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

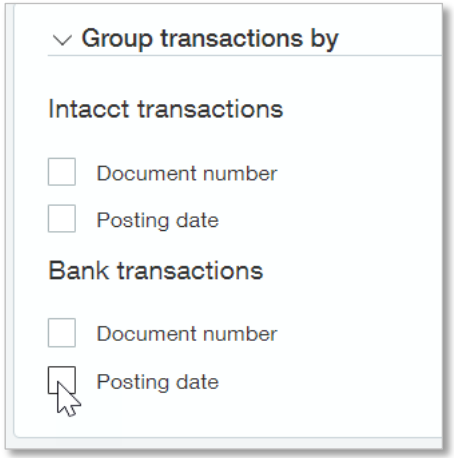
Sage Intacct Releases

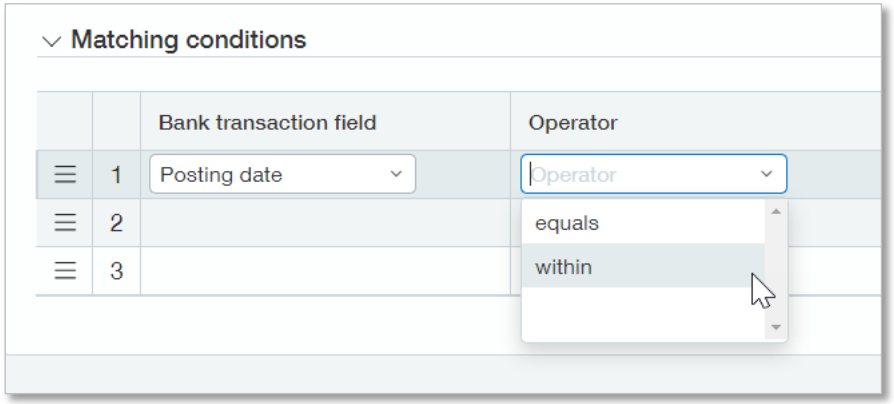
- Quarterly Update release schedule – everyone is always on the same version – integrations don’t break with new releases!
- Interim Releases and Updates
- Release 3 August 20, 2021
- Release 4 scheduled for November 12, 2021

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’





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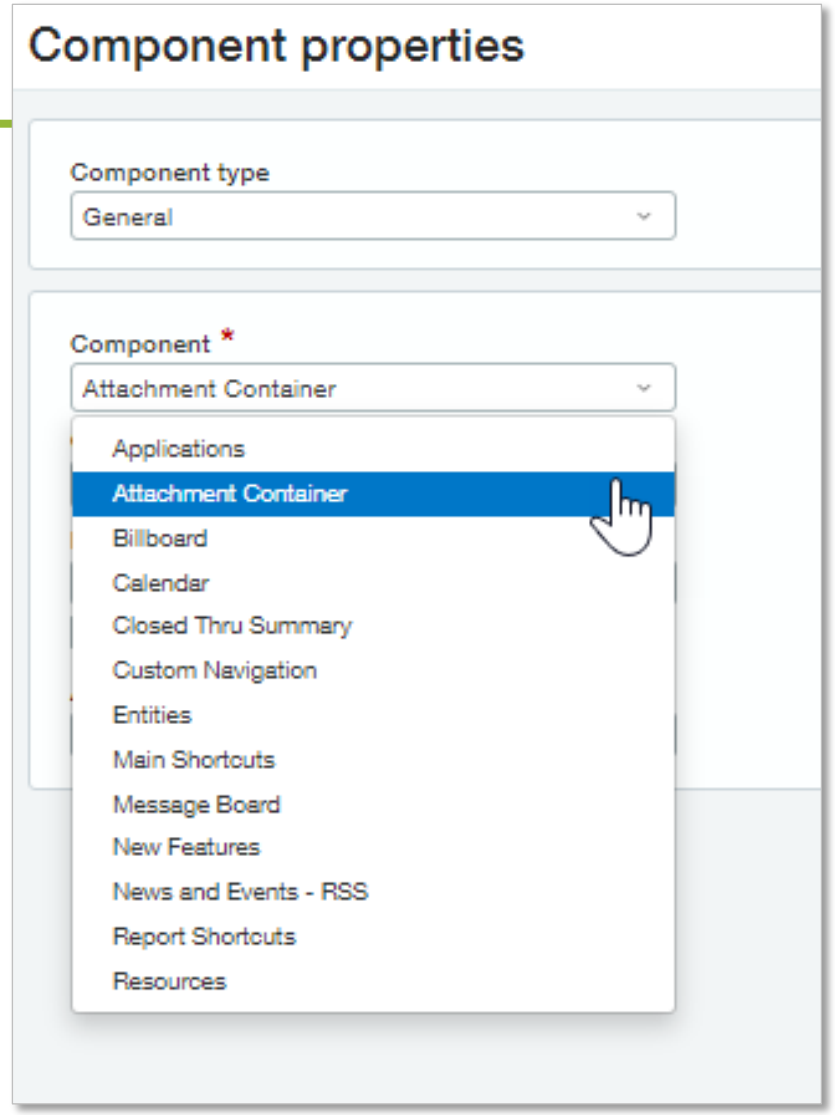
Dashboard Enhancements

Three new components:

