DATASHEET

Advanced Salesforce Integration for Your Software Business

Accelerate quote-to-cash by up to 75% and free thousands to millions in cash

sage Intacct

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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.

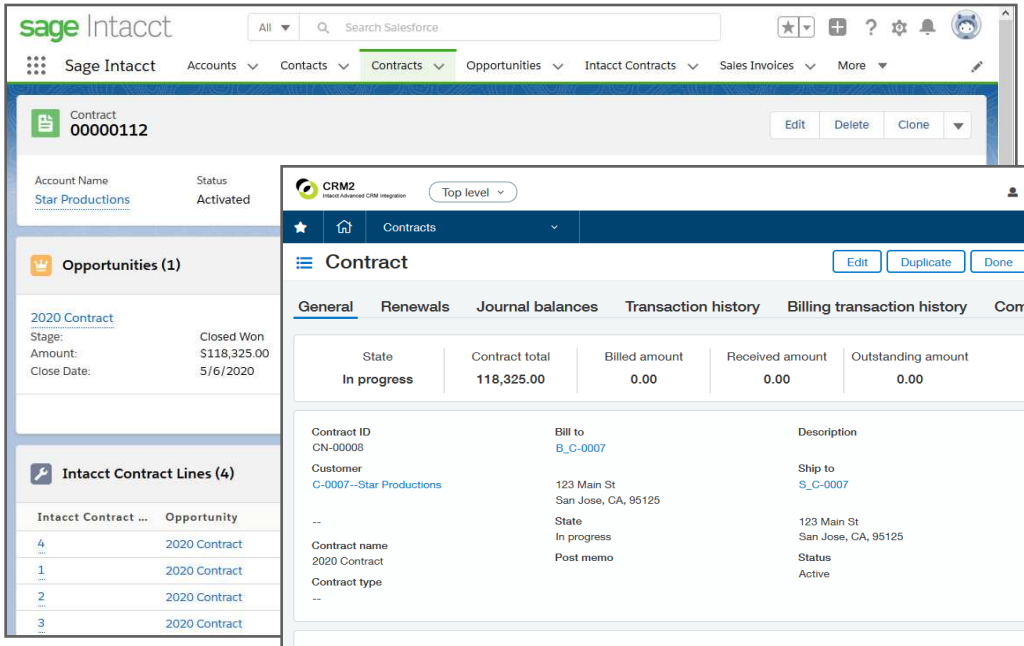
Salesforce Chatter in Sage Intacct means Sales and Finance can communicate efficiently—to expedite approvals, clarify policies, resolve exceptions, and more. Since all communication is stored in your financial solution, you don't have to search through emails to find the history.

Shorten quote-to-cash cycles by 30 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—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.



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

Convert Salesforce quotes into Sage Intacct contracts with a single click, eliminating manual data reentry and automating downstream billing and revenue recognition.

Automate quote-to-cash

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, 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 amorization
- 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
- "Smart Sync" 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

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About The Answer Co

The Answer Company is a leading supplier of business management software and technology consulting services. Since 1995, it has been helping businesses answer the difficult questions with regards to investments in technology and information systems. Working from offices across Canada, they serve national & international clients with a wide range of ERP solutions and numerous complimentary solutions that are powerful & flexible, and backed by industry expertise. The Answer Company's goal is to make businesses more successful at what they do and gain confidence to make profitable moves in their respective industries.

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