SSF CONSULTING
BUSINESS ADVISORS AND TECHNOLOGY SOLUTIONS
Sage Intacct

Sage Intacct
Best of 2022 New Features & Capabilities

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

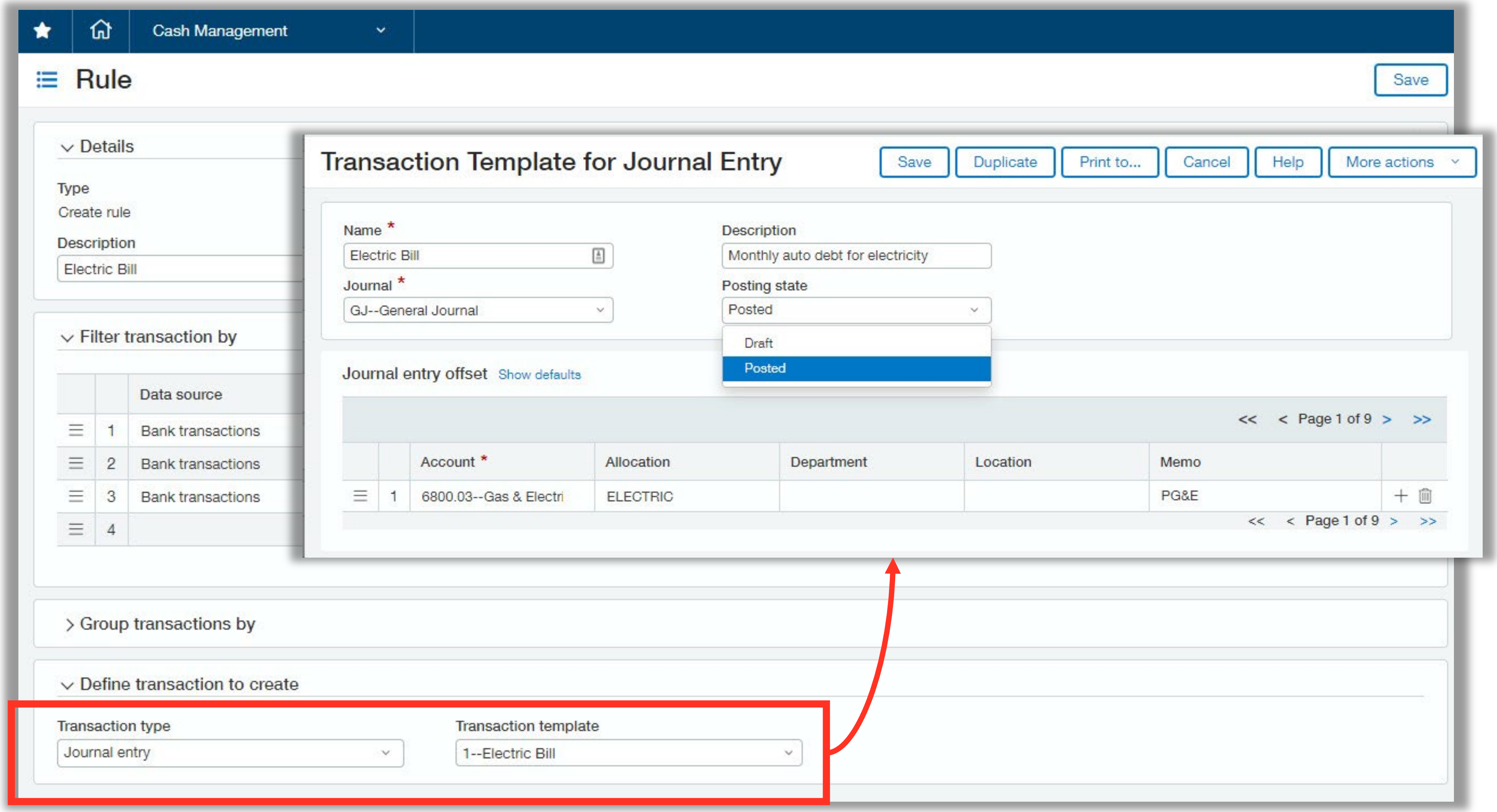
Michael Sudberry specializes in helping companies implement and optimize financial management solutions for their unique business needs. In addition to a background in accounting, Michael holds multiple Sage Intacct Certifications and has worked extensively with clients in the restaurant, professional services, and nonprofit industries.

