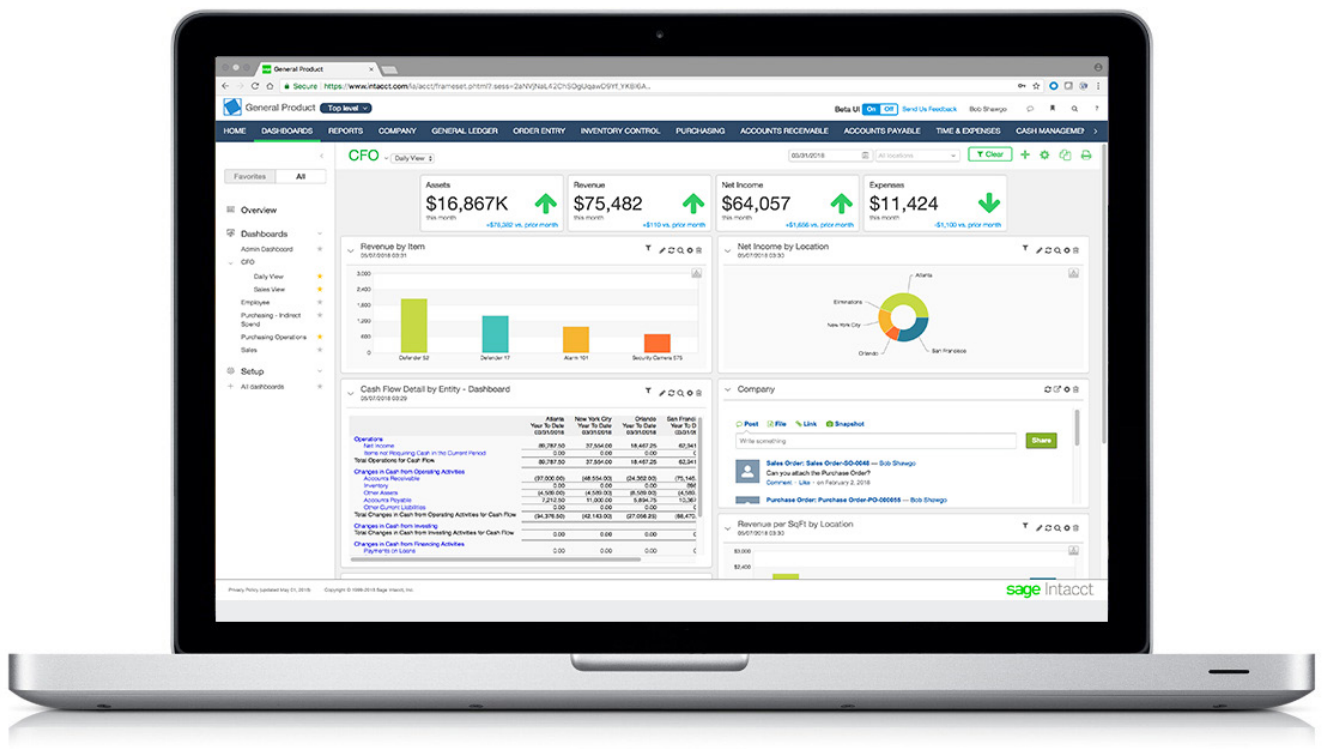# Sage Intacct

The Financial Management Platform that lets you do more and do it better

Sage

Sage Intacct

The Financial Management Platform that lets you do more and do it better

Being awarded #1 in customer satisfaction* in cloud financial management software year after year by G2 Crowd wasn't our goal. It's a side effect of our commitment to making sure finance teams thrive. We want them to have the visibility, information, and time they need to be strategic partners in business growth, while remaining steadfast custodians protecting the company against risk.

We believe that being named a Visionary by Gartner was a natural result of how we address customer needs – looking ahead to future-proof against changes in regulations, technology, and processes. Our customers want a best-in-class solution that aligns with where they're going, so we anticipate and deliver on those needs. Being the only preferred solution of the AICPA (American Institute of Certified Public Accountants) resulted from our dedication to tackling complex accounting issues, while maintaining an intuitive, user-friendly interface. AICPA has over 431,000 members who've seen and used every accounting system out there – Sage Intacct is the only one they prefer.

Find out more

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Features and benefits

Open eco-system
As a best-in-class system, Sage Intacct provides a simple, flexible connection service to dozens of related solutions, such as Martus, Webexpenses and Kimble.

