SSF CONSULTING
BUSINESS ADVISORS AND TECHNOLOGY SOLUTIONS
Sage Intacct

Sage Intacct
Quarterly Release Update – R3 2022

Presenters

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

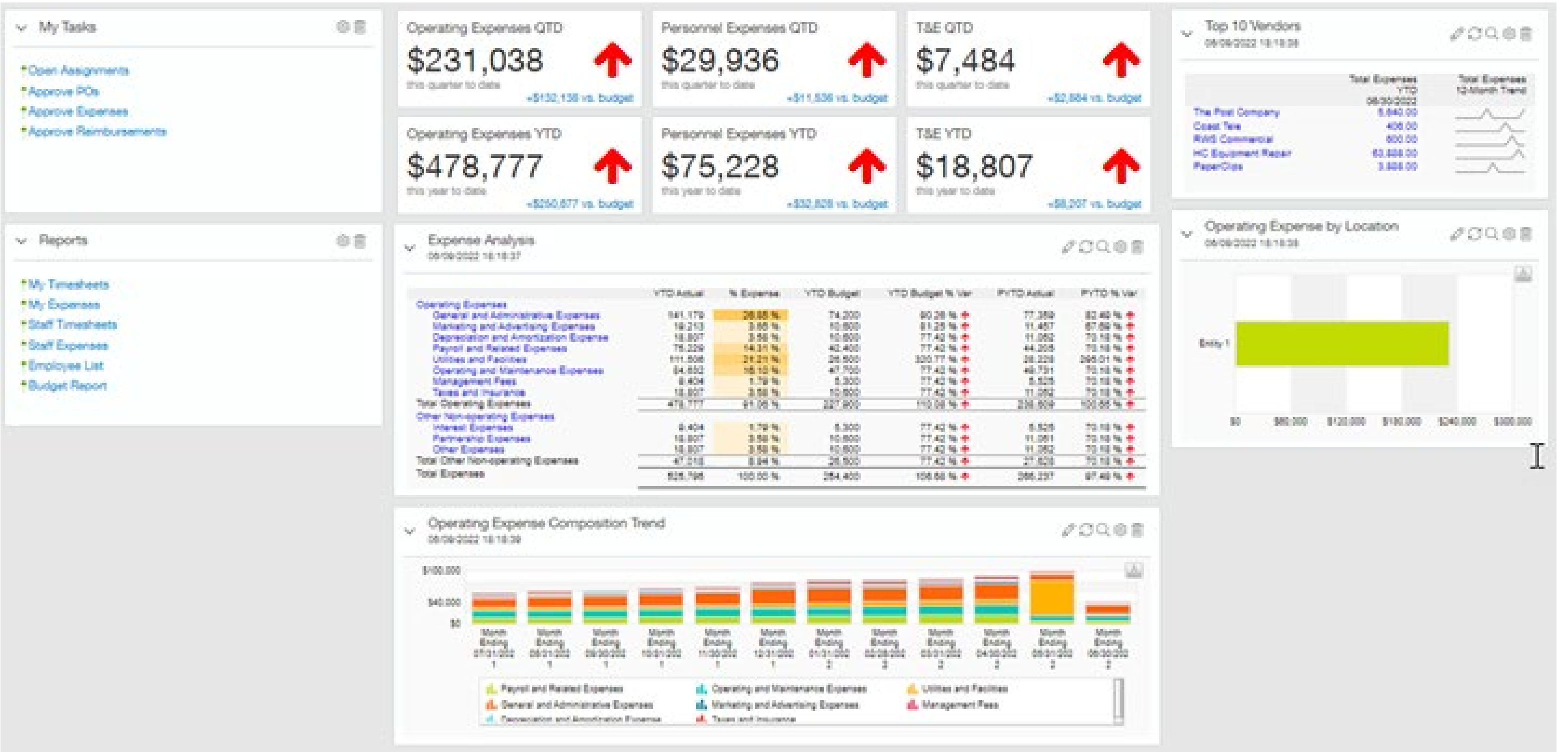
- Quarterly Update release schedule – everyone is always on the same version – integrations don’t break with new releases!
- Interim Releases and Updates
- Release 3: August 19, 2022
- Next release: November 11, 2022

