⟁ FAYE

☰ sugarcrm

sage Intacct

INTACCT
FOR SUGAR®

SugarCRM is the fastest growing CRM software package in the world. Intacct is the fastest growing cloud accounting and ERP software package in the world. It only makes sense to integrate the software so that companies can use best in class software in each software category without missing out on critical integration components.

The Faye SugarCRM Intacct Integration addresses this. It allows the two software packages to "talk with each other" by sending customers (accounts), inventory items (products), and sales history (sales documents) from

Intacct to Sugar and by sending quotes (sales orders) and new accounts (customers) from Sugar to Intacct. The synchronization between the packages can be set on a scheduler or run manually.

KEY BENEFITS

→ Eliminates double entry of customers in both CRM and accounting.

→ Provides access to product lists in CRM without having to manually key in items.

→ Keeps accounts and customers in sync.

→ Eliminates double entry of inventory items in both CRM and accounting.

→ Eliminates double entry of quotes and sales orders in both CRM and accounting.

→ Streamlines the "quote to cash" process.

FEAT URES & BENEFITS

Intacct Customers to Sugar Accounts

This takes Intacct customer data and moves it to the SugarCRM Accounts Module. New customers will be created automatically in SugarCRM. Existing customers will have their data (name, address, etc.) overwritten each time the synchronization is run.

Intacct Customer Sales History & Credit Information to Sugar

This function moves various Intacct sales history values to the new custom "Sales History" module in Sugar. No other Sugar data is overwritten during this synchronization.

Sugar Quotes and Sales Orders to Intacct

This function synchronizes quotes and sales orders entered and updated in Sugar with Intacct sales orders.

Intacct Contacts to Sugar Accounts

This takes the contact information from Intacct and moves it to the SugarCRM Contacts Module. New contacts will be created automatically when synchronization is run.

Intacct Inventory to Sugar Product Catalog

This takes Intacct inventory data (from the Inventory Master file) and moves it to the SugarCRM Product Catalog Module. Records for the same item number in SugarCRM will be overwritten with the latest Intacct data each time the synchronization is run.