BlueSnap®

+

sage Intacct

Sage Intacct is an ERP that provides cloud-based financial management software that allows clients to consolidate data, provide multidimensional reporting and simplify compliance. With Sage Intacct, you can create tailored dashboards, modernize accounts payable and accounts receivable, and build detailed reports to create a powerful financial resources tool. This solution enables any business to reduce manual processes and modernize their day-to-day billing.

Why You May Need an AR Integration for Sage Intacct

To get paid faster, grow globally and modernize your accounts receivable process, you need to select an AR automation solution with your payments integration. The provider you choose will impact your days sales outstanding and could improve cash flow. The right one can contribute significantly to your business's ability to digitalize and automate invoicing and billing, customer communication and unified reporting.

If you work with Sage Intacct, you can easily integrate with BlueSnap. You'll receive the benefits of BlueSnap's AR Automation with Global Payments capabilities coupled with Sage Intacct to provide AR task management, dunning and collection, fully automated workflows, compliant surcharging, a self-service customer portal, automatic payment reconciliation, payment optimization, global payment types and currencies, and unified reporting. All of this will allow your business to operate more efficiently and improve the bottom line.

With BlueSnap's Sage Intacct Integration, You Get:

- ✓ Payment Links you can embed into invoices and templates so customers can easily make payments.

- ✓ The ability for customers to store their preferred payment methods for hassle-free payments.

- ✓ To configure Auto Payment rules to automatically charge invoices.

- ✓ Bidirectional sync between BlueSnap and Sage Intacct

- ✓ PCI SAQ-A compliance to help keep your payments secure.

- ✓ Increased customer confidence by allowing them to enter their own sensitive payment details.

- ✓ Invoices charged from your Sage Intacct account are redirected to your BlueSnap AR Automation Account

- ✓ Compliant surcharging to reduce the costs of payments.

- ✓ Virtual Terminal for your employees to enter payment information

How Does BlueSnap Work with Sage Intacct?

Businesses using Sage Intacct for invoicing and billing can integrate their financial operations with BlueSnap to enhance their AR automation and collections. With a single integration to BlueSnap, merchants can automate the entire quote-to-cash process and accept payments in 200 geographies, benefit from local card acquiring in 47 countries, and get unified reporting for easy reconciliation. BlueSnap customers receive a consolidated view of their global business and the ability to streamline operations without the need for multiple payment gateways for each region they sell in or additional AR solutions to manage your invoicing and billing.

Why Use BlueSnap with Sage Intacct?

Improved Cash Flow
Streamline the quote-to-cash process and your workflows for more efficient invoice processing, recurring payments and collections.

Improved Forecasting & Planning
BlueSnap automatically tracks your invoices, giving you accurate data to properly communicate with customers. BlueSnap bidirectionally syncs with Sage Intacct for seamless reconciliation and reporting.

Enhanced Customer Experience
Enable customers to pay their invoices and balances, update billing information and view important account documents directly through a branded customer portal.

Increased Productivity
Automate each step of your billing, accounting and payment process through one application – no coding required.

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IN ACTION

One BlueSnap-Sage Intacct customer is a marketing and media business that focuses on executive forums and large-scale events. The business requires them to manage multiple invoices and billing types with each customer at once. Upon integrating to BlueSnap and combining our AR solution with Sage Intacct, they've consolidated their third-party vendors by bringing multiple lines of business into one platform. They have also improved internal efficiencies and created a better customer experience. In addition to payment processing, BlueSnap AR Automation helped this customer automate its entire billing process, including generating payment links, sending out invoices and collecting customer payments.

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Get started automating your entire AR automation flow with BlueSnap on your Sage Intacct account with our easy-to-follow guide.

Step 1. Connect AR Automation and Sage Intacct

In your Sage Intacct Account, you will create a web-services-only user by following the steps below. This process syncs the data between your AR Automation and Sage Intacct accounts.

1.1: Create User

1. Go to Company > Admin > Web Services Users > Add.
2. Complete the form.
3. Click save.

1.2: Choose Application/Module Permissions

For Intacct Single Entity Account

1. Under **User Application Subscriptions**, select the following subscriptions with the corresponding permissions:
   - Under **Company**, select the **Edit** option for Attachments
   - Under **Cash Management**, select **List** and **View** for:
     - Charge Card Accounts
     - Checking Accounts
     - Savings Accounts
   - Under **General Ledger**, select **List** and **View** for:
     - Accounts
     - Statistical Accounts
   - Under **Accounts Receivable**, select the following:
     - **Manage Payments**: select **List, View, Add**, and **Edit**
     - Customers: select **List, View, Add**, and **Edit**
     - Invoices: select **List, View, Add**, **Edit,** and **Post**
     - AR Account Labels: select **List, View,** and **Add**
   - **Inventory Control**
   - Under **Order Entry**, select **List, View, Add**, and **Edit** for Order Entry Transactions.
   - Under **BlueSnap**, select **List, View, Add, Edit, Delete, Import** and **Templates** for BlueSnapARQueue.
2. Click **Save**.

1.3: Enable Web Service Authentication

1. In your Sage Intacct account, go to **Company > Setup > Company > Security**.
2. Click **Edit**.
3. In the Web Services authorizations section, click + to add a new web service.
4. In the **Web Services Sender Information** screen, complete the following fields:
   - **Sender ID:** Pscore
   - **Description:** Armatic Integration
   - **Status:** Active
5. Click **Save**.