Agenda

- 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



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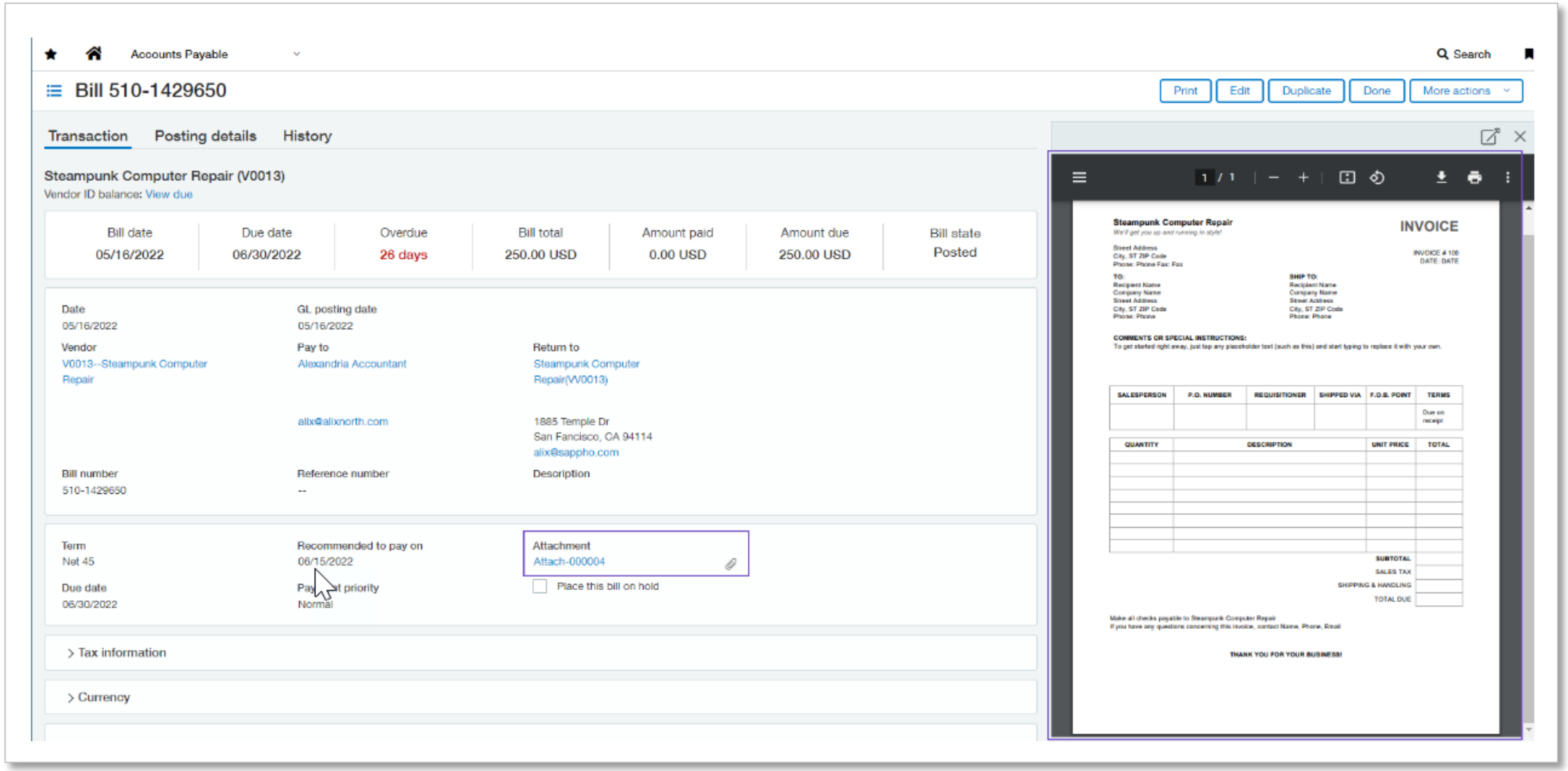
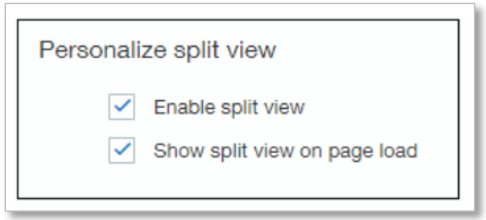
Accounts Payable

