Data sheet

Customer Payments Portal

Give customers a secure, self-service way to view and pay invoices online, while keeping payment activity connected to Sage Intacct.



Getting paid should not require back-and-forth emails, phone calls, paper checks, or re-keying payment data. The Customer Payments Portal connects invoice delivery, digital payment, and payment status in one embedded experience, making it easier for customers to pay and for accounts receivable teams to manage cash.

Make invoices easier to pay

Email invoices and reminders with a secure payment link so customers can move from invoice to payment in one seamless workflow.

Provide 24/7 self-service

Let customers review open invoices, select what they want to pay, and complete payment online at their convenience with flexible payment methods including credit cards, debit cards or ACH.

Keep payment activity connected

Payments initiated through the portal post back to Sage Intacct and are marked as paid, helping the AR team maintain an up-to-date view of invoice status.

Strengthen cash flow reporting

Get complete visibility into incoming payments and unpaid invoices, with current payment status in Sage Intacct to help teams stay in control.

Reduce manual reconciliation

Auto-reconcile payments to reduce re-keying and avoidable errors, shorten reporting time, and help improve DSO and cash flow visibility.

Secure and compliant payments

Use configurable payment limits and payment services supported by SOC 1 and SOC 2 reporting and PCI DSS compliance, giving your customers peace of mind.

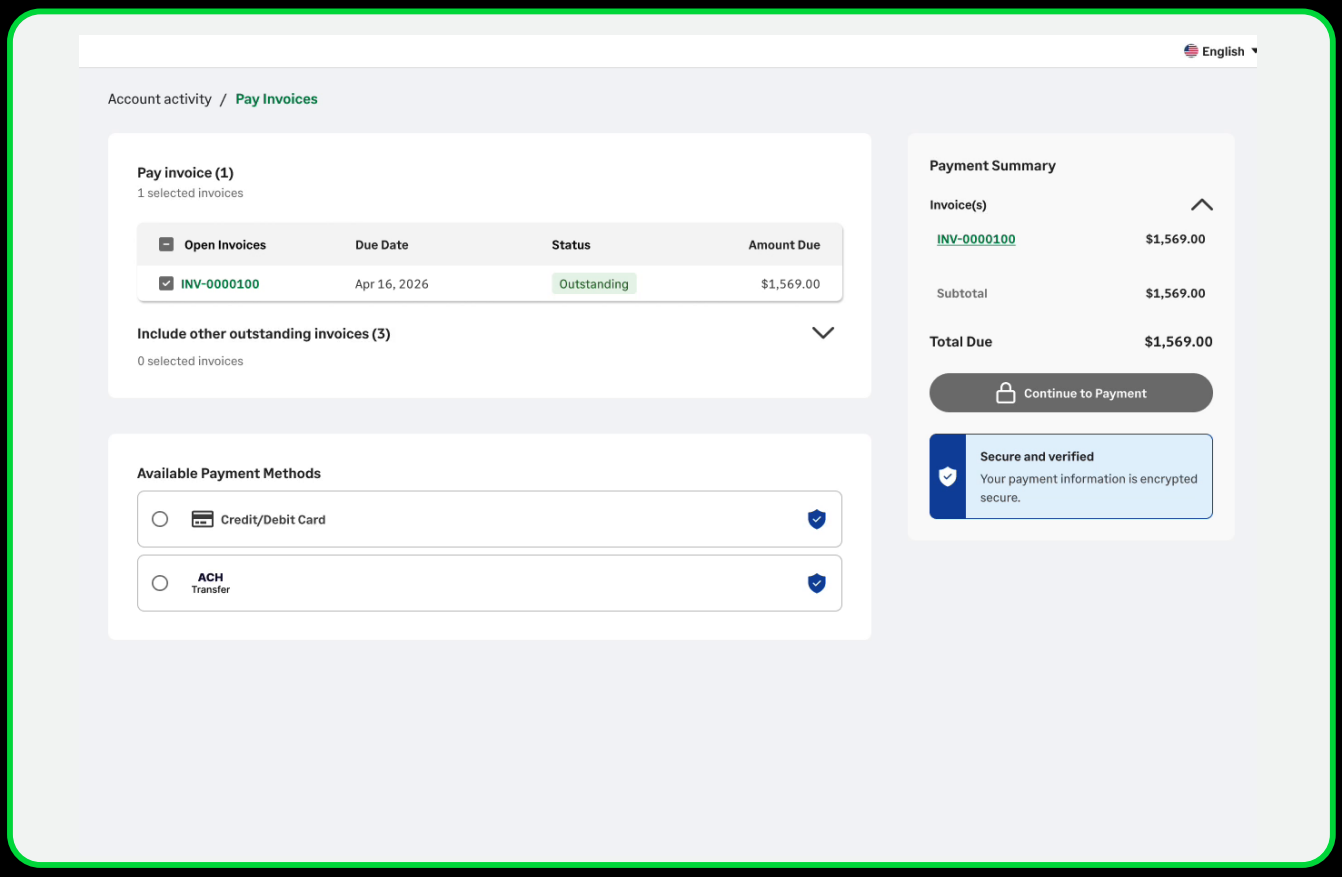
One connected payment experience

- A faster path from invoice to payment
- Real-time payment status in Sage Intacct
- Less manual work for the AR team

Sage

A simpler path from invoice to payment

Make it easier for customers to pay



1 Send

Email an invoice or reminder with a secure link

2 Review

The customer views open invoices and selects what to pay

3 Pay

The customer chooses an available payment method and confirms

4 Update

Payment status posts back to Sage Intacct

Greater cash visibility, less manual work

Customers get a clear, secure way to manage outstanding invoices and make payments online. AR teams get fewer manual touchpoints and a more current view of payment activity all within Sage Intacct.

Customer payments powered by Fortis.

sageintacct.com
877-437-7765

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