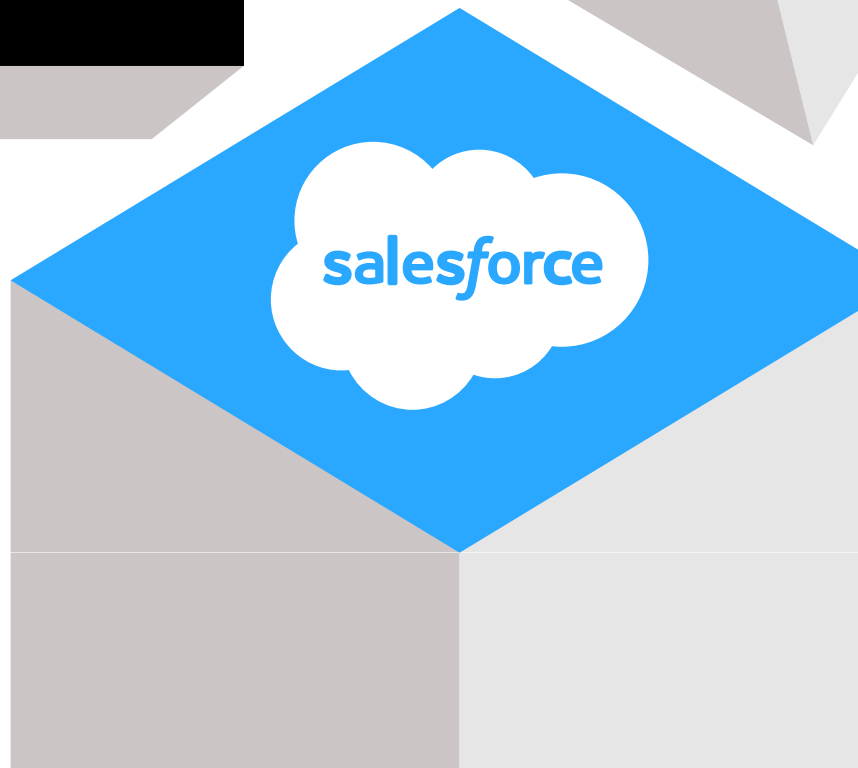
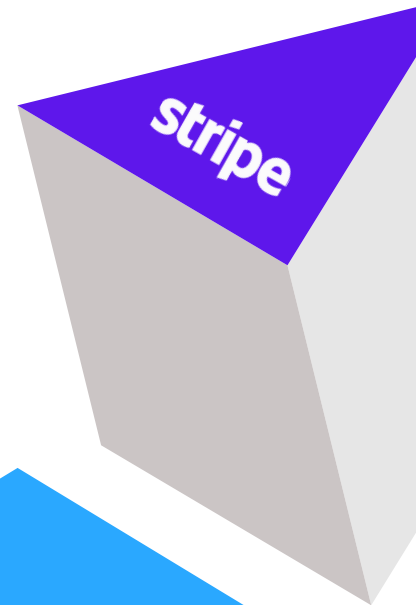


ULTIMATE GUIDE TO SAGE INTACCT INTEGRATIONS

Learn about integrations and how they can help eliminate manual processes wreaking havoc on your data & financial reporting.



WHAT'S COVERED IN THIS GUIDE

The Dilemma

What are integrations?