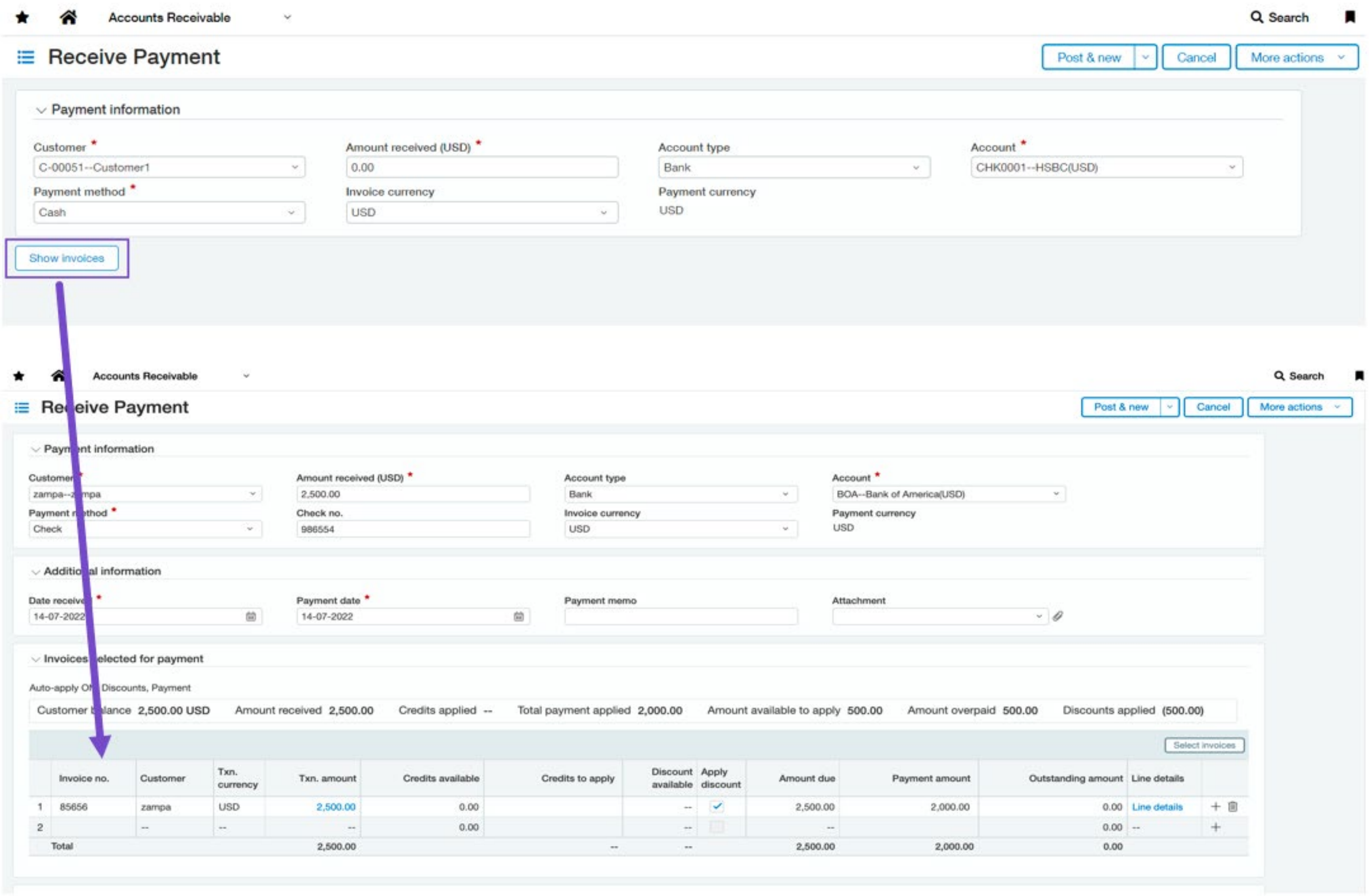
- New view of Attachments





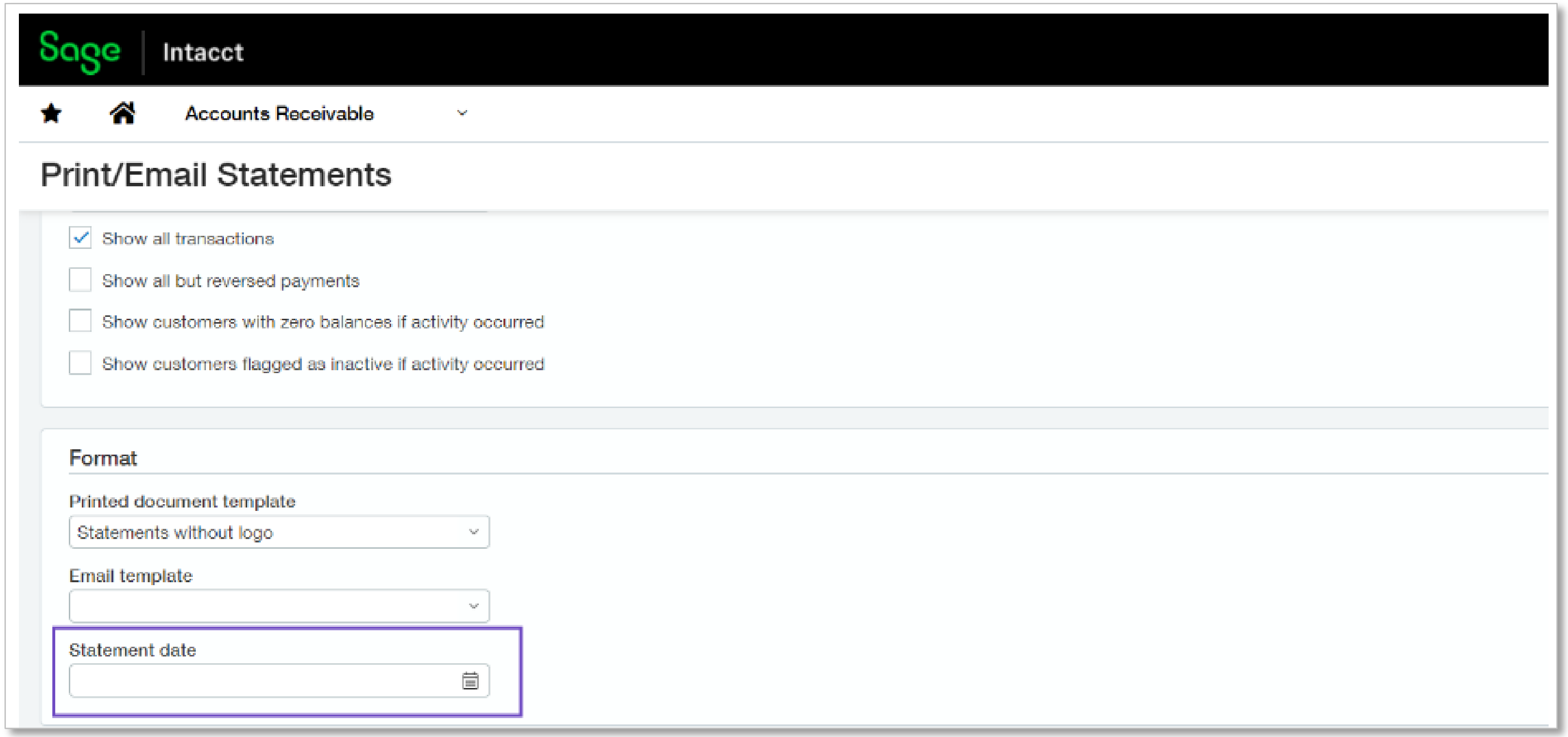
Accounts Receivable

- Enhancement to Receive Payments
