



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



Integrating Best of Breed Cloud Solutions

## SugarCRM Intacct Integration Application



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



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 FBSG 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.



## 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





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

Features include:

## **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.



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Faye Business Systems Group offers both packaged and custom software implementations along with project management, custom programming, software training, and product support. With over 25 years of experience in the software industry, FBSG helps companies of all sizes run more efficiently, effectively and profitably.

**ALSO AVAILABLE FROM FAYE BUSINESS SYSTEMS GROUP:**

- SugarCRM Sage 100 ERP Integration Application
- SugarCRM Constant Contact Integration
  - SugarCRM Authorize.Net Integration
  - SugarCRM Quickbooks Integration

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**COMPATIBILITIES:** This software is currently compatible with: Intacct & SugarCRM v6.0, 6.1, 6.2, 6.3, 6.4, 6.5

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