Need to bring in online usage data for billing? No problem. Need to connect to a specialised e-commerce engine or point-of-sale system? How about a sophisticated warehouse barcode system? No problem. Our integrations team can help connect other services, even homegrown services.

Built to scale
Reducing time to close by as much as 79% and seeing real-time reporting across hundreds of consolidated entities, finance leaders using Sage Intacct are in a position to drive growth, not just cope with it.

Built for finance
As a best-in-class provider, our cloud financial software delivers deep accounting capabilities across multiple industries. We speak CPA—the majority of our in-house experts who design and implement Sage Intacct for our customers are seasoned finance professionals. This commitment to finance, is a big part of being named the first and only preferred provider of the AICPA and the vision leader in SMB finance.

Built for the cloud
Sage Intacct's multi-tenant, true cloud foundation brings robust technology infrastructure to your organisation, without the high costs of managing servers. It provides the elasticity companies need to grow. Sage Intacct handles:
• 100 million application requests per day
• 1 billion API calls per month
• Over 50 billion financial records

Built for success
Sage Intacct customers achieve an average 250% ROI and payback in less than 6 months. It's no wonder that Sage Intacct has received the highest customer satisfaction ratings from G2 Crowd. We know our customers have a choice, and we work to earn their loyalty every day. Our Customer for Life commitment and constant product innovation feedback keep us totally aligned with what matters to the people depending on our software.

Built for public companies
Among our customers, dozens of companies, like Kayak, Marketo, GrubHub, and Bitly, have gone public using Sage Intacct. Finance leaders see few achievements as rewarding - or processes as challenging - as going public. We make the process a whole lot easier - and the hoped-for results much more certain - with modern, IPO-ready financial management reporting. Finance teams using Sage Intacct ensure compliance and auditability, with the audit trails, visibility, and forecasting necessary to support an IPO. Best of all, this keeps companies compliant and growing after the IPO.

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You can generate real-time reports almost immediately with Sage Intacct.
For instance, it takes only 10 seconds to generate a report with 12 months'

Cheryl Richardson
CFO, DFP Recruitment

A Platform
for Success

Our platform delivers the foundation that drives business results, giving you a system that has all these things.

Extensible:
A system that can handle your unique business needs. Our platform supports APIs and developer tools that allow you to build custom applications, extensions to the core financial system that are industrial grade. Instead of building an application, with our platform tools, you also have the ability to synchronise data in real-time with any external system you work with. Our largest customers do about 10M API calls / month.

Scalable:
Our system is built to scale, especially for growth. Our largest customers can transact 1 million invoices lines / month using our system.

Secure:
Our system is built to protect your data and keep it safe. We are certified by third-parties to validate our security measures in accordance with cloud standards.

Reliable:
Our system is built to be available whenever you need it. We guarantee our system to be available 99.8% of the time. But our 12-month average availability is higher than that at 99.988%.

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Core Financial Management

Automate Accounts Payable and save thousands of hours
With Sage Intacct's accounts payable management software, your business saves thousands of hours—and hundreds of thousands of dollars—by automating manual accounts payable processes and eliminating inefficient workflows. Just point and click to configure approvals processes that work for your organisation. You can track and view payments, approvals, and reports—anytime, anywhere. See your accounts payable liabilities and vendor-aging reports, and bill and payment register reports across your business in real time.

Sage Intacct's accounts payable solutions let you create automated, configurable processes to enhance internal controls and ensure complete accountability. You define the workflows and approvals so you have complete visibility into the entire AP process. You can even set spending limits to maintain budget compliance with spend management.

Accounts receivable software—get paid faster
Sage Intacct is the accounts receivable management software that makes your team more efficient, so you get paid faster. Automate your processes, email your invoices, and offer more payment options. Generate recurring invoices for easy subscription management, attach customer documents to transactions for better recordkeeping, and more. Our cloud-based accounts receivable software integrates with the rest of the business systems—including your CRM solution— to give you a single view of quotes, sales orders, and invoices. It automatically posts order transactions to your general ledger and AR ledger to streamline billing and accounting.

Gain real-time visibility with built-in and configurable dashboards reports, graphs, and charts. Get a complete picture of customer aging, invoice analyses, recurring invoices, deferred revenue, and more. With Sage Intacct, you can analyse AR data from a range of perspectives for a complete view of your business.

