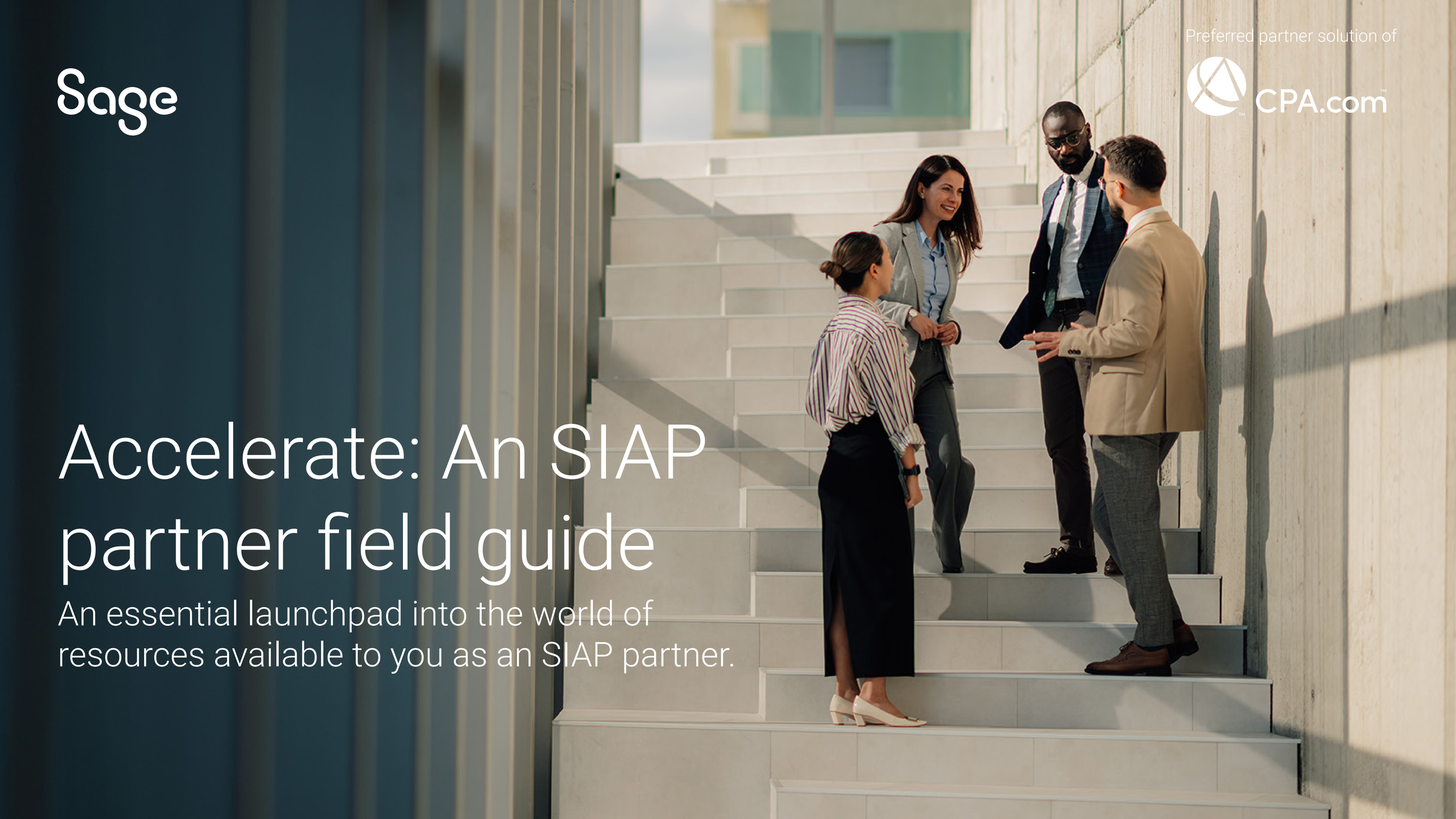
Sage

Preferred partner solution of

CPA.com™



Accelerate: An SIAP partner field guide

An essential launchpad into the world of resources available to you as an SIAP partner.

Building success in the Sage Intacct Accountants Program

Executive summary

Firms in the Sage Intacct Accountants Program are all unique—in size, service maturity, industry, and more. As a trusted partner, you need fast, easy access to the right tools, content, and support. But, with so many resources available, it's not always clear where to look and how to begin. **We've created this field guide to be a launchpad into the world of Sage resources** tailored specifically for SIAP partners. These are the same resources that our account managers, professional services, and support teams provide to SIAP partners.

This curated source of truth shines a light on the most commonly used and requested Sage assets. From enablement tools and marketing materials to support contacts and go-to-market resources, this asset seeks to remove barriers and build structure around the wealth of resources at your fingertips.

While it doesn't attempt to catalog every single asset available to SIAP partners, **it delivers a clear path forward for your most immediate and impactful needs.** It also encourages exploration: if a section sparks your curiosity, we've included pointers to where you can dive deeper and continue building your firm's momentum.

Ultimately, this playbook is designed to help your firm confidently navigate the Sage ecosystem—and spark conversations between you and your account management team, turning questions into opportunities for deeper collaboration that ignites growth in your practice.



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Contents

To consolidate the available resources for SIAP partners, we have focused on the primary sources that new partners request most often. This document is searchable and hyperlinked to quickly navigate.

02 Executive summary

05 Sage Help & Support

10 Sage University

15 Highspot

20 Sage Community

25 Consensus

28 Appendix

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Resources for your firm at each step of your journey



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Contents

SECTION 1

Sage Help & Support



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Sage Help & Support is a function natively integrated within the platform to assist users and administrators in finding answers on how to achieve a given outcome in Sage Intacct.

This comprehensive, self-service repository can answer most questions related to the platform.



Help Center

Comprehensive knowledgebase with feature specific guidance, best practices and FAQs

Sage Copilot search help

Generative AI powered conversational guide to navigating help topics, quickly delivering precise how-to answers

