

Product Brochure

Sage Intacct

Industry-leading cloud finance software
built for growing businesses



Sage Partner



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A powerful foundation built for success



A best-in-class provider

Designed to accelerate your success—our cloud financial management platform delivers deep accounting capabilities across multiple industries and:

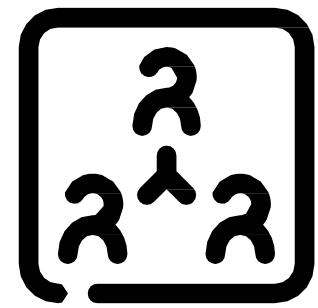
- Reduces time to close by up to 79%
- Provides real-time reporting
- Enables the consolidation of 100s of business entities in minutes
- Puts finance leaders in a position to guide the business and drive more growth



Innovative features for today and tomorrow

The modular, true cloud financial management platform of Sage Intacct meets your business needs today and gives you the flexibility to easily add more functionality tomorrow.

With four major releases annually with multiple new features per release for our customers, innovation is in our DNA, and industry analysts have named Sage Intacct as a “visionary” and a “leader”.



True cloud flexibility and accessibility

Keep your organization agile with an open and configurable cloud accounting solution that lets you easily share data and connect multiple solutions, including Salesforce.

Sage Intacct handles over 100m application requests per day, over 1b+ API calls per month, and 50b+ financial records.

Your entire organization can leverage intuitive systems that your global teams can learn and navigate with ease.

**Sage Intacct
customers achieve
an average 250%
ROI and payback
in less than
6 months**



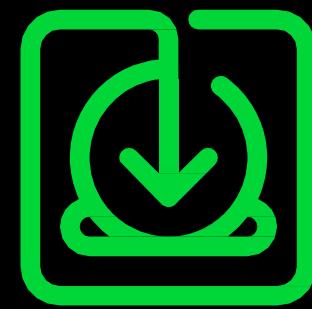
Our solution

Sage Intacct at a glance

Built for finance, by finance

As a best-in-class financial management solution, Sage Intacct provides a simple and flexible open API to dozens of related solutions like Salesforce, Expensify, Kimble, and many more. With easy connection and integrations with other solutions, Sage Intacct can fit to your exact industry and business needs.

