

SugarCRM is the fastest growing CRM software package in the world, and one of the leading cloud based CRM solutions. Intacct is a leader in cloud based accounting and financial management systems. It only makes sense to integrate the software so that companies can use best in class software in each software category without missing out on critical integration components all while staying safely and conveniently in the cloud.

The **FBSG Sugar CRM –Intacct Integration Application** addresses this. It allows the two software packages to “talk with each other” by sending customers, inventory, sales history, and credit information from Intacct to Sugar and by sending quotes and sales orders) from Sugar to Intacct. The synchronization between the packages can be set on a scheduler or run manually.

Key Benefits

- Eliminates double entry of customers in both CRM and accounting
- Updates CRM with critical customer sales history and credit information that can be used for marketing campaigns and salesperson inquiries
- Provides access to product lists in CRM without having to manually key in items
- Eliminates double entry of quotes and sales orders in both CRM and accounting
- Keeps accounts and customers in sync
- Streamlines the “quote to cash” process



Features:**Intacct Customers to Sugar Accounts**

This takes Intacct customer data and moves it to the SugarCRM Accounts Module. New customers will be created automatically in SugarCRM. Existing customers will have their data (name, address, etc.) overwritten each time the synchronization is run.

Intacct Contacts to Sugar Accounts

This takes the contact information from the Intacct and move it to the SugarCRM Accounts Module. New contacts will be created automatically when synchronization is run.

Intacct Customer Sales History & Credit Information to Sugar

This function moves various Intacct sales history values to the new custom “Sales History” module in Sugar. No other Sugar data is overwritten during this synchronization.

Intacct Inventory to Sugar Product Catalog

This takes Intacct inventory data (from the Inventory Master file) and moves it to the SugarCRM Product Catalog Module. Records for the same item number in SugarCRM will be overwritten with the latest Intacct data each time the synchronization is run.

Sugar Quotes and Sales Orders to Intacct

This function synchronizes quotes and sales orders entered and updated in Sugar with Intacct sales orders.

Compatibilities:

This software is currently compatible with:

Intacct

SugarCRM v6.0

SugarCRM v6.1

SugarCRM v6.2

SugarCRM v6.3

SugarCRM v6.4