  - Simplified Workflow



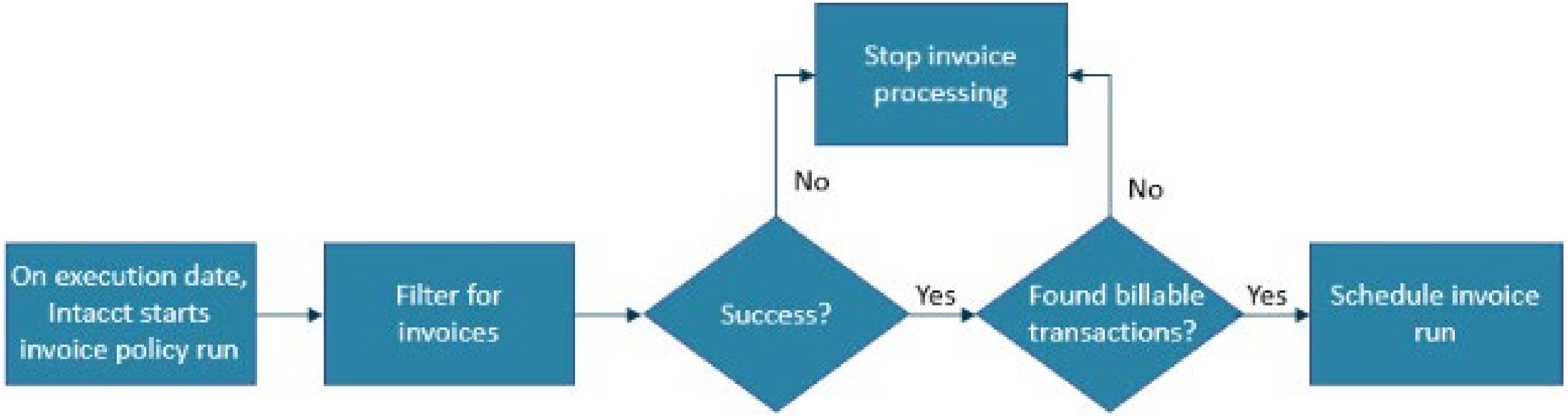
Accounts Receivable

- XML Preview of AR Statements and Invoices
- New Statement Date field <<STATEMENT_DATE>>