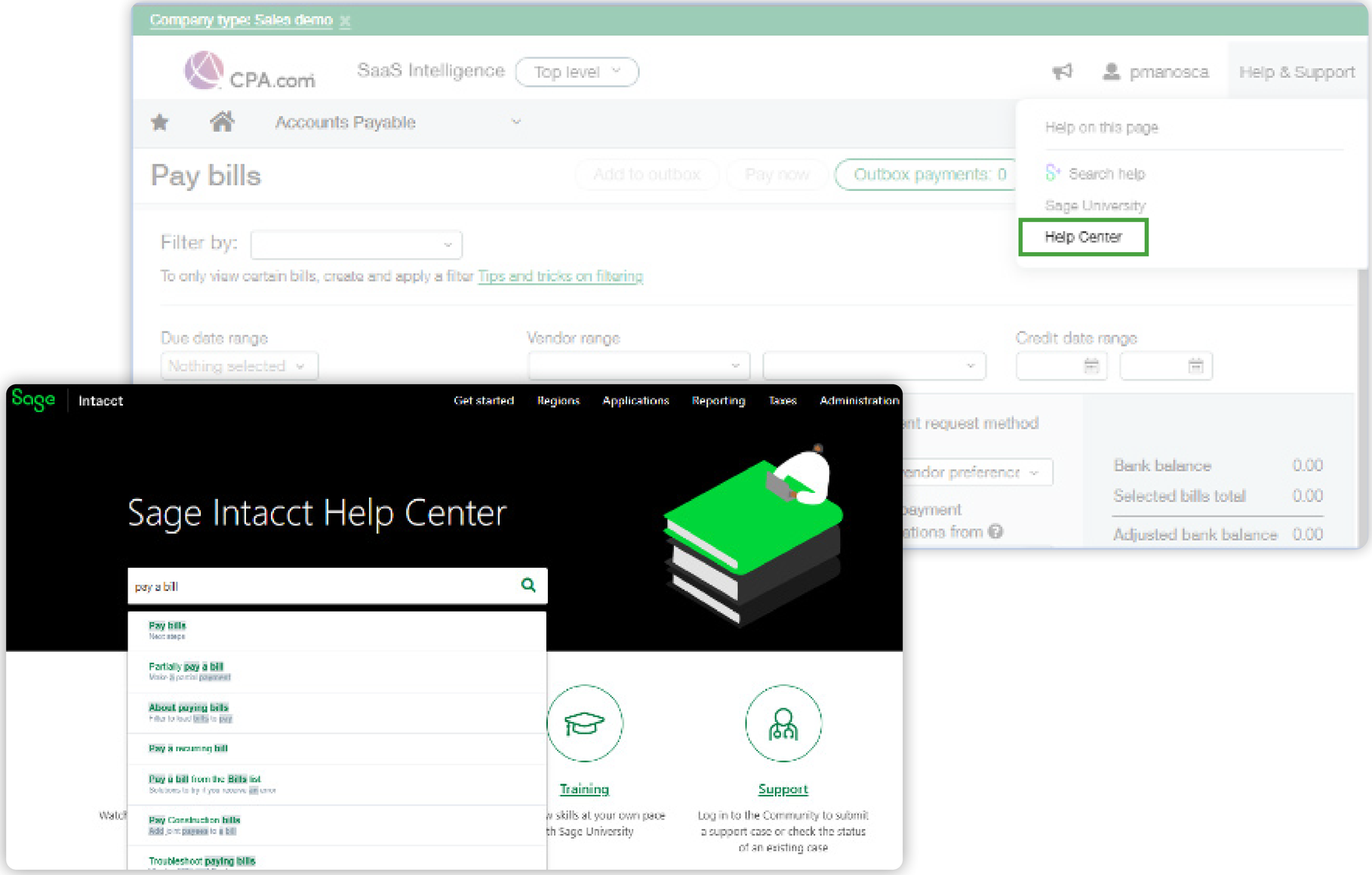
Help on this page

In-page guidance with direct access to documentation and step-by-step instructions with context

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Help Center

Find answers to all technical questions, right within Sage Intacct. Navigate to the Help & Support menu on the right. Select ‘Help Center’ and then use the search bar to learn how to ‘Pay a Bill’.

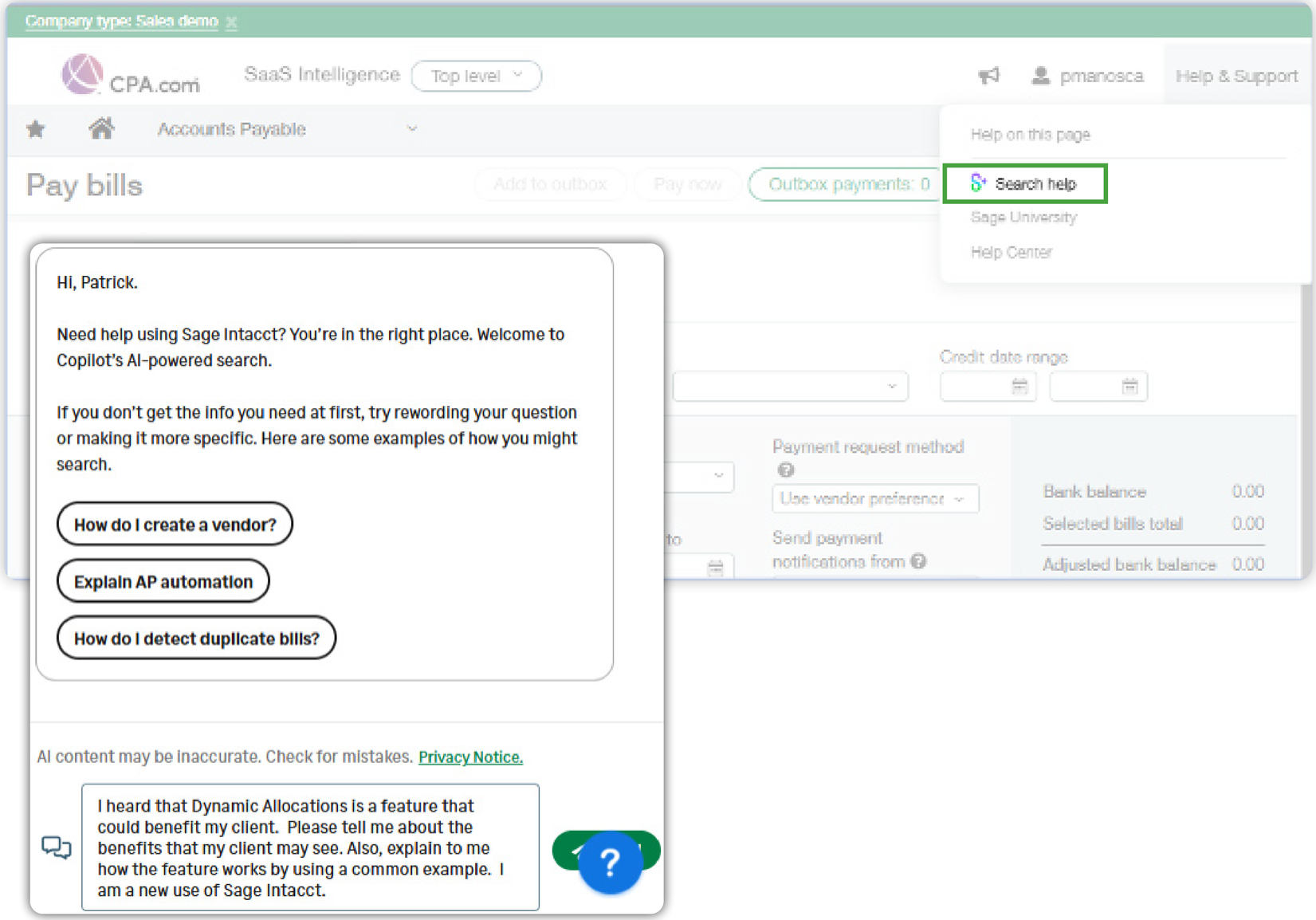


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Search help with Sage Copilot

Navigating the Help Center is made even easier with the power of AI built into Sage Copilot to assist and streamline your search query and results to achieve your tasks in Sage Intacct.

Simply navigate to the Help & Support dropdown within Sage Intacct and select 'Search help.'