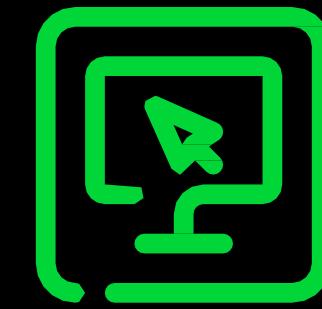
Key features of Sage Intacct



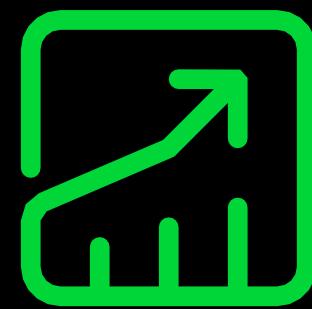
Core financials



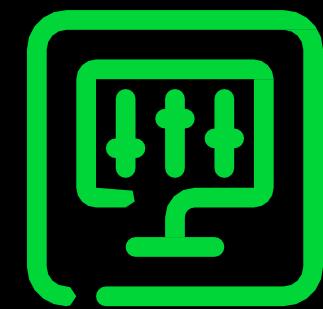
Billing



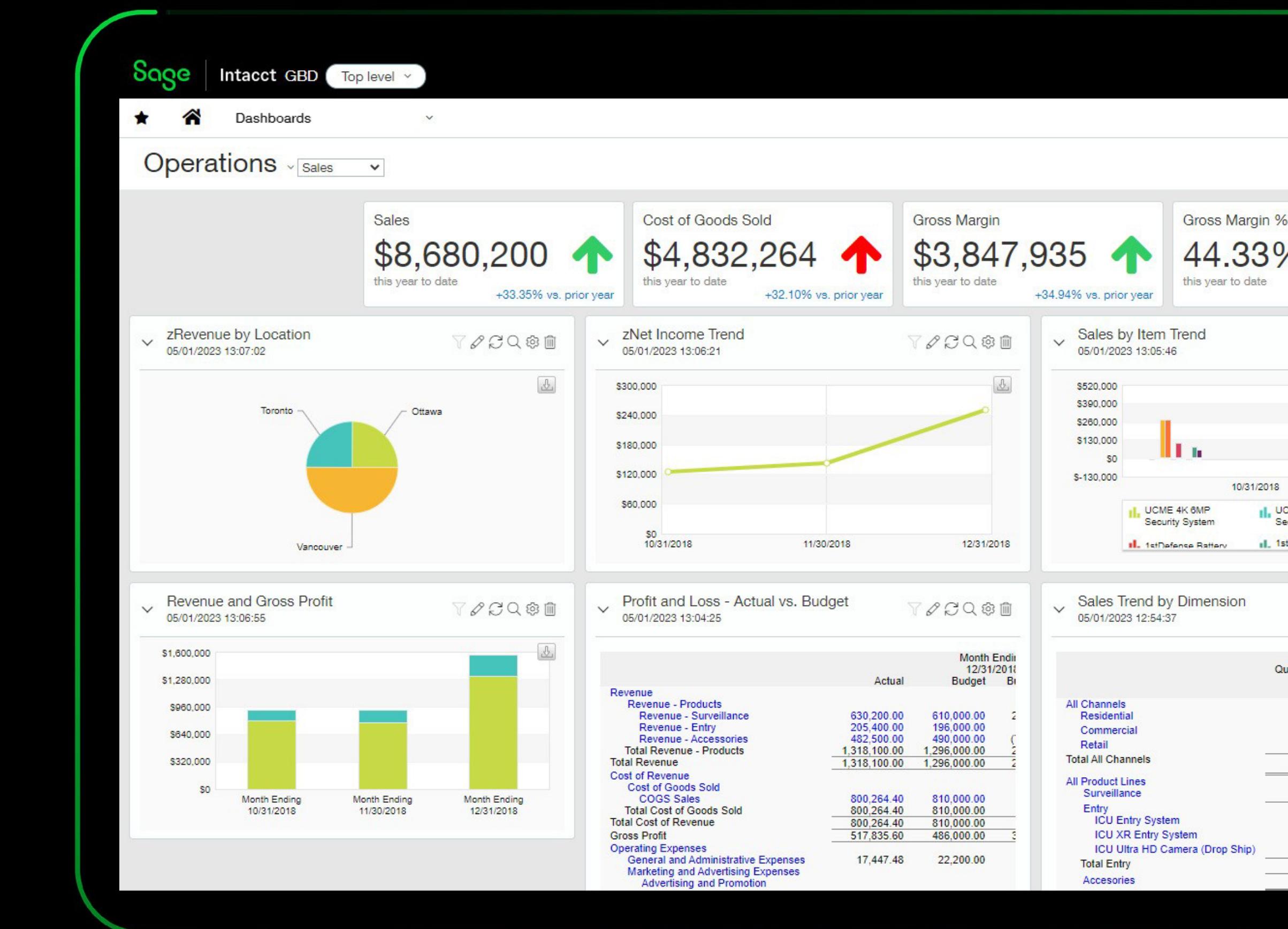
Advanced functionality



Dashboards and reporting



Flexible platform



Core financials

Automate complex processes and multi-dimensional data analysis

Slash your close time by up to 79% and accelerate your finance team's productivity. With accounts payable software by Sage Intacct, your business saves time through the automation of manual processes and eliminating inefficient workflows. Just point and click to configure approvals processes that work for your organization.

Accounts payable

Automate and digitize AP workflows to reduce effort, errors, and cycle payment time.

Accounts receivable

Automate invoicing and collections process to accelerate your cash cycle.

Cash management

Track multiple accounts with real-time visibility and easy reconciliations.

Multi-entity management

Streamline and centralize inter-entity management, from entity set up to consolidation and reporting.

General ledger

Multiple entities, currencies, and geographies that can be consolidated in minutes.

Order management

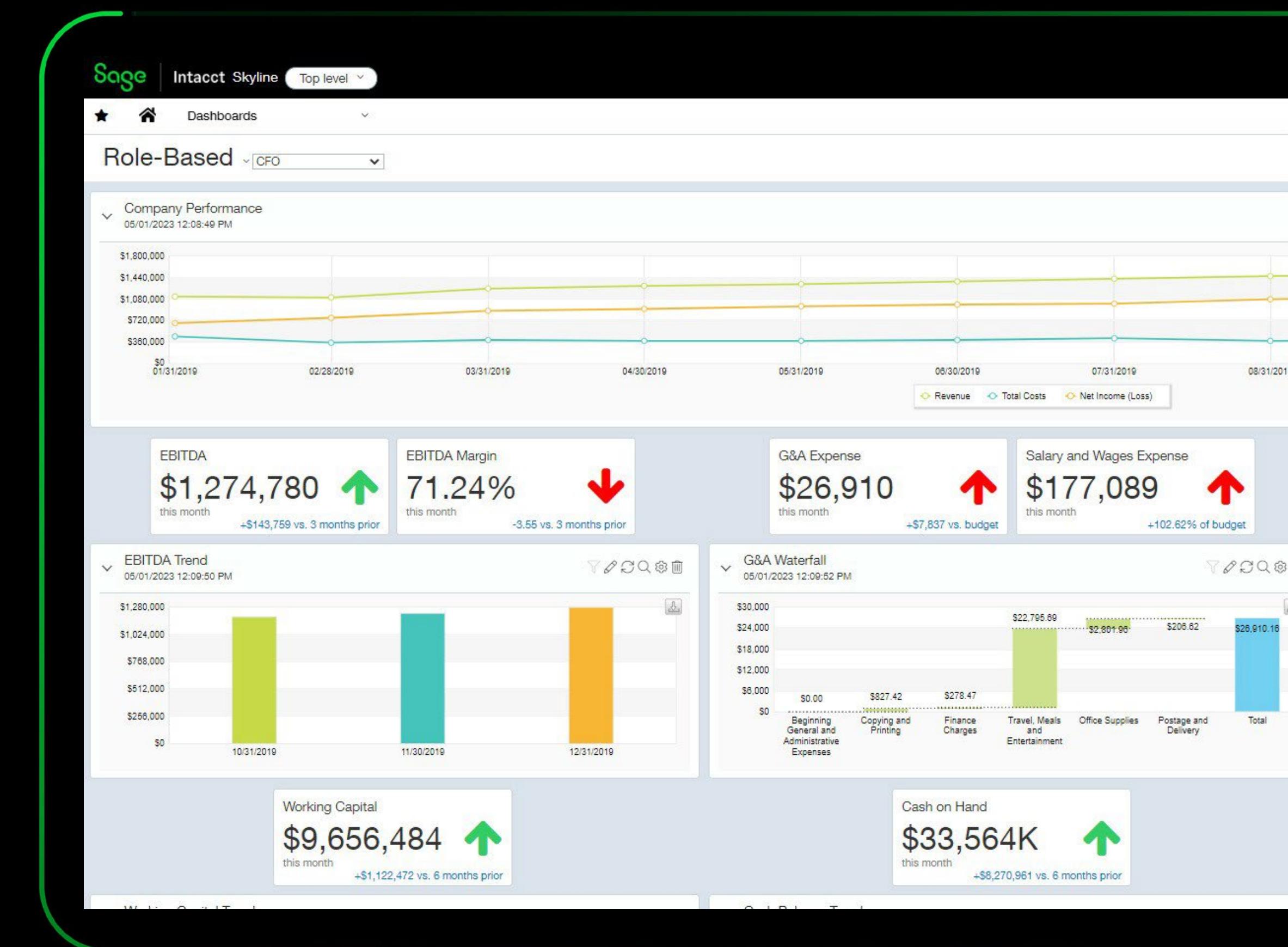
Automate complex, high-volume quote-to-cash cycles and improve profitability.

