



**CONSULTING**  
BUSINESS ADVISORS AND TECHNOLOGY SOLUTIONS

| Sage Intacct

Sage Intacct

**Quarterly Release Update – R3 2022**

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# Presenters

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**TOM ACHOR**

» Sr. Solutions Consultant

With over 30 years of experience, Senior Solutions Consultant, Tom Achor, specializes in delivering accounting support and helping clients evaluate, implement, and optimize cloud-based financial and ERP software investments.



**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.

# Sage Intacct Releases

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- Quarterly Update release schedule – everyone is always on the same version – integrations don't break with new releases!
- Interim Releases and Updates
- Release 3: August 19, 2022
- Next release: November 11, 2022

# Agenda

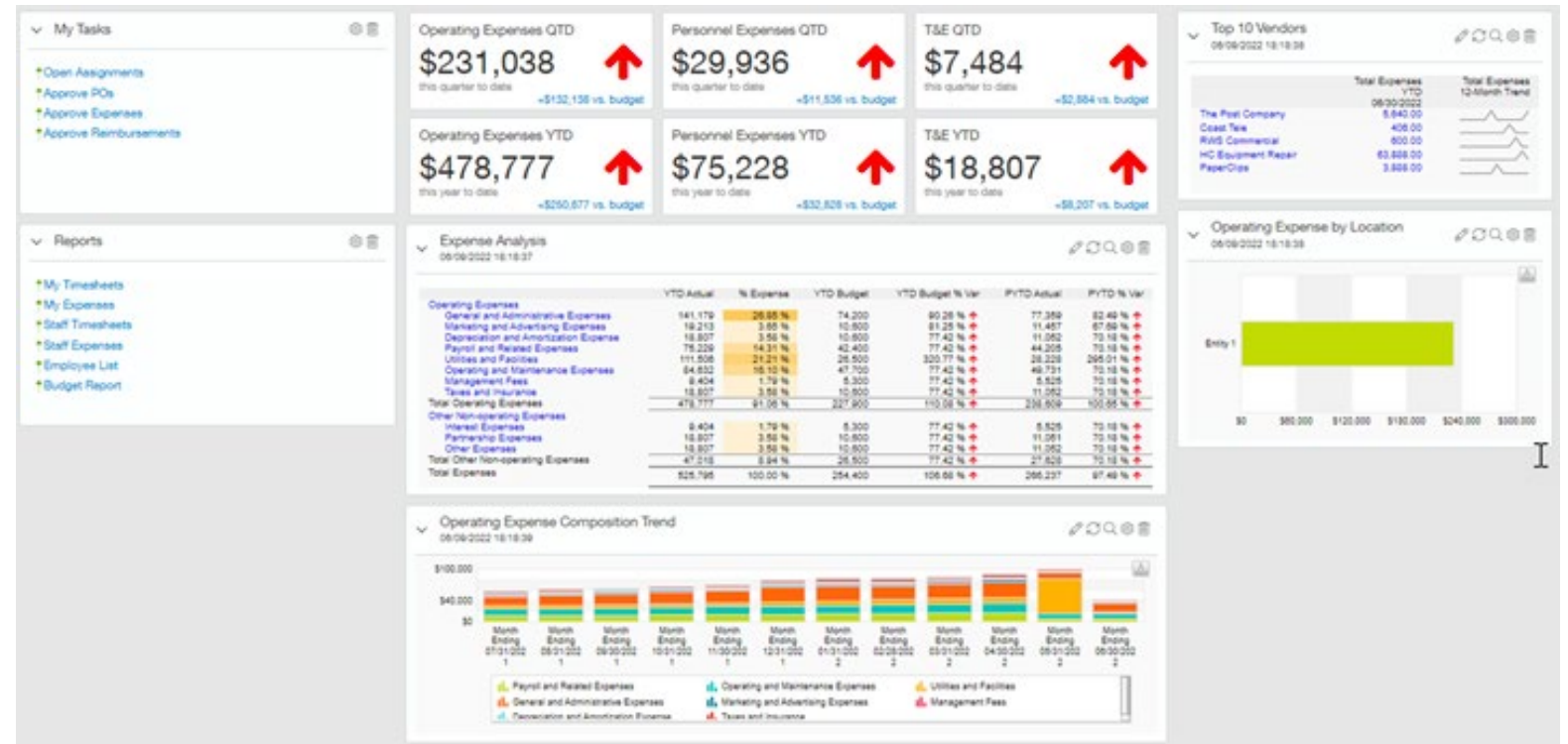
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- QuickStart: Role-based Dashboards
- Accounts Payable: Expanded Bill Attachments
- Accounts Receivable:
  - Enhancements to Received Payments
  - XML Preview of AR Statements and Invoices
- Contracts:
  - Automatic Invoicing
  - Renew Termed Contract as Evergreen
- Cash Management: Automatically Create Credit Card Transactions