Agenda

- Auto-create GL and Credit Card Transactions
- GL Outlier Assistant
- Nonprofit Grant Tracking Enhancements
- Sage Intelligent Time for Grants
- AP Automation and Vendor Payments
- Accounts Payable: Expanded Bill Attachments
- Inventory Enhancements
- Sage Intacct Payroll powered by ADP
- QuickStart: Role-based Dashboards
- Accounts Receivable:
  - Enhancements to Received Payments
  - XML Preview of AR Statements and Invoices
- Contracts:
  - Automatic Invoicing
  - Renew Termed Contract as Evergreen
- Embedded Training

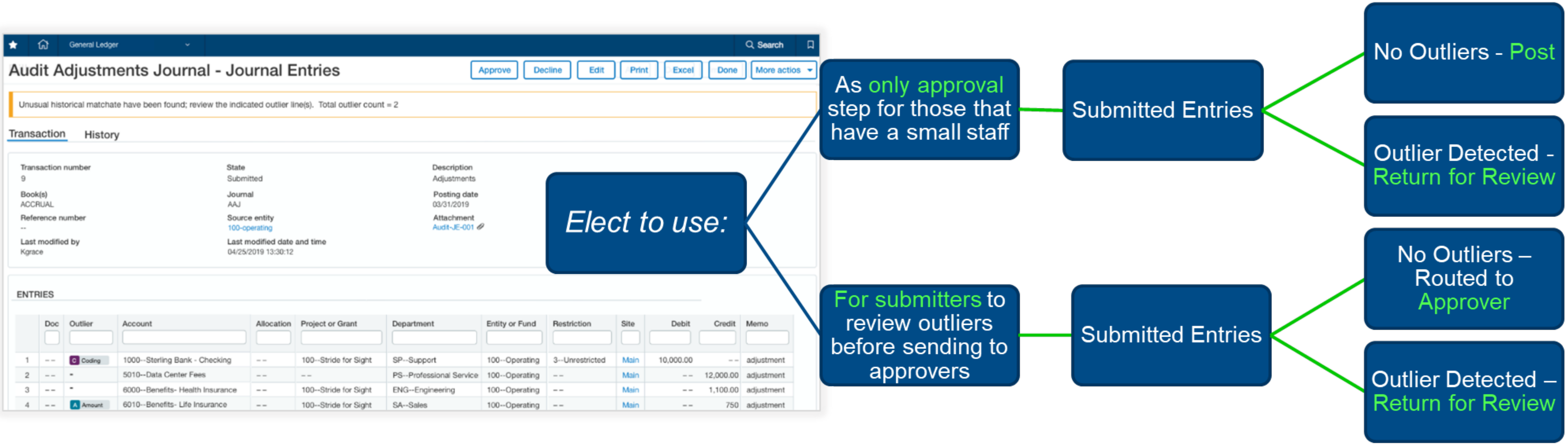
Auto-create GL & CC Transactions from Bank

- Use existing rule engine on bank data
- Define criteria for incoming bank or credit card data
- Create matching GL transactions in draft or posted state based on reusable transaction templates
- Create matching Credit Card transactions from bank feeds



General Ledger Outlier Assistant

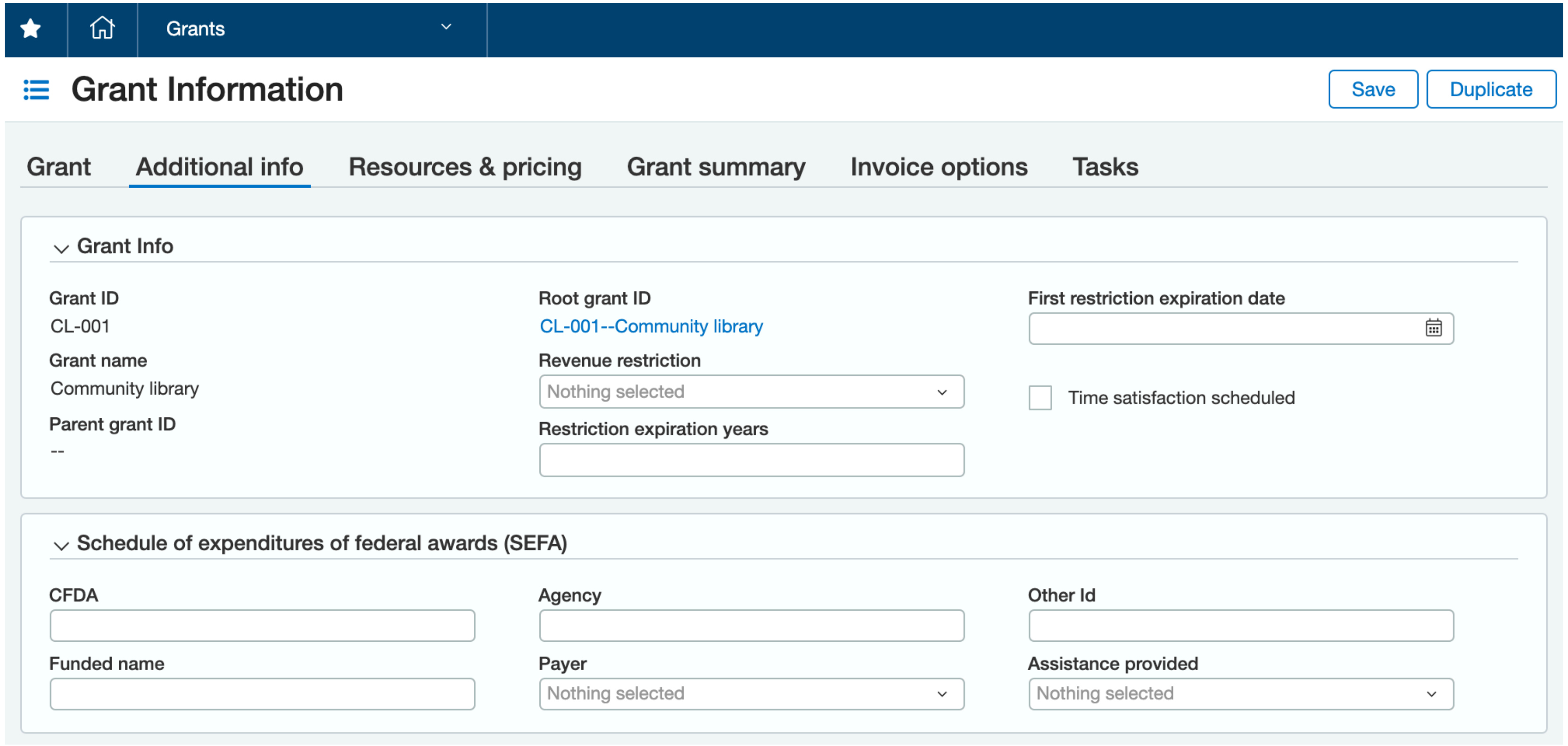
- GL Outlier Assistant can now be enabled for GL Entry and Approvals
  - AI-powered Outlier Assistant can auto approve submitted journal entries with no exceptions
  - Submitters can use GL Outlier Assistant to review before submitting entries for approval