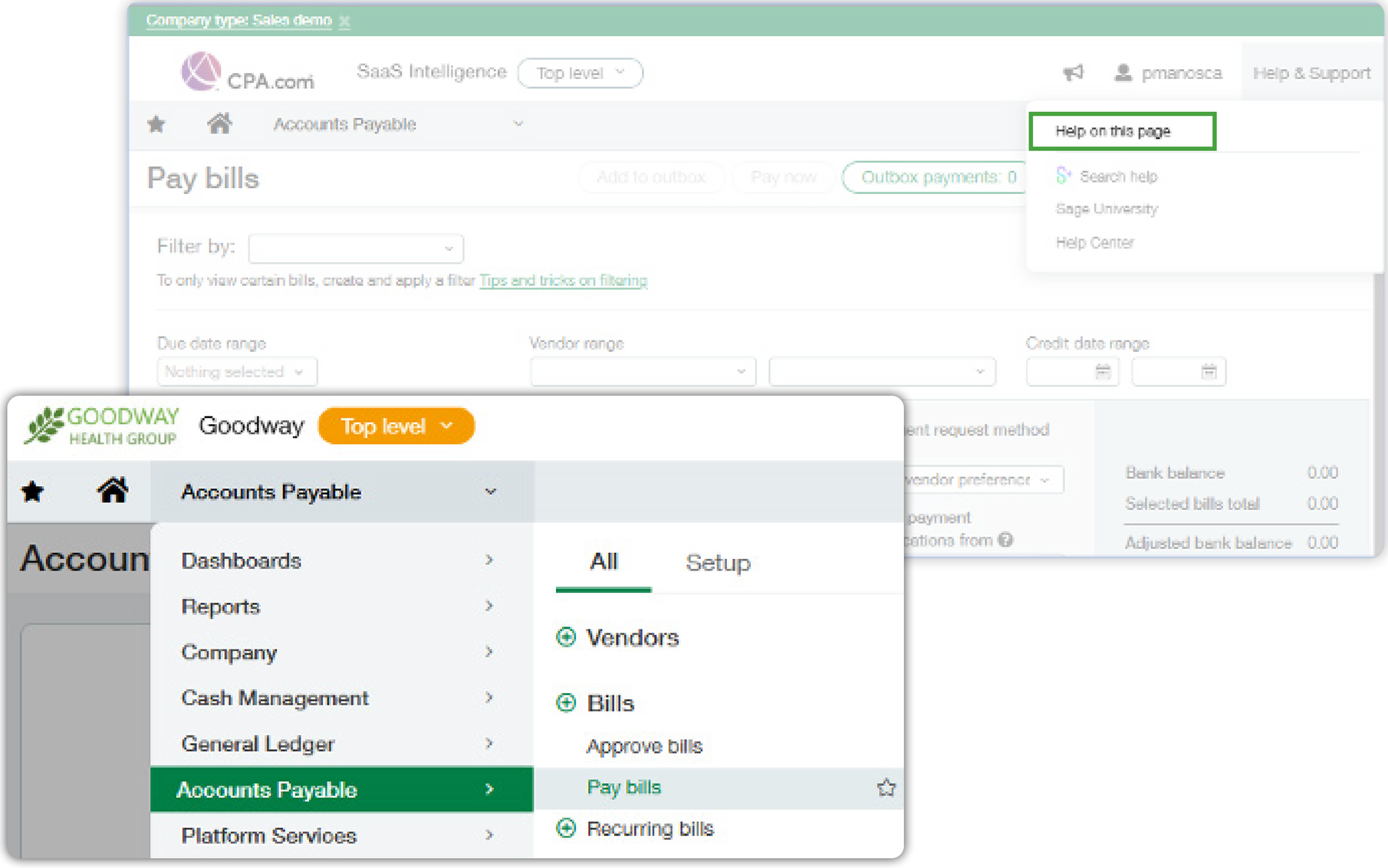


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Help on this page

Looking for an answer to a specific page you are on within Sage Intacct?

Navigate to the Help & Support menu on the right and click on ‘Help on this page.’



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SECTION 2

Sage University



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Sage University (Sage U) is the online learning platform provided by Sage for learning across all Sage products, including Sage Intacct. Use Sage U to learn how to use Sage products, access structured courses, tutorials, and get certified.

Accessible from within Sage Intacct under 'Help & Support' or via sageu.com.



Sage certification

Complete and renew your SIAP required certifications, Accounting Specialist and Implementation Specialist

Product training

Train new employees and master advanced features using the role-based learning, online courses and function-based training

Video library

Nano videos between five to twenty minutes to educate accountants, clients and any users on Sage Intacct functionality

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Sage certification

The Sage Intacct Accounting Consultant and Sage Intacct Implementation Consultant are required* certifications for SIAP firms. Training courses and exams for these certifications can be found by navigating to Sage University and clicking on the appropriate Learning Path. Certifications must be renewed annually to be considered active.



Accounting Consultant



Implementation Consultant

*It is required that 1 person is certified in each and recommended that at least 2 people get certified in each.

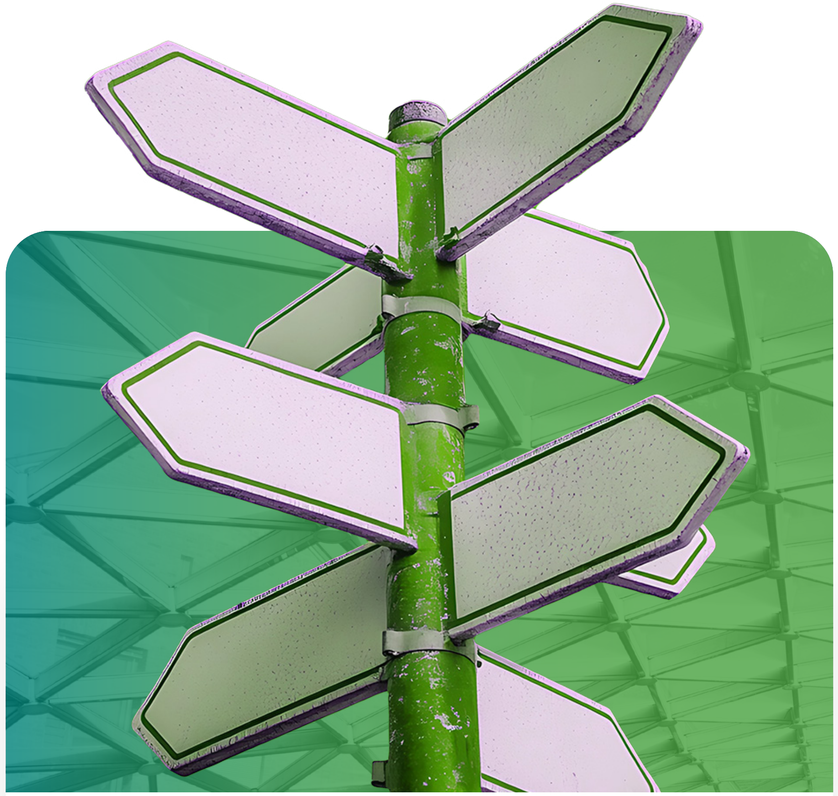
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Product training

As technology advances, so does the capability and functionality of Sage Intacct. To help you keep up with how the product functions, Sage University is the home of a comprehensive product training library where you and your firm can:

- Access all product training, from the basics to Sage Intacct's most advanced functionality.
- Follow curated Learning Paths or search for the product area you'd like to learn more about.
- Find self-paced courses on most product areas, or, for more advanced functionality like Projects, Financial Reporting and Dashboards, or Interactive Custom Report Writer, let instructors guide you through product knowledge.

Navigate to Sage University – Sage Intacct and click on Learning Paths or Course Catalog.