# QuickStart Dashboards

- For the *General Business* and *Not-For-Profit* QuickStart templates
- New Role-based Dashboards:
  - CFO
  - Controller
  - AP Manager
  - AR Manager
  - Department Manager



# Accounts Payable

- New view of Attachments

The screenshot displays the Accounts Payable interface for a bill with ID 510-1429650. The bill is for 'Steampunk Computer Repair (V0013)' and is currently 'Posted'. The interface shows a summary table with the following data:

Bill date	Due date	Overdue	Bill total	Amount paid	Amount due	Bill state
05/16/2022	06/30/2022	26 days	250.00 USD	0.00 USD	250.00 USD	Posted

Below the summary table, there are sections for 'Date', 'Vendor', 'Bill number', 'Term', and 'Due date'. The 'Attachment' section is highlighted with a red box, showing an attachment named 'Attach-00004' with a 'Place this bill on hold' checkbox.

On the right side, a split view window displays the invoice details for 'Steampunk Computer Repair'. The invoice includes the following information:

- Invoice #:** 100
- Invoice Date:** DATE
- SHIP TO:** Recipient Name, Company Name, Street Address, City, ST ZIP Code, Phone, Phone
- COMMENTS OR SPECIAL INSTRUCTIONS:** To get started right away, just top any placeholder text (such as this) and start typing to replace it with your own.
- Table:** A table with columns: SALESPERSON, P.O. NUMBER, REQUISITIONER, SHIPPED VIA, F.O.B. POINT, TERMS. The TERMS column contains 'Due on receipt'.
- Table:** A table with columns: QUANTITY, DESCRIPTION, UNIT PRICE, TOTAL.
- TOTALS:** SUBTOTAL, SALES TAX, SHIPPING & HANDLING, TOTAL DUE.
- Footer:** THANK YOU FOR YOUR BUSINESS!

Personalize split view

- Enable split view
- Show split view on page load

# Accounts Receivable

- Enhancement to Receive Payments
  - Simplified Workflow

The image shows two screenshots of the 'Receive Payment' form in the Accounts Receivable module. The top screenshot shows a basic form with fields for Customer, Amount received (USD), Account type, Account, Payment method, Invoice currency, and Payment currency. A 'Show invoices' button is highlighted with a purple box. The bottom screenshot shows the same form after clicking 'Show invoices', which has expanded to include an 'Additional information' section with Date received and Payment date, and an 'Invoices selected for payment' table. A purple arrow points from the 'Show invoices' button in the top screenshot to the 'Invoices selected for payment' table in the bottom screenshot.

**Payment information**

Customer	C-00051--Customer1	Amount received (USD)	0.00	Account type	Bank	Account	CHK0001--HSBC(USD)
Payment method	Cash	Invoice currency	USD	Payment currency	USD		

