



CONSULTING
BUSINESS ADVISORS AND TECHNOLOGY SOLUTIONS

Sage

Sage Intacct

Quarterly Release Update – R1 2023

Presenters



TOM ACHOR

» Sr. Solutions Consultant

Tom brings over 30 years of experience delivering accounting support and helping clients evaluate, implement, and optimize cloud-based financial and ERP software investments. He has a diverse background working across various public and private industries, with added focus on nonprofit, government, cannabis, healthcare, and retail.



MICHAEL SUDBERRY

» Sr. Systems Implementation Specialist

Michael Sudberry specializes in helping companies implement and optimize financial management solutions for their unique business needs. In addition to a background in accounting, Michael holds multiple Sage Intacct Certifications and has worked extensively with clients in the restaurant, professional services, and nonprofit industries.

Agenda



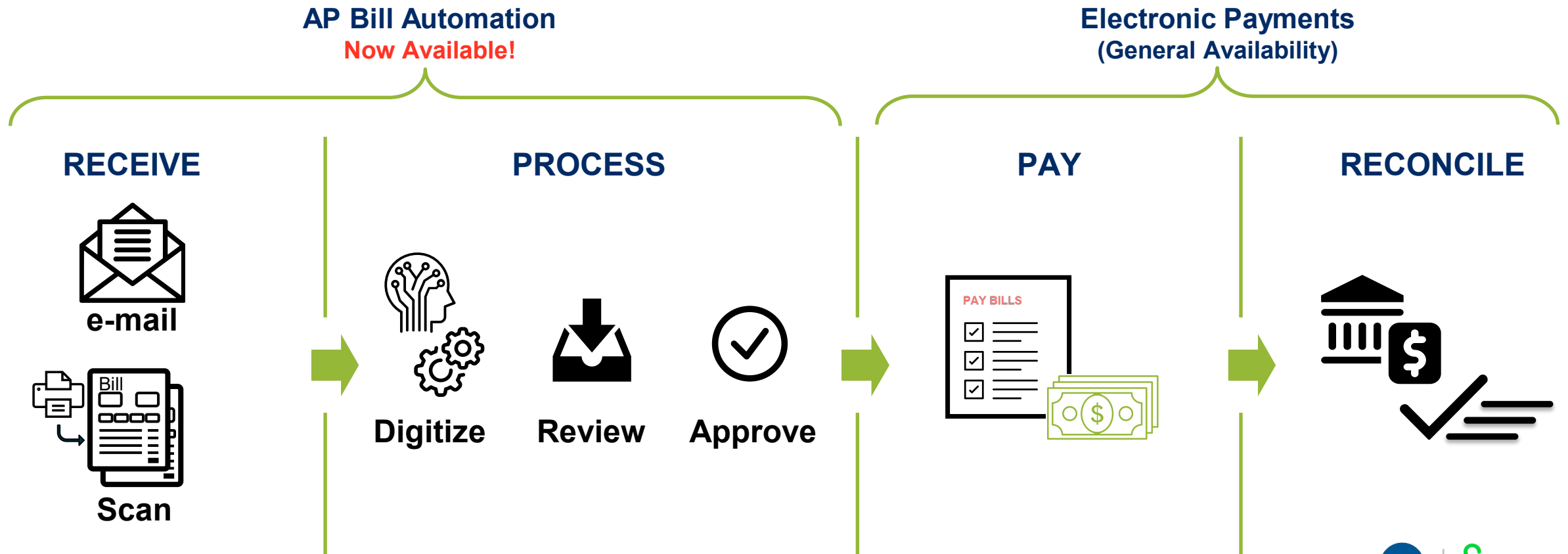
- Sage Intacct Releases
- AP Automation Updates
- Vendor Payments Enhancements
- Enhanced List View
- Move to Sage University
- Projects Enhancements
- Subscription-based Businesses

Sage Intacct Releases

- Quarterly update release schedule – everyone is always on the same version – integrations don't break with new releases!
- New releases may require new permissions or configurations
- Interim releases and updates
- Release 1: Feb 17, 2023

AP Automation Update

Streamline workflows, eliminate manual steps, and save time!



Enhancements to Vendor Payments Powered by CSI

Add an email address for remittances

Set up your vendor remittance emails to go to a different email address than the one you entered during setup. This is useful when your CSI remittance emails land in the CFO's inbox rather than your AP department.

The screenshot shows the 'Cash Management' interface with the 'Payment providers' tab selected. Under the 'CSI' provider, there are two checked options: 'Enable account for Vendor Payments powered by CSI' and 'Rebate account'. The 'Check start no.' field contains the value '7676'. The 'Email address for remittances' field is empty and highlighted with a purple border. The 'Subscribed' status is shown at the bottom left.

Details	Check printing	Bank file	Banking cloud	Payment providers
CSI				
<input checked="" type="checkbox"/>	Enable account for Vendor Payments powered by CSI			
<input checked="" type="checkbox"/>	Rebate account			
		Check start no.	7676	
		Email address for remittances	<input type="text"/>	
Subscribed				

Enhanced List View

Efficiently view and manage Vendor information

The screenshot shows the 'Accounts Payable' interface. The top section displays 'Vendors Beta' with options to '+ Create', 'Import', and 'Export'. Below this is a 'Manage view' dropdown and a 'Display hierarchy' checkbox. A table lists vendors with columns for Vendor ID, Vendor Name, Address Line 1, City, State, Postal Code, and Country. The table includes a search filter 'contains' and an 'equals' filter. The bottom section shows a detailed view for 'V115 -- Martin Electric' with tabs for 'Vendor', 'Additional information', 'Contact list', 'Payment information', 'Bank file', 'Payment providers', and 'Restrictions'. The 'Vendor' tab is active, showing details like ID, Name, Status, and Primary contact information.

