenance

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



SAGE INTACCT BENEFITS

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

Immediate, bi-directional synchronisation 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 re-keying of information, phone calls or emails, or jumping between systems.

Salesforce Chatter in Sage Intacct means 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 30-75% 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 amortisation.

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 - just point, 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.

ONE SYSTEM ENDLESS 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**.