**Additional information**

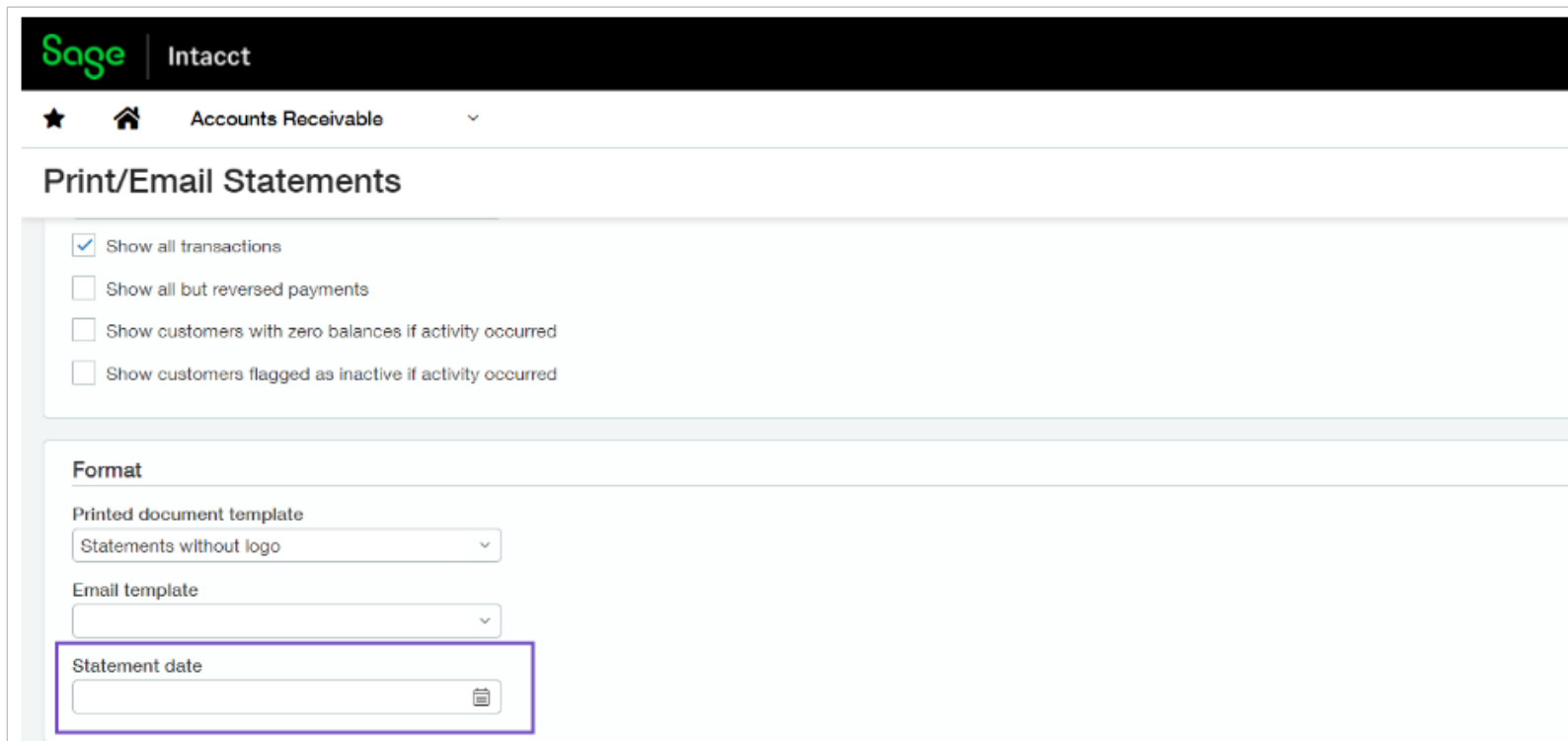
Date received	14-07-2022	Payment date	14-07-2022	Payment memo		Attachment	
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**Invoices selected for payment**

Invoice no.	Customer	Txn. currency	Txn. amount	Credits available	Credits to apply	Discount available	Apply discount	Amount due	Payment amount	Outstanding amount	Line details
1	85656	zampa	USD	2,500.00	0.00	--	<input checked="" type="checkbox"/>	2,500.00	2,000.00	0.00	<a href="#">Line details</a> +
2	--	--	--	0.00	--	--	<input type="checkbox"/>	--	--	0.00	-- +
Total			2,500.00	--	--	--	--	2,500.00	2,000.00	0.00	

# Accounts Receivable

- XML Preview of AR Statements and Invoices
- New Statement Date field <<STATEMENT\_DATE>>