Sage Intacct's accounts receivable solutions let you create automated, configurable processes to enhance internal controls. You define the approvals to align with the way you operate, so you have complete visibility into the entire AR process. Reduce costs and improve cash flow by letting you efficiently manage customer communications with structured, automated processes. You can send customers configurable reminders, assign owners to collection cases to ensure accountability, and centrally record all activity.

Cash management software for improved cash flow
True cash management gives you a complete picture of your cash footprint and working capital. Where is the cash coming from? Where is it going? Sage Intacct cash management software shows a complete picture of your cash position, giving you greater visibility of all payments and transactions across all chequing and savings accounts and credit cards across locations and entities. You see it all in real time, so you're always in control of cash.

For easier cash management, automatically import statements (bank feeds) from your financial institutions and automatically reconcile your checking, savings, and credit card accounts in just minutes. Spot exceptions, manage bank errors, monitor for fraud, and maintain accurate cash balances. Apply payments to accounts not tied to an invoice or record POS payments not applied to a single customer. Quickly generate payments or use the bill-focused payment cycle. With Sage Intacct, you can transfer funds across accounts to locations and entities right when you need them.

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The internal controls in
Sage Intacct are critical.
The entire AP and AR cycles
are now paperless with an
audit trail and an automated
approval process built right in.

Faith Noble, CFO
Toward Employment

**General ledger and financial management platform
unlike any other**
Unlike basic business ledgers and GL software, Sage Intacct's
powerful and innovative general ledger and financial
management platform uniquely provides the extensive
visibility, scalability, and flexibility you need to thrive
without limitations. It's the ideal GL accounting foundation
for smarter, flexible financial management.

Sage Intacct general ledger software shows you reports and
dashboards across any combination of drivers and metrics.
With dimension values—pre-built, user-defined, or required—
you capture the unique business context of transactions,
operational measures, and budgets and see the most relevant
real-time views of business performance. Easily manage
complex financials for multiple entities – domestically or
globally. Consolidate financials with the push of a button,
automate currency conversions, and get consolidated
financial statements without waiting for month's end.

Sage Intacct General Ledger financial management lets
you close subsidiary ledgers independently.Meanwhile, you
can continue to operate business-as-usual during the close
period by closing one ledger while other ledgers are still
processing transactions, resulting in a more efficient and
less disruptive period end.

Automate the order management cycle
Streamlining even for the most complex quote-to-cash
processes, cloud-based Sage Intacct order management
software is sophisticated enough to handle higher order
volumes, order processing complexity, inventory challenges,
and pricing structures. The result ? An order management
system that saves time, improves accuracy and increases
profitability. Sage Intacct software removes the manual work
from multi-channel order management and conforms to your
unique workflow and pricing requirements. Simply input
orders when they come in—and never enter them again.
Data automatically flows to order fulfillment, billing,
revenue accounting, and all the other places you need.

Thanks to easy, pre-integrated Salesforce CRM connectors,
you can manage the Salesforce quote-to-order cycle by
enabling sales and finance to share pricing, order status,
and other information and generate orders without
duplicate data entry. And a prebuilt integration with Avalara
automatically calculates the right sales tax for any order in
any jurisdiction across all sales channels.