Nonprofit Grant Tracking Enhancements

Centralize funding details within the Grant Tracking & Billing Projects record

- For nonprofits who track funding within the Grant Tracking & Billing Projects area of Sage Intacct
- Enable grant fields
- Maintain restriction details
- Track Federal grant funder details to maintain records accuracy and uniformity
- Leverage new attributes for reporting and insight



Sage Intelligent Time Enhancements

AI-powered timesheet for faster and more accurate time entry

Now Available with Grant Tracking

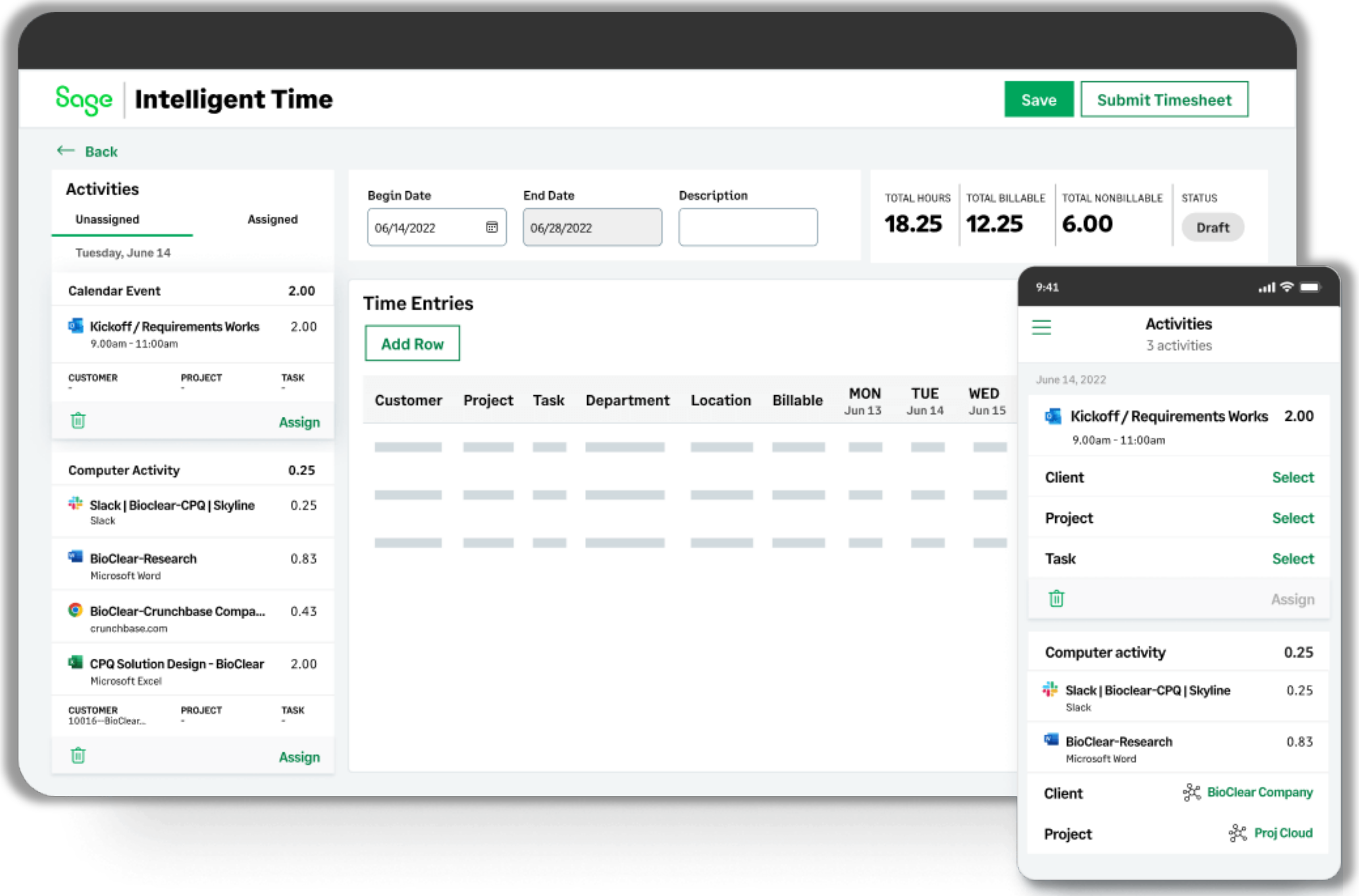
- Refined to meet nonprofit needs
- Keep program staff focused on delivery, not time capture
- Electronic affirmation for single-audit