Learning Paths

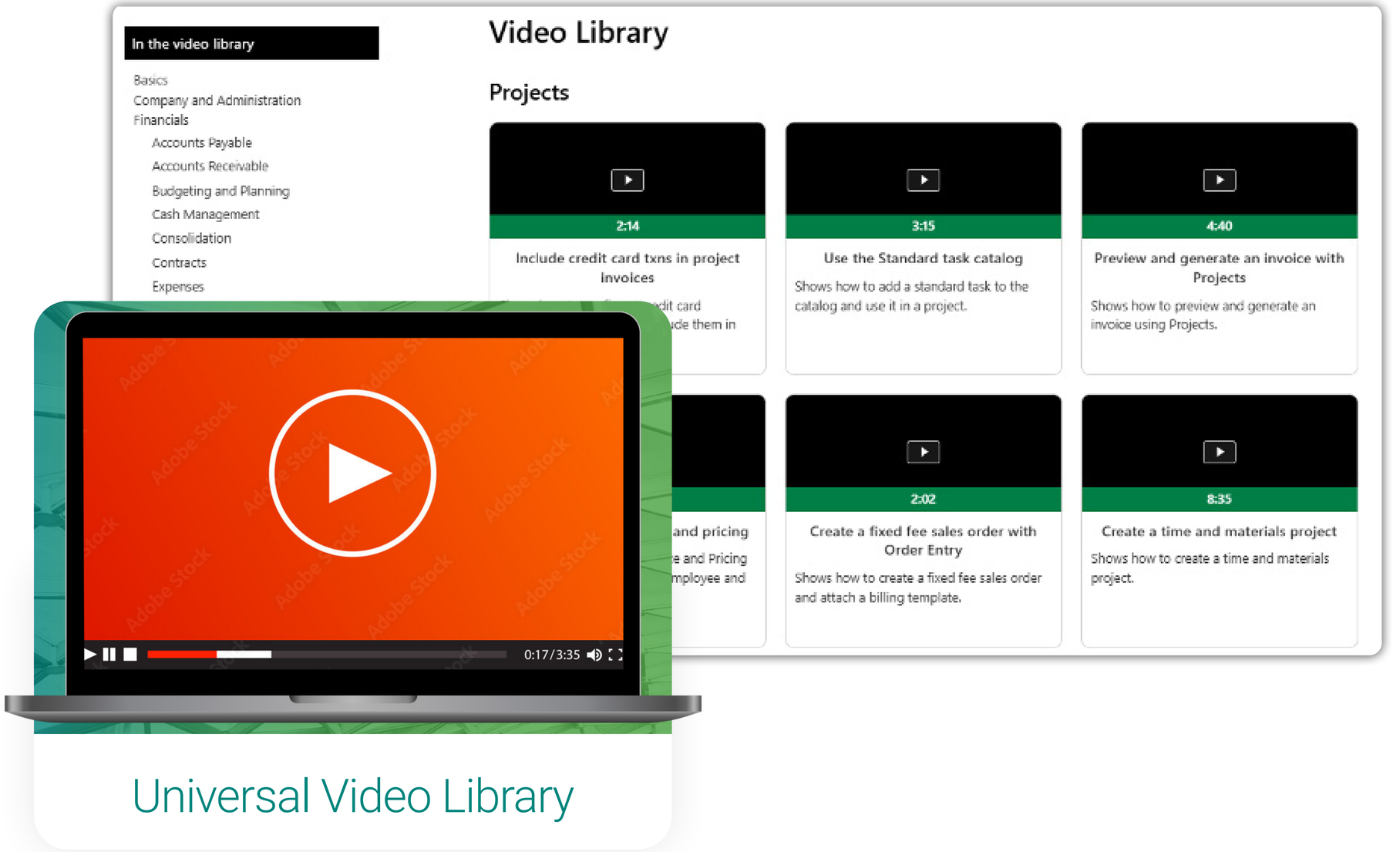


Course Catalog

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Video library

Looking for a refresher on how to use Sage Intacct? In need of a small training video for a client or new employee? The Video Library within Sage University allows for high-level, on-the-spot, task specific instructional knowledge. Login to Sage University and navigate to the Video Library.



Universal Video Library

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SECTION 3

Highspot



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As a Sage Intacct Accountants Partner, you'll have access to a dedicated Highspot repository designed to help your firm bring clients into the Sage ecosystem and drive success.

In this repository, Sage gathers and updates assets for partners and organizes it by content type to help you navigate.

Highspot has an abundance of additional searchable resources. SIAP partners are provided with two or four users, depending on your SIAP membership type. Contact your SIAP Account Executive for access to Highspot.

Login at app.Highspot.com/signin



- Pricing
- Marketing & sales enablement
- Implementation & onboarding

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Pricing

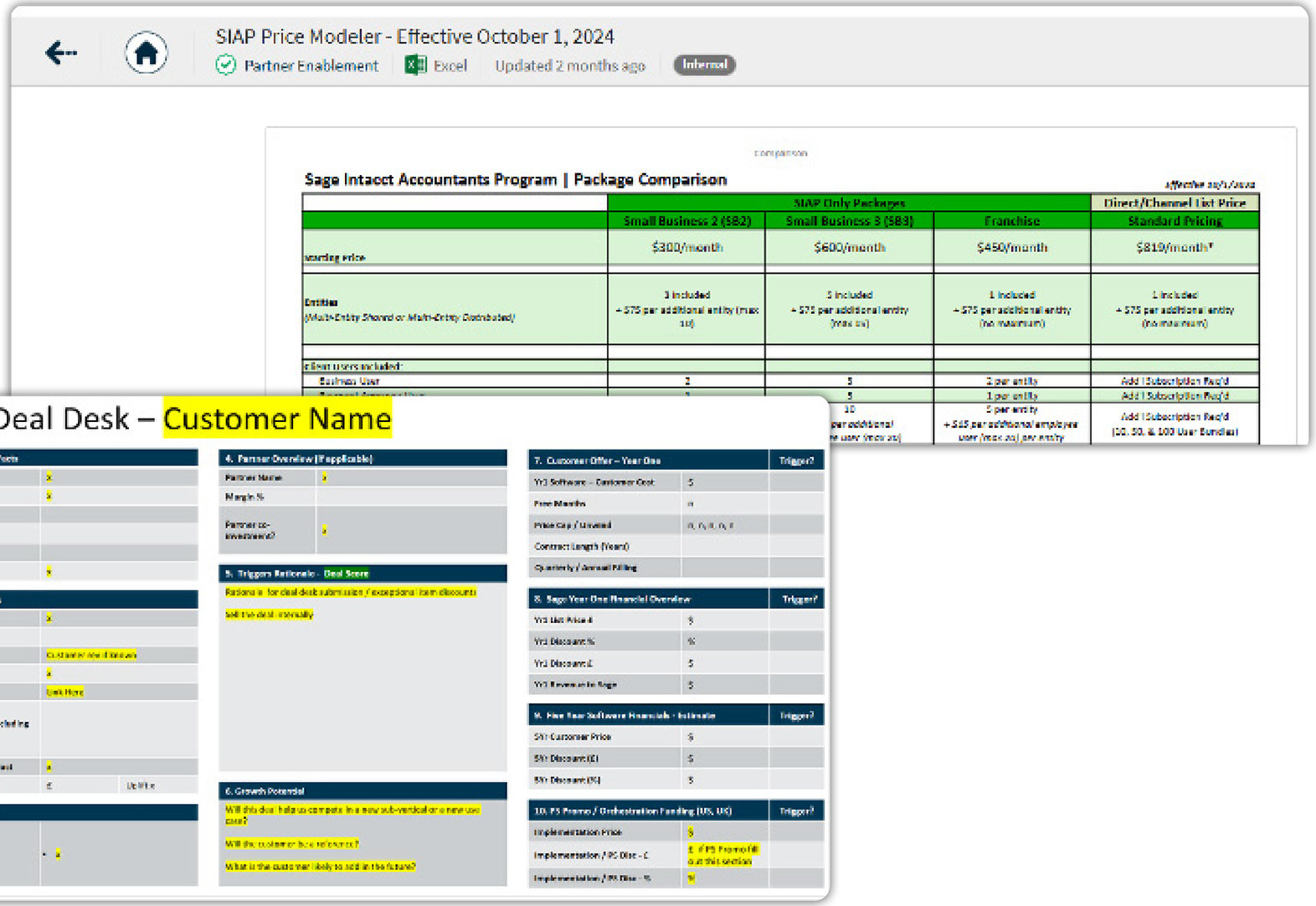
The pricing modeler is vital to your SIAP practice.

This tool should be used to price your Sage Intacct subscription. It has information on available modules and descriptions, as well as SIAP pricing options.

Ensure you always have the most up to date version of the SIAP Pricing Modeler, which can also be found directly from the SIAP Partner Homepage under the Pricing section.

When discussing a switch in accounting software for a client, there will inevitably be questions about the cost equation. Two tools are available to you to help have the conversation with you client: **Sage Deal Desk** and **SIAP Pricing Modeler**. Use of the Deal Desk Form is meant to help firms take price out of the equation when clients are considering multiple accounting solutions.

Access the Sage Deal Desk form directly from the SIAP Partner Homepage under the “Pricing” section.



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Marketing & sales enablement