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Sage Intacct purchasing

Use Sage Intacct purchasing to create structured, predefined transaction and purchase approval workflows that increase purchasing speed, accuracy, and efficiency. At the same time, Sage Intacct's comprehensive suite of dashboards and reporting tools lets you monitor budget vs. actuals, analyse costs, and gain visibility into your entire procure-to-pay cycle. That's purchasing software, perfected.
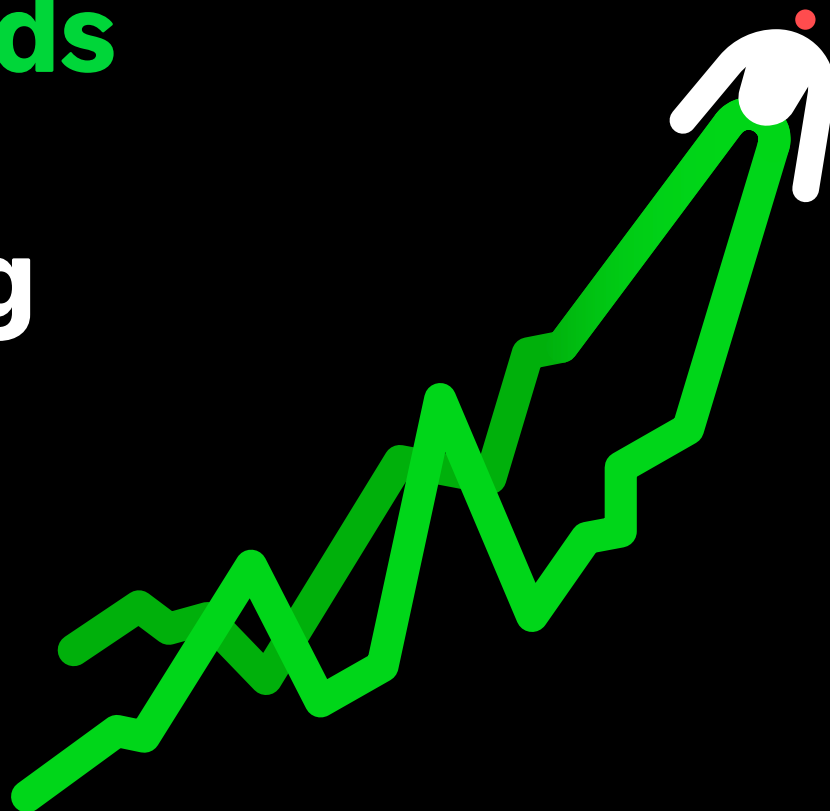
Cloud-based purchase order management software automates your unique workflows and accelerates purchase requisitions, purchase orders, and approvals. The Sage Intacct purchase order system connects with accounts payable, cash management and inventory, so you don't enter the same information twice. And you can drag-and-drop files for simpler recordkeeping and instant access to supporting documents. Our purchase order management software gives your team easy access to critical information.

You'll see customisable, role-based purchasing dashboards, so you can quickly track budget performance, compare purchase quotes, see price breaks, and more. With real-time information at a glance, Sage Intacct purchasing software lets your team focus on making the right purchase decisions.

Take complete control of your entire procure-to-pay process. With Sage Intacct purchase order software, you leverage best-practice templates that enforce and control your careful, thoughtful processes for purchase requisitions, quotes, orders, returns, and more. Set spending limits to maintain budget compliance with spend management. And you can use tailored workflows and approval processes for purchase order management to ensure everyone adheres to your organisation's unique requirements.

Dashboards and Reporting

Financial dashboards and reporting software that turns data into insight

The pressure's on to expand the breadth, accuracy, and granularity of your financial and management reporting. Executives, investors, shareholders, auditors, and others want to know more than what's happened—they want to know why. And you want to surface this information quickly so your firm can correct problems or respond to opportunities before the moment is lost. Sage Intacct Reporting and Dashboards ensures you get the deep operational and business-performance insights that tell you why and the real-time view that enables you to act today.

See every dimension of your business

Sage Intacct's innovative general ledger includes 8 dimensions to capture the business context of your transactions, operational measures, and budgets. That means you can quickly access or create reports that analyse real-time business performance by business drivers—without managing a complex chart of accounts. Our 8 predefined dimensions are ready to go out of the box, including department, item, and employee. And it's easy to add more dimensions to reflect unique business drivers and take your financial reports to the next level.

Get the rich reports you need — the way you want them

Create reports that go deeper by drawing on your combined financial and operational data. What's more, you can drill down to source transactions for immediate, granular details or easily view consolidated reports without waiting for period-end. With Sage Intacct, you can do it all without exporting data to a spreadsheet, writing custom scripts, or waiting on someone to customise reports. Validate with Justus—or build and customise your own reports right from within Sage Intacct. With flexible scheduling and delivery options, like email and cloud, you can get reports when you need them, where you need them.

Make it easy for stakeholders to get the insights they need Display real-time reports, metrics, and insights tuned to the needs and perspectives of all stakeholders— in finance, sales, operations, and the boardroom—wherever and whenever they need them. Dashboards provide at-a-glance views of what matters most: cash balances, project profitability, deferred revenues, revenue per square foot— practically any ratio or metric you need. Data visualisation features let you easily flag important trends, display critical comparisons, highlight missed or hit targets, and more. Skip the hassle of exporting data to a spreadsheet or presentation program and emailing it; instead, just build a dashboard once, then let Sage Intacct update it for you in real time.

With Sage Intacct's financial reports, you get the agility and flexibility to quickly slice-and-dice the details that matter to all key stakeholders: investors, executives, sales, finance, and other departments. And when you have new questions, dive deeper with custom reports, dashboards, or visualisations. Reach peak performance with fast answers for confident decision-making.