Types of integrations

Integration use cases

What's possible with integrations to Sage Intacct

Getting started with integrations to Sage Intacct

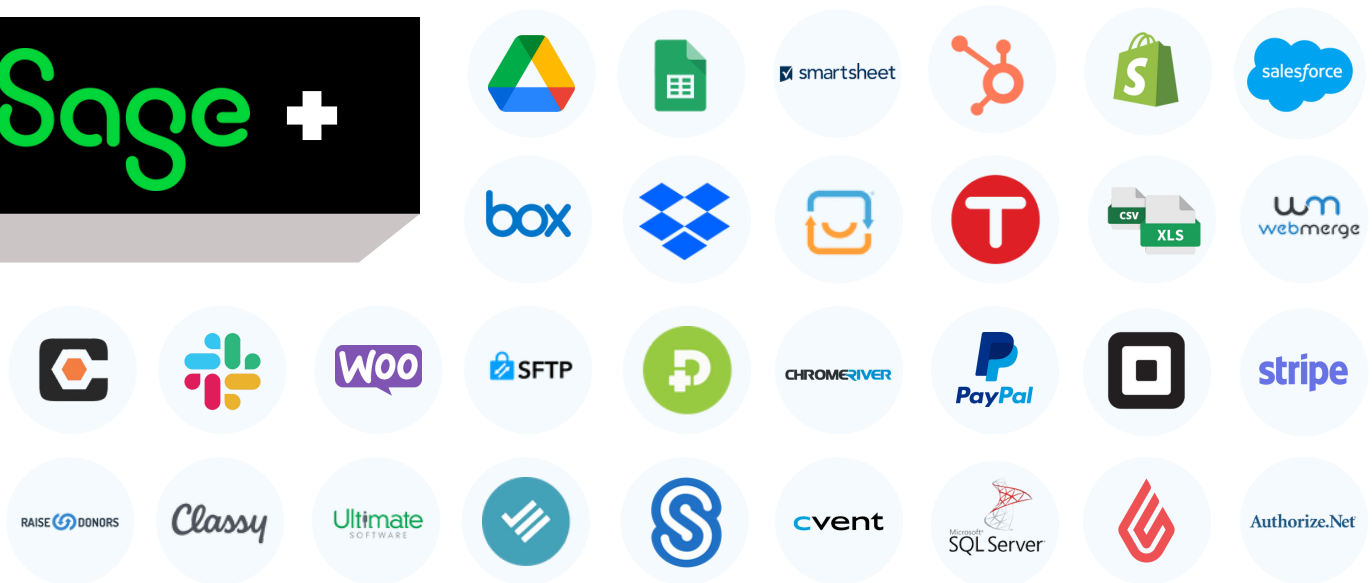
THE DILEMMA

When was the last time you were working on a project and found yourself bouncing between applications to get the data you needed to perform your job? Like five minutes ago?

We hear you. We see you.

And we're here to tell you: there's a better way.

If you were to do an inventory of the software applications used across your entire business, the number might surprise you. This is especially true for small and medium-size businesses experiencing growth.



Eventually, the spreadsheets and simple accounting system are joined by a new customer relationship management (CRM) system, budgeting tools, and an eCommerce platform.

With more systems comes more data. With more data comes more opportunities to grow the bottom line. That is, if your systems are connected and the data is in sync.

Without tight integrations between your most important business applications, teams operate in silos, adopting manual workarounds to get the data they need, which probably isn't what they were hired to do in the first place.

ALL USER INPUT IS ERROR.
ELON MUSK





And, since none of us are perfect (unless you have pets—then to them you are obviously perfect), we are inherently prone to making mistakes. Every time someone has to remember to pull a file or manually push a button, the greater the risk there is for inaccuracy. Not to mention, it's a huge time suck.

Manually importing and exporting data is not only a waste of valuable workforce talent, but it's also incredibly error-prone.

The average benchmark for manual data entry error is one percent. Consider one of every 100 entries being manually entered into your systems each day is wrong. What would the impact be over 100 days? A year? Five years?

That's where integrations come in.

With integrations between systems, the business minimizes risks associated with manual data entry while you get your time back to focus on higher value-add projects.

You know, the stuff you and your team were actually hired to do.