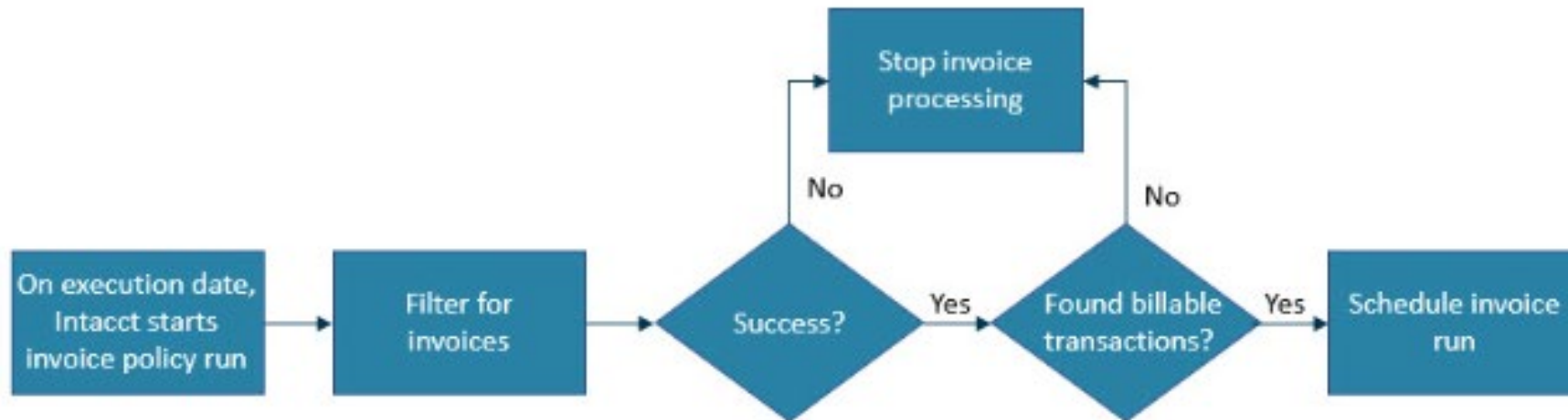
The screenshot shows the Sage Intacct interface for Accounts Receivable. The top navigation bar includes the Sage logo and the word 'Intacct'. Below this, there are icons for a star and a home button, followed by the text 'Accounts Receivable' and a dropdown arrow. The main heading is 'Print/Email Statements'. Underneath, there are four checkboxes: 'Show all transactions' (checked), 'Show all but reversed payments', 'Show customers with zero balances if activity occurred', and 'Show customers flagged as inactive if activity occurred'. Below these is a 'Format' section with three dropdown menus: 'Printed document template' (set to 'Statements without logo'), 'Email template', and 'Statement date'. The 'Statement date' field is highlighted with a purple border and includes a calendar icon.



# Contracts – Automatic Invoicing

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- Set up and configure an invoice policy with the desired invoice run schedule settings and filter criteria



# Contracts – Renewals

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- Automatically renew term contracts as evergreen

## Configure Contracts

▼ Billing

Term type options

Termed

Evergreen

Both

Invoice transaction definition ?

Contract Invoice ▼

Enable usage billing

# Auto-Create Charge Card Transactions

**Rule**

Details

Type: Create rule

ID \*:

Name \*:

Description:

Status: Active

Filter transaction by

		Data source	Field	Operator	Value	
≡	1	Bank transactions	Transaction type	equals	Debit	+ 🗑️
≡	2					+ 🗑️

- Use existing creation rule engine on bank feed or import
- Define criteria for incoming bank data
- Create matching CC transactions in draft or posted state based on reusable transaction templates

# Other Enhancements

- Interactive Custom Report Writer and Interactive Visual Explorer Time Series
- Platform Triggers

**Trigger Type**

Select the type of action that should be performed when this trigger is activated.

**Trigger Type**

Type	Description
<input type="radio"/> Validation	Formula-based data validation
<input type="radio"/> Update Field Value	Update the value of a field in this record or a related record
<input type="radio"/> Create New Record	You must create at least one Conversion Map before you can use this event type.
<input type="radio"/> Attach Related Record	You must create at least one Relationship before you can use this event type.
<input type="radio"/> Run Triggers on Related Records	You must create at least one relationship before you can use this event type.
<input type="radio"/> Send Email	Send an email based on an Email Template
<input type="radio"/> HTTP Post	Send a request to an external system using HTTP POST
<input type="radio"/> Intacct API	Send a request to the Intacct API

# Recap

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# Release Resources

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- Can be found:
  - On your Sage Intacct Homepage!
  - [Full Release Notes](#)
  - [Access the Sage Intacct Community](#)
- 2022 Quarterly Release Calendar:

Release	Release Date
Release 1	February 18, 2022
Release 2	May 13, 2022
Release 3	August 19, 2022
<b>Release 4</b>	<b>November 11, 2022</b>

# Hope to See You There!

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Sage  
Transform

**Sage Transform 2022**

Orlando, Florida | **October 10-14, 2022**

[Registration now open](#)



# | Thank You!

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

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