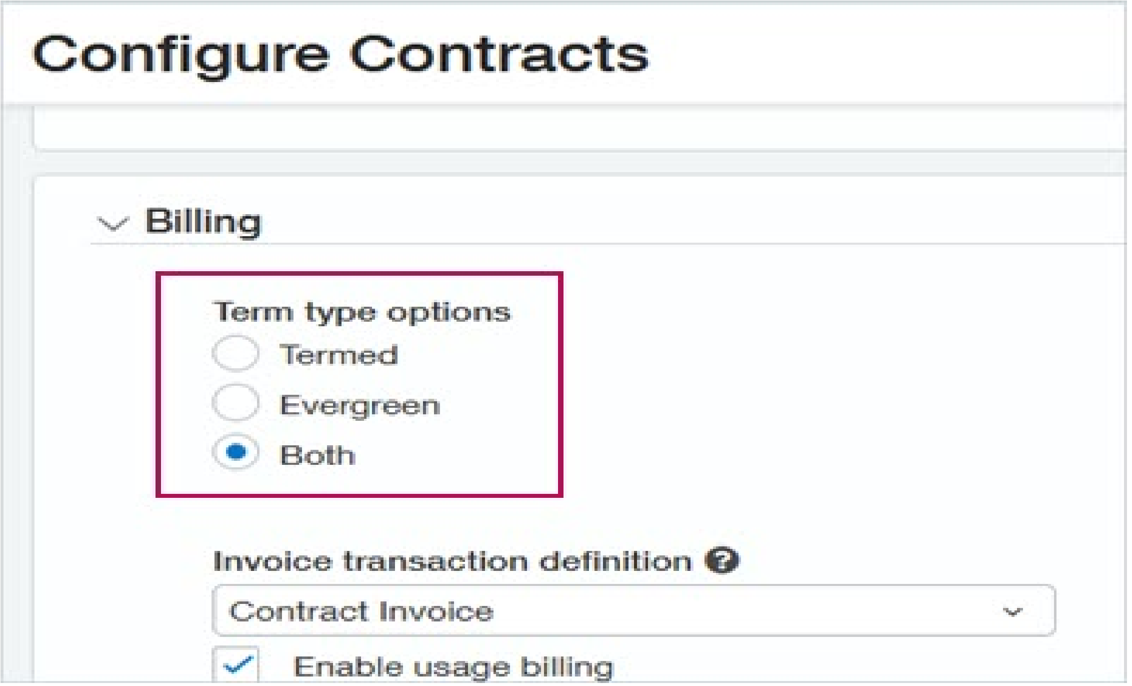
Contracts – Automatic Invoicing

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

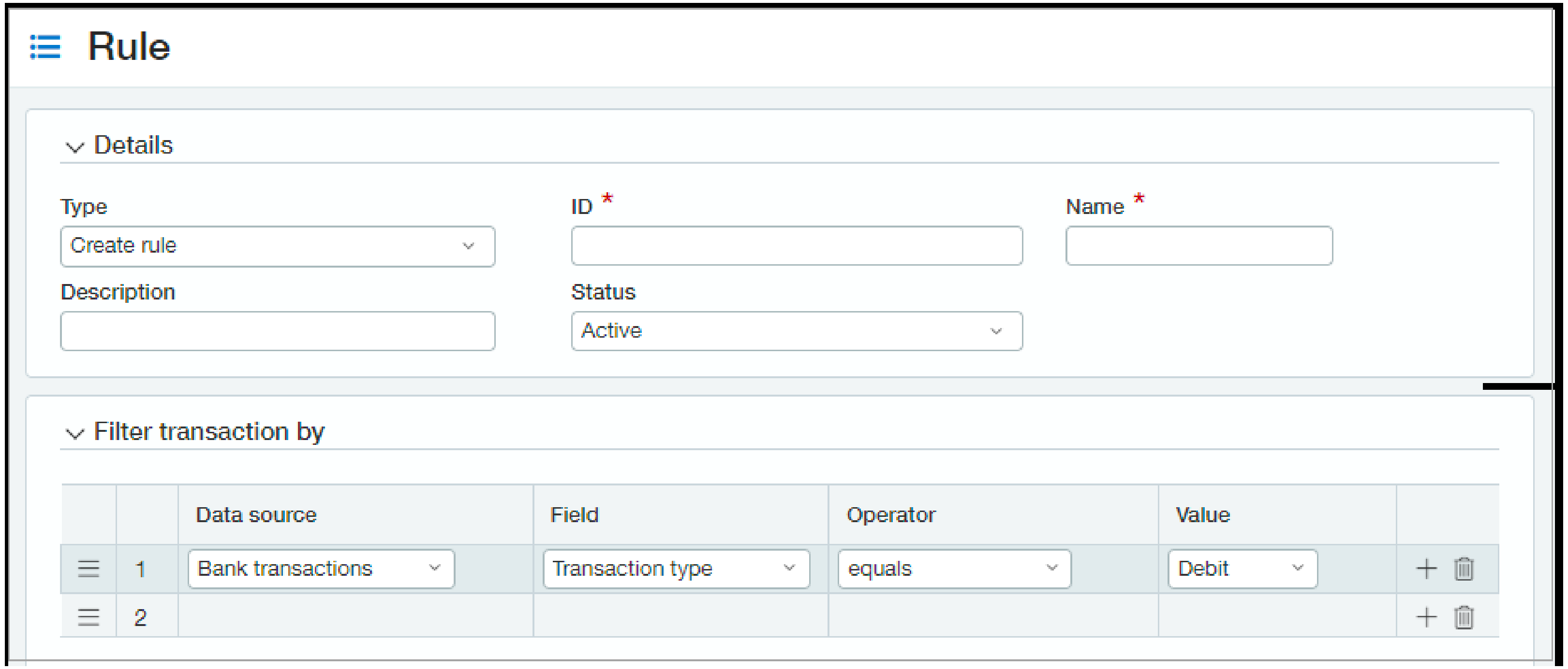


Contracts – Renewals

- Automatically renew term contracts as evergreen



Auto-Create Charge Card Transactions



- 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

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

Recap

- QuickStart: Role-based Dashboards
- Accounts Payable: Expanded Bill Attachments
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Release Resources

- 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
Release 4	**November 11, 2022**

Hope to See You There!

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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