Sage Intacct's multi-entity
capabilities will help us gain
a lot of efficiencies across our
business' entities and groups.
We will be able to set up structures
in one entity and transfer it over
to other entities, helping us save
significant time.

Chris Mouradjallian
Financial Controller, Weston Energy

Contract Billing and Revenue Recognition

Gain control and visibility around your contract and subscription billing

Growing revenue with flexible pricing models just got easier. Whether you are looking for greater automation in pricing and billing, tighter integration with your automated revenue recognition, or a seamless data flow between Salesforce and your financials, Sage Intacct Contract Billing lets you tailor pricing and billing schedules to fit your business model.

Don't let billing complexity stand in the way of driving revenue in your company. Eliminate labour-intensive manual calculations with built-in tiered pricing and usage-based billing. You save time and drive revenue with models that match the complexity of your business. From billing across regular periods to non-linear billing, like milestones, you have the flexibility to adapt pricing and billing to the best revenue process for your business. You also enjoy constant visibility into your billing progress with billing by classification reports.

Save time and drive revenue with models that match the sophistication of your business. Sage Intacct lets you adapt pricing and billing —all with constant visibility with complete reporting.

When it comes to subscriptions, specialised contracts, and recurring billing services —and the added complexities of

GAAP-compliant revenue recognition—Sage Intacct is the cloud financials solution finance trusts. We provide the automated workflows, smart revenue recognition, and seamless data flows that streamline the revenue cycle across your organisation.

Tackle complex customer contract revenue accounting
Revenue recognition is the accounting principle that outlines the conditions under which revenue is recognised. In the past, each company and industry followed a different model of revenue recognition, but the GAAP has created a standard for how revenue must be recognised in businesses that transfer goods or services based on contracts with customers.

Sage Intacct's Revenue Recognition Software can help your business stay compliant, effortlessly.
Sage Intacct removes the complexity, time, and frustration associated with revenue recognition. We help you simplify revenue management by flexibly configuring expense amortisation to match or differ from your revenue recognition terms.

Templates and schedules in Sage Intacct automatically allocate revenue and amortise expenses for you, even as subscriptions and contracts change Contract revenue management lets you integrate with Salesforce for a seamless, bi-directional flow of order, customer, and contract data to save time and reduce errors from manual processes. You can streamline subscription and recurring revenue management for real-time updates to accounting and billing for discounts, usage, renewals, upgrades, cancellations, and other changes.

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Easily and quickly handle project costing and billing complexities

Project-based companies in engineering, consulting, and other professional services face a more diverse mix of clients and projects—and that leads to increasing complexities. You want to bid smarter based on historical profitability.

Meanwhile, clients want different billing terms and invoice formats/data. That's where Sage Intacct shines, with a comprehensive project-billing solution to streamline and simplify this critical process.

Cost projects more accurately

Your professional services firm needs a project costing and financial management platform to match the way you work. Whether you just need to track expenses by projects, identify unbilled research and development costs, or run billable services projects for clients, Sage Intacct project costing and billing software have answers you need.

We show you the true financial impact of past projects, so you can make smarter project bids. By tying into your CRM system, Sage Intacct shows you what's in the pipeline, so you line up the right people and materials and turn bids into projects without manual data re-entry.

Automate your most important process— turning orders into cash

Sage Intacct's recurring-revenue management software lets you integrate with Salesforce for a seamless, bidirectional flow of order, customer, and contract data to save time and reduce manual errors. Streamline subscriptions and recurring-revenue recognition with real-time updates to accounting and billing for discounts, usage, renewals, upgrades, cancellations, and other changes.

Align revenue recognition with expense allocations

Templates and schedules in Sage Intacct mean you can automatically recognise revenue according to accounting standards. Sage Intacct lets you recognise revenue and amortises expenses, even as contracts change.

Deliver relevant insights to all stakeholders

Customised dashboards and reports give you deep, actionable views into revenue value and profitability by contract, products, divisions, and more. Sage Intacct shows you every stage of the revenue lifecycle: order, fulfillment of performance obligations, revenue recognition, billing, and collection—so you're ready with quick answers for customers and colleagues.

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Sage Intacct has not only given us the ability to see what's happened in the past, it has given us a look through the window to see what's going to happen in the future. We can use projections and know with more certainty that they're going to be accurate.

