

Sage Match¹ connects accountants and bookkeepers with the businesses that need them.

Through this new tool, business owners are able to search for accounting professionals based on their business focus, goals, location, and desired expertise to ensure they find the accounting professional who's right for them. Sage Match also benefits accounting professionals by helping them grow their practice by connecting directly with small businesses looking for the right accountant or bookkeeper to meet their needs and help them succeed. Best of all, access to Sage Match is complimentary.¹

For accountants and bookkeepers: Grow your practice by connecting directly with businesses looking for professionals like you.

For businesses: Let Sage Match find an accounting professional to deliver what you need so you can focus on your business.

Matches are initiated by the businesses, ensuring businesses don't get spammed and accounting professionals only receive requests for proposals from qualified business prospects.

Get started in two simple steps

1. Sign up Accounting professionals: sage.com/ca/sagematch Businesses: sagematch.com



2. Start connecting!



Accountant dashboard

| Sage Malch Home Accountant Dashboard | Profile Jeff Clark 👻 | | sage M | ALCH Home Accountant Dashboard Profile | Jett Clark 🔹 💭 | |
|---|----------------------------|---|---|--|---------------------------|---|
| Requests | | | | Find an Accountant | | |
| Inbox Archived Withdrawn | | | and the second se | Enter a location | Q | |
| Archive Move to Proposals | | | | | | |
| From Subject | Request Date | Action | Filters | | | - |
| | | | Within 10 miles | Services Credentials & Expertise | ▼ Industries ▼ Language ▼ | |
| | | | Response Receiv | d Awaiting Response Accepted Declined Canceled Archive | ad | |
| 1y Proposals | | | | | | |
| All In Progress Accepted Declined Completed Archived | | | Requests RFP No. | Description | Date Action | |
| Archive Mark as in Progress Mark as Accepted Mark as | Declined Mark as Completed | | 95 | Just looking for more information | 2015-08-31 View | |
| From Subject | Status Request Date Action | | 61 | - Looking for a proposal | 2015-07-21 View | |
| | | | | | | |
| Jeff Mitchell Looking for a proposal | Completed 07/21/2015 | Territoria de la construcción de la | My Proposal | | | |
| Jeff Mitchell Looking for a proposal | Completed 07/21/2015 View | Vittopiy Mark as | My Proposal | | | |
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- Simple dashboard options: Home, Dashboard, Profile
- Secure inbox to manage requests and proposals
- Opportunity to sort proposals by in progress, accepted, declined, completed, and archived
- Simple dashboard options: Home, Dashboard, Profile
- Secure inbox to manage requests and proposals
- Opportunity to sort proposals by response received, awaiting response, accepted, declined, canceled, archived
- Multiple ways to search for a professional: distance, services, credentials and expertise, industry, language

Business dashboard

¹ A Sage Impact account is required for accounting professionals to access Sage Match. To receive and maintain access to Sage Match and Sage Impact, you must be an accountant or bookkeeper providing professional accounting or bookkeeping services for multiple fee-paying clients. If at any time Sage determines that you are no longer eligible, your access will be terminated. Sage Impact is your go-to control center for accounting, financial management, business intelligence, community, and business leads–all in one online hub and available at no cost to accounting professionals. Third-party and additional Sage apps or services may be subject to fees and separate terms and conditions.

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