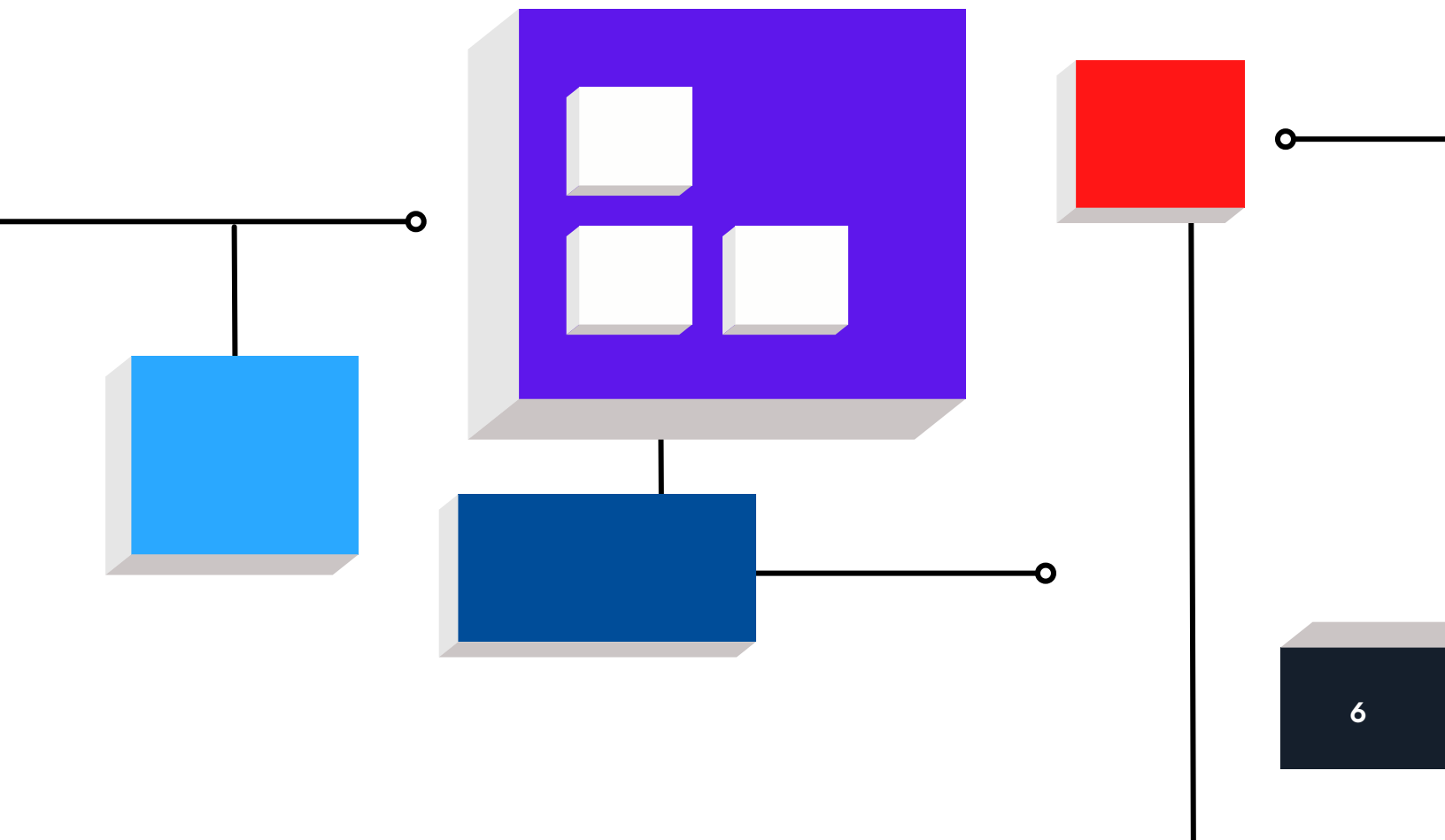
WHAT ARE INTEGRATIONS?

Since integrations come in many shapes and sizes and vary in complexity, let's break it down using a simple analogy.

Think about the television in your living room. Is it a Smart TV with apps to your favorite streaming services like Netflix or Hulu?

Or, do you use another device such as an Amazon Fire TV Stick or Apple TV to stream your favorite content?

Without apps or third party connectors, you'd be forced to consume content on different devices, or worse, not at all! Time to bust out the DVD player and go old school, folks.



As technology continues to evolve, so do our options for when, where, and how we leverage it to get the information we're looking for.

