



CONSULTING
BUSINESS ADVISORS AND TECHNOLOGY SOLUTIONS

sage Intacct

Sage Intacct Quarterly Update R3

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.

Tom brings a deep understanding of accounting challenges that businesses face as well as current and emerging tools and technologies to meet those challenges. He has a diverse background working across various public and private industries, with added focus on nonprofit, government, cannabis, healthcare, and retail.

Presenters



MICHAEL SADBERRY

» 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 Release Overview
- R3 Highlights - New & Improved Functionality:
 - Cash Management
 - Dashboards
 - Financial Report Writer
 - Secure PDF Reports
 - Contract Billing Enhancements
 - Canadian Sales Tax
- Release Resources

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 20, 2021
- Release 4 scheduled for November 12, 2021

Cash Management

Matching Rules

- Improved grouping – can now group bank transactions, not just Intacct transactions
- Can create rule that only looks at specific bank transactions
- Additional operators in the filter and matching conditions
- Flexible date comparisons using matching operator of 'within'

Group transactions by

Intacct transactions

Document number

Posting date

Bank transactions

Document number

Posting date

Matching conditions

	Bank transaction field	Operator
1	Posting date	Operator
2		equals
3		within

Dashboard Enhancements

Three new components:

- Attachments
- Billboards
- Custom Navigation

Very well covered in the recording for R3

Component properties

Component type

General

Component *

Attachment Container

Applications

Attachment Container

Billboard

Calendar

Closed Thru Summary

Custom Navigation

Entities

Main Shortcuts

Message Board

New Features

News and Events - RSS

Report Shortcuts

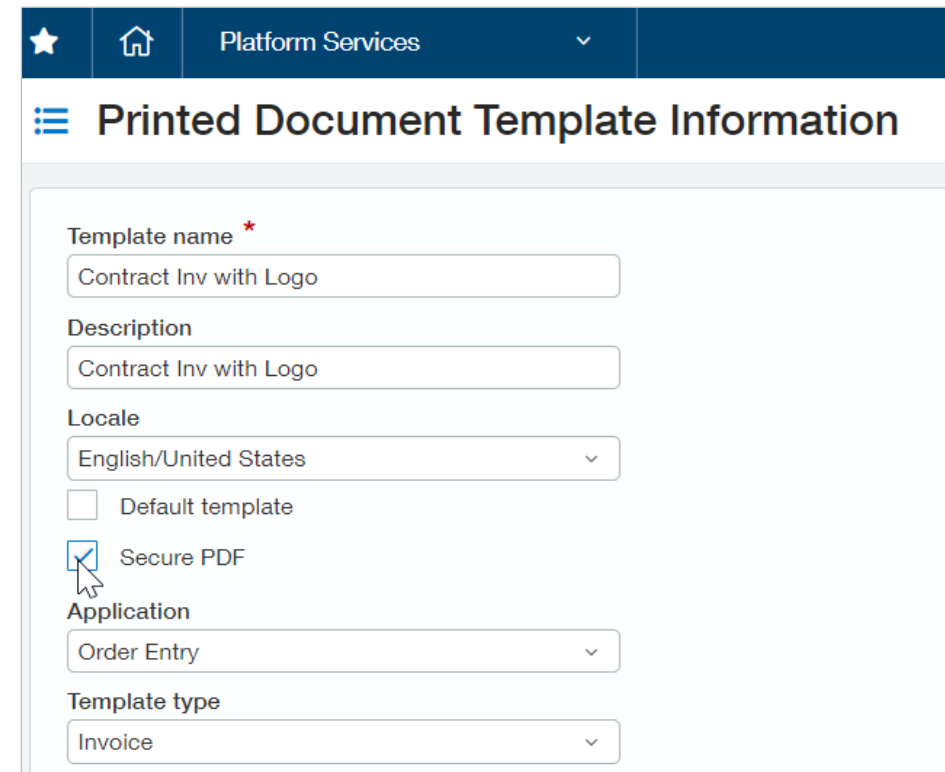
Resources

Financial Report Writer

- New normalized columns help by showing whether negative or positive variances are favorable or unfavorable
- Addition of spacer columns (Keep in mind these count as column for computations)
- Easily identify a report and its contents in the QuickStart library

Secure PDF

- Prevents altering of electronically printed documents
- No one can edit, sign, copy extract or comment on the PDF
- Setting is on the printed document template



The screenshot shows a web interface for configuring a printed document template. The header includes a star icon, a home icon, and the text 'Platform Services'. The main title is 'Printed Document Template Information'. The form contains the following fields:

- Template name ***: Text input field containing 'Contract Inv with Logo'.
- Description**: Text input field containing 'Contract Inv with Logo'.
- Locale**: Dropdown menu showing 'English/United States'.
- Default template
- Secure PDF
- Application**: Dropdown menu showing 'Order Entry'.
- Template type**: Dropdown menu showing 'Invoice'.