Von Maharaj
Controller, NTFN

Out-of-the box revenue recognition functionality
Enjoy out-of-the-box functionality that reduces the need for IT resources. You can handle revenue management requirements with configuration, not scripting. Structure your workflows to capture and edit contracts natively in Salesforce without additional integration software.

Faster invoicing and billing for improved cash flow
With Sage Intacct project costing and billing software, you can combine different billing terms on a single project or multiple projects and deliver a consolidated invoice. You can base invoices on time and materials, fixed fees and milestones, or percentage completion.

Apply any custom invoice templates based on a specific project for each customer and configure invoices to individual client formatting specifications. With Sage Intacct, you save money and time while improving cash flow.

Reduce revenue leakage
Sage Intacct project costing and billing software cuts revenue leakage through an integrated process spanning sales, finance, and operations. Personalised dashboards give you real-time visibility into budget vs. actuals, billed versus unbilled expenses, and billable hours versus unbillable hours. You can even track change orders and not-to-exceed amount triggers so you can carefully manage the project and adjust plans as needed.

Automated revenue recognition
You need flexible billing terms to win and keep clients, but that can also make it difficult to comply with ules and controls and meet stringent GAAP requirements.

Sage Intacct uses the same data for automated billing and revenue recognition. However, automated billing schedule is separate from automated revenue-recognition schedule, so you can do what's right for your customers—and stay compliant.

Automate day-to-day revenue recognition tasks and regulatory compliance
Sage Intacct removes the complexity, time, and frustration associated with revenue recognition. We help you simplify revenue management by flexibly configuring expense amortisation to match or differ from your revenue recognition terms.

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Team morale has improved as a result of Sage Intacct, because everyone wants to do more analytical thinking instead of just pushing numbers around.

Bryan Thompson
CFO, Anchor Loans

Integration

Integration is standard with Sage Intacct
As a best-in-class financial management platform, Sage Intacct was built from the ground up to integrate with other best-in-class solutions. Most customers integrate at least two external applications with Sage Intacct, which provides the flexibility to choose the best options for your organisation. In addition, our platform services help accelerate customisation with infrastructure solutions built to match unique business requirements.

Support complex business processes with integrationser
Complex processes unique to your business often require extracting data for processing, then posting results. Sage Intacct's open APIs make interacting with data not only possible, but relatively simple.

Open APIs allow multiple, stable, secure integrations
Technology advancements, like SDKs and resource white listing, make integrations between systems quicker, secure, and reliable. Language-agnostic APIs rely on XML requests and responses. Roughly 60% of Sage Intacct transactions post using Web Services.

The best-of-breed cloud solution for connecting finance and sales
Sage Intacct offers pre-built integration with Salesforce to give you a best-in-class financial management platform with the best-in-class Salesforce cloud CRM platform. This delivers a seamless integration and alignment to improve productivity, fuel growth, and accelerate revenue.

Point-and-click Salesforce integration
Together, Sage Intacct and Salesforce give you a complete view of every customer, streamlined accounting workflows, and a smarter quote-to-cash process. The powerful combination of Sage Intacct and Salesforce also creates productive communication between the department that makes the numbers and the department that manages them.

It's easy to integrate Salesforce with the Sage Intacct financial management platform because our CRM integration was prebuilt on the Salesforce platform. You won't need expensive third-party integration, IT support, or custom consulting. With the Sage Intacct cloud financial management platform, just point, click, and connect.

Help your sales teams turn opportunities into orders with a single click or verify pricing in real time—all from within your Salesforce CRM solution. With Sage Intacct Collaborate, your sales reps and managers can easily communicate with finance using Salesforce Chatter—embedded within Sage Intacct—to easily expedite approvals, discuss and resolve exceptions to order management processes, and clarify accounting policies.

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Conclusion

About Sage Intacct

As a best-in-class financial management platform, Sage Intacct was built from the ground up to integrate with other best-in-class solutions. Most customers integrate at least two external applications with Sage Intacct, which provides the flexibility to choose the best options for your organisation. In addition, our platform services help accelerate customisation with infrastructure solutions built to match unique business requirements.

