

Data sheet

Bring Your Best Intelligence and Empower Your Clients to Succeed with Sage Intacct



Bring your best intelligence to your clients' business...empower clients to make faster, smarter business decisions

"With Sage Intacct, we're able to look at business intelligence that you wouldn't generally expect from an accounting firm, allowing us to provide deeper guidance to our clients."

~ Vinotha Alexander, Frank, Rimerman + Co. LLP

Sage Intacct provides a comprehensive financial platform that enables you to deliver high-value accounting and financial advisory services to help clients make faster, smarter business decisions. By providing anytime, anywhere access to real-time data, it allows you to collaborate better with clients and further elevate your trusted advisor role.

With Sage Intacct you can reduce time-consuming manual work and increase profitability. It improves data quality and reduces wasted hours by cutting the time it takes to fix data errors, reconcile books, and meet with clients. Your firm will experience improved productivity and efficiency, reduced risk and error, and enhanced service for clients.



The Sage Intacct Accountants Program from CPA.com

The Sage Intacct Accountants Program (SIAP) includes access to an array of training resources and support tools designed to help grow your client accounting services practice and ensure success. Benefits include:

- Access to the unique Accountant's Console and use of Sage Intacct Partner Portal.
- Dedicated account management.
- Free use of Sage Intacct for your firm when your firm is in the Sage Intacct Accountants Program.
- Free training for both your accounting users and implementation resources, including video tutorials, live web-based classes, and on-site classes.
- Professional services assistance with your first 2 clients to help you get started.
- Sales and implementation support.
- Technical support via email and phone.
- Special pricing for your outsourced accounting clients.
- Client sales tools and marketing resources to help you grow your client accounting services practice.
- Networking opportunities with your fellow SIAP partners.
- SIAP partner meetings to provide you with updates on the latest program resources and system enhancements.

A complete accounting and financial management solution

Bring a new level of financial intelligence to your clients' business through the robust dashboards and reports available in Sage Intacct, including both operational and financial metrics. Built-in custom reports allow your firm and clients to quickly view the information needed and analyze data.

Sage Intacct is designed to grow with businesses and allows you to focus on clients of different sizes, in different fields, with the same ease and authority to serve a variety of needs—from basic processing to highly complex analytics. Sage Intacct makes it easy to manage the financials for multiple locations and entities. You can save time and reduce errors by automating multi-entity consolidation and intercompany transactions.

Sage Intacct also includes financial best practices, business guidance, benchmarks, and industry templates—which are all customizable. With a single view and seamless access to client information directly from the accountant console, Sage Intacct allows you to simplify client portfolio management. Serve more clients with the same number of staff members by reducing travel time, mitigating data management issues, and leveraging automation and standardization.

Move beyond standard reporting to provide clients with deeper consultative support.

A module to meet every need

Sage Intacct offers a robust lineup of modules to meet all your clients' accounting needs. Core modules include:

- General Ledger
- Accounts Payable
- Accounts Receivable
- Cash Management
- Order Entry
- Purchasing
- Employee Expenses
- Standard Reporting
- Centralized Dashboards

Boost productivity and efficiency

- Access and manage client data securely 24/7 from any web browser.
- Update and share data instantly across the firm.
- Standardize processes on one financial platform for all accounting work.
- Eliminate wasted time re-entering data between different applications.
- Access industry templates, including business processes, charts of accounts, financial reports, business dashboards, and more.

Enjoy integration with key applications

- Integrates with over 150 other leading applications including Bill.com, Salesforce, American Express, and more.
- Offers open API, allowing for web services to connect to existing systems or those you are considering in the future.

Experience the height of security and reliability

- Backed by high reliability Tier 1 data centers; SSAE 16 SOC1 Type II audited and PCI DSS certified.
- Provides world-class security, disaster protection, and backup and recovery.
- Offers built-in internal controls and security permissions to give you control to what users can access.
- Includes the Sage Intacct Buy with Confidence guarantee.

“Sage Intacct allowed us to move away from QuickBooks and the manual processes that come with building custom reports. Sage Intacct had everything we needed: scalability, high-end reporting that our clients require, and it was cloud-based.”

~ Bill Klein, Consero Global Solutions

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