

Sage Software
Solutions (P) Ltd.

Sage Partner

WhatsApp Integration for Sage Intacct



**Transaction updates,
delivered on WhatsApp**

Auto-send transaction information updates in Sage Intacct to the WhatsApp of customers and vendors

The screenshot shows the Sage Intacct interface for a sales order. At the top, the 'Skyline Software' logo and 'USA 1' region are visible. The main header shows 'Order Entry' and the specific order 'Sales Order-SO0040'. A red rectangle highlights a green 'WhatsApp' button located next to 'Print or email' and 'Edit' options. Below the header, there are tabs for 'Transaction' and 'History'. The 'Transaction' tab is active, displaying a table with transaction details for 'Community Agency Services (10010)'. The table includes columns for Transaction date, Date due, Item totals, Subtotals, Transaction total, and Transaction status. Below the table, there is a section for customer and shipping information, including Date, Customer, Project, Document number, Bill to, and Ship to details.

Transaction date	Date due	Item totals	Subtotals	Transaction total	Transaction status
08/15/2024	09/14/2024	500.00	0.00	500.00	Pending

Community Agency Services (10010)

Date: 08/15/2024

Customer: 10010--Community Agency Services

Project: --

Document number: SO0040

Bill to: Martin, Marco

Ship to: Martin, Marco

612 E Boulevard Ave
Bismarck, ND 58505 United States

WhatsApp Integration for Sage Intacct enables businesses to instantly send transaction updates and document copies to customers and vendors through WhatsApp, with all key details automatically pre-filled for faster, smoother communication.



Updates sent as soon as invoices or POs are generated



Share documents along with WhatsApp messages



Messages sent automatically from Sage Intacct without any effort



Reduce delays in sharing important business updates

Maintain full control over WhatsApp communication setup

WhatsApp Assignment : WhatsApp Assignment

WhatsApp Assignment information

Order Entry ☒ Order ☒ Shipping ☐ Invoice	Purchasing ☐ Purchase Order ☐ Purchase Receipt	Account Receivable ☐ Invoice Entry ☐ Receive Payments ☐ AR Ledger - Report ☐ Customer Aging - Report
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- ✔ Effortlessly select which transaction screens, (eg. Orders, Shipping), trigger WhatsApp messages using the dedicated Notification Assignment UI
- ✔ Set up verified WhatsApp Business Account (WABA) linked to Meta Business Manager
- ✔ Store the Sender ID and Token required for WhatsApp registration

WhatsApp Message : WhatsApp Message

WhatsApp Message info System info

WhatsApp Message information

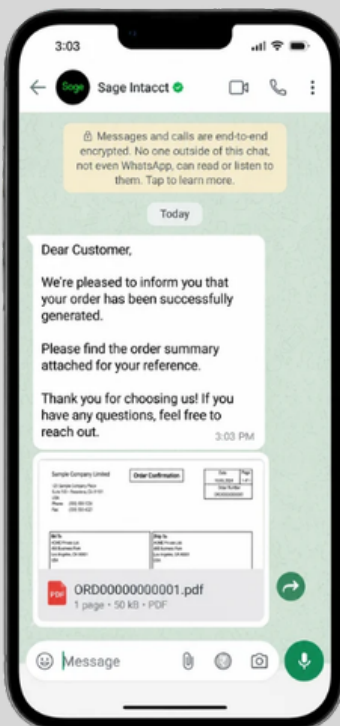
Transactions Order Entry

Message Template Dear Customer,

We're pleased to inform you that your order has been successfully generated.

Please find the order summary attached for your reference.

Thank you for choosing us! If you have any questions, feel free to reach out.



Accurate and Relevant Messages Every Time



Create custom, transaction-specific messages and templates



Send the right information to every recipient for every transaction



Share relevant transaction documents, where required



Reduce manual effort and improve communication accuracy

WhatsApp communication directly via Sage Intacct

- Quick transaction information delivery
- Better experience for customers & vendors
- Minimal manual messaging
- Reduced follow-up effort
- Consistent external communication



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