Sage Intacct Forms & Operational Flows

Broaden workflow capabilities with integrated data collection across your entire organization

Sage Intacct Forms and Operational Flows allows organizations to maximize the value and extend their Sage Intacct solution by establishing integration data collection via links and external portals for your most important business relationships. Enable powerful enterprise content management across your entire organization with the ability to consolidate data and operational flows, creating 100% data collection coverage, and centralizing approval and collaboration.

Improve collaboration across your organization
So often, engagement and collaboration with your network can be surface-level. With Sage Intacct Forms and Operational Flows you can now create custom forms and gather data with collaborative, chat-style dialogues across your entire ecosystem. Not only will this increase employee collaboration with streamlined communications throughout your business, but it also empowers your stakeholders to access data and engage with your organization via an external portal.
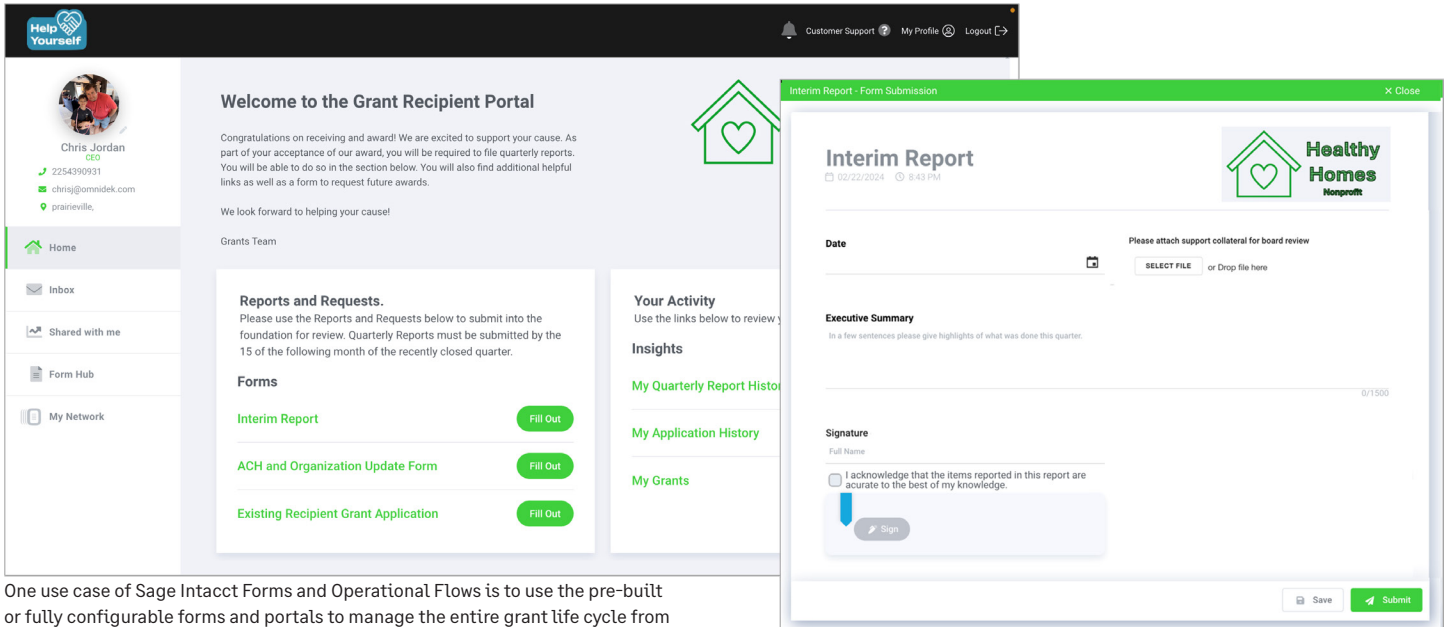
Gain efficiencies with automated operational workflows
Efficiencies can drive momentum in your process flow with both your internal and external stakeholders. Identifying opportunities for process improvement and taking action without external consultants or IT involvement refines and improves broad implementation across your user base. A centralized single inbox approval process eliminates e-mail and paper-based approvals.

Increase transparency and capture insights in one place
Manually consolidating data from multiple sources can be costly and time-consuming. Sage Intacct Forms and Operational Flows reduces dependencies of costly add-on applications and simplifies your IT stack. By collecting data and driving entries into other Sage Intacct application areas as needed, transparency across your organization is improved with user-level insights into workflows and approvals.

Sage

One use case of Sage Intacct Forms and Operational Flows is to use the pre-built or fully configurable forms and portals to manage the entire grant life cycle from eligibility to application to interim reports and draw requests.

Empowerment

- Less reliance on add-on applications
- Full coverage of process flow across all users
- Centralized data hub on work in progress for real-time data analytics

Engagement

- Customers
- Vendors
- Employees
- Contract employees
- Other key stakeholders

Efficiency

- Real-time dashboards
- Self-service user portal
- New process creation and deployment
- No code self-service portals
- No code form and workflow builders

Economics

- Vendor qualification
- Purchase requests
- HR forms and flows

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