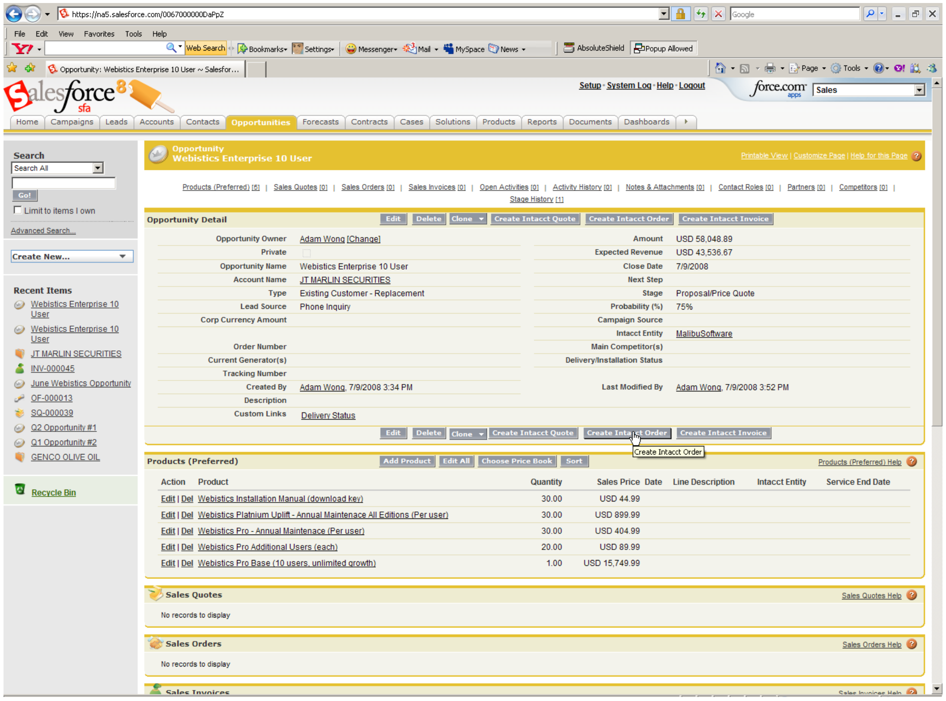
Intacct®

Preferred Provider of
Financial Applications for
AICPA business solutions

Product Brief

Intacct MAX™ for Salesforce CRM

Intacct MAX™ for Salesforce CRM combines Intacct and Salesforce CRM for complete quote-to-cash management, letting your sales team leverage the leading on-demand CRM system for lead, opportunity, quote and front office customer management while your finance team leverages Intacct, the leading on-demand financial management application for back office processing. You can eliminate manual data re-entry, deploy a single, integrated quote-to-cash process and give each member of the sales and finance teams the information they need, where and when they need it to operate more effectively and productively.



With Intacct MAX for Salesforce CRM, sales people can submit quotes and orders to the financial system without leaving their Salesforce CRM application.

OPPORTUNITIES TO QUOTES

Automatically generate quotes from Salesforce CRM opportunities and streamline the entire sales cycle — from quote-to-cash — all in one system.

QUOTES TO ORDERS

Sales representatives can turn quotes into orders with a single click, eliminating paperwork and manual re-entry of data. They can verify pricing in real time, and complete the sale online.

ORDERS TO FULFILLMENT

Your finance team can instantly verify pricing, check inventory and shipping schedules and ensure customers receive goods and services on time.

ORDERS TO RENEWALS

If a contract or subscription is going to expire soon, Intacct can automatically generate a renewal sales opportunity in Salesforce CRM based on the original contract term plus desired price adjustments.

One On-Demand Quote-to-Cash System

Intacct MAX for Salesforce CRM lets your sales team create a booked order in Intacct from a sales opportunity in Salesforce CRM — with a single click. Sales staff can create sales quotes, convert existing quotes to orders, verify pricing and inventory and track order status in real time, all from within their familiar Salesforce CRM applications.

Higher Sales Team Productivity

With Intacct MAX for Salesforce CRM, your sales team can view financial data inside Salesforce CRM that is typically only available in back office systems. Sales reps can see order information, provisioning and shipping status, billing status and payments, allowing them to understand what is happening with their customers. Sales reps can also view customer aging, product backlogs and transaction ledgers directly in Salesforce CRM and without requiring assistance from the finance department, so they know which customers are behind in payments and which are waiting for shipments. Sales people have instant access, from anywhere, to key financial information they need to provide better service to their customers.