Purchasing

Achieve speed, accuracy, and visibility with structured transactions and approvals.

Intercompany eliminations

Automate intercompany eliminations at the point of consolidation.



Dashboards and reporting

Intuitive dashboards that give fast, rich financial and operational performance

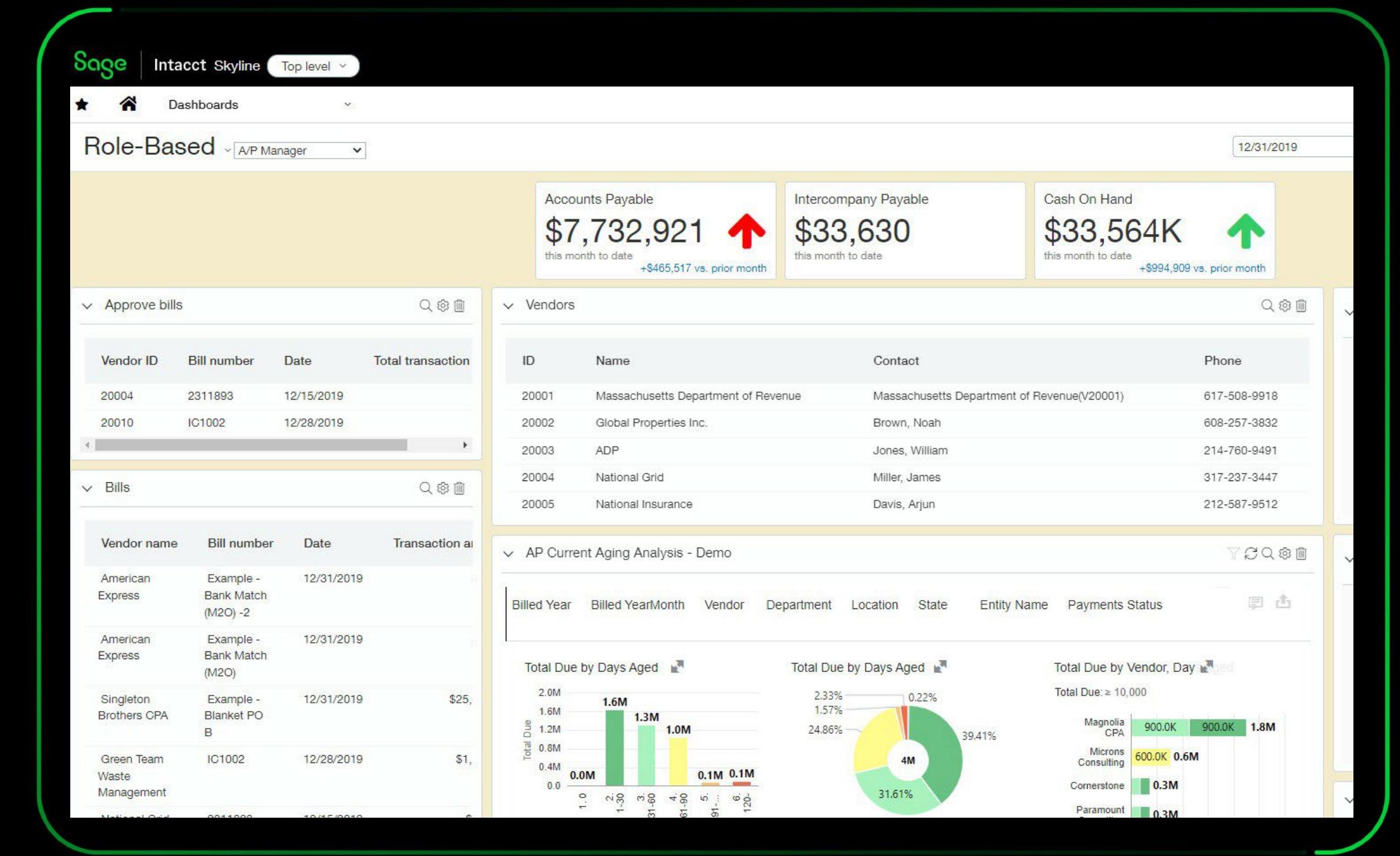
Save 40+ hours monthly on financial reporting and cut time spent checking data accuracy by 75%. With financial reports from Sage Intacct, you get the agility and flexibility to quickly slice and dice the details that matter to all key stakeholders—investors, executives, sales, finance, and other departments. Reach peak performance with fast answers for confident decision-making.

