

## Use Cases and Endpoints for Canix <-> Sage Intacct Integration

Canix integrates with Sage Intacct so that users can manage Sales Orders and Purchase Orders in Canix, while keeping their general ledger accounts in Sage Intacct up to date. This reduction of double data entry saves time and reduces errors:

- Send invoices to the appropriate GL account in Sage Intacct
- Send purchase orders to the appropriate GL account in Sage Intacct
- Record payments in Sage Intacct from Canix
- Process returns in Canix and send the associated credit memos to Sage Intacct



### **Send Canix Sales Order Invoices to Sage Intacct**

Canix pulls Sage Intacct GL accounts, customers, warehouses, and items from Sage Intacct so that you can associate those data points with a Canix invoice and send that invoice to accounts receivable (or another GL account).

**Create Sage Intacct Invoice**

Sage Intacct GL Account\*  
Contract Subscriptions - Unbilled (40600-101)

Sage Intacct Customer\*

Sage Intacct Warehouse\*  
100

Ty's Co (TC)  
License Number  
License Expiration Date  
Point of Contact  
Ty Clauss  
Phone  
585-748-1678  
Address  
CA  
Credit  
Sales Representative  
Email

**Invoice Details**

Order Items

Dank Flower 1/8th Jars - Blue Dream	\$50	x	101	Each	=	\$5050
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Send Invoice To  
Email Address

Invoice Date  
06/03/2022

Payment Terms  
COD

Sage Intacct Payment Term\*

Due date  
06/03/2022

Delivery Date\*  
06/03/2022

Internal Notes  
Customer Memo for Invoice

Subtotal	\$5,050.00
Discount	--
Taxable Subtotal	\$5,050.00
Taxes	\$606.00
Delivery Fees	\$50.00
Credit	--
<b>Total</b>	<b>\$5,706.00</b>

Need help?

*\*if you deal with returns frequently, you'll also be able to process those returns in Canix and send a credit memo to Sage Intacct.*

## Send Canix Purchase Orders to Sage Intacct

Canix pulls Sage Intacct vendors, items, and payment terms from Sage Intacct so that you can associate those data points with a Canix Purchase Order and send that receipt to accounts payable (or another GL account).

**Create Sage Intacct Order 0000000040** Created

Sage Intacct Vendor\*  
Advisor Printing

Green Farms Dairy  
License Number  
--  
License Expiration Date  
--  
Point of Contact  
Bill Smith  
Phone  
555-837-8190  
Email  
billsmith@greenfarms.com  
Address  
--  
Website  
greenfarmsdairy.com  
Notes  
--

Jars  
2100.000 each available  
Select Sage Item\* \$0.00 × 1,000 Each = \$0.00

1g Pre Roll Boxes  
4805.286 each available  
Select Sage Item\* \$0.00 × 1,000 Each = \$0.00

Requested Delivery Date\*  
05/26/2022

Payment Terms\*  
NET

Custom Terms  
-14

Sage Intacct Payment Term\*

Payment Date  
06 / 09 / 2022

Internal Notes

Subtotal	--
Discount	--
Taxable Subtotal	--
Local Excise Tax	--
State Excise Tax	--
Other Tax	--
Delivery Fees	\$10.00
Cultivation Taxes	--
Credit	--
<b>Total</b>	<b>\$10.00</b>

Need help?

## Send Payments from Canix to Sage Intacct

In Canix select the desired Sage Intacct payment method and deposit account before sending to Sage Intacct.

Record Payment

Amount  
\$

Payment Date  
07/01/2022

Reference Number

Send Payment to Sage Intacct

Sage Intacct Payment Method  
Check

Sage Intacct Deposit Account  
Demo Bank (USD)

Cancel Record