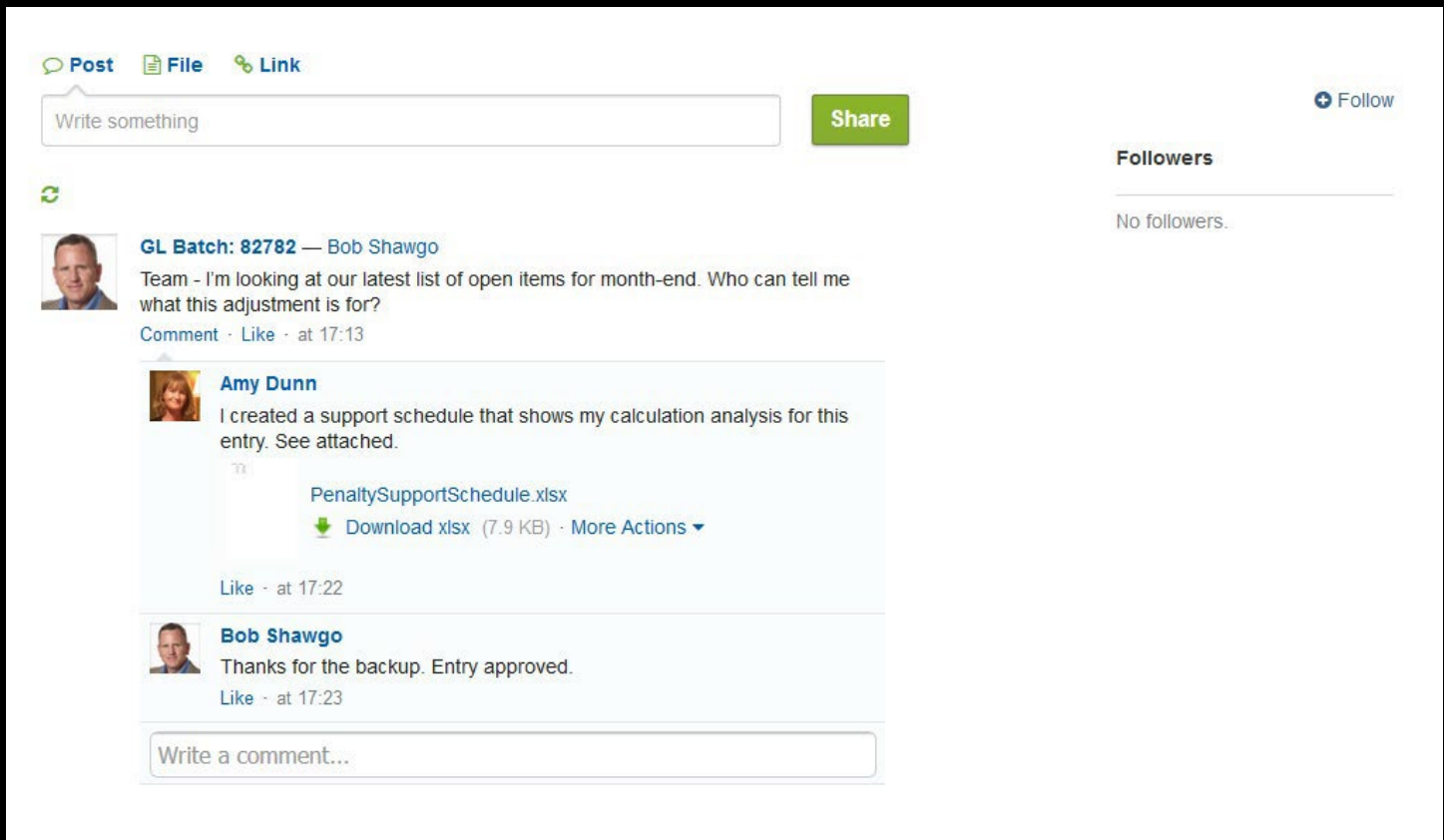**Datasheet**

Sage Intacct Collaborate

Enable your finance, sales, and services team to cooperatively resolve any issue.

Open communications are vital for any organization's performance and success. Unfortunately, companies can inadvertently develop siloed communications that slow down or even derail critical financial processes. Overcome these barriers, increase productivity, and facilitate knowledge sharing with Sage Intacct Collaborate, a secure social layer included in your Sage Intacct cloud financial management subscription.

Collaborate in real time

- **Easily resolve non-routine transactions:** Keep your business on track by collaborating on non-routine transactions such as clarifying policies, gathering missing information, or resolving exceptions.
- **System of record:** Receive and respond to messages through email and collaborate. Never lose a conversation since they are all stored in the transaction record.

Say goodbye to excess meetings and communication barriers. Synchronize your various finance and sales teams by enabling transparency and promoting collaboration. Realize the productivity gains by easily resolving non-routine transactions on a single system of record with Sage Intacct Collaborate.

Inform and stay informed
- **One-click visibility.** See all messages related to an issue with one click. Leave a note rather than explaining the situation multiple times.
- **Constant visibility.** Track the conversations through email notifications, the collaboration center, and real-time feeds in your Sage Intacct dashboards.
- **Automated alerts.** Receive automatic notification when discounts, budgets, or other critical values change.
- **Group messaging.** Create groups to facilitate communications among relevant parties to focus on specific tasks such as quarter close, audit, order processing, and more.
- **File attachments.** Upload file attachments directly to your conversations in Sage Intacct and track their updates with built in version control.

Integrate with Salesforce
- **Unify conversations.** Collaborate in real time on shared records inside Salesforce or Sage Intacct for clarity between sales and finance teams.
- **Mobile chatter notifications.** Get notifications from both Sage Intacct and Salesforce via the Salesforce mobile app.
- **Create collaboration groups**. Extend groups you define in Salesforce to include Sage Intacct users.

To learn more about the Sage Intacct financial management solution, sign up for a **coffee break demo**.

www.sageintacct.com/intacct-collaborate
877-437-7765