Intacct and Sage CRM Integration

Situation

One of our Intacct customers uses Sage CRM to manage leads, prospects and opportunities. Using out-of-the-box Sage CRM functionality and workflow, they promote leads to prospects, add opportunities to companies and then add quotes and sales orders to those opportunities. Before entering sales documents into Intacct, they promote prospects to Intacct customers and the opportunities to Intacct projects.

What we did

CodePartners developed a few simple actions in Sage CRM so that, with a few clicks, all the details of the customer and the project transfer to Intacct. Using ASP.NET, Sage CRM SDK, and Intacct API, we created a link on the Sage CRM Summary page to transfer the data easily into Intacct. There is also a built-in safeguard to prevent duplicates.

Actions:

Current State: In Progress

- Lost
- Quote Sent
- Make Note
- Promote Opportunity to Intacct

Future goals

Future goals for the integration include pushing open documents into Intacct from Sage CRM and providing bi-directional flow.

CodePartners