



Preferred Provider of
Financial Applications for
AICPA business solutions

Solution Brief

Intacct for Salesforce CRM Users

Thousands of companies like yours already use and love Salesforce CRM, the leading on-demand CRM application. Salesforce CRM provides your sales and executive teams with anytime, anywhere access to lead and opportunity information and gives you visibility into your entire sales pipeline. But once your sales people close an opportunity, Salesforce CRM stops. Much more has to happen as the order moves to your finance department to be booked, invoiced, shipped, collected and turned into cash, revenue and commissions. In many companies, there are major gaps between sales and finance and between the CRM and financial systems.

Intacct and Salesforce CRM work together to provide a better way. Hundreds of companies like yours are running their entire business on-demand with Salesforce CRM, the CRM solution you already know and love, and Intacct, the leader in on-demand financial applications. Intacct is the most popular financial management system seamlessly integrated with Salesforce CRM, connecting your front and back offices and streamlining your entire quote-to-cash process. Specifically designed for Salesforce CRM users, Intacct makes the lives of both your finance and sales teams infinitely better, easier and more productive.

For your finance team, the built-in integration between Intacct and Salesforce CRM eliminates the need for manual, time consuming and error prone data re-entry. Customer and order information is automatically synchronized between Salesforce CRM and Intacct when a sale is closed. Once Intacct processes the order,

transaction data and back-office details are automatically synchronized back to Salesforce CRM. This eliminates the need for sales order and financial reconciliation, saving valuable time and significantly reducing costs.

The integration between Intacct and Salesforce CRM provides sales reps with valuable visibility into information that used to be siloed in the financial system — information like credit history, inventory levels, shipment details, account balances, billing and payment status. Sales people can see all of the relevant back office details for their customers directly in Salesforce CRM, without needing to ask the finance team. This anytime, anywhere access increases sales rep productivity and customer satisfaction, empowering the sales team to immediately field financial questions from their customers and

The screenshot shows a dual-browser interface. On the left, a Mozilla Firefox window displays the Salesforce 'Opportunity: Current State Analysis' page. On the right, another Mozilla Firefox window shows the Intacct '2 - SALES ORDER' screen. The Intacct screen displays a sales order header with a date of 10/17/2008, type 2 - Sales Order, customer ID CUST-000150-Malibu Services Co., and document number new. Below the header is a table of line items:

Item	Description	Quantity	Price
ITEM-00125-UEI Fixed-Fee Project	UEI Fixed-Fee Project	1.00	1,000,000.00
ITEM-00108	BPR Practice VP	80.0	650.00

The total for the sales order is 1,052,000.00. Below the order table, sections for 'Products (Standard Services)', 'Sales Quotes', and 'Sales Orders' are visible, each containing a table with columns for Action, Document No., Date, Subtotal, Total, State, and Intacct Entity.

With just one click, sales can submit a completed order to the Intacct financial system for processing.

helping them avoid common mistakes, like selling more products to customers who are already on a credit hold. The process for submitting a completed order is also easier with Intacct and Salesforce CRM. With a single click of a button in Salesforce CRM, a closed deal can be submitted to the Intacct financial system for processing. Your sales team never needs to leave their familiar Salesforce CRM interface — order information is securely transmitted to Intacct and applicable financial information is safely and securely synchronized back with Salesforce CRM. Intacct provides deep

and mature financial management and accounting applications that automate key processes and ensure GAAP and SOX compliance. Intacct is the next

(and last) financial management and accounting system you'll ever need, and the preferred choice for companies already running Salesforce CRM.

"Intacct takes over where Salesforce CRM leaves off by implementing rules for billing, revenue recognition and even contract renewals. Invoices are issued at the proper times and accounts receivable are updated automatically. All relevant customer and order data within Salesforce CRM populates Intacct's financial system of record automatically, saving time, costs and potential errors caused by manually re-entering opportunity data."

– VP Finance at BDMetrics
5 out of 5 star review from



SUPERIOR ACCOUNTING AND FINANCIAL MANAGEMENT APPLICATIONS

Quickly Get Started

Intacct QuickStart Financials easily maps your existing charts of accounts

to Intacct, automatically creating your hierarchy structures and giving you extensive financial reporting capabilities

'out of the box'. Intacct and our partners have moved thousands of companies to Intacct — we know how to do it, and we do it fast and right the first time.