1.4: Connect Intacct in AR Automation

1. In your AR Automation account, go to **Account > Accounting**.
2. Click **Connect** under Intacct logo.
3. Enter the **Company ID, User ID** (xmlgw-armatic), and **Password** for this user.
4. Click **Connect**.

The pop-up window closes automatically and data begins syncing from your Sage Intacct account to AR Automation. If your account has a large number of customers and/or invoices, the first sync takes longer.

Step 2. Embed Payments and Get Enhanced Data Synchronization

Follow the steps below to take advantage of the expanded features and services available. You will have the ability to embed Payment Links in invoices and templates in Intacct, set up Auto Payment rules to automatically charge invoices, get enhanced data synchronization between your accounts, and more.

2.1: Download the BlueSnap Module

1. In your AR Automation account, go to Account > Accounting.
2. Click **Download BlueSnap Package**.
3. Extract the BlueSnap Zip file to your computer

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IN ACTION

Another BlueSnap-Sage Intacct customer is a digital marketing company that specializes in providing websites and online digital marketing services for small community professionals, specifically lawyers, dentists, accountants and veterinarians. With BlueSnap and Sage Intacct, they have been able to consolidate multiple accounting systems across their business and streamline and automate their invoicing and billing. Because of this, they have been able to reduce the resources dedicated to AR and leverage a seamless interface to stay on top of past-due bills.

There will be two files contained:

- The **BlueSnap Package** file - This file will enable more efficient and comprehensive data exchanges with your Sage Intacct account, including the ability to utilize your Sage Intacct invoice PDF.
- The **BlueSnap Application** file - This file will add payment processing to your Sage Intacct account, enabling you to embed Payment Links in invoices and more. Your Sage Intacct account must have Platform Services to install this package.

2.2: Install the BlueSnap Package File

1. In your Sage Intacct account, go to **Platform Services > Custom Packages > Add**.
2. Click **Choose File** and select the saved **BlueSnap Package** file from your desktop.
3. Notify your Implementation Specialist of which invoice template you would like to use: AR or Sales Invoice templates.
4. If your Sage Intacct account has Platform Services, continue to the next step to install the second package, which will enable you to process payments directly from your Sage Intacct account. If you do not have Platform Services, you will still have the ability to process payments - you will do so from your AR Automation account (please skip the next step).

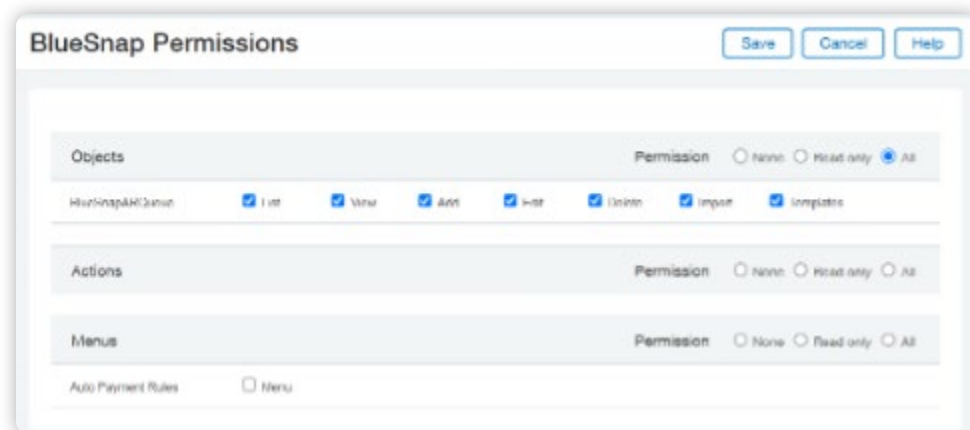**2.3: Install the BlueSnap Application File (Requires Platform Services)**

In order to complete this step, please ensure your Sage Intacct account has Platform Services before proceeding.

1. In your Sage Intacct account, go to **Platform Services > Install Application > Add**
2. Click **Choose File** and select the saved **BlueSnap Application** file from your desktop.

2.4: Add Permissions

You must add permissions in the BlueSnap module for all users (Roles) and/or Web Services Users that are creating invoices in your account. You can set permissions in the Roles settings.

1. Navigate to **Company > Admin > Roles**.
2. Select **Web Services User Role** and/or **Roles** for users that are creating invoices in your Intacct/ AR account.
3. Select the BlueSnap module with the corresponding permissions: **List, View, Add, Edit, Delete, Import, and Templates** for **BlueSnapARQueue**.

2.5: (Optional) Set Up Automatic Payment Rules

Automatic Payment rules allow you to automatically charge new and updated invoices meeting a set of conditions that you define. If your Sage Intacct account has Platform Services, follow the steps below. Otherwise, learn how to set up Auto Payment rules in your AR Automation account.

1. In your Sage Intacct account, click the dropdown menu in the top-left of the screen and go to **BlueSnap > Auto Payment Rules**.
2. Follow these steps for adding an Auto Payment rule.

Now you are ready to automate your AR automation flow with BlueSnap in your Sage Intacct account.

Need Additional Support? Contact Us