Project Costing and Billing Updates

- Fine-tuned for greater performance
- Capture every billable minute
- Increase accuracy of true job costs and future bids

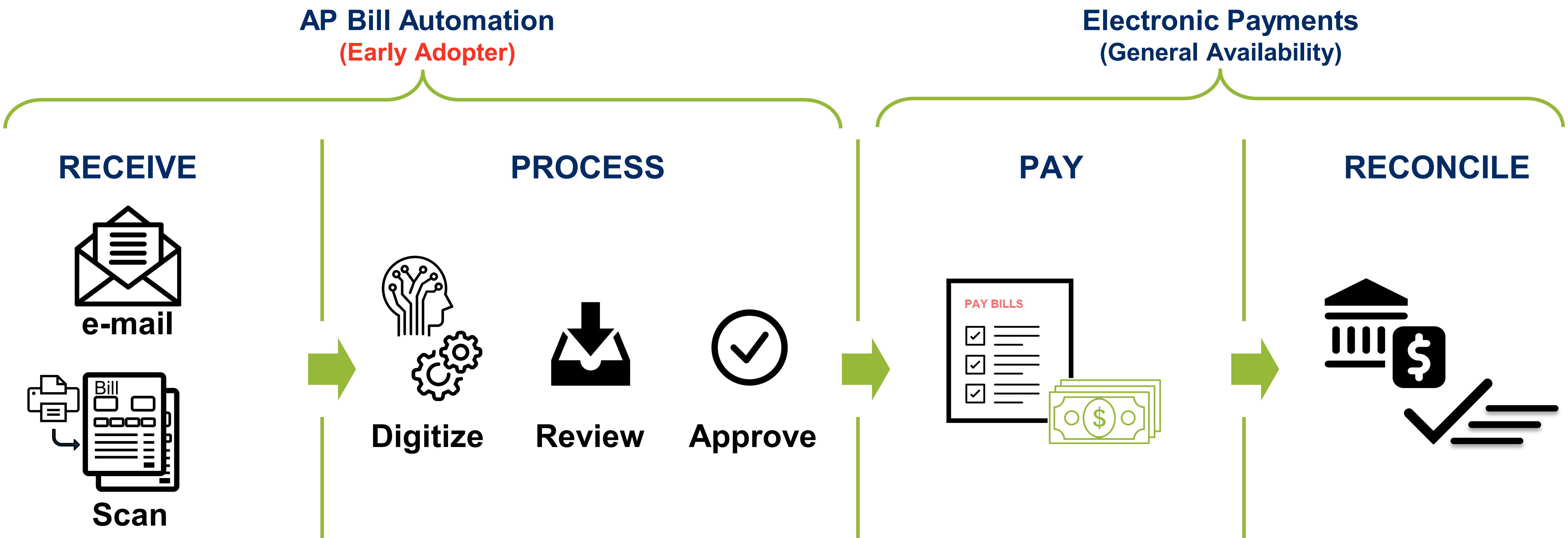
International rollout

- Now available in Canada, South Africa, and Australia



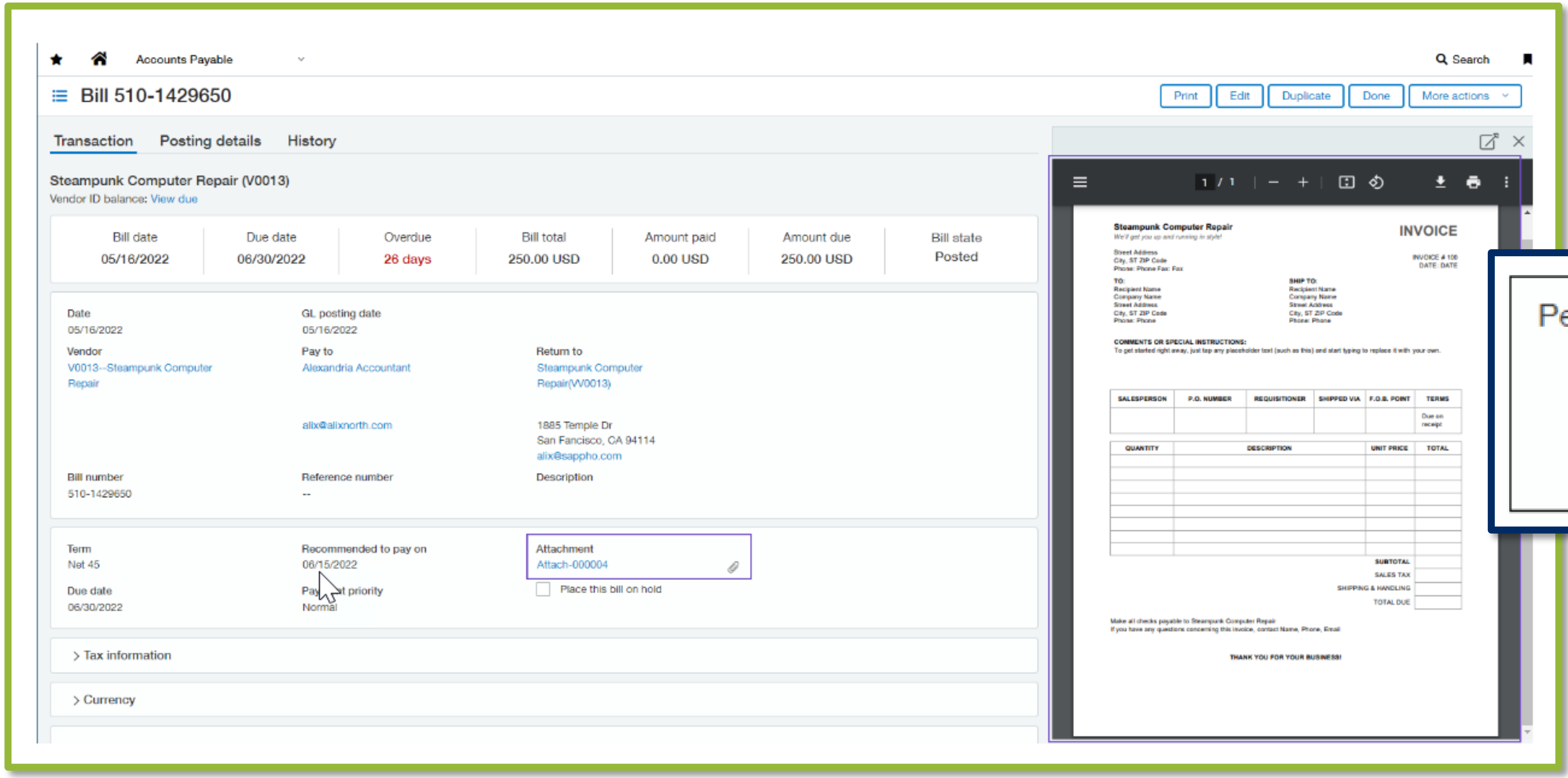
AP Automation

