Data Sheet

Sage Intacct PolicyConnect for Deeper Financial Insight



Integrating data from your policy administration system (PAS) into Sage Intacct enables deeper analysis and reporting on critical insurance finance metrics.

Insurance organizations can often be plagued by disparate data sources, limiting their visibility into company performance. For the finance team, this prevents them from achieving key objectives, including enhancing profitability, keeping pace with growth and supporting strategic decision-making, and more.

Developed as part of a long-standing strategic partnership with Wipfli, LLC, a top-20 consulting firm with deep industry expertise, Sage Intacct PolicyConnect provides insurance finance leaders with a simple, automated way to integrate an insurance organization's policy data with Sage Intacct's cloud-based, financial management system.

This results in insurance finance teams enjoying streamlined processes and a reduction in manual errors ,while also enabling deeper analysis and reporting on key metrics that are critical to finance leaders' understanding the true cost of providing services to policyholders.

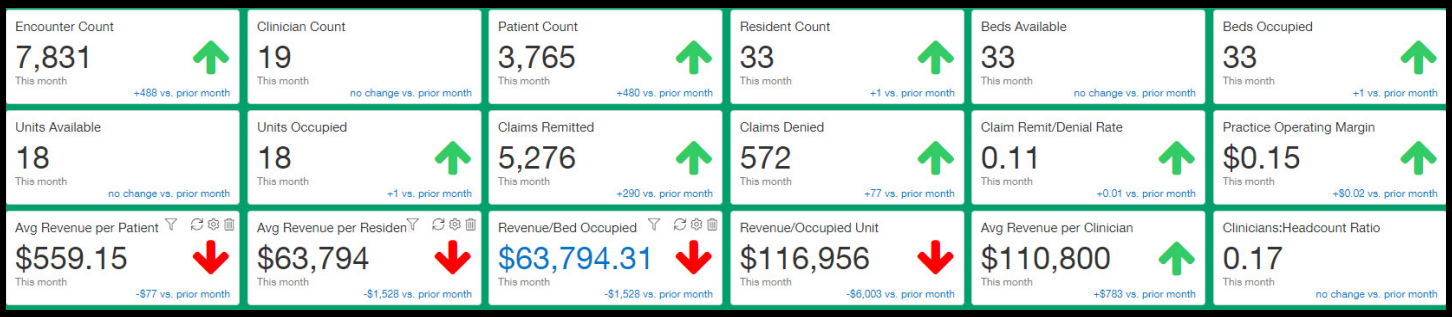
Sage Intacct PolicyConnect allows insurance organizations to:

Deliver automation to save time, allowing insurance finance leaders to further build efficiencies and handle higher policy volumes and business growth without adding headcount.

Utilize deep reporting in Sage Intacct, leveraging financial, policy, regulatory and statistical data for a 360-degree view of the organization.

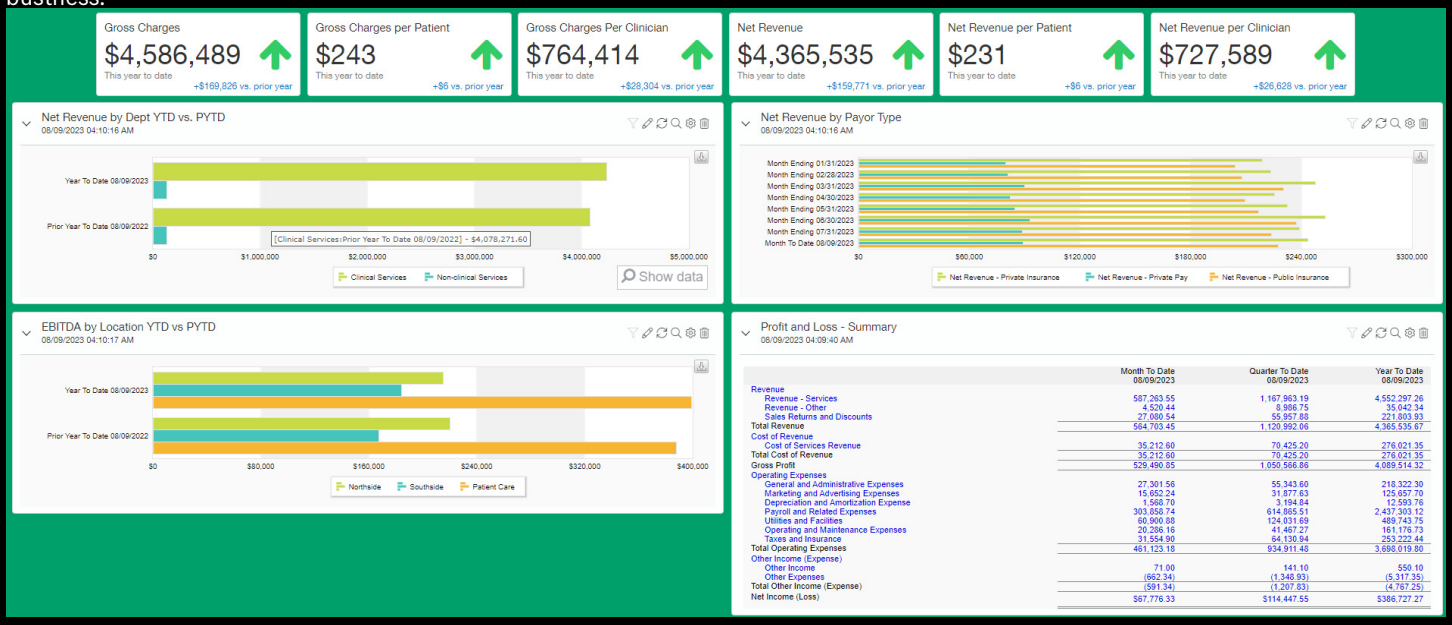
Use multiple data sources and multiple PASs to simplify processes by bringing data together automatically.