Data into insight

The innovative general ledger includes dimensions to capture the business context of your transactions, operational measures, and budgets. That means you can quickly access or create reports that analyze real-time business performance by business drivers—without managing a complex chart of accounts.

Rich financial reports

With Sage Intacct, financial reporting and analysis options are almost limitless. From comparing operational statistics with financial metrics, checking summary roll-up figures for multiple entities—even if it's only mid-month, drilling down to source transactions for granular transparency instantly, to flagging trends and spotting exceptions with powerful report visualizations.



Improve business agility

With all your financial and operational data in one place, the best-in-class multi-dimensional visibility from Sage Intacct lets you slash time spent checking your financial data accuracy, so you can start making impactful strategic decisions.

Dive deeper

The Interactive Custom Report Writer from Sage Intacct lets you easily create real-time reports that tackle your toughest reporting needs. Get the insights you need in seconds to address complex issues and respond to market changes.

Billing

Smart solutions to automate complex revenue and billing processes

When it comes to subscriptions, specialized contracts, recurring billing services and the added complexities of compliance, Sage Intacct is the cloud solution finance trusts—managing revenue complexities the intelligent, automated, and faster way. We provide automated workflows, smart revenue recognition, and seamless data flows that streamline the revenue cycle across your organization.

Contract and subscription billing

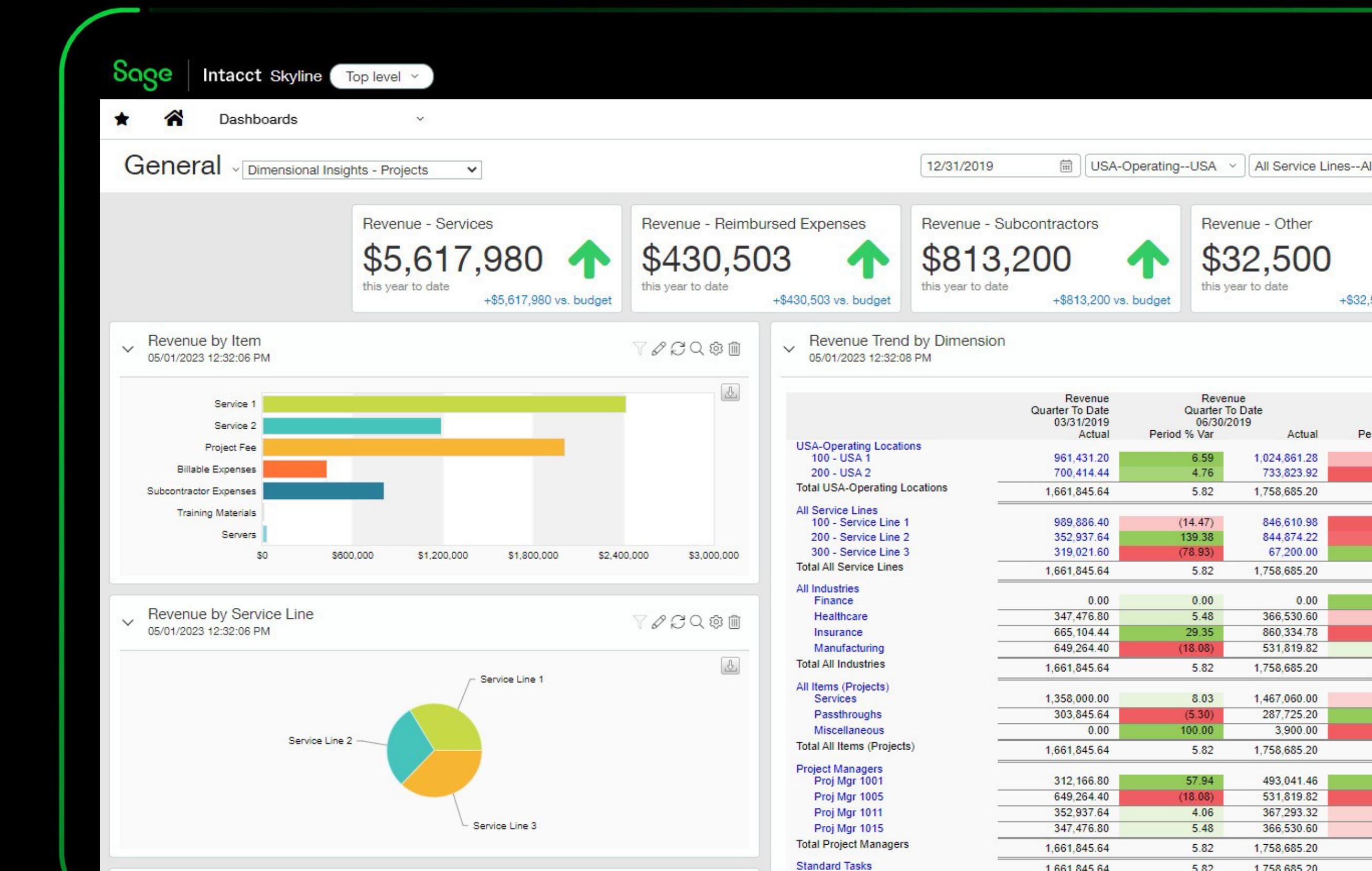
Streamline workflows across the AP cycle with speed and efficiency.