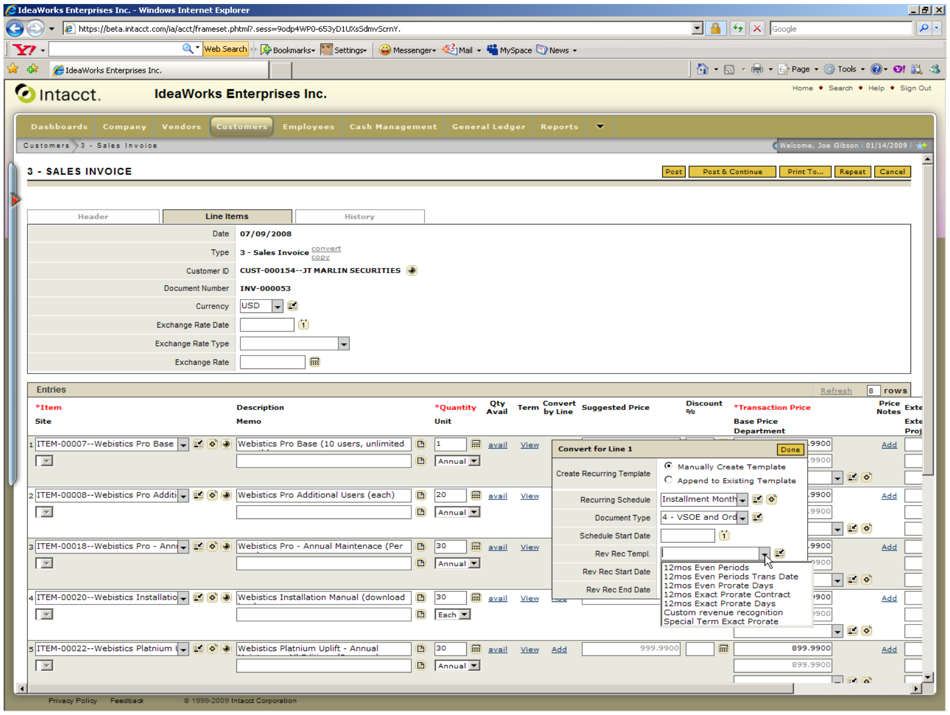
Share Information Across the Enterprise

Your warehouse managers can leverage Intacct MAX for Salesforce CRM to instantly view approved sales orders, and your finance staff has insight into support issues when calling customers to collect payments.

> "Salesforce CRM addresses the front end of an important business process — capturing leads and closing orders, while Intacct handles the back end, including booking the order, fulfillment and actually collecting the cash. By uniting the Salesforce CRM and Intacct systems, customers eliminate the in-between processes that are costly, time-consuming and error-prone."
>
> – CIO, Ingres Software

Automate Sales Contract Renewals

Intacct MAX for Salesforce CRM enables you to automate the renewal process for expiring contracts or subscriptions. Intacct MAX for Salesforce CRM can automatically generate a renewal sales opportunity in Salesforce CRM before the existing sales contract expires, enabling your sales or renewal teams to manage and forecast renewals and extensions. You can notify both your sales rep and your customer about the pending renewal through pre-built email templates. You can configure your renewal pricing policy to match your business process, automating price increases or maintaining the discounts originally given. This ensures you maximize renewal revenue by getting ahead of pending events and by ensuring that the right people in your organization are actively working your renewal stream at the right time.



Intacct MAX for Salesforce CRM lets your finance team manage the billing and payments process for your sales orders.

Key Features

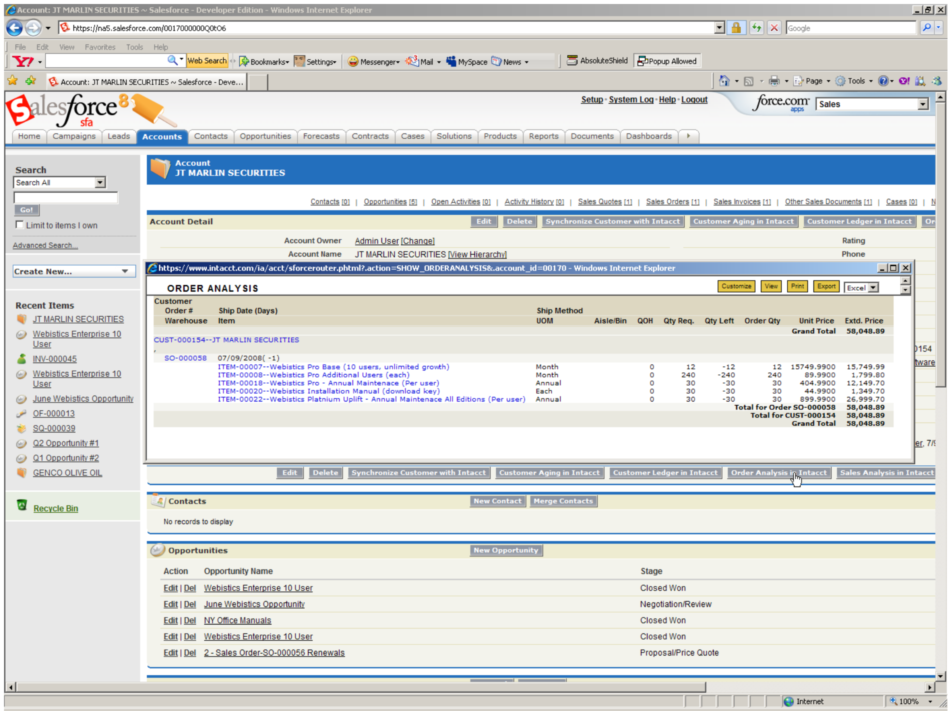
- Eliminate manual re-entry of sales order information
- Add visibility to Salesforce CRM — order information, shipment status, billing status and more
- Works with Intacct Global Consolidations to easily manage orders from multiple accounting entities

"We wanted a web-based solution that would enable our sales teams to create a contract in Salesforce CRM and then simply push that information to our financial applications, so we could eliminate duplicate efforts between sales and accounting. Intacct not only met this requirement, but also offered incredible reporting and dashboard capabilities that we didn't have with our previous solution."

– Controller, Bulk TV and Internet

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 and the lowest total cost of ownership. Contact us to learn how Intacct can help you run your business, on-demand.



Updated billing and payment information is reflected in Salesforce CRM.