Enhanced Contracts Billing

- Contract Usage Billing subscription to support an additional type of quantity-based billing: Committed quantity.
- Enable line level 'Bill to' contact (Contracts only), so that you could start specifying different bill-to contacts for different contract lines in the same contract.

Contract Line

Contract Line

▼ Billing

Billing method ⓘ
Quantity based ▼

Quantity type
 Variable
 Committed

On contract line end date
Bill unused quantity ▼

If usage exceeds the committed quantity
Bill overage ▼

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Flat/fixed amount About the calculator ⓘ

Calculate

Committed qty Rate Multiplier Discount %
5000 x .1 x - %

Flat/fixed amount
500.00

Base flat/fixed amount
500.00

Line type
Sale

Price list details

Subscription to Canadian Sales Tax

- For new instances of Sage Intacct for Canadian customers,
 - Canadian Sales Tax is available for subscription at no cost
- For existing Canadian customers,
 - We submit a case to expose the Tax solution at no cost to the customer
 - Customer will need some assistance for implementation
 - Must disable Advanced Tax as a Tax Solution within 90 days of case to avoid future billing events for having two tax solutions enabled

Release Resources

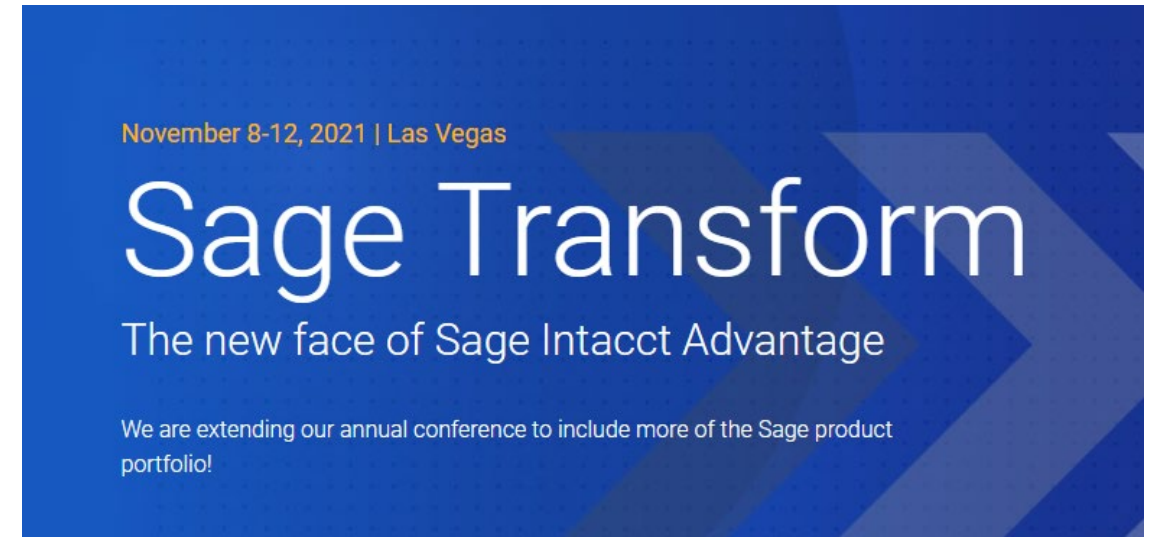
Can be found:

- On your Sage Intacct Dashboard!
- [Full Release Notes](#)
- [Access the Sage Intacct Community](#)

Upcoming Events

- Sage Transform is coming!
<https://www.sageintacct.com/transform>
- Early-Bird rate is available until Oct. 14
- In-Person (Las Vegas) and virtual options are available

Planning to attend? Please let us know!

A blue banner for the Sage Transform event. The text is white and orange. The date and location are in orange: "November 8-12, 2021 | Las Vegas". The main title "Sage Transform" is in large white font. Below it, the subtitle "The new face of Sage Intacct Advantage" is in smaller white font. At the bottom, a line of text reads "We are extending our annual conference to include more of the Sage product portfolio!".

November 8-12, 2021 | Las Vegas

Sage Transform

The new face of Sage Intacct Advantage

We are extending our annual conference to include more of the Sage product portfolio!

Recap

- R3 Highlights - New & Improved Functionality:
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| Thank You!

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

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