Project costing and billing

Bid smarter and bill faster with less revenue leakage.

Revenue recognition

Automate complex revenue accounting, configure expense amortization and more.



Payroll and HR

Empower your organization to take care of your greatest asset, your people.

- Get instant visibility into your people data for your local or global workforce.
- Run payroll in a few simple steps with the leading mid-market payroll solution.
- Sync employee data to Sage Intacct in real time, no duplicate data entry.
- Use your dimensions to streamline posting and reporting for payroll journal entries.



Advanced functionality

Flexible additional modules for total financial management

You're always ready for what's next with additional modules.

Planning

Plan using live financial data and build budgets in minutes.

Fixed assets

Fixed assets and core accounting creates an automated asset management system.

Inventory management

Track, value, and manage stock while maintaining accuracy at every step.

Global consolidations

Point in time inter-entity reporting with multi-currency consolidations.

Project accounting

Manage costs and revenue, keep projects on time, and maintain profitability.

Dynamic allocations

Fully automate allocations inside your accounting solution.

Revenue recognition

Account for multiple revenue types from subscriptions, to licenses, to services.

Spend management

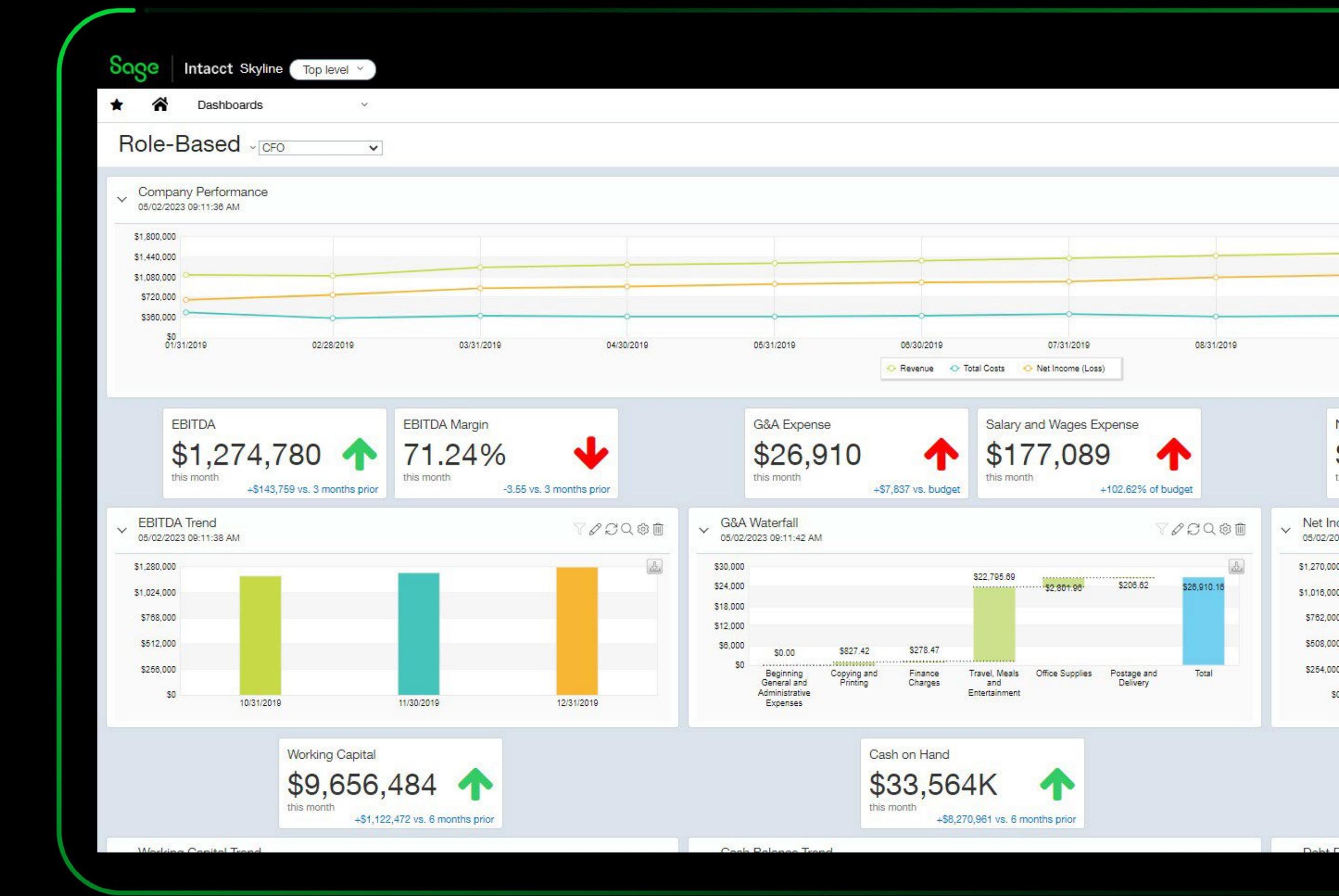
Take care of company purchasing vs budgets and never exceed spending caps.