Integrations give us the same flexibility by creating connections between systems that tell certain data types when and how to interact—all without human intervention.

Integrations connect software, third-party applications, and/or data so they can share, combine, and enhance information with each other.

TYPES OF INTEGRATIONS

Like our devices, we have options when it comes to integrations. Let's take a look at some of the most common integration types so you can decide which one is best for your business.

PACKAGED

One of the great things about many cloud-based applications today (i.e. Sage Intacct, Hubspot, Salesforce) is that most have pre-built integrations to hundreds or even thousands of other applications.



Benefits: Pre-built integrations can be quick to implement with little to no technical resources.



Drawbacks: Pre-built means just that. You get what you get and are confined to the functionality as provided by the developer.

When evaluating a packaged integration, it's important for your organization to clearly define:

1. Which systems will data be flowing between?
2. Which direction does the data need to flow? (i.e. one-way or two-way sync)
3. Does this integration support that process entirely as we've defined it?

CUSTOM CODE

These types of integrations work as long as the APIs for the application are supported. You can generally make it do whatever you want, but it can be expensive and take a long time to get up and running.

Additionally, when it comes time to make changes to it, you'll need support from the integrations team, often requiring them to pause all workflows until fixes are complete.



Benefits: Custom code can be written to your exact specifications and business processes using the APIs.



Drawbacks: This approach can be time intensive, difficult to scale, more costly, and usually requires a highly skilled developer to maintain it.

When evaluating custom code, it's important for your organization to clearly define:

1. Which processes specifically are not supported by the packaged integration?
2. Do we have the skill set internally to build and maintain the integration?
3. If not, are we willing to outsource to a third party?

An API (Application Programming Interface) is a set of functions that allows applications to access data and interact with external software components, operating systems, or microservices.

Middleware is commonly characterized as the “glue” that connects different software platforms and devices together.

MIDDLEWARE

This is an exploding landscape in today’s technology. Much like custom code, as long as the system you’re wanting to integrate to has an API that supports the function, you can get exactly what you want from the integration.

Unlike custom code, middleware tools are often referred to as no-code/low-code, making it easier for business users to deploy and maintain it. You have the ability to effortlessly extend the integration across multiple applications.

Another key difference with middleware platforms like Workato, Jitterbit, or Tray.io, is the error handling mechanisms that help in alerting your team if and when the integration isn’t working properly.



Benefits: Middleware solutions can support very simple to specific and complex business processes at scale. They’re easily extensible and have built-in error handling mechanisms to notify users when there’s a problem with the integration.



Drawbacks: Most middleware providers require an annual subscription to continue using their platform so there are ongoing costs associated with this approach as long as your organization has integration needs.

When evaluating middleware, it's important for your organization to clearly define:

1. How many apps do you need to connect? Consider future app integrations and/or enhancements to existing systems if known.
2. Have you defined the logic and taken into consideration different variables? For example, before creating a new customer, do you want to see if one exists already? You may also consider using other identifiers such as zip code, web domain, and/or phone number as part of this process for more accuracy.
3. Do the systems you're working with have governor limits? Most applications place limits on the number of API calls you can make in a given time period. Analyzing anticipated volume at peak times will help to determine batch/bulk integration rather than a single transaction at a time.

ROBOTICS PROCESS AUTOMATION (RPA)

In this approach, you have a bot that works through the user interface instead of the API. It's customizable much like middleware but is a lot faster than writing your own code. Investment in more time and money is expected with this one because you have to continue updating the bot to make changes for you.



Benefits: Since RPA is layered on top of systems (not built into them), it simplifies new deployments or changes to existing bots while mitigating disruption to the business.



Drawbacks: If bots are not effectively documented and governed, it can create complexities that make troubleshooting more difficult to pinpoint. RPA only works when the process is very narrowly defined, which may require multiple bots to account for deviations in the process.

Robotic process automation (RPA) refers to software that can be easily programmed to do basic, repetitive tasks across applications.

