



2024 | BOSTON
INNOVATE
JMT CONSULTING

Mission: Light Speed (4A)

The Power of Integrations

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Jigar Darji

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THE EXPERTS IN
MISSION-DRIVEN
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Introduction



John Tiso
Director of Client Services,
JMT Consulting

Introduction



Jigar Darji
Technical Solutions Consultant,
Sage Software



Purpose

- More awareness of the costs of not integrating
- More awareness of the benefits and gains to integrating
- Start to imagine what's possible for your organization!

What IS an integration?



What IS an integration?

- Any connection or transfer of data from one point to another to bring things together



What IS an integration?

- Any connection or transfer of data from one point to another to bring things together
- That's right - even each of us manually keying data into one system from another, WE'RE the integration!





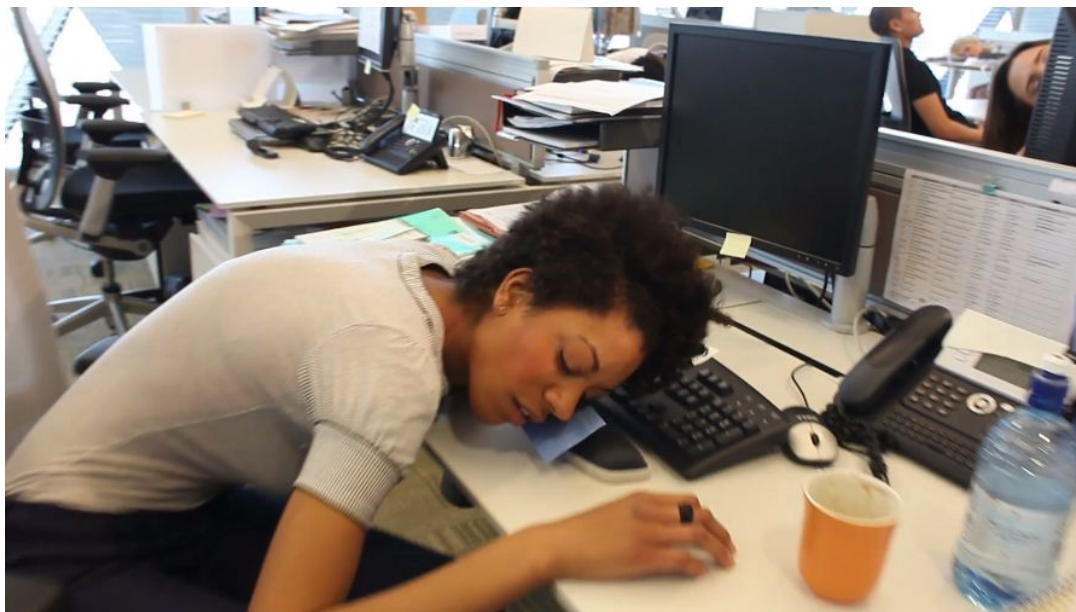
Why integrate your systems?

- Data transferred faster
- More Accuracy
- Reduced effort
- Reduced cost
- More reliable data
- More consistent data
- More informed decisions
- Better results
- More effectiveness
- More efficiency