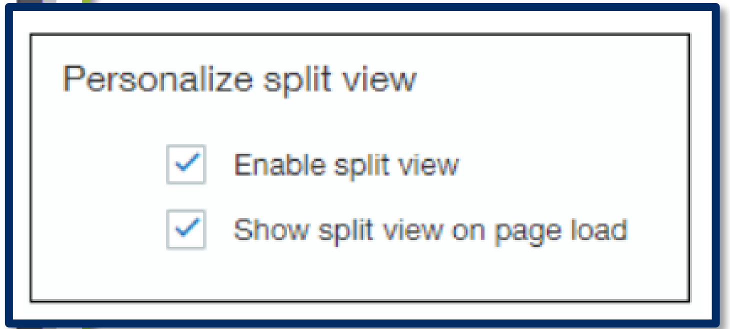
Streamline workflows, eliminate manual steps, and save time



Accounts Payable

New view of Attachments





Inventory

Improved efficiencies in managing inventory

Inventory Fulfillment*

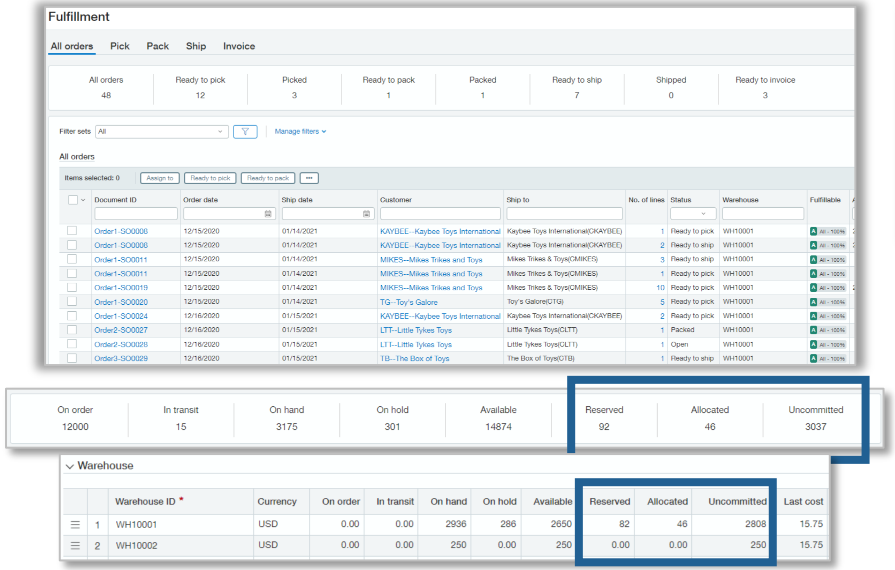
- Pick, pack, ship, invoice
- 360 visibility into fulfillment activity from order