When evaluating RPA, it's important for your organization to clearly define:

1. Is the process repetitive and high volume?
2. Is the process documented with specific actions/decision points?
3. Is the data used by the process structured consistently between apps?



To learn more about RPA, visit the Workato blog:
[8 benefits of using RPA \(and how to get even more from the software\)](#)

No two integration projects are the same.

There's not necessarily a right or wrong approach to integration. Some environments may leverage a combination of approaches to accomplish end-to-end workflows.

Use the tips in this guide to help you make the best decision for **your organization**.

INTEGRATION USE CASES

These are just a few examples of the most common use cases we see for SMBs looking to gain more efficiencies internally and provide better experiences for their customers.

ECOMMERCE

If you're one of the **more than nine million businesses in the world** with an online storefront, you know how cumbersome it can be to keep orders, payments, and inventory in sync—especially if your eCommerce solution isn't integrated with an ERP or accounting software.

Without an integration, finance teams are forced to manually import and export spreadsheets to get the transactional data they need for month-end reporting and forecasting.

- By the year 2040, it's estimated that **95% of all purchases will be through eCommerce.**
- 46.5% of small to mid-sized businesses say that **offering free shipping increases their profits.**
- eCommerce sites can gain a **35% increase in conversion rates** with an optimized checkout design.

CREDIT CARD PROCESSING

With so many ways to collect money these days, how do you make sure your business gets paid?

For those accepting Dogecoin, we're out.

But if you're using a payment processor like Stripe or Square to manage your billing, an integration to your accounting system will ensure transactions stay in sync.

- Online bill payment provider Fiserv's "2021 Expectations & Experiences: Consumer Payments" report found that **a majority of consumers want to have multiple payment options when paying bills.**
- Among respondents, 84% say **having the option to pay by credit card is a must-have** or nice to have, followed by 79% who said paying by debit card was a must-have or nice to have.

Integrations between **payment processors** and **Sage Intacct** help businesses:

- Manage recurring billing
- Automatically generate invoices
- Sync transactional data in real-time
- Seamlessly issue refunds without manual effort
- Provide a better customer experience
- Collect on invoices faster

CLOUD CRM

According to industry estimates from Grandview Research, more than 91% of companies with 10 or more employees use a CRM to manage conversations with customers. A CRM has tremendous benefits for other functions in the organization, especially when connected to an ERP or finance system.

- 91% of data in CRM systems is **predicted to be incomplete**, stale, or duplicated each year.
- 80% of companies reported **having to make changes to their support technology in 2020**, including adding new features and capabilities to their CRM solution.

Some of the most common use cases for integrating a CRM like **Salesforce** to an accounting platform like **Sage Intacct** include syncing:

- Customer information to improve accuracy and prevent redundancy
- Sales quotes with sales orders for faster invoice generation and order fulfillment
- Payments for real-time visibility of paid and unpaid invoices
- Dues, donations, memberships, or subscriptions for a painless month-end close

WHAT'S POSSIBLE WITH INTEGRATIONS

Need to sync deal information from your CRM to Intacct?
We've built an integration for that.

Have an online storefront but need to generate invoices from
your accounting system? Our team has been there and built an
integration for that.

Need to get data from an application without an API into
Intacct? Export a CSV file to your FTP, Box, Google Drive (any
cloud-connected repository) and we'll do the heavy lifting
from there.

Some of the **most common app integrations** we
build for SMBs and nonprofits include:

- **Salesforce to Sage Intacct**
- **Salesforce Nonprofit to Sage Intacct**
- **Stripe to Sage Intacct**
- **Shopify to Sage Intacct**
- **HubSpot to Sage Intacct**



Other integrations we've built to **Sage Intacct**:

.CSV	ABRM	Authorize.net	BP Logix	Box
Chrome River	Citrix ShareFile	Classy	Cvent	Dropbox
Google Drive	HubSpot	Jira	Kaltura	Lightspeed
Microsoft SQL	My SQL	PayPal	PayTrace	Pipedrive
Planning Center Online	Point Click Care	ProCore	Proprietary Client Apps	Raise Donors
Restoration Manager	Salesforce	sFTP/FTP	Shopify	Slack
Smartsheet	Square	Stripe	SQL Databases	TaskRay
TSheets	Ultimate Software	WebMerge	WooCommerce	Your app