Vendor ID	Vendor Name	Address Line 1	City	State	Postal Code	Country
V102	Jason's Deli	50 New Salem Street	Wakefield	MA	18800	United States
V103	Franklin Smith...	PO Box 564	West Chester	PA	19381-0564	United States
V104	Holt Consultings			MA		United States
V105						
V106						
V107						
V108						
V109						
V110						
V111						
V112						
V113						
V114						
V115	Martin Electric					
V116	Amanda Workman					
V117	Ameritas Life Insurance Corp					
V118	Ameris - Corp					
V119	Ameris - B Affleck					
V120	R Reynolds					
V121	Ameris - C Daines					

- Personalize your Vendor list views on the fly
 - Reorder, resize, freeze columns with drag & drop interactions
 - Add / Remove columns on screen
 - Hierarchy view (existing but improved visual)
- Advanced Filtering, Sorting
- Split screen – view list alongside record detail
- Batch operations – bulk delete

Sage University is Here!

Exciting news! **As of January 23**, you can now access training at **Sage University** and can check out our exciting new features and functionality.

New & improved learning paths for ease of use

Earlier access to complimentary training for everybody

Self-service access to learning records

The screenshot shows a user interface for learning paths. It is divided into three main sections: Accounts Payable Specialist, Accounts Receivable Specialist, and Controller/Accountant. Each section has a list of learning paths. The Controller/Accountant section is expanded to show a list of paths with icons and descriptions. The paths are: Get started (Learn basic functions and operations), Core Learning (Learn the skills to perform your everyday duties), Additional Learning (Extend your skills as you gain experience), and Advanced Learning. The Core Learning path is highlighted with a dark background.

The screenshot shows the 'Get Started' and 'Core Learning' sections of the Sage University interface. The 'Get Started' section features a 'Getting Started with Sage Intacct' course card with a description, duration (.75 hour), and audio availability. Below it are 'Return to top' and 'Return to home page' buttons. The 'Core Learning' section features three course cards: 'Sage Intacct Fundamentals (NA)', 'Sage Intacct Fundamentals (UK)', and 'Using and Maintaining a Multi-Entity Shared Environment'. Each card includes a description, duration (8 hours), audio availability, and CPE eligibility (8 credits). 'View details' buttons are present for each course.

The screenshot shows a certificate of completion from Sage University. The certificate is titled 'Certificate of Completion' and is issued to Charley Sheffield for successfully completing the course 'Customizing Documents with Printed Document Template'. The date of completion is 12/08/2022. The certificate is signed by Kristin Feose, Director of Education at Sage Intacct. The certificate also lists the CPE Credits (3), Instructional Delivery Method (Group Internet Based), Area of Study (Computer Software and Application), and NASBA delivery method (QAS Self Study).

Projects Enhancement

- See the transaction state of billable invoice lines in Preview
- Expanded permissions for project manager users
 - Now, you can assign Order Entry (OE) permissions to your project manager users so they can add, edit, and delete Order Entry transactions (Quote and Order template types only).



Subscription-based Businesses

- Enjoy improved usability and flexibility for your contract needs, including support for additional evergreen billing scenarios.
- Model different billing plans without affecting the subledger with a billing schedule preview.
- Clearer guidelines for best practices for contract journal configuration.
- Include variable usage charges in open-ended subscriptions.

▼ Billing

Billing method [?] Flat/flat amount frequency [?]

Fixed price Include with every invoice

Prorate partial periods?

Billing frequency

Monthly

Flat/flat amount per invoice

Calculate

Quantity x Rate x Multiplier - Discount %

OR Enter amount

975.00

Duration (in periods)

6.00

Total flat/flat amount

5,850.00

Line type

Sale

Price list details

[View schedule](#)

Recap

- AP Automation Updates
- Vendor Payments enhancements
- Enhanced List View
- Move to Sage University
- Projects Enhancements
- Subscription-based Businesses



2023 Release 1

Best-in-class financials

GL

- New Trial Balance options

AP

- AP automation – General Availability
- Vendor payments enhancements

AR

- AR payment object in custom reports

CM

- Connect a bank feed to a French bank
- Creation rules now support VAT and GST

Tax

- Electronic filing for South African taxes

Order Entry

- Fulfillment for sales order management—Early Adopter
- Commit quantities during order entry—Early Adopter

Deep cross-industry functionality

Contracts

- Try out billing schedules before saving
- Usage billing with evergreen contracts

Mateo

- Streamlined process for closing a savings account
- Enhanced interest and statement-generation features

Projects

- Expanded permissions for project manager users
- See the transaction state of billable invoice lines in Preview

Leases

- Sage Intacct Lease Accounting—Early Adopter*

Best-in-class cloud platform

Usability

- New Vendor list user experience in public beta

Reporting

- New Construction Payroll reporting areas
- New Permissions reports
- Introducing new training courses and videos
- Sage University is here!

* Early Adopter

Release Resources

- Can be found:
 - On your Sage Intacct Homepage!
 - [Full Release Notes](#)
 - [Access the Sage Intacct Community](#)
- 2023 Quarterly Release Calendar:

Release	Release Date
Release 1	February 17, 2023
Release 2	May 12, 2023
Release 3	August 18, 2023
Release 4	November 10, 2023

| Thank You!

For questions or to request a personalized demo, contact us:

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