Time and expense management

Keep your team focused on client goals, not administrative tasks.

Lease accounting

Automate lease accounting processes to reduce compliance effort and errors.



Platform

Built-in tools to help business grow

Infrastructure solutions to give you an extra edge over the competition, be that in efficiency, cost savings or better decision-making across the business—Sage Intacct Platform Services is your ticket to making user expectations a reality.

Platform services

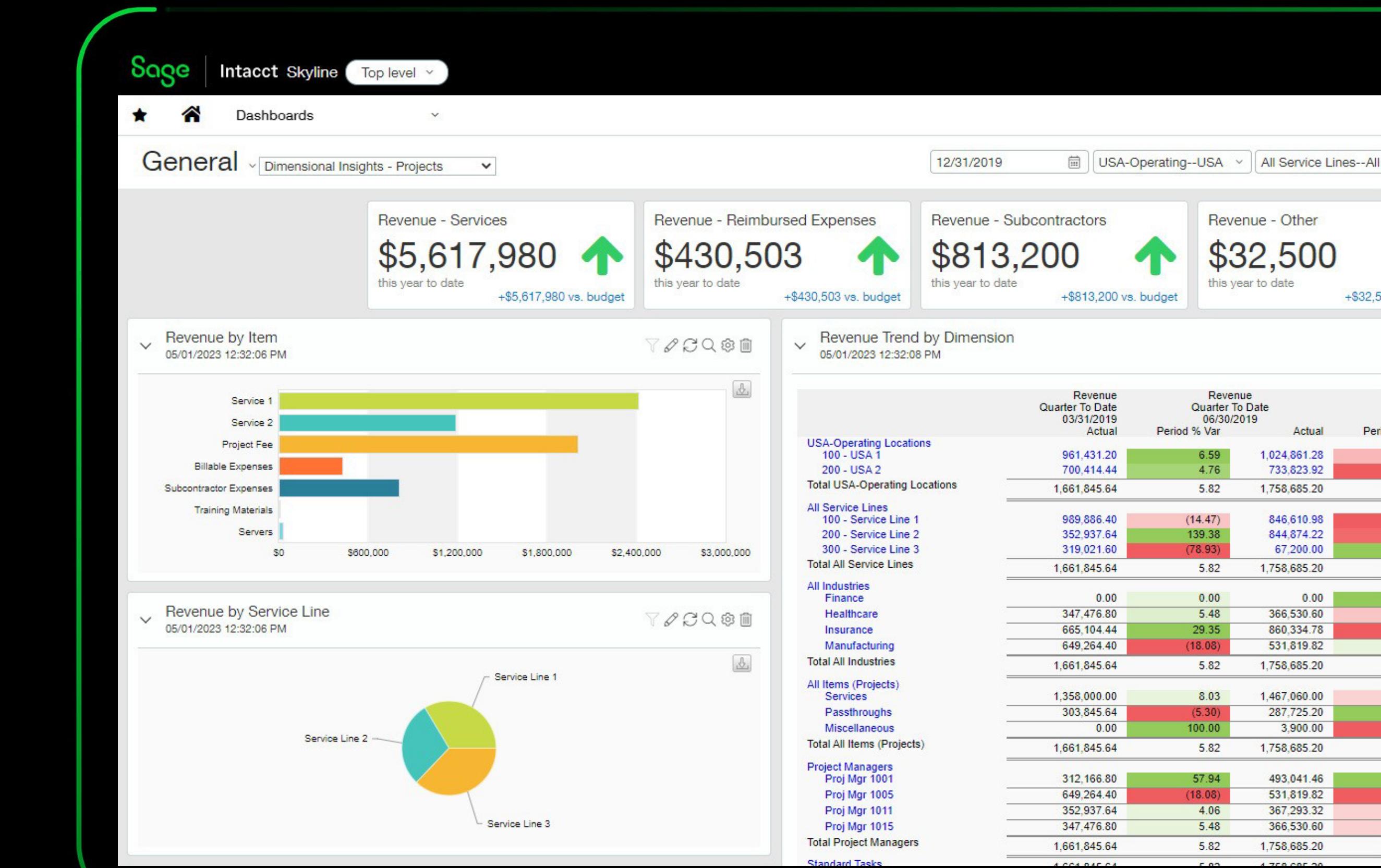
Create solutions precisely tuned to individual business needs.

Web-services API

Easily integrate with other best-in-class solutions.

Salesforce integration

Connect finance and sales—fuel growth and accelerate revenue.



Industry overviews

No matter what industry you're in or business model you follow, your organization is unique. Don't settle for a one-size-fits-all financial application.

