



BPA Platform

# Sage Intacct & Salesforce

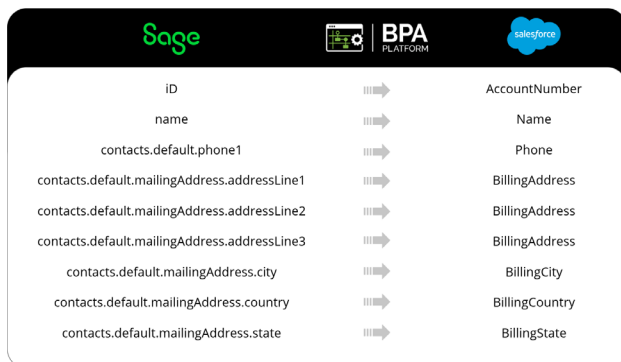
Codeless Platforms' Sage Intacct & Salesforce integration solution provides Salesforce and Sage Intacct users and partners with a pack of preconfigured tasks that automates the synchronisation of customer accounts and contacts, and product data and quantity.

The Sage Intacct & Salesforce integration solution reduces repetitive manual administration tasks from employee workloads, helping to remove data entry errors, increase employee productivity and improve company performance.

## Creating customer accounts

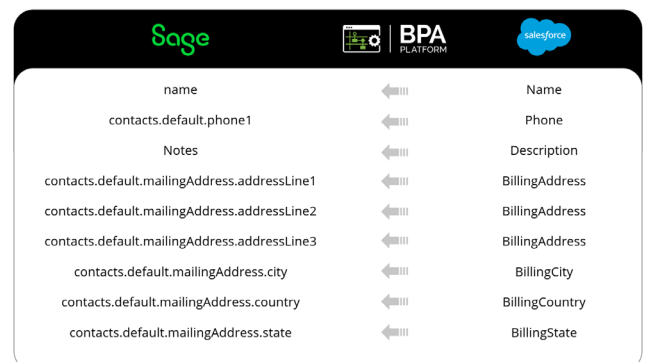
### Sage Intacct to Salesforce

New customer accounts created in Sage Intacct can be created in Salesforce, including account number, name, phone and billing address.



### Salesforce to Sage Intacct

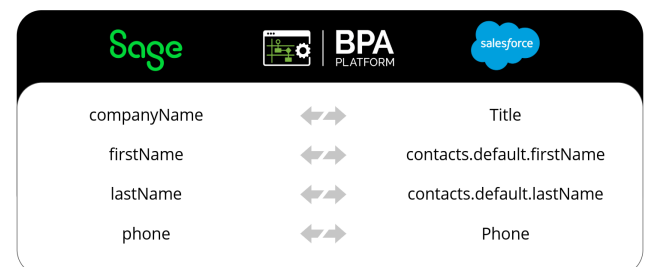
New customer accounts created in Salesforce can be created in Sage Intacct, including name, phone, billing address, and any notes related to that account.



## Creating customer contacts

### Bi-directional synchronisation

New customer contacts can be created in either Sage Intacct or Salesforce, including company title, name of contact, and phone number. Typically, the contacts data will be batched to run every 15 minutes during business hours.



The **tasks** in this document outline both bi-directional and one-way processes between Sage Intacct and Salesforce. The solution **requires three connections**: SQL Connector Tool (x1) for BPA Staging DB • Salesforce Connector Tool (x1) for Salesforce API • Sage Intacct Connector Tool (x1) for Sage Intacct API

## Product master data

### Sage Intacct to Salesforce

Product master data, including the name, description and price of the product, will be synchronised from Sage Intacct to Salesforce on an hourly basis.

The Sage Intacct id is used as the synchronisation key enabling new products and subsequent updates in the Sage Intacct master data to be reflected in the CRM copy.

Sage	BPA PLATFORM	salesforce
id	→	IntacctID(CustomField)
itemType	→	ProductClass
name	→	Name
notes	→	Description
quantityAllocated	→	Quantity
purchasing.standardCost	→	Pricebook2.price

## Product stock levels

### Sage Intacct to Salesforce

On-hand stock and available stock levels are synchronised to the Salesforce product list from Sage Intacct.

## Synchronising data

### BPA Platform's Staging Database

All data is temporarily stored in a staging database where the engine preps the data and compares records to determine which system needs updating.

The information in this document outlines our [standard templated tasks](#). [Additional requirements](#) can be catered for, but are **subject to additional cost and scoping**.

## BPA Platform: System Requirements

BPA Platform is Windows-based software, utilising a true three-tier client server model over TCP/IP, with a multi-threaded server running as a Windows Service. It can run in 32-bit and 64-bit environments, and can communicate with both 32- and 64-bit external systems.

### Supported Operating Systems \*

Microsoft Windows Server 2016  
Microsoft Windows Server 2019  
Microsoft Windows Server 2022

### Supported Hardware \*

Dual 2.4 Ghz Quad core  
4 GB of available memory  
1.5 GB available disk space  
1280x1024 desktop monitor

### BPA Platform Requirements \*

BPA Platform 2024  
Microsoft SQL Server ConnectorTool  
Sage Intacct Connector Tool  
Salesforce Connector Tool v2.0.4.0 or higher

### Supported Sage Intacct versions \*

Sage Intacct and Sage Intacct Starter Edition

\* minimum requirements