GETTING STARTED WITH INTEGRATIONS TO SAGE INTACCT

Before you go it alone, we recommend starting with these tried and true resources:



SAGE INTACCT MARKETPLACE

Sage Intacct customers have access to direct integrations built by Marketplace partners leveraging Web Services to connect their solutions to Intacct. Shameless plug: **check [this listing out](#)** while you're shopping around.



MIDDLEWARE/IPAAS SOLUTION

We've helped hundreds of organizations automate their operations with three-time Gartner market leader [Workato](#). We even use it for streamlining our own workflows!



INTEGRATION PARTNER

By working with an integration partner like Venn, you'll benefit from integrations tailored to your most complex processes. We take the guesswork out of planning for and executing an integration project. Also worth noting: Venn earned the 2021 Marketplace Partner of the Year: Customer Hero award.

Here are a few more things to keep in mind before kicking off an integration project:

SPEND TIME PLANNING FOR SUCCESS

Before starting an integration project, there's some planning that needs to be done. If you can finish this sentence then you're on the right track:

"When properly integrated, our systems will..."

Your answer should be specific and include requirements for the end result to be considered successful.



Not-so-specific: When properly integrated, Sage Intacct will sync sales orders from Salesforce.



Very specific: When properly integrated, Sage Intacct will pick up the daily sales orders and corresponding customers in Salesforce to create Sales Order Documents with the Transaction Definition of 'Sales Invoice.'

"Always begin with the end in mind."
Steven Covey, 7 Habits of Highly Effective People

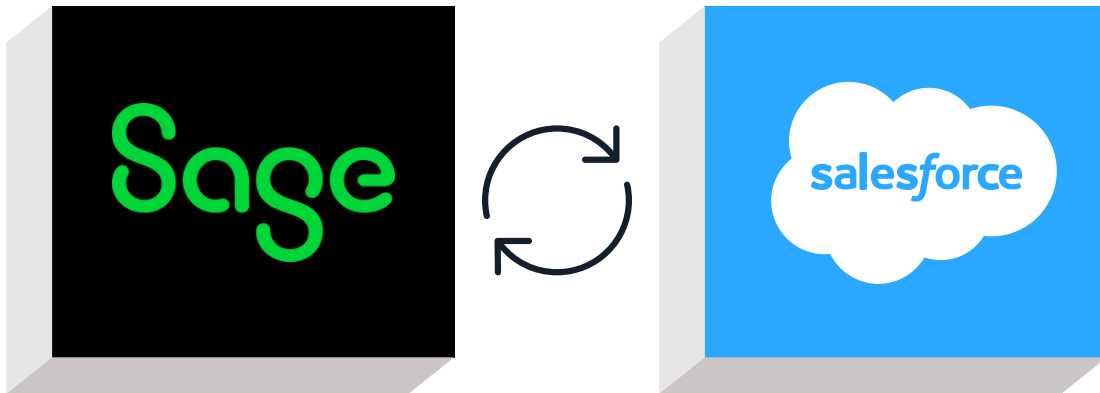
BEWARE OF BAD DATA

Be cautious of bad data when integrating. This includes duplicates and incorrect or missing data. If you have the wrong information in your source system, make those adjustments before pushing the workflow into the target system.

It's also important to note that many applications use different terminology to describe what equates to the same thing.

For example, Shopify and Salesforce each have "products," but Sage Intacct lists the same thing as "items."

Before you start the sync between the two, make sure you get them speaking the same language (or at least understand they may be listed differently).