Sage Intacct is the innovation and customer satisfaction leader in cloud financial management. Bringing cloud computing to finance and accounting, Sage Intacct's innovative and award-winning applications are the #1 cloud accounting software and financial management solutions for customer satisfaction. In use by organisations from startups to public companies, Sage Intacct is designed to improve company performance and make finance more productive. Hundreds of leading CPA firms and value-added resellers also offer Sage Intacct to their clients. The Sage Intacct system includes accounting, cash management, purchasing, vendor management, financial consolidation, revenue recognition, subscription billing, contract management, project accounting, fund accounting, inventory management, and financial reporting applications, all delivered through the cloud. Sage Intacct is an entity of Sage.
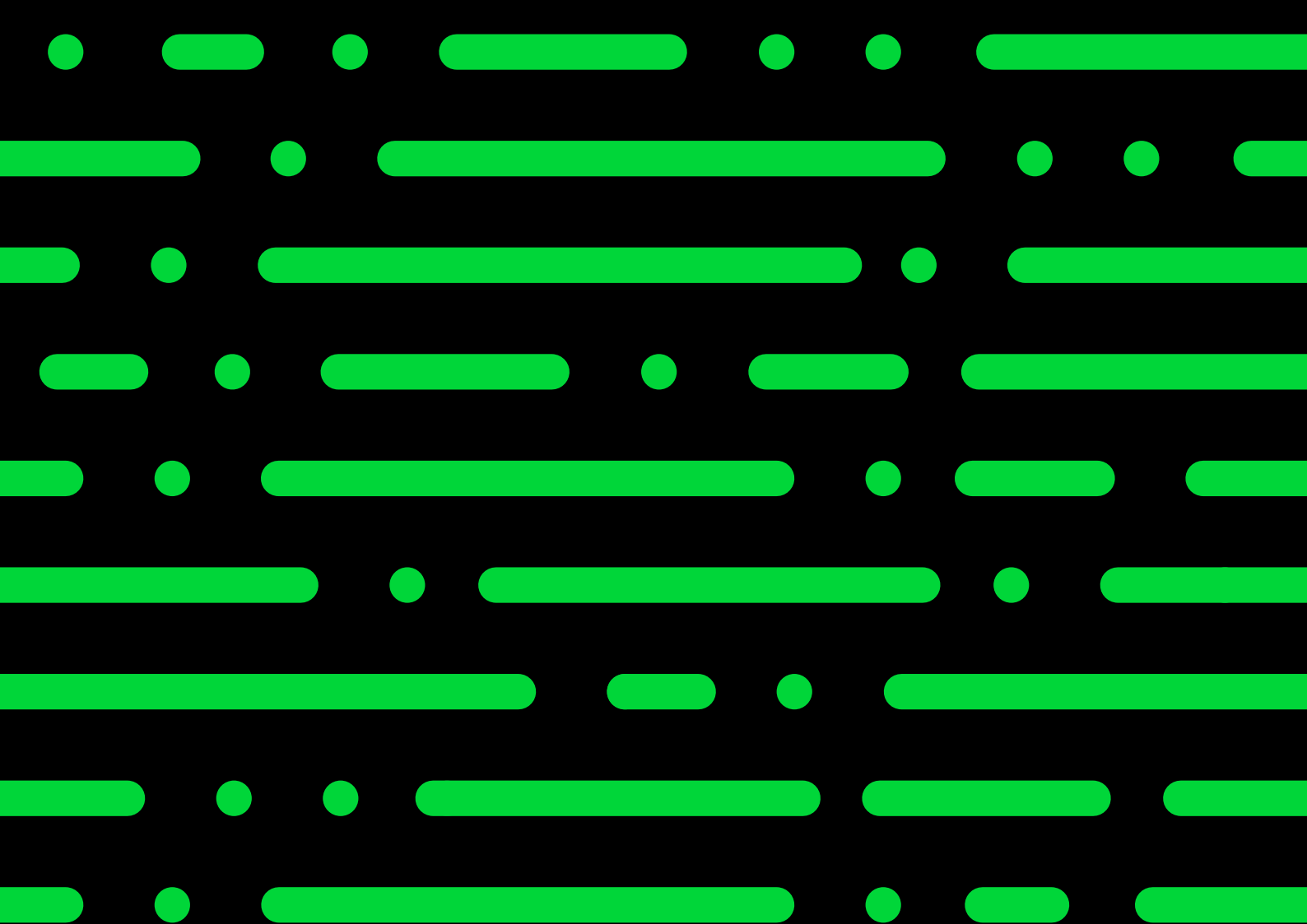
For more information, visit sage.com/au/intacct

2 Top Rated Awards in the Accounting & Budgeting and ERP categories

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