“Levels” of Integration

- Full manual



“Levels” of Integration

- Full manual
- Manual Export/Import





“Levels” of Integration

- Full manual
- Manual Export/Import
- File Drop





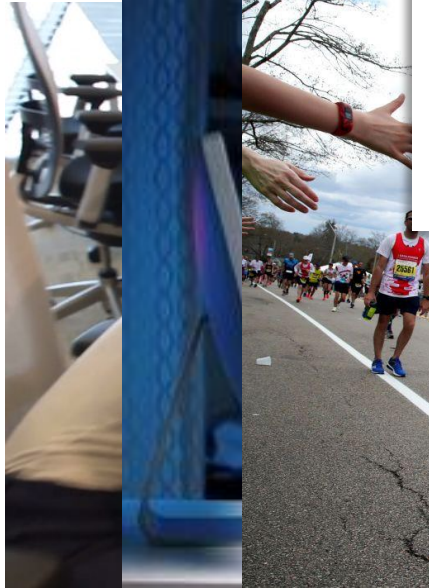
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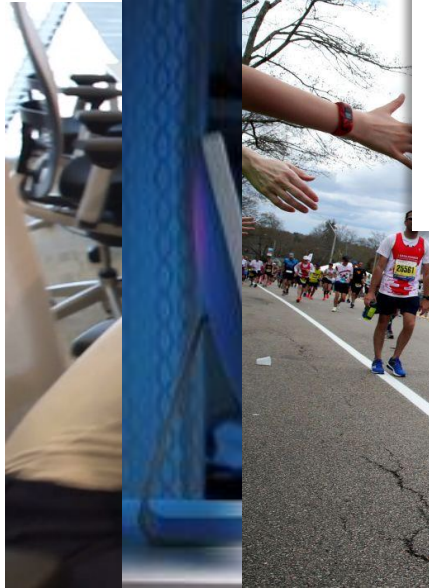
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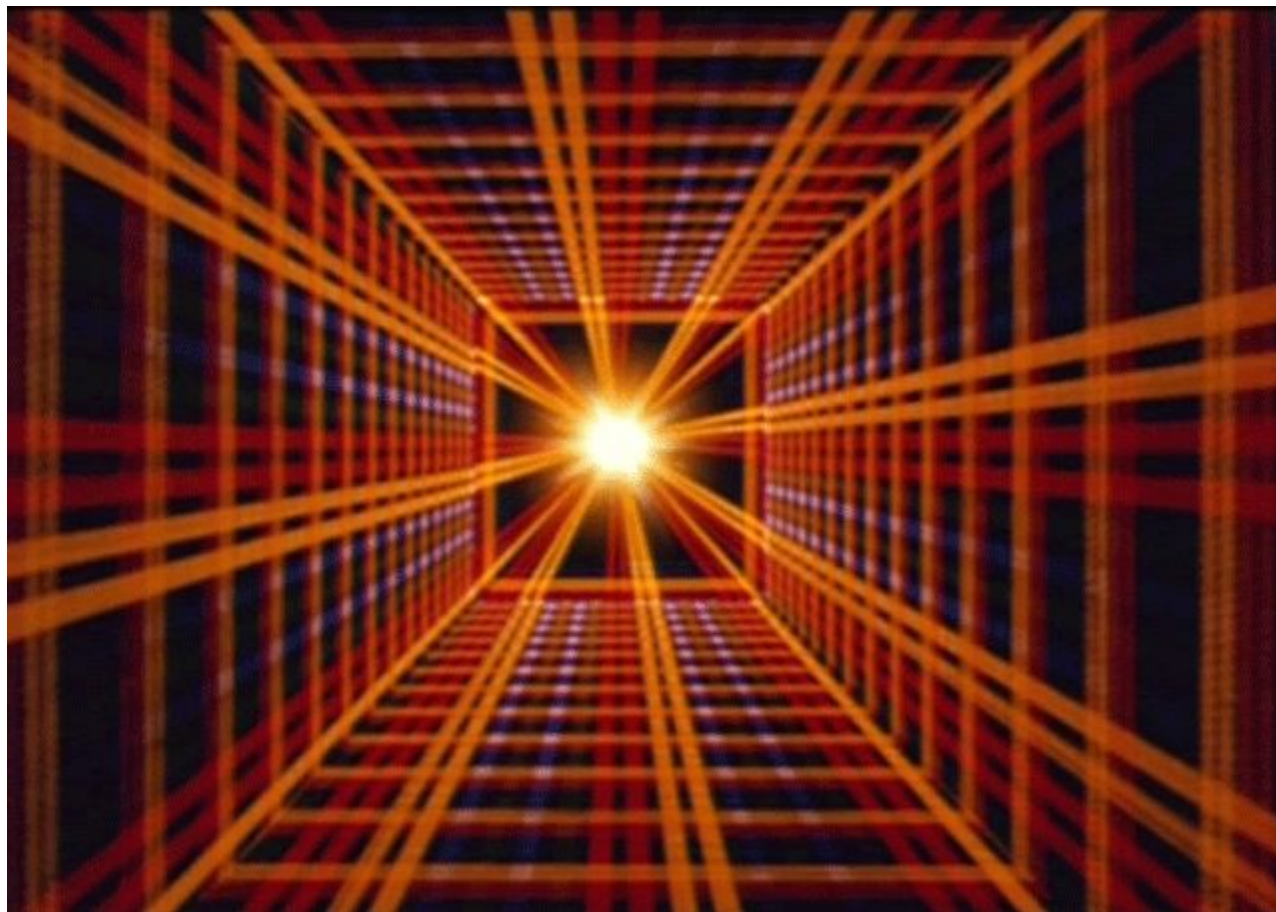


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NOT possible!