The screenshot shows two windows of the Intacct application. The main window displays a Sales Order Detail page for SO-000105. It includes fields for Doc No, Account, Opportunity, Document Number, Document Type, Message, Reference Number, Corp Currency Subtotal, Corp Currency Total, and Created By. Below this is a Sales Order Items section showing one item: ITEM-00125. The second window shows a Sales Order Items grid with one entry: ITEM-00125 - UEI Fixed-Fee Project. The grid includes columns for Item, Description, Quantity, Unit, Price, Extended Price, and Sub Totals.

Finance can process Salesforce CRM originated transactions according to their business processes.

Manage Multiple Entities with Ease

If you have multiple business units, subsidiaries or franchises, Intacct improves productivity, accuracy and compliance. Intacct helps you reduce your financial close cycle, improve the quality of your financial information and manage multiple business units in real time, as well as ensure compliance with financial and regulatory requirements in the regions where you do business.

Intacct Global Consolidations enables you to roll up subsidiary companies to their parent companies, and to correlate your subsidiary company financial data with the parent. You can consolidate

across the organization and view your consolidated financial statements — securely and in real time.

Automatic Multi-Currency

The Intacct financial management system handles multiple currencies with ease — from Intacct Order Management to Intacct Purchasing to Intacct Expense Management. Easy to use and highly automated, Intacct Multi-Currency reduces the cost and complexity of running businesses with multiple currencies and ensures accurate, up to the minute financial visibility and control.

View Your Data Any Way You Want, at Any Time You Want
Intacct delivers comprehensive financial reports that you can fine tune to any level of detail you need. Intacct

"Using Intacct has improved our business process and has saved us time. We have eliminated the need for excel subledgers to track deferred revenue and inventory; and we no longer need to export all of our financial data to excel in order to create financial reports. Our sales team uses the online employee expense reporting which has eliminated the need for accounting to enter all expense reports submitted. Intacct allows us to easily expand into foreign markets with its multi-currency capabilities for payables and invoicing."

– Controller at Packet Design
5 out of 5 star review from

force.com
appexchange

combines inquiry, reporting and analysis into a single reporting solution, so you get real-time visibility across your company without creating multiple stale copies of your data.
The built-in report wizard allows

you to create unlimited variations of reports and graphs, including income statements, balance sheets, budget variance reports, financial ratios, gross margin, statement of cash flows and more. Columns may contain time periods, or side-by-side comparisons of any level of department or location hierarchy detail, financial vs. operational results comparison, as well as budget vs. actual. Your users can retrieve important information by drilling down from each report, including supporting documents that back-up each transaction.

Reference # : Current State Analysis Terms : 2/10 Net30

Item	Description	Unit	Quantity	Unit Price	Amount
ITEM-00125	UEI Fixed-Fee Project Fixed-fee project per custom Statement of Work (SOW) and custom pricing. SOW is required for all orders. VP approval required for this item.	Each	1	\$900000.00	\$900,000.00
ITEM-00108	BPR Practice VP Hourly rate for BPR practice Vice President/Executive Steering	Hour	80	\$650.00	\$52,000.00
				SUBTOTAL	\$952,000.00
				TOTAL	\$952,000.00

Sales has the ability to view and validate financial information, down to the transaction level, directly from Salesforce CRM.

Intacct lets you manage both financial and operational information. Combine information from Salesforce CRM and Intacct together to analyze key business information such as average revenue per employee, earnings per share, productivity per sales rep and product utilization.

Intacct. A Better Way to Run

Your Business.

Superior financial applications. Real-time business visibility. An open, on demand platform. Easy administration and configuration without programming. You can have all these things and the highest rate of customer success and satisfaction with the lowest total cost of ownership.

"Intacct is not only a robust financial management system which includes all modules including revenue recognition — normally an expensive add on — but its real strength is that it can be seamlessly integrated into our existing system's infrastructure."

— VP of Finance, JasperSoft
5 out of 5 star review from

force.com
appexchange



Manage your business through Salesforce CRM reports and dashboards, which combine both sales and finance information.

Learn why hundreds of companies like the ones below are already running their entire business on-demand with Intacct and Salesforce CRM.