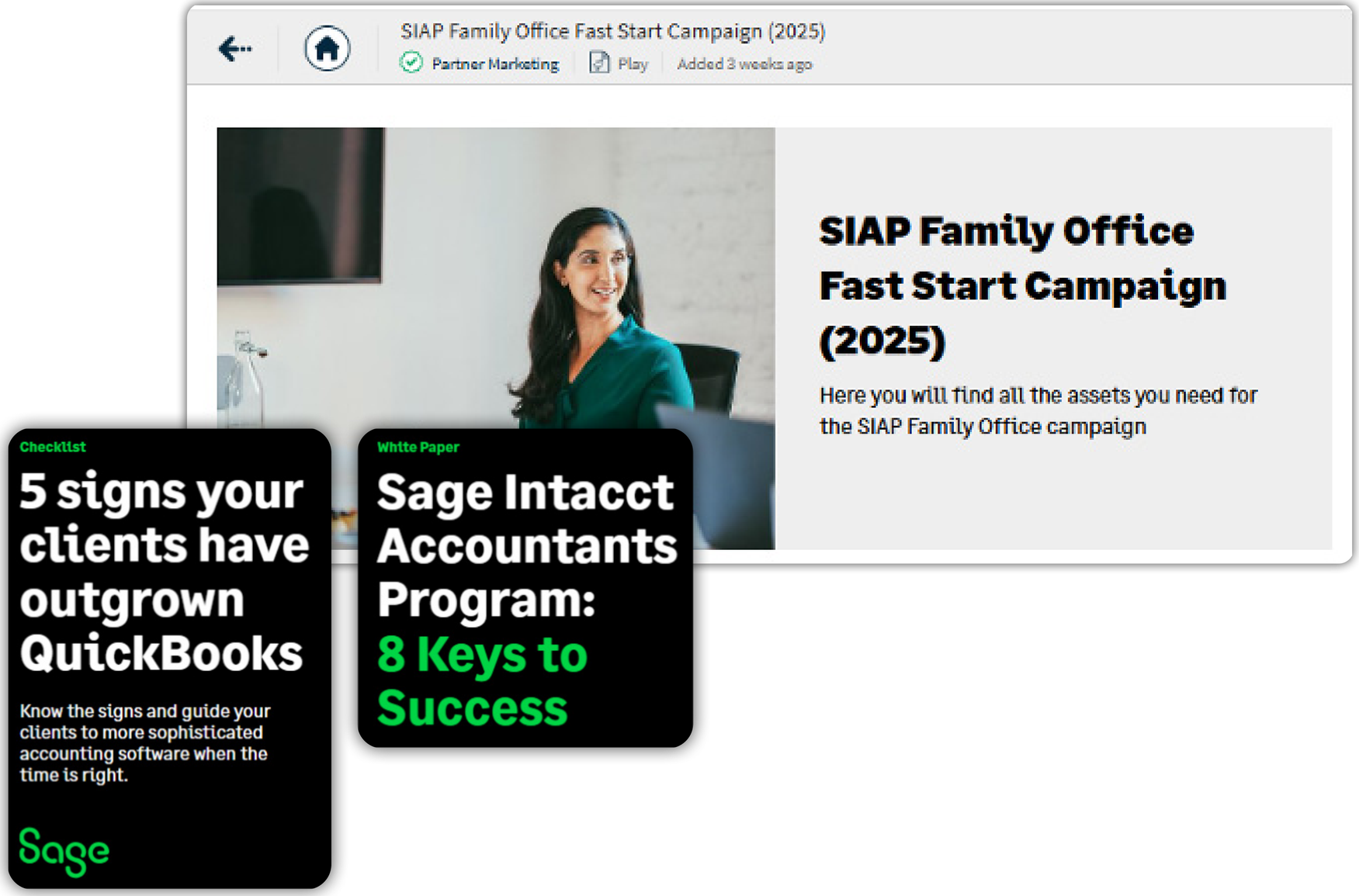
Your firm's success with Sage Intacct translates into greater value for your clients and strengthens our partnership

To help market your services using Sage Intacct as a foundation, Highspot contains robust marketing content with access to assets and campaigns designed specifically for SIAP partners.

Located on the SIAP Partner Homepage, simply scroll down to marketing enablement and select your desired content.

Take advantage of playbooks, education, emails and social media post templates.

Sales enablement content helps ensure you understand and can sell the value of using Sage Intacct along with identifying the right clients for the product. Scroll down to the Sales enablement section to find additional resources.



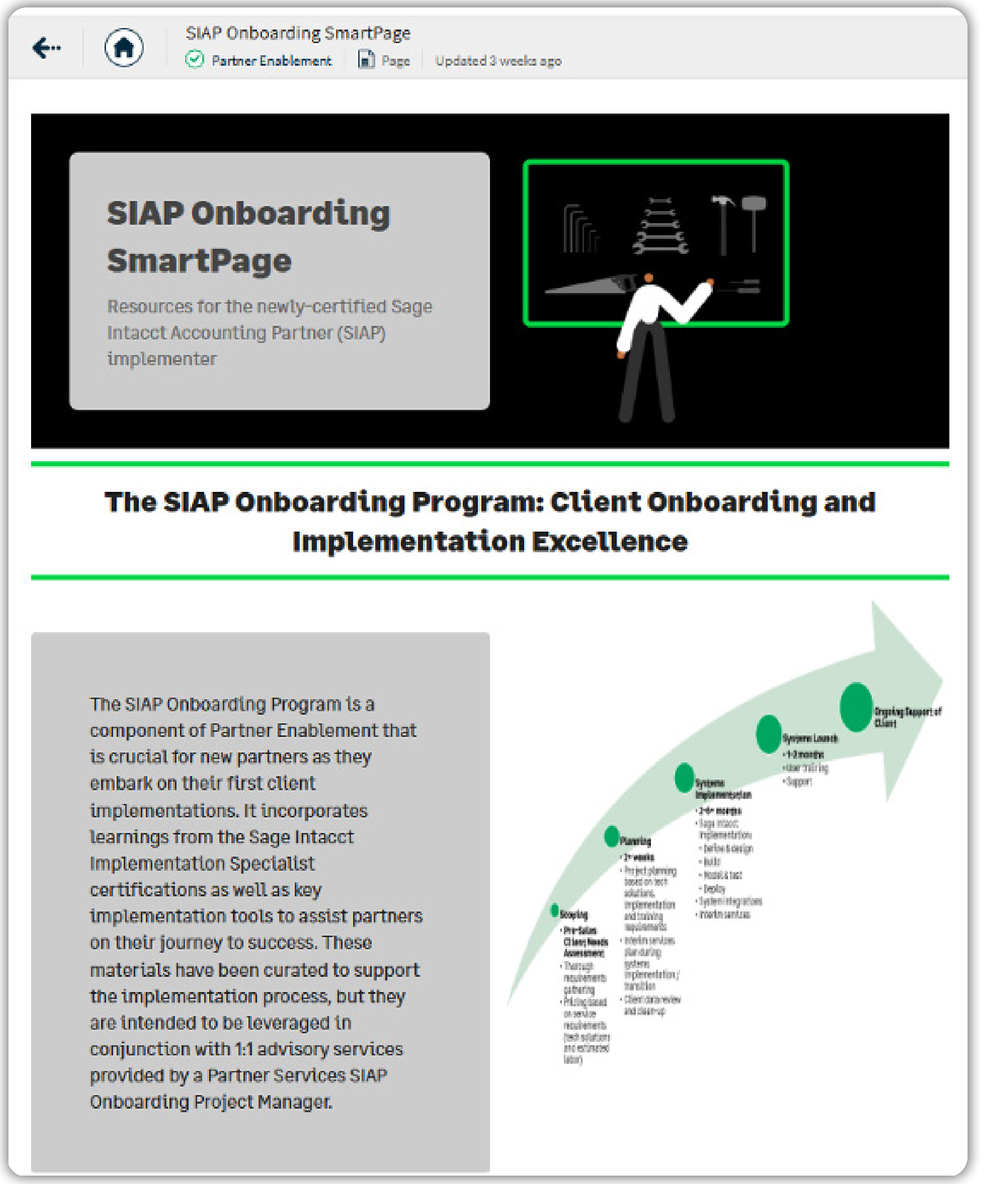
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Implementation & onboarding

Highspot includes a multitude of resources for your implementation and onboarding needs.

The SIAP Onboarding Smartpage provides implementation methodology and tools, including Project Preparation, Trusted Practice Solutions, Demo Company Matrix, and best practices for contacting and working with Sage Support.

This Smartpage and access to other onboarding resources like the Partner Office Hours and Golden Image Program can be found on the SIAP Partner Homepage under Implementation & Onboarding.



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SECTION 4

Sage Community



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With thousands of firms using Sage Intacct, it's safe to say—you're not alone.

Whatever challenge you're facing, chances are someone else has encountered it, solved it, and shared their experience. That's the power of the Sage Intacct Community.

This dynamic hub is more than just a forum—it's a robust knowledgebase built for and by Sage Intacct users. Inside, you'll find:

- Real-world insights from fellow users
- Expert guidance from seasoned pros and Sage support
- Articles, discussions, and how-tos that solve real problems

For SIAP partners, these three key areas of the Community are especially valuable and frequently used.

You can access the Sage Intacct Community directly from your Sage Intacct environment by navigating to Help & Support > Community

There's no limit to how many of your firm's employees can participate. SIAP partners are encouraged to set up as many users as needed to support their teams and unlock the full potential of this resource.

Need help getting started? Your SIAP Account Executive is here to assist with Community setup and access.



Log a support case

Entry point to provision demo environments, certain Intacct modules, and technical support.