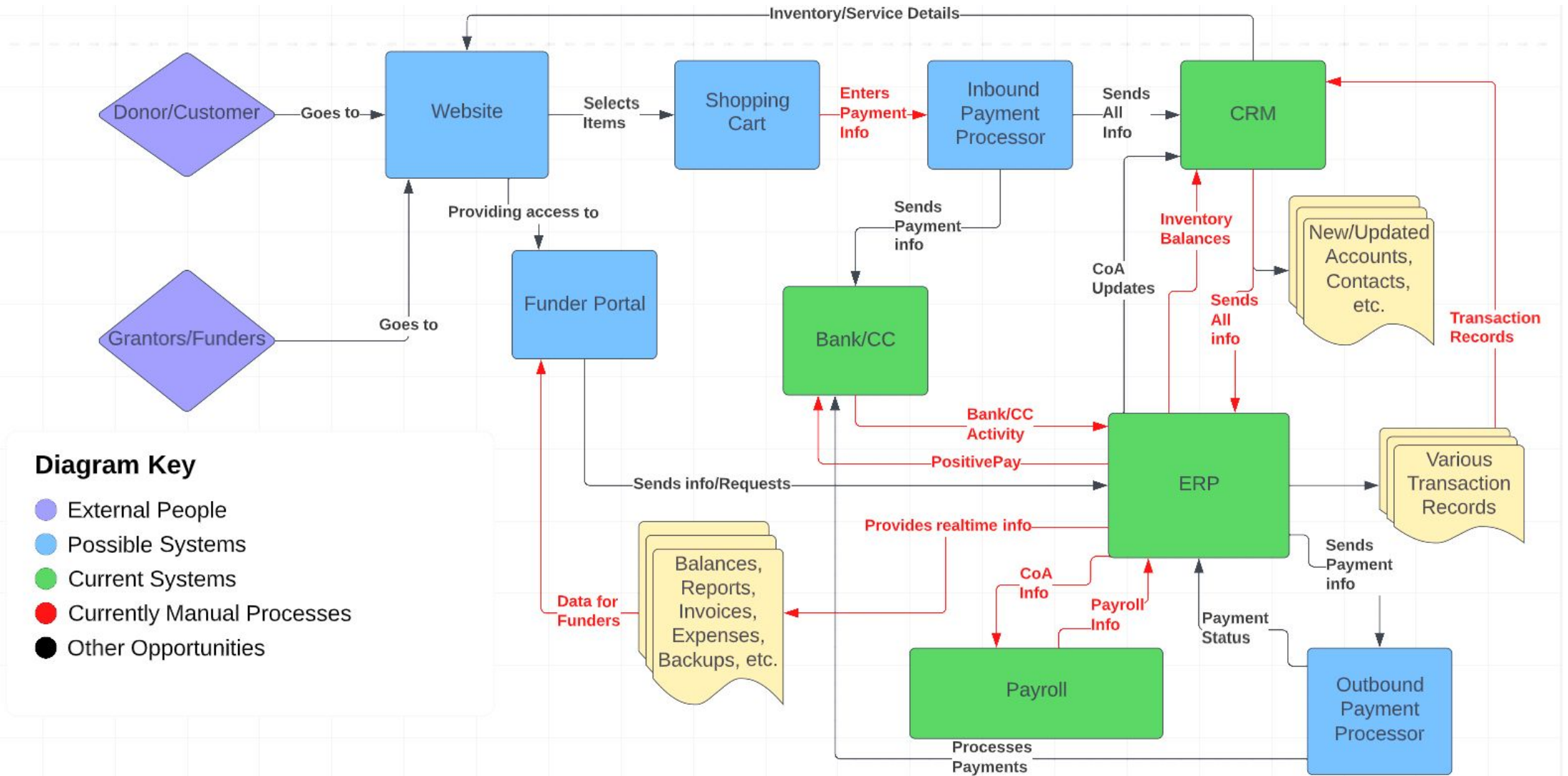
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Example of common integrations

- Website and Shopping Cart
- Shopping Cart and Payment Processor
- Payment Processor and Bank
- CRM and Website
- CRM and Shopping Cart
- ERP and CRM
- ERP and Bank (Payments, PositivePay, Bank Rec
- ERP and CC Provider
- And Payroll, and Inventory, and Vendors, etc. etc. etc.....

YES Possible!





Where is there overlap in the systems/processes/functions?

- CRM Sales activities recorded as Sales Transactions in Intacct
- CRM Donations/Small Gifts recorded as Other Receipts in Intacct
- CRM Pledges/Grants recorded as Pledge/Grant records in Intacct, and then Pledge/Grant Receivable Invoices
- Intacct Inventory/Warehouse Information available in CRM
- Customized database designs with customized connection points
- All of the above and then some!

