

Sage Intacct Advanced CRM Integration for Nonprofits



Sage Intacct Advanced CRM Integration for Nonprofits allows for seamless integration with Sage Intacct and Salesforce—giving you the high-level view you need to assess progress toward mission achievement, while potentially saving hours each month and future-proofing your integration investment.

Get a clear view of your nonprofit's financials

- **The data you need for analysis:** The seamless integration between Salesforce and Sage Intacct gives embedded insight—common views of shared information—to both accounting and CRM users.
- **Right level of visibility:** Get flexible summary or detail based on revenue stream. Whether you want to get a detailed workflow for major gifts, or to aggregate small donations to reduce clutter, you always have the right level of visibility you need for analysis and decision-making.
- **Keep everyone on the same page:** Empower program and development staff with direct insight into outstanding receivables—without having to ask accounting. Plus, integration with Salesforce Chatter allows for easy collaboration.

Save time and reduce errors with a single source of truth between Sage Intacct and Salesforce

- **Seamless integration:** The dual-recording integration means your contacts, accounts, projects, and donations are always in sync—in real-time. Plus, your accounting team always has the option to review. It's the best of both worlds
- **Save hours each month:** Eliminate time spent massaging and importing CSV files, creating manual journal entries, or reconciling across systems.
- **Reduce human error:** Automated integration means fewer mistakes and easier reconciliation.

Future-proof your investment

- **Flexibility when you need it:** Adapt your workflows as your organization grows or changes over time.
- **Easy to maintain:** With automatic upgrades and enhancements, along with stringent annual security reviews, there is no IT burden on your staff.
- **Supports your version of Salesforce:** Sage Intacct Advanced CRM Integration for Nonprofits works with both Salesforce Classic and Lightning user interfaces.

Salesforce's Chatter feed is embedded inside Sage Intacct so you can collaborate within the context of related transactions in both Salesforce and Sage Intacct.

Advanced integration specifically for nonprofits

Sage Intacct Advanced CRM Integration for Nonprofits allows you to gain strategic insight with combined CRM and financial data. You choose the right level of visibility for analysis and decision-making with flexible summary or detail options based on the revenue stream. The finance team has the flexibility to choose which revenue-related information to share with Salesforce users—and as long as they have a Salesforce license, they have access to that data. In addition, communication across teams is easy with integrated Salesforce Chatter and Sage Intacct Collaborate.

Using this integration, the finance team can see if development has secured funding without having to ask, and the development team can see if finance has recorded the gift. The dual recording functionality means the data is never out of sync and reduces the reconciliation burden between Salesforce and accounting.

With automatic upgrades and enhancements, stringent annual security reviews, and support for both Salesforce Classic and Lightning user interfaces, your integration works as your organization changes in the future.

Productivity

- Flexible detail or summary based on revenue stream
- Automated integration of contacts, accounts, projects, and revenue
- Optional accounting review

Efficiency and collaboration

- Common view of contact, account, project, and donations
- 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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