SSF 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.
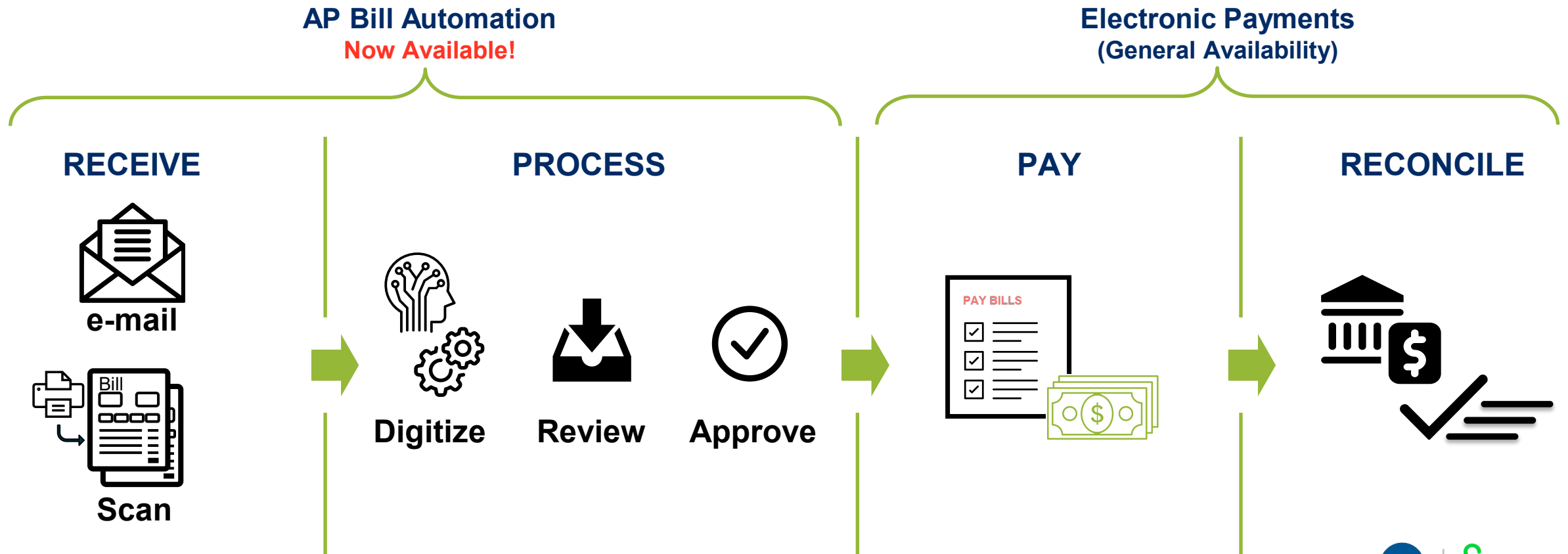
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Agenda

- 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.

Enhanced List View

Efficiently view and manage Vendor information

- 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

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.

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

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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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