

DATASHEET

Why Upgrade to Sage Intacct Advanced CRM Integration?

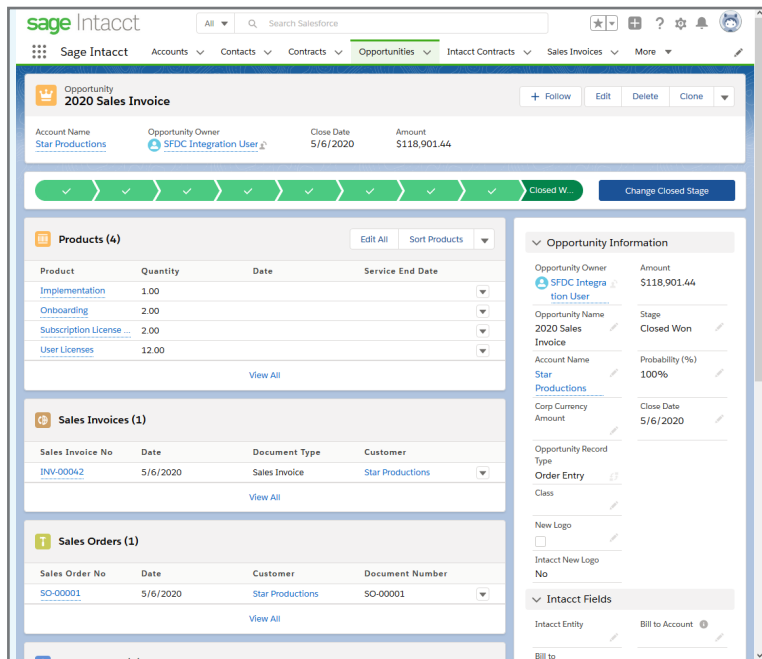
Streamline your workflows with less steps, greater accuracy, easier maintenance, and continued innovation

As a Sage Intacct CRM Integration user, you already know the value that automating your Salesforce integration brings to your business. Sage Intacct Advanced CRM Integration is the newest generation of our Salesforce integration, incorporating ten years of experience working with hundreds of customer integrations. The result? Finance and Sales stay in sync with even less effort. You decrease maintenance time and improve security. And your integration stays current and ready to meet future needs with quarterly updates.

Stay in sync with Sales with less effort and errors

With new "Smart Sync" synchronization, you further automate your workflows, saving steps and minimizing the chance for errors, while providing better visibility for both Sales and Finance.

- **Real-time synchronization.** "Smart Sync" and bulk synchronization ensure that Salesforce accounts and contacts are always in sync with Sage Intacct.
- **Salesforce contact synchronization.** Accounts and transactions support 'Bill To' and 'Ship To' contact addresses.
- **Dimensions and list synchronization.** Managed in Sage Intacct, over sixteen lists automatically sync to Salesforce.
- **Direct order entry integration.** Reduce the potential for out-of-sync issues by synchronizing sales quotes, orders, and sales invoices with the click of a button in Salesforce. Or, use Salesforce's process logic to fully automate the sync. No more pop-up window.



Regular quarterly updates allow you to stay current with the latest innovations. For instance, Advanced CRM Integration supports both the Salesforce Classic and Lightning user interfaces, so you have one less thing to worry about when making the transition to Lightning.

Decrease maintenance time and increase security with easier manageability

Spend less time on maintenance and security and more time on running your business.

- **Managed package.** Objects used do not count against Salesforce's object limit.
- **Simplified user and security management.** Setup is as simple as pairing users with secure, OAuth certificate-based authentication.
- **Support for all Sage Intacct entity and currency configurations.** Whether you're single or multi-entity and need single or multi-currency capabilities, we've got you covered.
- **Customizable and developer friendly.** Easily integrate into customized Salesforce environments and configure them to use your existing record types. The Sage Intacct reference application and page layout templates are included.
- **Enhanced field mapping.** Bi-directional sync is supported on account and contact records.

Meet future needs with continued innovation

As your business and industry grows and changes, Sage Intacct and Salesforce will be there to support you with new capabilities and improvements.

- **Future proof.** Quarterly updates support new Sage Intacct features and enhancements along with stringent, industry-standard security reviews.
- **Integrated applications.** Extensible to support Sage Intacct Contracts, Projects, and future integrated applications.
- **Salesforce Lightning certified.** Only Sage Intacct Advanced CRM works with both Salesforce Lightning and Classic user interfaces to help with your transition when the time comes to migrate to Salesforce Lightning.

For more info, talk with your Account Manager or your channel partner.

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