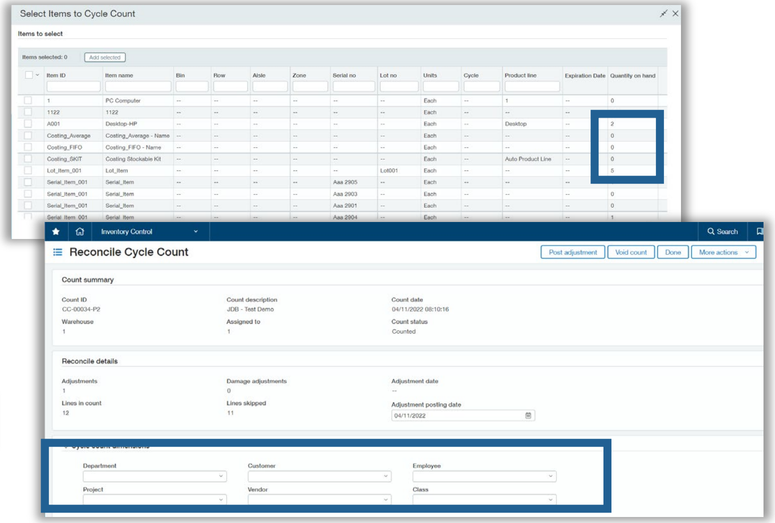
Enhanced Cycle Counts

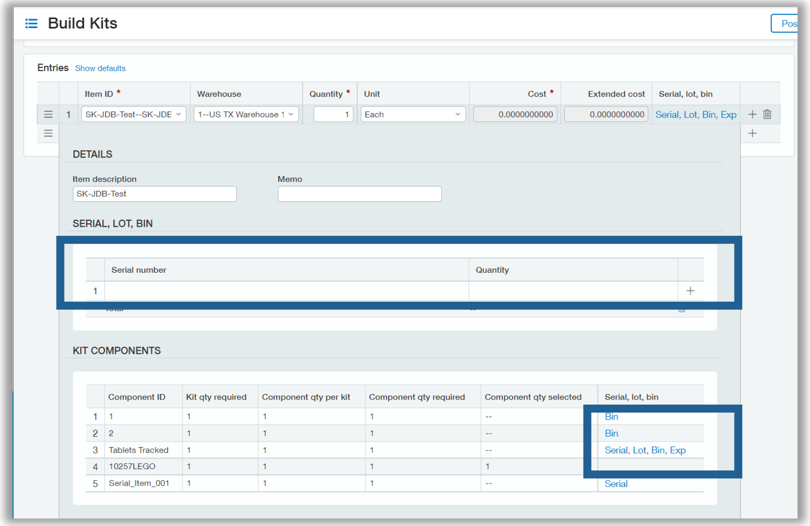
- Option to include zero and negative quantity on hand items
- Assign default dimension values on reconciliation

Stockable kit tracking

- Allowing tracking for parent and component items
- Posting tab for build/disassemble kits



