FayeBSG Software

SugarCRM Intacct Integration
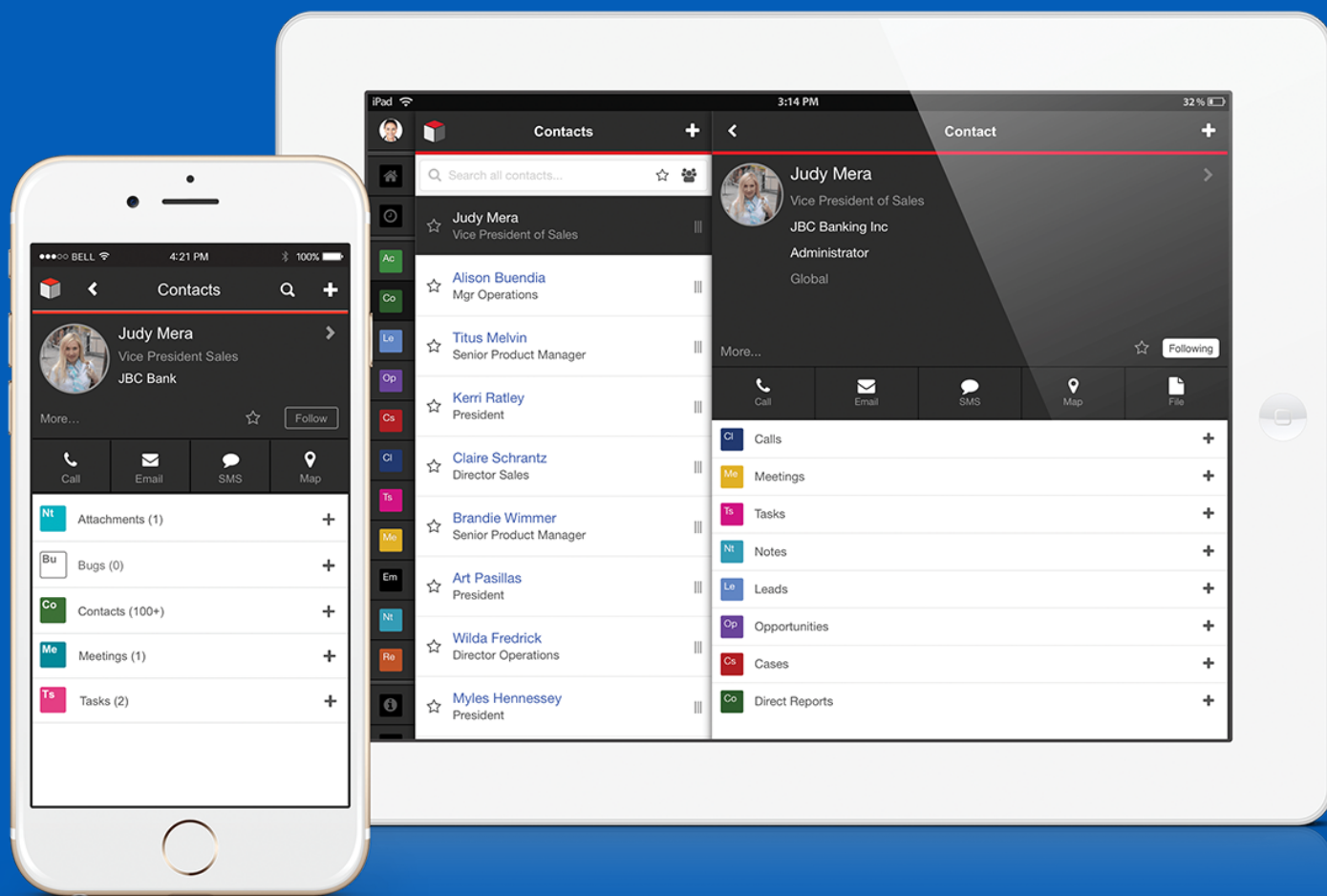
BRING YOUR FINANCIAL MANAGEMENT AND ACCOUNTING DATA FROM INTACCT TO SUGAR FOR 360 DEGREE TEAM ACCESS

SugarCRM enables businesses to create extraordinary customer relationships with the most innovative, flexible and affordable CRM solution on the market. Intacct is a highly efficient cloud-based accounting software created for small to medium-size businesses moving out of entry-level accounting.

The FayeBSG 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.

We're consistently adding more features to our Sugar Intacct Integration as we get more feedback from clients, so please check our site frequently to see what new points of integration have been added to date.

"The best implementations are the ones where you don't even know they occurred...Good work!"

-TED MARINO
CLEAR CHANNEL COMMUNICATIONS

KEY 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

FEATURES

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

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

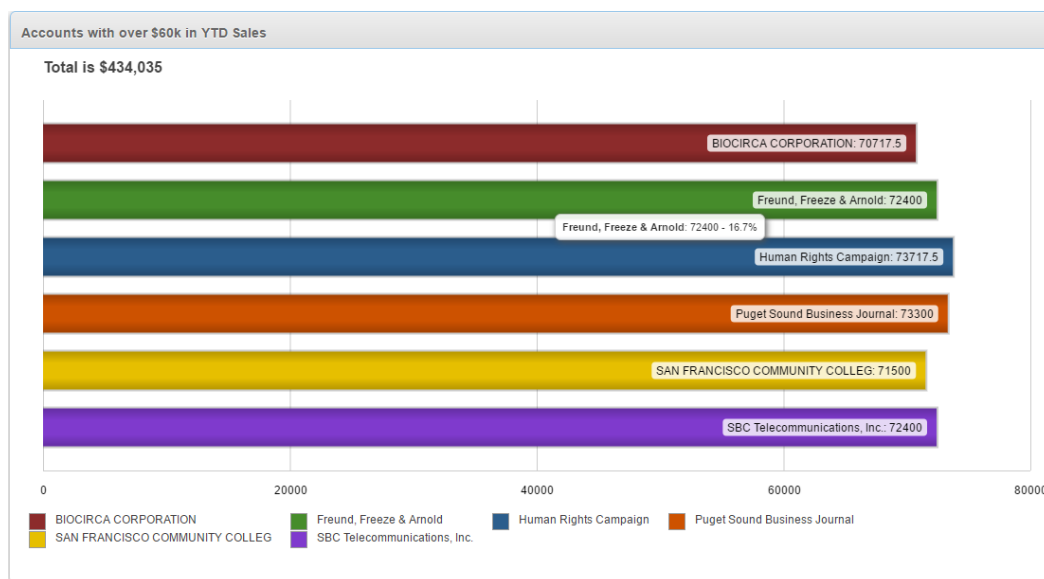**Intacct Customer Sales History & Credit Information to Sugar**
This function moves various Intacct sales history values to the new custom "Sales History" module in Sugar. No other Sugar data is overwritten during this synchronization.
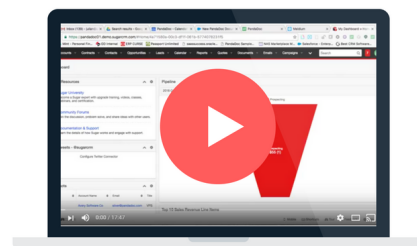
Intacct Inventory to Sugar Product Catalog
This takes Intacct inventory data (from the Inventory Master file) and moves it to the Sugar Product Catalog Module.   Records for the same item number in Sugar will be overwritten with the latest Intacct data each time the synchronization is run.

Sugar Quotes and Sales Orders to Intacct
This function synchronizes quotes and sales orders entered and updated in Sugar with Intacct sales orders.

VIEW ON-DEMAND DEMO

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