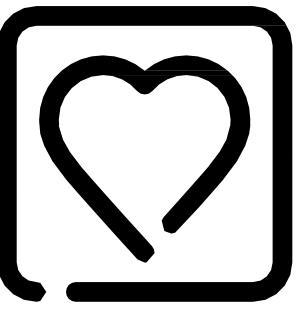


General business

The need to constantly adapt to customers and the market—having Sage Intacct in your corner helps with the volume, variety, and change.

“The productivity we’ve gained is **saving Certus around \$400,000 every year** because we’re able to **keep our staff extremely lean** and can do all of the reporting we need without a high-paid financial analyst.”

—Eric Williamson, CFO, Certus Energy Solutions

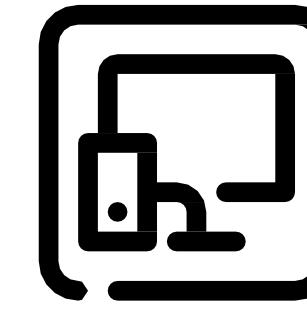


Non-profits

With unique challenges like program and project management, fund balancing, and complex reporting needs, Sage Intacct can help you tackle these issues with greater efficiency and managerial visibility—and less reliance on error-prone spreadsheets.

“When a large federal or corporate donor funds a multi-year literacy program across multiple schools, we can **accurately report** back the specific cost associated with each programmatic component, as well as the program’s impact to date, which **increases our credibility and accountability** as an organization.”

—Shari Freedman, CFO, Room to Read



Software-as-a-Service (SaaS)

Automate even the most complicated financial processes, adapt to new changes faster, and deliver flexible reporting in your rapidly growing business.

“I absolutely love Sage Intacct. **The ease of use, dimensional accounting, and real-time drill down into transactions** has made my life much easier.”

—Sunny Wu, VP of Finance, LogiSense

Industry overviews



Financial services

Integrate data from different systems, easily monitor financials from diverse portfolios, consolidate results across multiple operating companies, and create timely, actionable reports for your board.

“Sage Intacct **frees me up** to be a better partner to the C-suite. I’m able to get into analysis for strategic planning rather than just managing tactical financial processes because the team can handle those now without me. And that’s removed a tremendous burden for me.”

—Barbra Harris, CFO, Pathway Lending

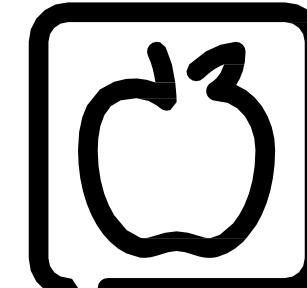


Hospitality

Focus on your guests with automated financial processes, gain more insight into your hospitality business, and make decisions that’ll boost profitability.

“With Sage Intacct, we work smarter instead of harder, even as we grow at a rapid pace. The fact that we’ve **added 7 new entities**—each with their own budgeting and financial planning requirements—**without needing any additional staff** is a true testament to Sage Intacct’s robust ERP capabilities.”

—Tamara Crawford, CFO, Tetherow



Healthcare

While striving to achieve scale, Sage Intacct can help you monitor performance and keep financial processes running smoothly—especially across multiple locations.

“In the world of community health centers, you have to be able to look at your financials in a very dynamic way in order to both **meet compliance requirements** and actively manage operations. From my own experience, as well as every other CFO I’ve asked, there’s no financial system better than Sage Intacct when it comes to **analyzing data across multiple dimensions**.”

—Lora Winchell, CFO, Hunter Health

Industry overviews



Professional services

Track project costs, expedite time-and-expense processes, consolidate resource management, and access real-time analytics to maximize business performance.

“Sage Intacct has also provided us **a level of flexibility that was unprecedented**. I can review and approve an invoice or journal entry from anywhere, whether I am working from a branch location on my computer or walking between meetings with only my phone.”

—Allison Benabente, CPA Controller,
Sprague Pest Solutions

Extend the power of Sage Intacct with Sage Intacct Marketplace

Expand Sage Intacct to more areas of your business with Sage Intacct Marketplace. It offers a variety of the most innovative cloud solutions—all built to be best-in-class and integrate with Sage Intacct from day one.

Something for everyone

If someone in your business needs it, you'll probably find it in the Sage Intacct Marketplace. It's easier than ever to manage your subscriptions, point of sale, payroll, projects, and so much more as Sage Intacct integration helps your data automatically flow into your financials—giving you a single place to get your full financial picture.

Future-proof your business

If your business requirements change in the future, no problem. Unlike suite solutions, Sage Intacct lets you keep your freedom. Just visit the Sage Intacct Marketplace whenever you need to extend your Sage Intacct ecosystem.

