Sage Intacct Forms and Operational Flows

Portals, Forms, and Flows

Exploring how Sage Intacct Forms and Flows Stacks up against industry leading solutions

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Sage Intacct Forms and Operational Flows

Forms, Workflow, Portals and File Management Solution for Sage Intacct

The next technology revolution is the creation of portals by Small businesses to better automate and secure workflow experiences outside of email.

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Table of contents

We will address 4 key features of Sage Intacct Forms and Operational flows

Forms
No-code Form Designer and SI Process Extenders

Flows
Advanced Workflow options for any workflow

Portals
Deeper relationship management across constituents

File Management
SI Dimensional Anchored ECM

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Forms

No Code Designer allowing Sage Intacct customers to Collect Data from Anyone or Any Thing.

Web Forms, Portal Users, Employees, and IOT devices feeding data into powerful workflows with seamless integration to Sage Intacct.

No Code Forms Designer

SIFOF offers a powerful No-Code Form Designer comparable to tools like Microsoft Form, Google Form, Formstack, and Jot Form.

Competitive advantage is the native integration with Sage Intacct, and library of process extenders called "Clusters".

Sales narrative for replacing current form tool with SIFOF is that you can have 1 forms platform with integration to Sage Intacct.

The **Average Customer** uses SIFOF for +**18 Workflows.**

Formstack's largest client by volume chooses SIFOF.

"As someone deeply involved in the operational efficiencies of Academica, I've had the opportunity to extensively use both Formstack and Sage Forms within our processes. While both platforms offer a suite of functionalities aimed at simplifying data management and workflow automation, my experience has led me to strongly advocate for Sage Forms, particularly when it comes to seamlessly integrating data into our SAGE Intacct system.

Sage Forms direct integration capability has been a game-changer for us at Academica. The ability to streamline information smoothly and efficiently into SAGE Intacct without the need for manual intervention or additional steps has not only saved us valuable time but also significantly reduced the margin for error. This direct pipeline into our financial system ensures that our data is always up-to-date, accurate, and where we need it to be, allowing us to focus more on strategic decisions rather than on data management.

The user-friendly interface and robust support provided by Sage Forms have made the transition and daily use of the platform smooth and hassle-free. Their commitment to continuously enhancing their platform to meet their clients' evolving needs is something we at Academica greatly appreciate. In comparing SF with Formstack, while both have their strengths, for our specific needs at Academica—especially in regards to direct integration with SAGE Intacct—Sage Forms stands out as the superior choice.
-Ryan Shook, CTO, Academica.org

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Portals

Don't Leave your most valuable relationships to email and file attachments.

Create compelling experiences for any constituency.

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No Code Portal Designer and Centralized administration of Portal Users.

SIFOF Offers customers the ability to create bespoke portal experiences for any constituency. Easily manage these portal experiences via point and click portal assignment, and automated tagging driven by Sage Intacct data.

Portal tagging based upon **Vendor/Customer Creates, Account Groups, Project Creates, Project Resources** managed in Sage Intacct automating data access for external users.
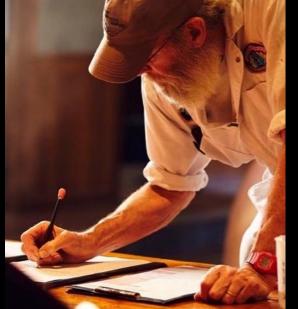
Flows

Powerful and collaborative, multi-dimensional workflows.

Layered Workflow exceptions able to handle any company quirk.

File Management

Forms link to Sage Intacct Dimensions creating a complete record history.

Continuous Improvement

Create a Request Culture in your company and create greater process control opportunities.

90% reduction in Time and Cost to Implement new processes.

Reduce technology count by 50%

Reduce technology spend by 30%

Take back control of your workflow management

Empower a culture of Constant Improvement

Put someone in charge!

Thank you!