- Attachments
- Billboards
- Custom Navigation

Very well covered in the recording for R3

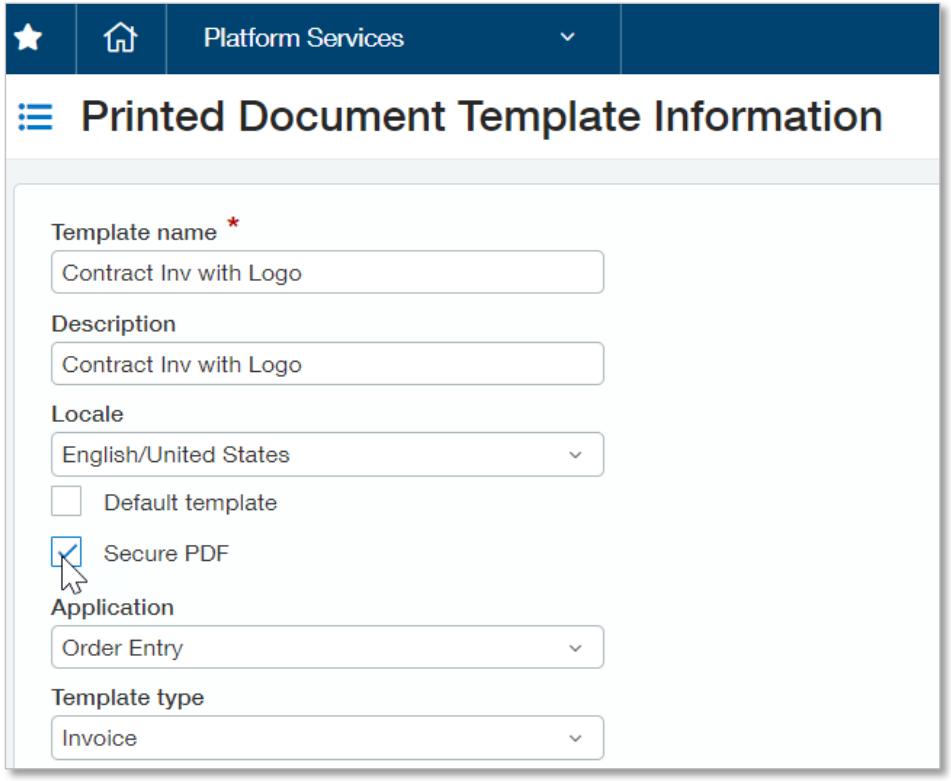


Financial Report Writer

- 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

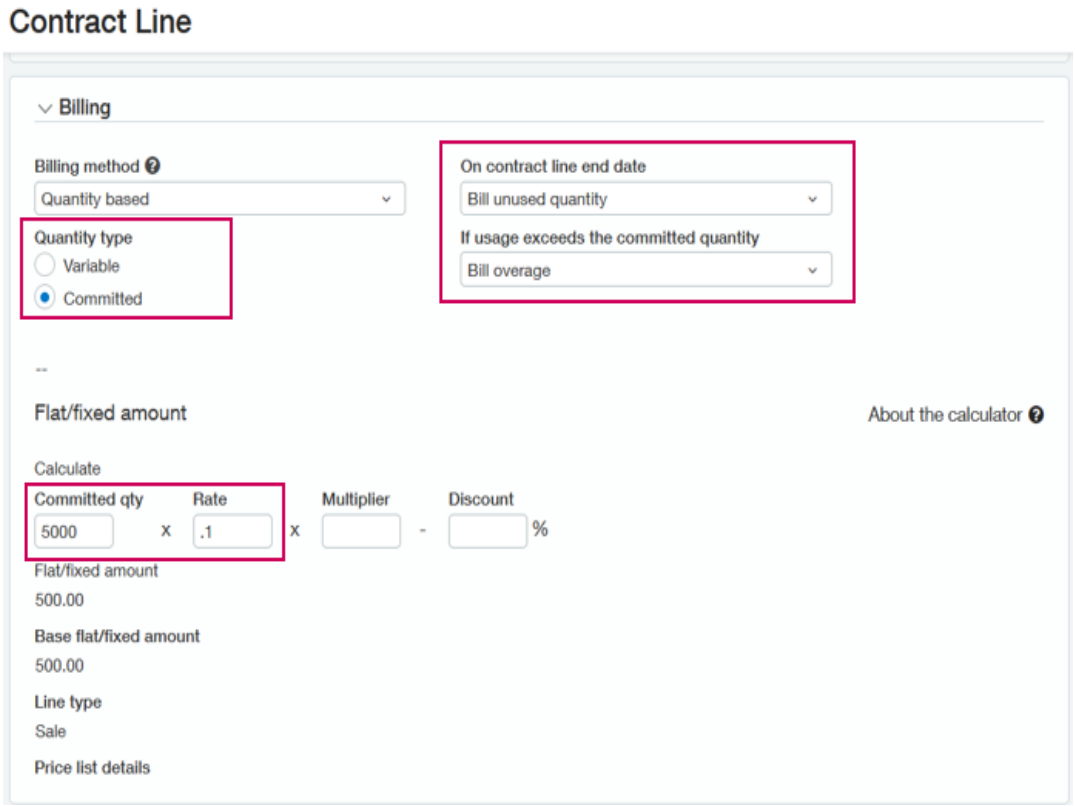
Secure PDF

- 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



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.



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!

Recap

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

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

Tom Achor | (925) 271-8620 | tachor@ssfllp.com

Michael Sudberry | (925) 271-8620 | msudberry@ssfllp.com

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