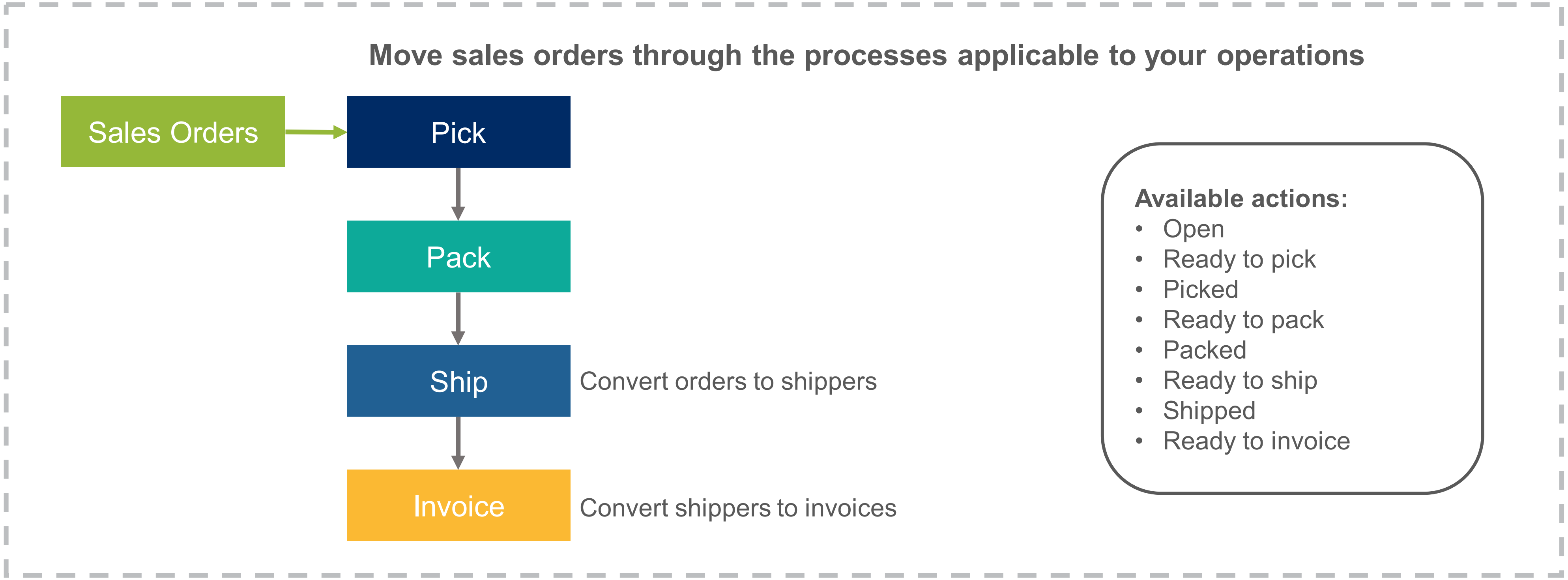




* Early Adopter

Fulfillment for Sales Order Management

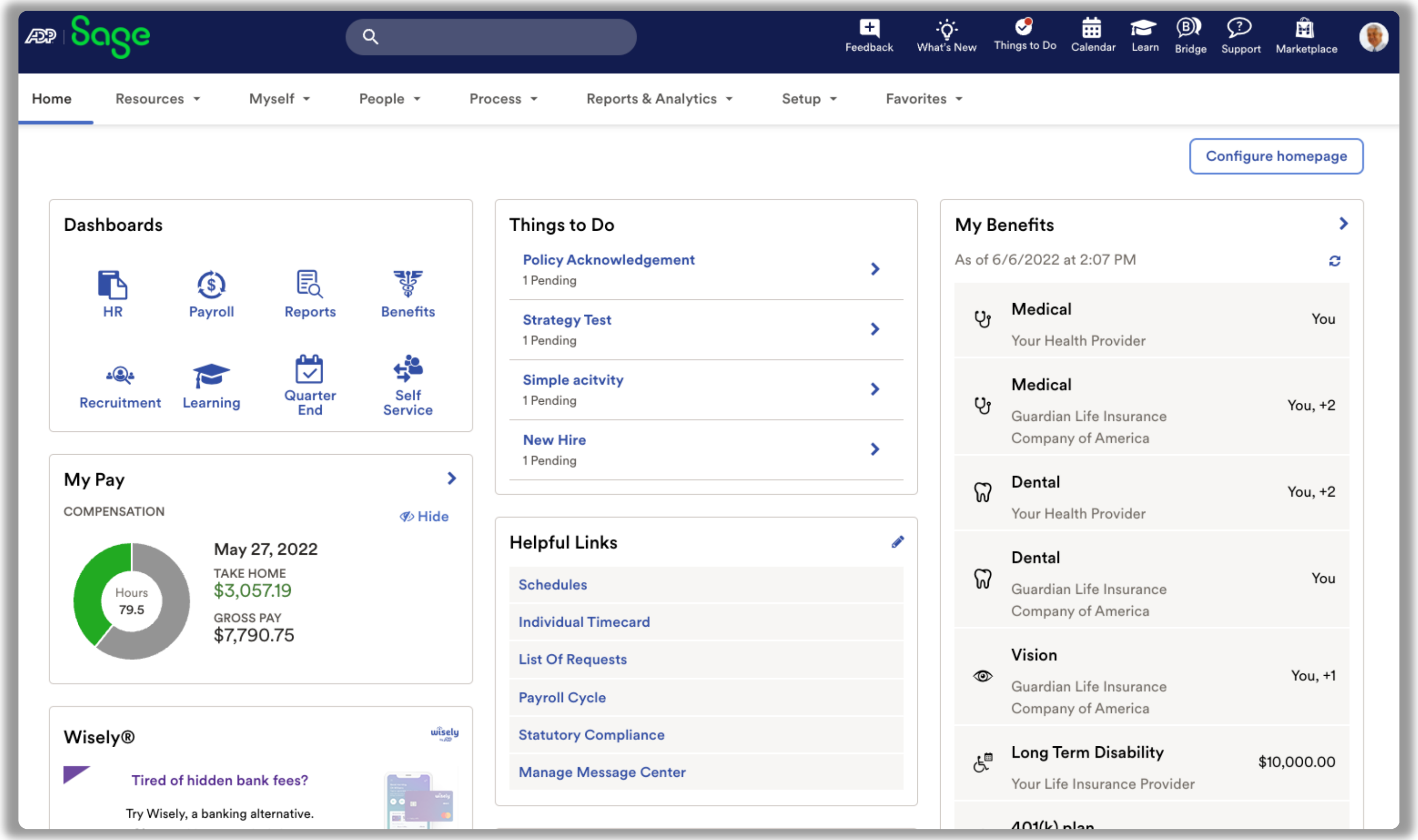
- Fulfillment gives warehouse managers and warehouse workers the tools to track and ship sales orders in a timely fashion to keep customers happy. It also provides pick and pack lists, which makes the job of the pickers and packers on the warehouse floor more efficient and less costly.



