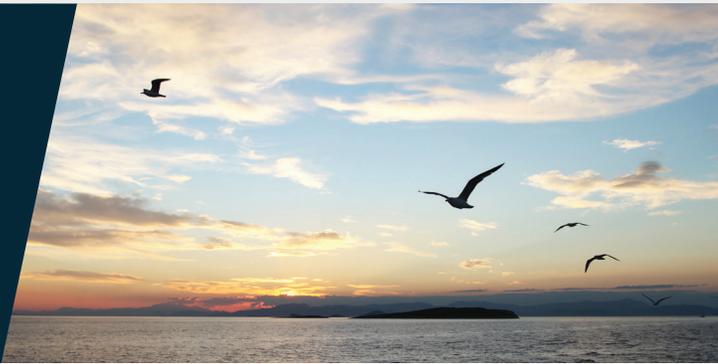


Sage Intacct Implementation



Tipalti's Sage Intacct implementations are collaborative engagements where our team works closely with you to guide you through the process. Your Sage Intacct implementation includes the following:

sage Intacct

- Branded supplier iFrame (color) or supplier portal (logo) from Tipalti's preset templates
- Supplier onboarding workflow including global data validation engine
- Electronic tax ID collection and validation (W-9, W-8, VAT)
- Global payments using standard payment processing account
- Support for multiple subsidiaries and currencies (if purchased)
- Supplier invoice processing workflow
- Basic API support for processing invoices / payments and reconciliation
- Sage Intacct integration configuration (including multi-entity and syncing at the subsidiary level)



Prepare

Tipalti provides a strong foundation for implementation success with a structured, comprehensive setup call to review your end-to-end workflow, outline a joint onboarding plan and timeline, review and validate the technical configuration requirements, and guide you through our due diligence approval cycle. We also create a sandbox environment in this stage and provide training on the end user experience, the AP Hub, and a technical overview of the integration process so you have everything you need to get started.

Implement

Implementation typically takes 6-10 weeks. We provide a detailed step-by-step project plan after kickoff and schedule weekly (or more frequent) status calls to ensure the project stays on track. After agreement on the requirements, we assist you with technical integration of the iFrame into your website or setting up the Tipalti hosted portal, configuring the necessary integrations (banking, PayPal, email, and ERP), and creating a sample payment file.

Sage Intacct Integration Assumptions

- Bi-directional sync of Vendor information between Tipalti and Sage Intacct (basic information only; requires unique Vendor ID generated by Sage Intacct, or Tipalti will create one)
- Sync of Vendor Bills from Tipalti to Sage Intacct
- Sync of Vendor Bill Payments from Tipalti to Sage Intacct (no mapping for custom fields available)
- Sync of Chart of Accounts from Sage Intacct to Tipalti
- Sync of Department, Class, Payment Terms, and Location Field lists (other fields are not supported)
- Support for sync of vendor credits
- Mapping of Custom Field data between Tipalti and Sage Intacct for vendors, bills, and bill lines
- Sync of Tipalti Fees from Tipalti to Sage Intacct as Bills and Bill Payments
- Support for single or multi-subsiary integrations
- Limited support for syncing default values for coding/ custom fields from Tipalti to Sage Intacct for bills, payments, vendor credits, etc. (your Implementation Manager can provide more details)
- Upgrades are included. Any customizations made may need to be re-implemented and re-tested after upgrade.

Train

Before supplier onboarding begins, Tipalti provides in-depth training on the AP Hub and finance functions as well as the supplier onboarding workflow and experience. You get complete knowledge transfer so you feel confident managing your operation over the long-term.

Launch

After training, it's time to launch. We provide adoption and change management support as you invite suppliers to onboard and register. Once suppliers are onboarded, you fund your account, prepare payment files, execute the first payment run, and learn how to troubleshoot exceptions. We're there with you every step of the way as you go live.

Optimize

The relationship doesn't end after you've made your first payment. We are a partner invested in your long-term success and offer ongoing support so you get the most out of Tipalti.



Technical Support: Technical and product support is provided to all customers, with phone and email support available around the clock. The support team consistently ranks 99% in customer satisfaction and has deep finance and Tipalti experience so you get the answers you need quickly.



Account Management: Our team of account managers can work with you to understand your long-term goals and develop a success plan to help you reach these milestones. We will recommend best practices, services, solutions, and processes that will help you leverage all of the platform capabilities to maximize engagement and adoption.