SAGE INTACCT



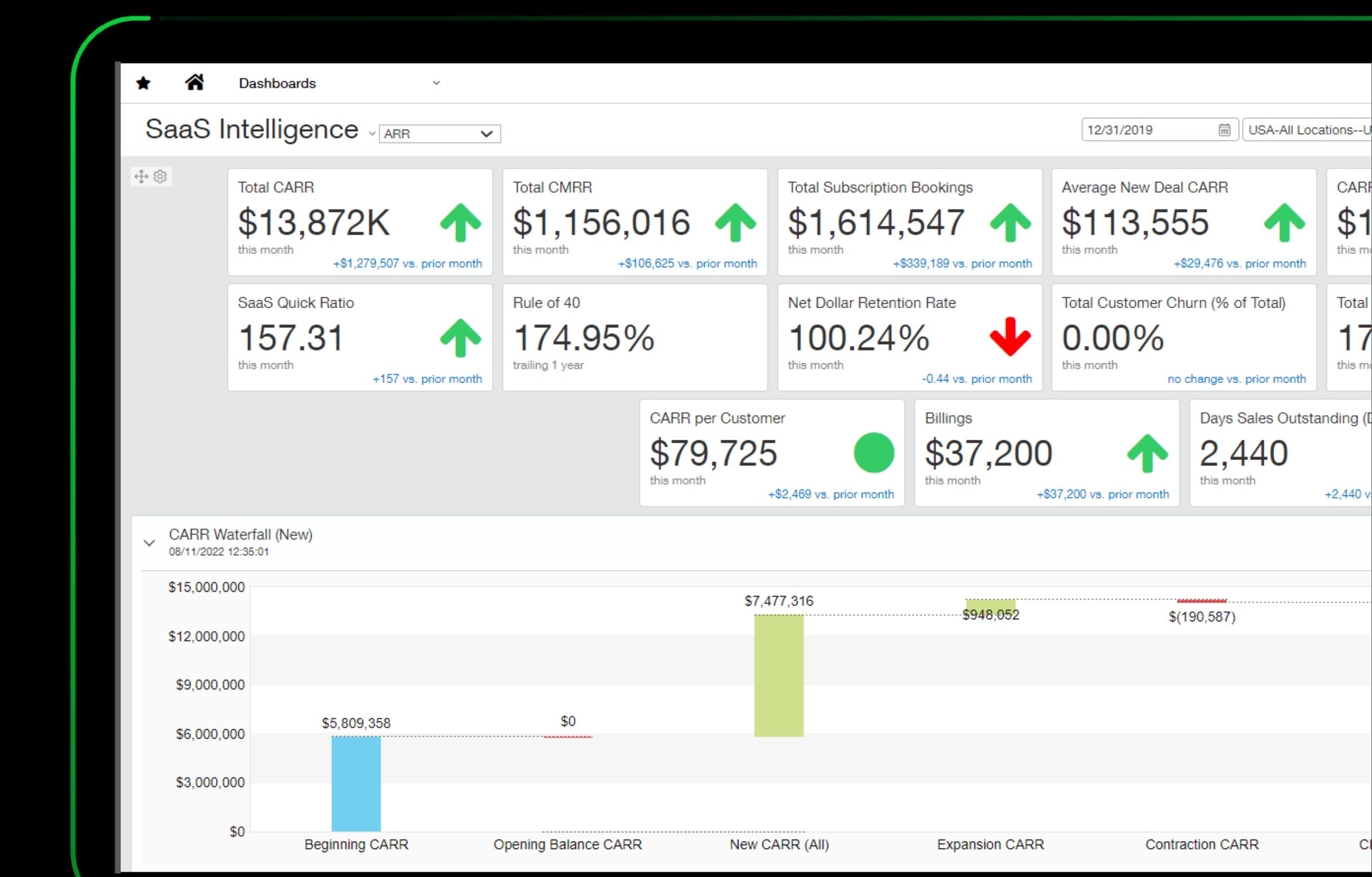
Industry and Customer Recognition



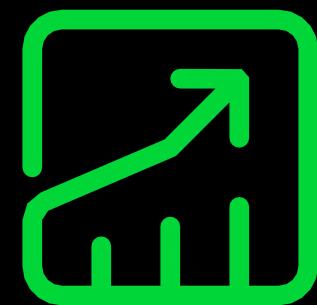
Top-rated ERP solution
by Trust Radius



Preferred provider
of the AICPA



Our customer achievements



250%

return-on-investment



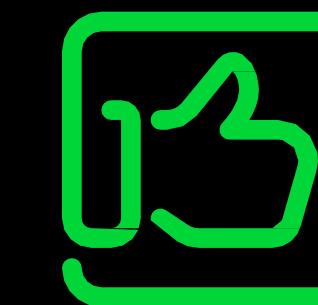
<6 months

payback



65%

productivity improvement



#1 in customer satisfaction

Sage Intacct has had the highest satisfaction, product direction and NPS scores compared to other cloud accounting peers since 2015.

#1

In Customer Satisfaction by G2 Grid Report for Mid-Market Accounting Software

2000+

Independent and verified reviews

Top-rated

Top-rated Enterprise Resource Planning solution in 2023 by TrustRadius

We're invested in your long-term success



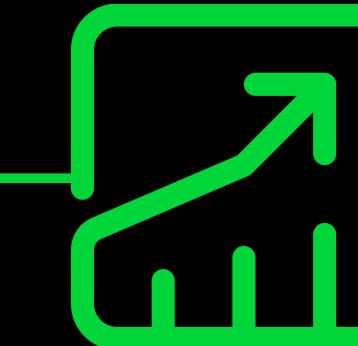
Your success is our mission

We're the right partner for the long-term



We've got the best technology for your organization

AICPA-endorsed and #1 in customer satisfaction



We scale with you every step of the way

You won't outgrow us



BAASS

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