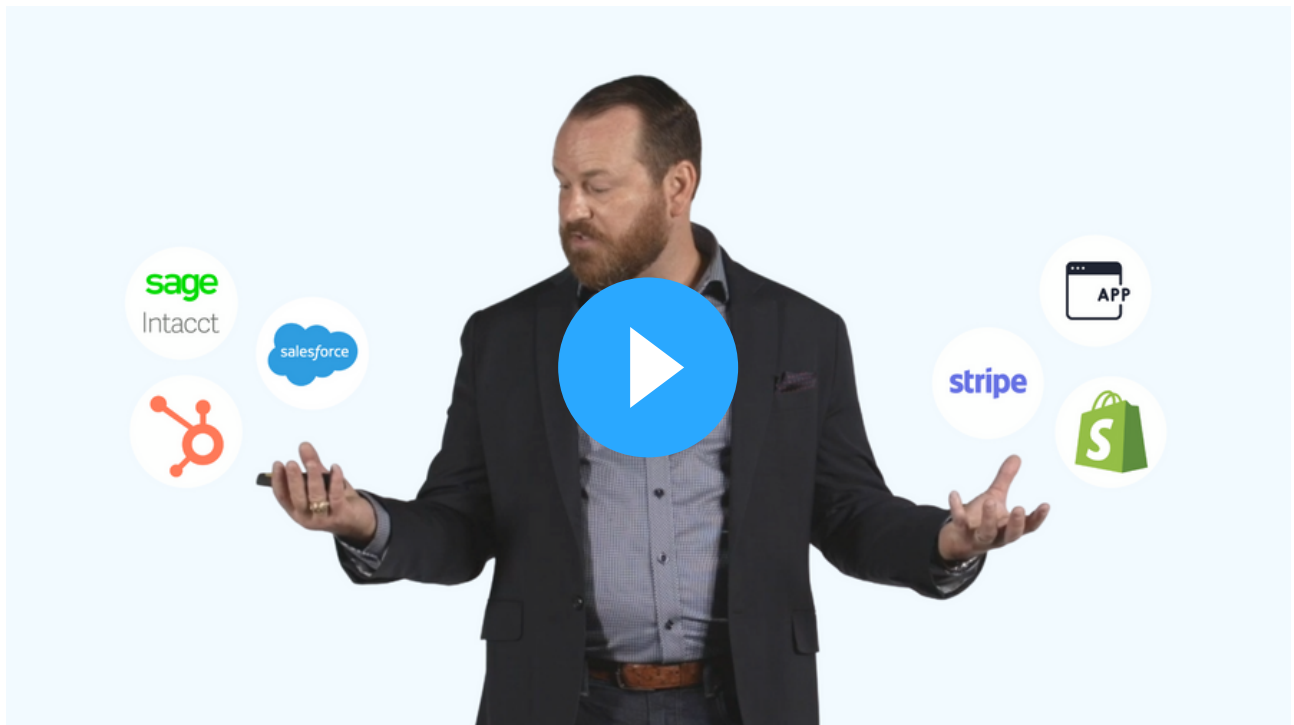


Customer	○	—————	○	Account
Sales Order	○	—————	○	Opportunity
Invoice	○	—————	○	Invoice
Payment	○	—————	○	Payment
Items	○	—————	○	Products

KNOW YOUR PROCESSES UPSTREAM AND DOWNSTREAM

Ask yourself, "Is there a system that comes before the integration? Where does the integration fit into our current workflow?"

One thing our team does before starting a project is a **Requirements Gathering Workshop**. We start by mapping out all the options we can think of. Then, we decide which process gets us to the desired end result most efficiently and effectively because there are often different ways of tackling an integration project.



Need help with an integration to Sage Intacct but not sure where to start?



Schedule your free consultation to get started.

ABOUT VENN TECHNOLOGY

Venn Technology helps finance professionals get their time and sanity back by building integrations between their most important business systems and just about anything with an API. Plus, we're pros at implementing and customizing all things Salesforce.

Our integrations and automations are designed to put an end to siloed processes—saving clients time and money by eliminating error-prone, manual operations that cause continual frustration and put organizations at risk.

Our mission: Integrate. Automate. Be free!



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Because we know our stuff, but we didn't just come up with those cool stats & facts all on our own.

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