Connect with peers

Discuss ideas, post questions, view responses, and browse articles posted by Sage Intacct team members and expert users.

SIAP billing

Access and update billing information for your SIAP billing needs.

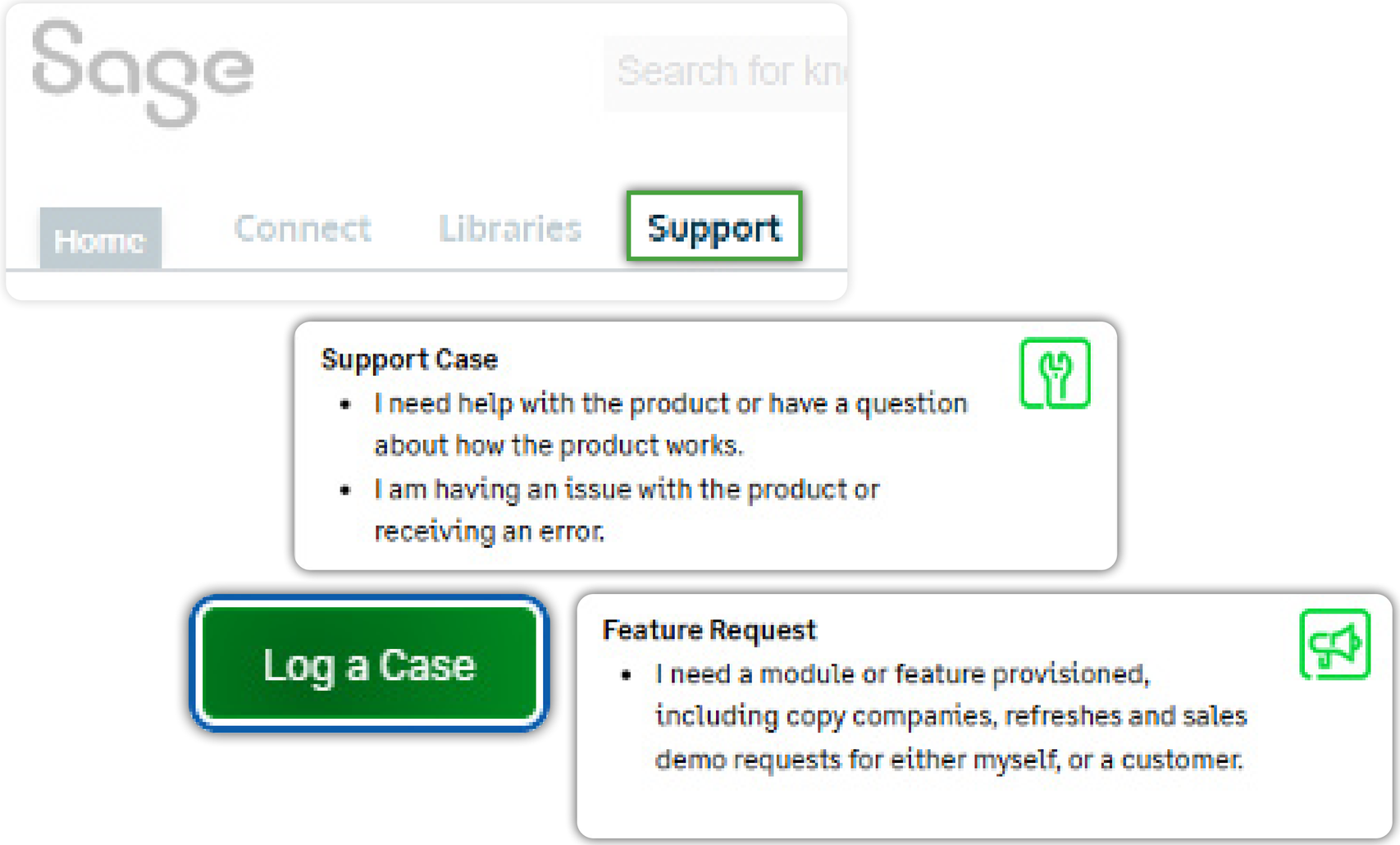
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Log a support case

Sometimes, you need a deeper level of technical support.

Sage Intacct Community makes it easy to create a support case, which you'd use for one of the following reasons:

1. You need technical support directly from Sage Intacct.
2. You need Sage to provision a feature or a module that you cannot enable within an instance.
3. You need a Sage maintained demo environment provisioned.



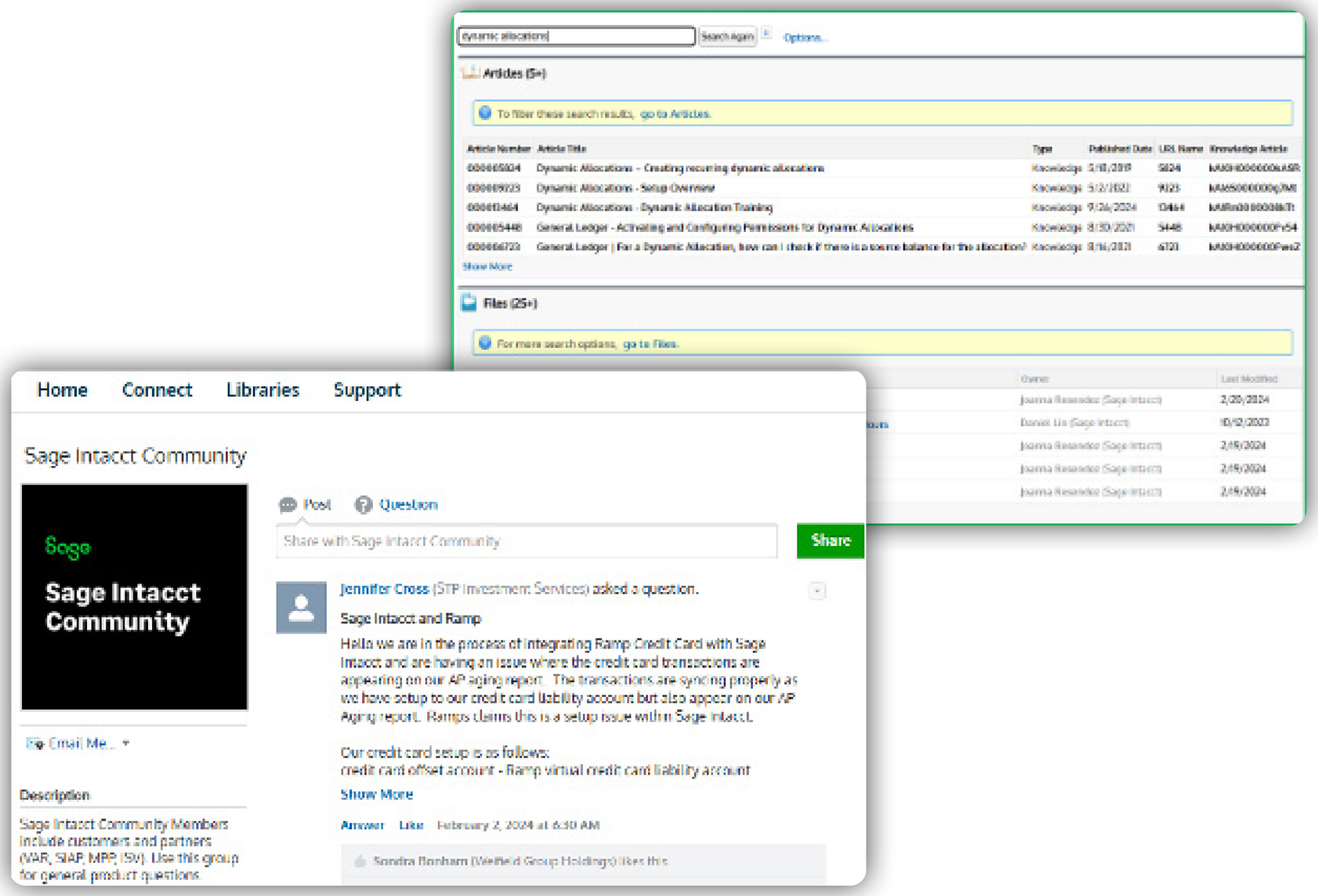
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Connect with peers

The community of Sage users is vast—and you can use it to your benefit.