Speed of Light



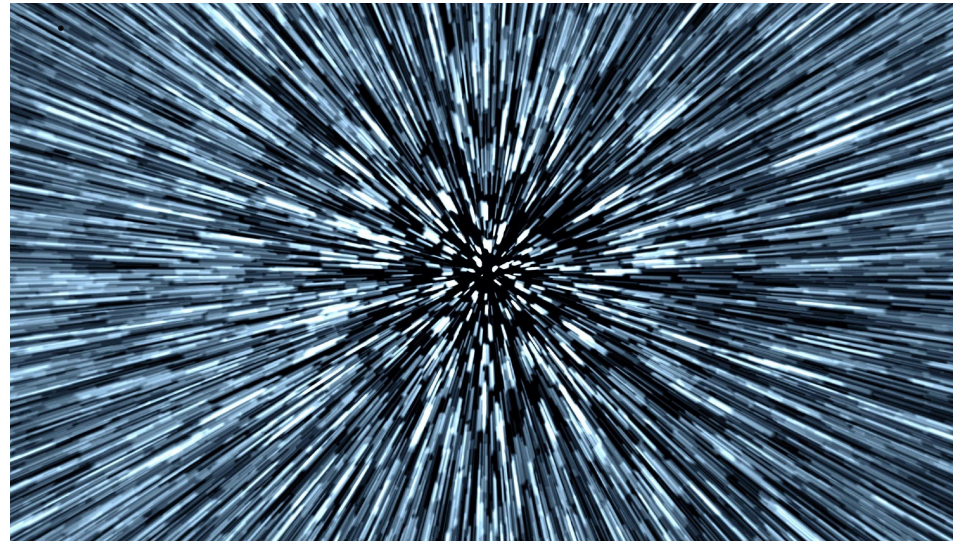
Speed of Light



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Speed of Light

- Pre-Built Connectors (ex. Sage Intacct Advanced CRM Connector)
- Integration Platforms (ex. DataBlend, Workato, etc.)
- Full Custom Developed Integration



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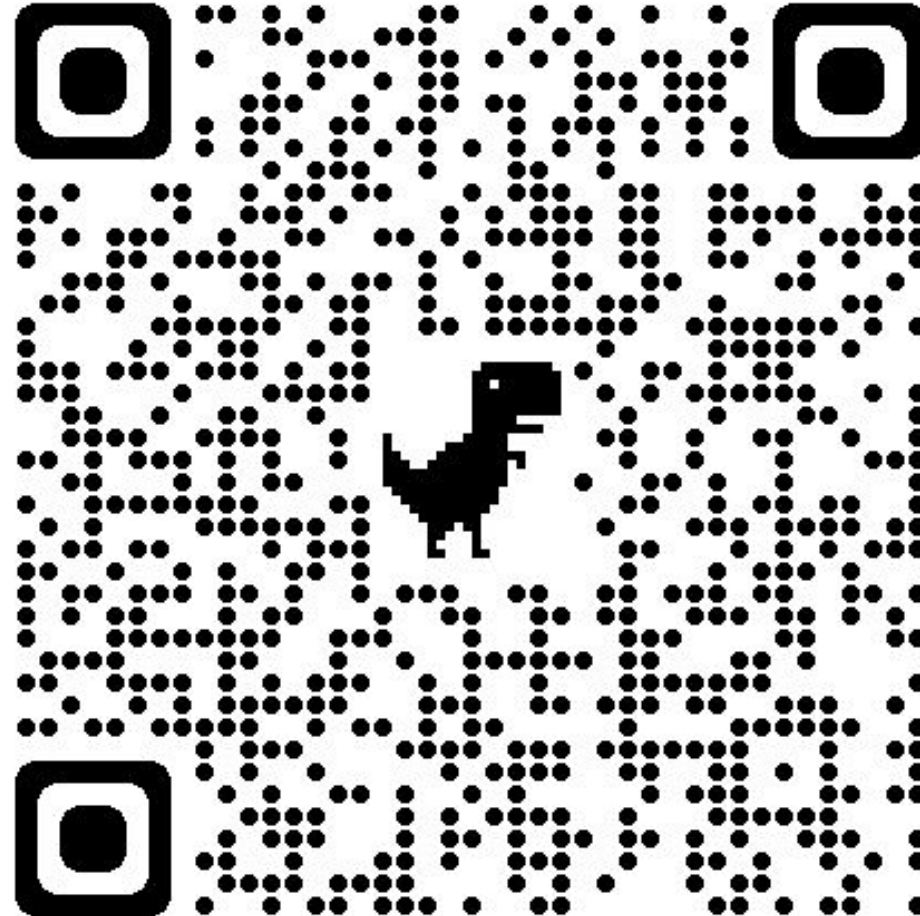
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