Support multi-entity in Sage Intacct, enabling a clear view of an insurance organization's financials holistically, as well as by business segment.



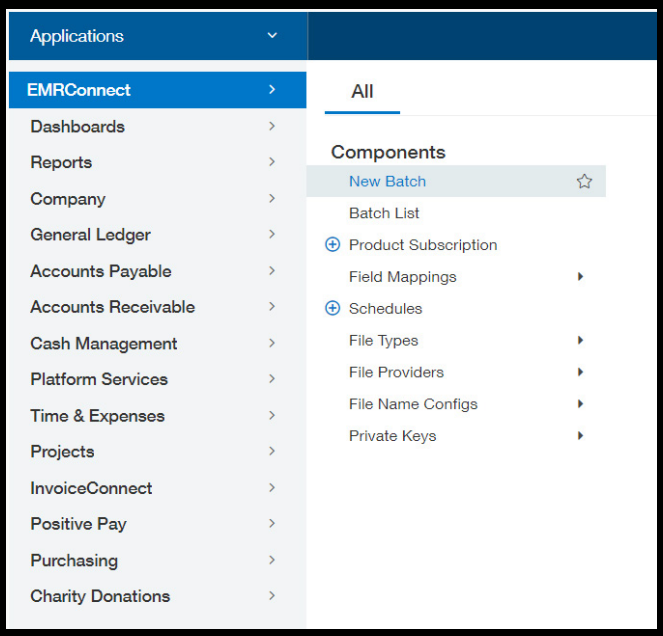
Sage Intacct PolicyConnect enables insurance finance leaders to fully take advantage of the insurance-specific KPIs that come standard within Sage Intacct and makes our dashboards and reports more informative and actionable for stakeholders on the finance team and beyond.

Whether you are an operationally intense P&C insurer, a high-growth specialty insurer, a private equity-backed reinsurer, or a risk-weighted life insurer looking for ways to further efficiencies and allocate resources to positively impact the quality of policyholder service, Sage Intacct PolicyConnect allows the insurance finance team to have - and share - unparalleled levels of insight that drive the business.



Sage Intacct PolicyConnect is PAS agnostic and works with most delimited flat files you can produce from your PAS. It allows you to easily set up and configure different field mappings for as many PAS flat file formats as you need. Once formats are defined, you can set up schedules or bring in data on demand.

These features make it an ideal tool for an insurance organization that has grown by acquisition, businesses that need to lower operational expenses and other organizations that may be amidst a modernization or finance transformation.





Insurance organizations choose Sage Intacct because our comprehensive financial management capabilities are tailored to not only help improve efficiency in the finance team's day-to-day tasks, but also meet the specific needs of the insurance market, all while allowing finance leaders to drive strategic direction and growth of their organizations.

Whether you have complex product portfolios, are running multiple PAS platforms or are looking to scale and build efficient operations, Sage Intacct's cloud-based, GAAP-compliant accounting solution is with you every step of the way.

Further, our Customer-for-Life culture means doing right by our customers is in our DNA. We partner with you for the long-term to help you achieve positive outcomes for your business - and your policy holders.

©2025 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of Sage Global Services Limited or its licensors. All other trademarks are the property of their respective owners.