Reach out to your peers through the Sage community when:

1. You want to research a topic and browse expert users' feedback and discussions
2. You want to ask experienced SIAP users questions
3. You have a great idea for a product enhancement



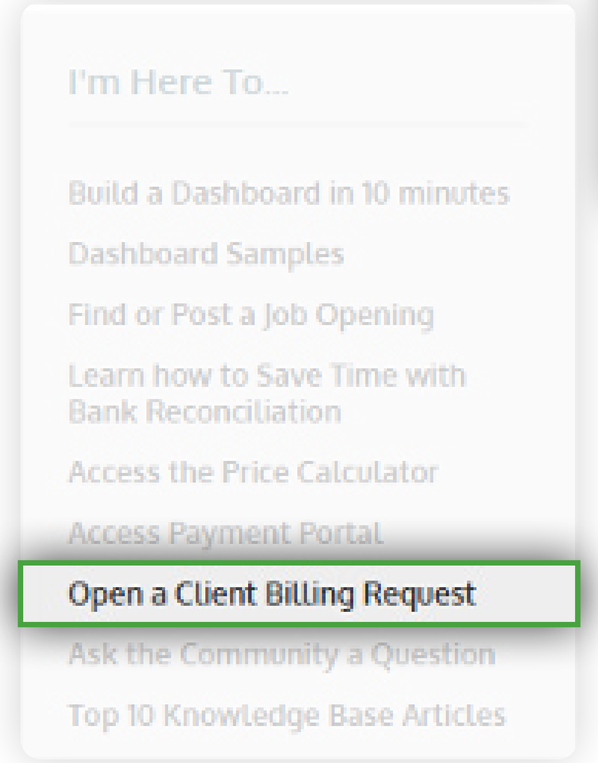
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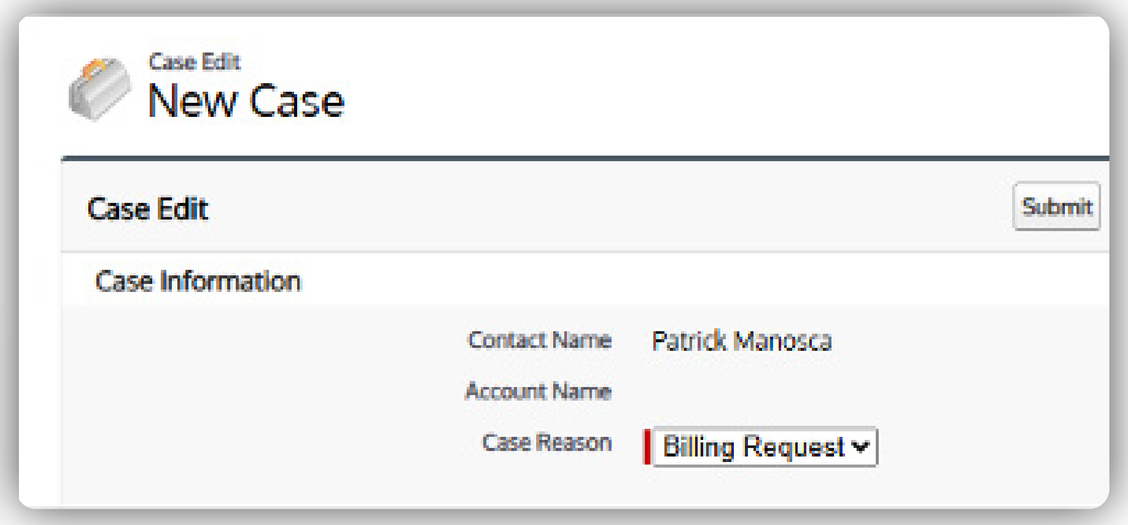
SIAP billing

Things change, and so do billing requirements.

As a partner in the Sage Intacct Accountants Program, you have easy access to make changes to billing including when:

1. You want to request a change to client billings
2. You need to open a new case to track and document changes





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SECTION 5

Consensus



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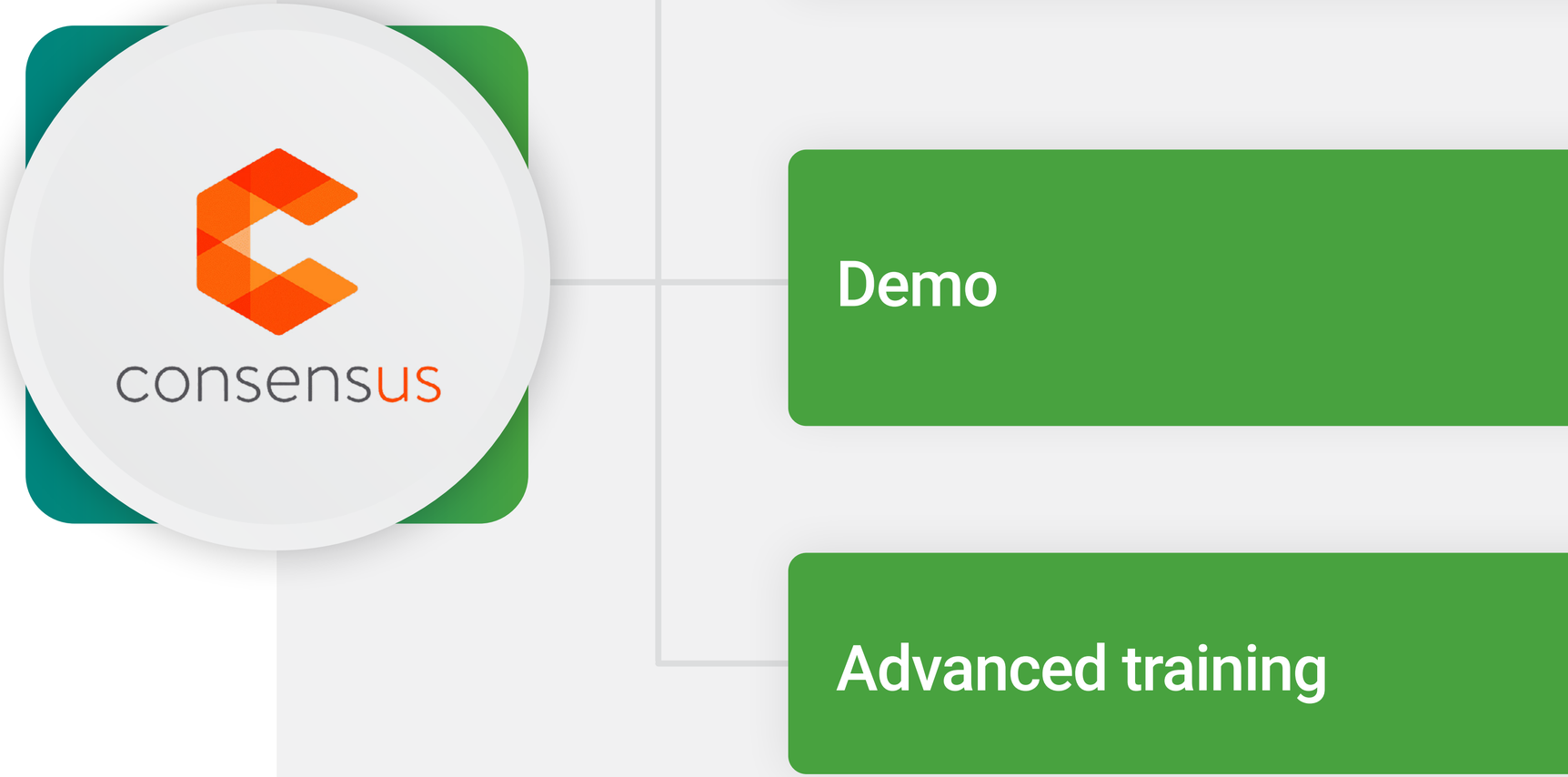
Sage uses a tool called Consensus to deliver robust sales and training assets, which are available to SIAP partners.

The tool is set up to provide detailed training and knowledge.

- Industry specific training tool
  - Educate staff on micro verticals in Sage Intacct
  - Differentiate your practice to prospects and clients
  - Customer (your client) education on their industry
- Product demos to clients and prospective clients
- Advanced product training ancillary to Sage University
  - Demo Library in addition to Sage U Video Library

Contact your SIAP Account Executive to request access to Consensus.

