



Faye  
Business  
Systems  
Group



# Sugar Intacct Integration Application Spec Sheet



# Fly high with the world's leading cloud based CRM and ERP software packages

**F** SugarCRM is the fastest growing CRM software package in the world, and one of the leading cloud based CRM solutions. Intacct is a leader in cloud based accounting and financial management systems. 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 all while staying safely and conveniently in the cloud.



The Faye SugarCRM Intacct Integration Application addresses this.

It allows the two software packages to “talk with each other” by synchronizing customers, inventory, sales history, quotes, and sales orders between Intacct and Sugar. The synchronization between the packages can be set on a scheduler, run in batch mode, or run manually for individual records.



## BENEFITS

- Eliminates double entry of customers in both CRM and accounting
- Eliminates double entry of inventory items in both CRM and accounting
- Provides access to product lists in CRM without having to manually key in items
- Eliminates double entry of quotes and sales orders in both CRM and accounting
- Keeps accounts and customers in sync
- Streamlines the “quote to cash” process





# Excel above the rest and skyrocket your business to the top.

## FUNCTIONALITY INCLUDES:

### **Customer Sync**

Import Intacct Customers into Sugar. Send Sugar Accounts into Intacct. Sync Intacct customer data as changes are made and move it to the SugarCRM Accounts Module.

### **Contacts Sync**

This takes the contact information from Intacct and syncs it with Sugar Accounts. New contacts can be created automatically when synchronization is run.

### **Intacct Customer Sales Documents Sync to Sugar**

This function moves various Intacct sales history documents (invoices, shipments, orders, etc.) to an Invoice History Module in Sugar. No other Sugar data is overwritten during this synchronization.

### **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.

### **Sugar Quotes and Sales Orders to Intacct**

This function sends Sugar quotes and sales orders into Intacct sales orders.

### **Custom Mapping**

Map any standard or custom field within Intacct to any standard or custom field in Sugar and vice versa.

### **Flexible Sync Scheduling**

Sync records at pre-defined intervals, send records one at a time, or “click to send”. Sync the way that works best for you!



## Anywhere, anytime... 360 degree access to your business with SugarCRM and Intacct.



*Welcome to the software you've always wanted....*

5950 Canoga Avenue, Suite 615  
Woodland Hills, CA 91367  
Voice: 818.280.4820 Fax: 818.280.4821  
info@fayebsg.com www.fayebsg.com

Faye Business Systems Group is a technology consulting and software company that helps growing companies become more profitable by working with them to implement creative, innovative, and effective financial and business systems. Products currently include SugarCRM, Sage 100 ERP, Intacct, Acumatica, and a variety of award winning custom software solutions. Services include project management, software implementations, consulting, software development, training, and support. FayeBSG helps companies of all sizes run more efficiently, effectively, and profitably.

ALSO AVAILABLE FROM FayeBSG:

SugarCRM Constant Contact Integration  
SugarCRM Sage 100 ERP Integration  
SugarCRM Authorize.net Integration  
SugarCRM QuickBooks Integration  
SugarCRM JIRA Integration  
SugarCRM ShoreTel Integration

TRADEMARKS: Intacct is registered trademark of Intacct Corporation, Inc. Windows is a trademark of Microsoft Corporation. SugarCRM is a trademark of SugarCRM, Inc. All other company and product names may be trademarks of the respective companies with which they are associated.

This documentation and the software described herein, is prepared and published under license. Neither Intacct nor SugarCRM, Inc. has tested or verified either the software or any representation in this documentation regarding the software. Intacct and SugarCRM do not make any warranty with respect to either this documentation or the software described herein, and specifically disclaims any warranty, express or implied, with respect hereto, including the warranties of fitness for a particular purpose and merchantability.

COMPATIBILITIES: This software is currently compatible with: Intacct and SugarCRM v6.0 thru to 6.5.

Information in this document is subject to change without notice. Copyright 2014, Faye Business Systems Group, Inc.

All rights reserved.