Login at app.goconsensus.com

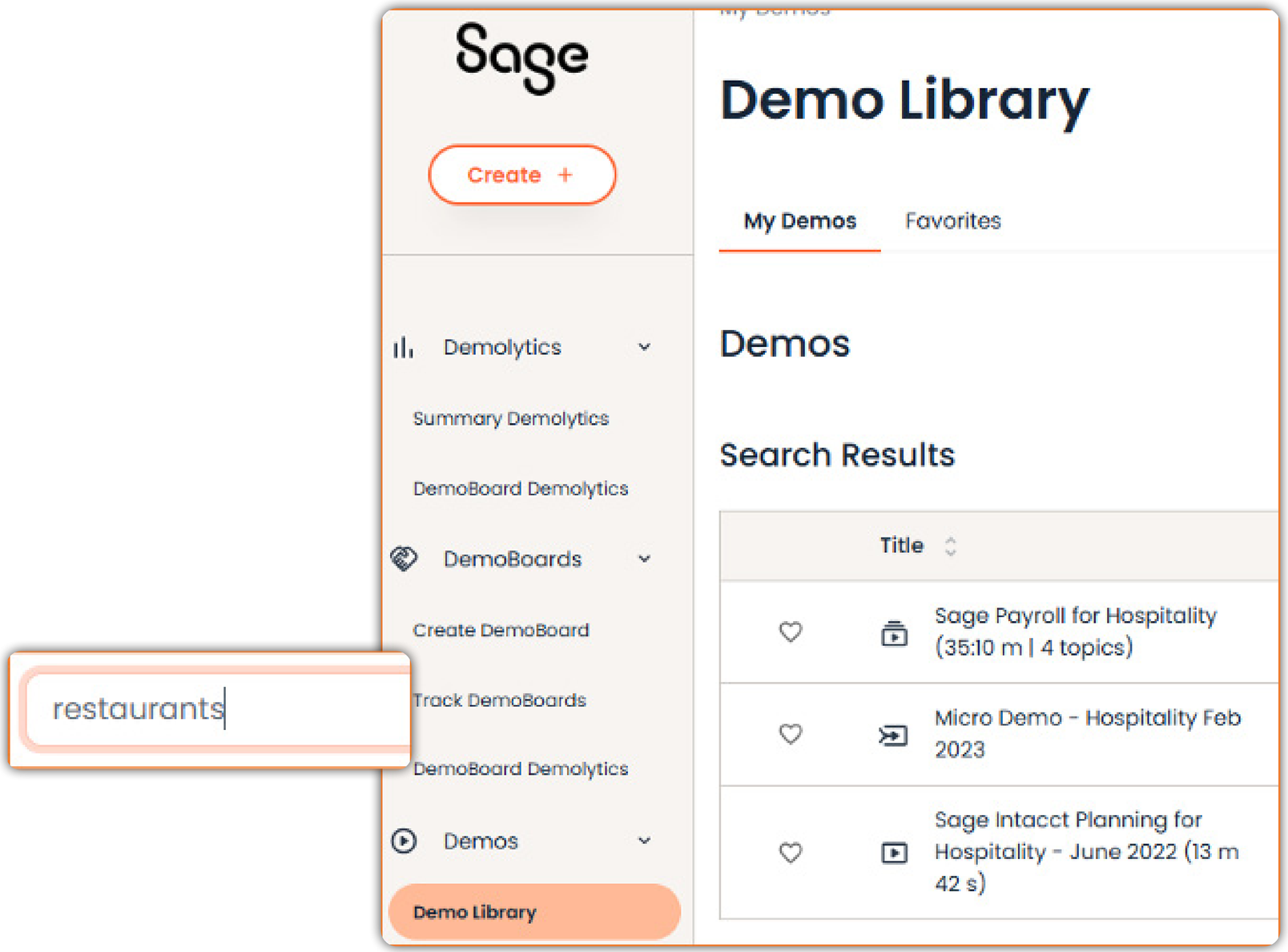


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Industry example

Searching for ‘restaurants’ will show demos that Sage Intacct Solution Consultants have created, delivered, and recorded.

These videos can be shared internally and externally for value added services and training paths.



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SECTION 6

Appendix



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	Purpose	Persona	Use case	Link
Training appendix				
Highspot	Hub for SIAP Firms	All users	You need informtion on anything regarding Intacct	sageintacct.highspot.com
Help Center	Core functionality	Staff, Reviewer	You need how to steps to achieve a task	sageintacct.highspot.com
Sage university	Intacct certifications & courses	Staff	You need Intacct certification and/or education in functions	sageintacct.highspot.com
Community	Knowledgebase, Provision Demo Environments & TPS, Post Q&As	All Users	You need to seek expertise about a topic outside your firm	sageintacct.highspot.com
Consensus	Pre-recorded Demos for Education & Upsell	All Users, Prospective Clients	You need Intacct demonstrated with context	goconsensus.com
Sage Intacct Video Library	4-min to 15-min topical training videos	Staff, Reviewer	You need a brief how–to video on a specific feature	https://www.intacct.com/ia/docs/en_US/help_action/Intacct_basics/video-library.htm
Marketing & sales appendix				
Highspot	Hub for SIAP Firms	All users	You need Sage marketing content and sales assets	sageintacct.highspot.com
Sales enablement	Demos by vertical, content on FP&A, Outgrowing QB	Sales Team	You need a brief demo on restaurants or fixed assets	sageintacct.highspot.com > Sales Enablement
Marketing Accelerator Course	Marketing Strategy, Resources & Courses	Marketing Team	You need marketing training: AI, SaaS, Cloud, Paid Search	sageintacct.highspot.com > Marketing Enablement
Focus on Growth Series SIAP Marketing Resources	Social media marketing, Hubspot Pipeline Mgmt	Marketing Team	You need Hubspot training on pipeline mgt, outbound email	sageintacct.highspot.com > Marketing Enablement
SIAP Marketing Resources	Prospecting, Pipeline, Campaigns, Templates	Marketing Team	You need training on leads, pipeline, email templates	sageintacct.highspot.com > Marketing Enablement
Sales & Demo Skills Training	Courses, Office Hours, Demo Assets by Vertical	Sales Team	You want to enhance your Intacct demo skills	sageintacct.highspot.com > Marketing Enablement > Post-Onboarding Resources
Onboarding appendix				
Highspot	Hub for SIAP Firms	All users	You need to understand how to onboard a client	sageintacct.highspot.com
SIAP Onboarding SmartPage	SIAP Implementation Resource Hub	Implementers	You need to project plan and onboard your first client	sageintacct.highspot.com > SIAP Implementation Guide
Implementation Methodology, Tools	Project Prep, Project Planning, Project Execution	Implementers	You need to understand best practices and available tools to onboard a client	sageintacct.highspot.com > SIAP Implementation Guide
Demo Company Matrix	Demo Environments by Vertical and Focus Area	Implementers	You need to provide sales team demo companies	sageintacct.highspot.com > SIAP Implementation Guide
SIAP Company Templates	Console Template to create client instances	Implementers	You need to templatize a client to scale future clients	sageintacct.highspot.com > SIAP Implementation Guide
Trusted Practice Solutions	Templatized Micro Vertical Production Companies	Implementers	You need to efficiently onboard a client vertical	sageintacct.highspot.com > SIAP Implementation Guide

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About Sage

Sage Intacct is the innovation and customer satisfaction leader in cloud Financial Management. With the powerful combination of Sage, and Intacct, the Sage Business Cloud offers the best capabilities of both companies. Bringing cloud computing to finance and accounting, Sage Intacct's innovative, and award-winning applications are the preferred financial applications for AICPA business solutions. In use by organizations from start-ups to public companies, Sage Intacct is designed to improve company performance, and make finance more productive. Hundreds of leading CPA firms and value-added resellers also offer Intacct to their clients. The Sage Intacct system includes accounting, cash management, purchasing, vendor management, financial consolidation, revenue recognition, subscription billing, contract management, project accounting, fund accounting, inventory management, and financial reporting applications, all delivered through the cloud.

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