Sage Intacct Payroll powered by ADP

Payroll and HCM – Seamlessly integrated with Sage Intacct Accounting

- Easily pay your employees - eliminating missed deadlines, errors, and fines.
- Save time by leveraging powerful employee self-service features and remote processing
- Add as many or as few additional HR solutions as you need without engaging separate vendors.
- Get detailed insights so you can make more strategic business decisions.



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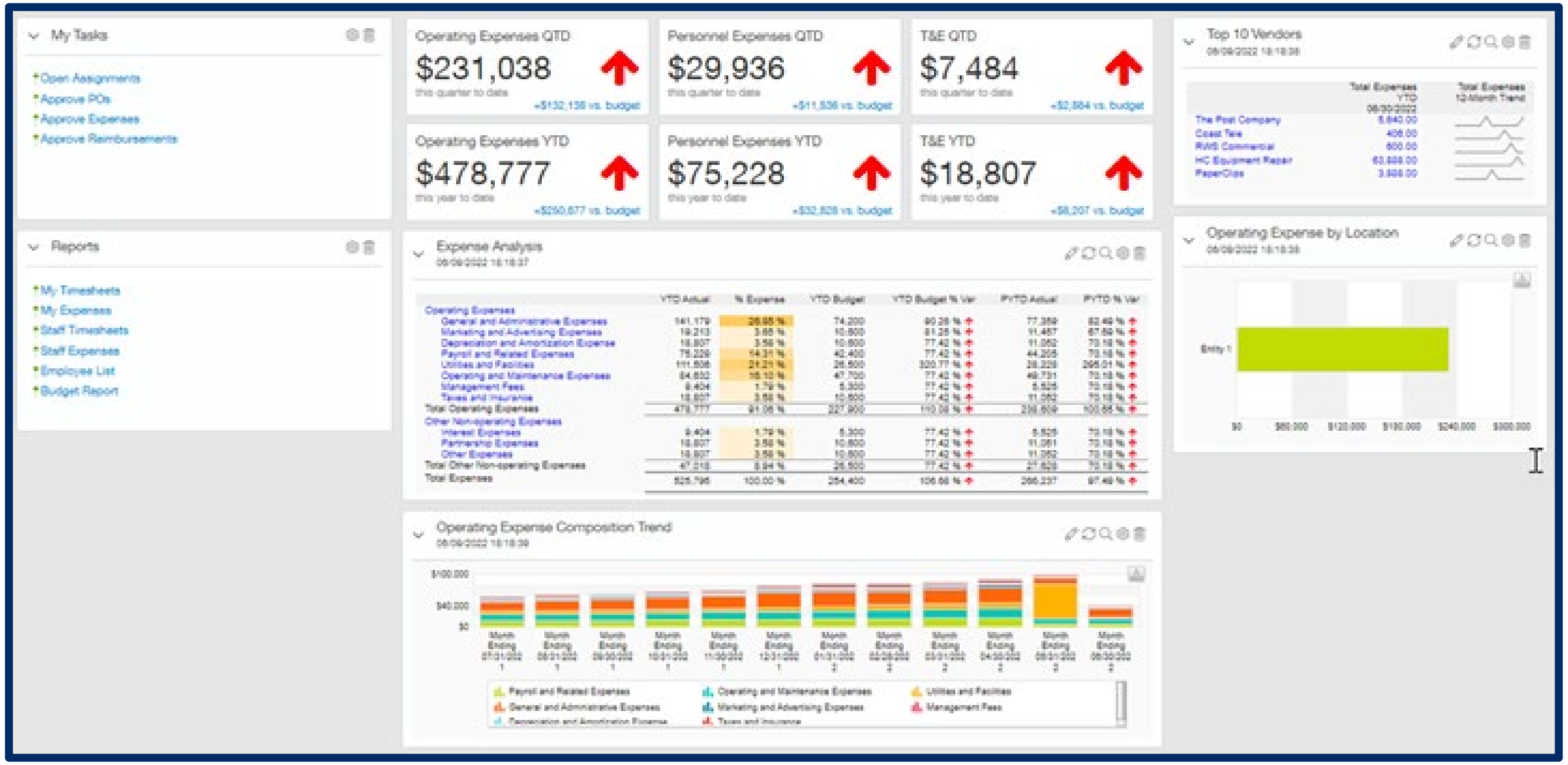
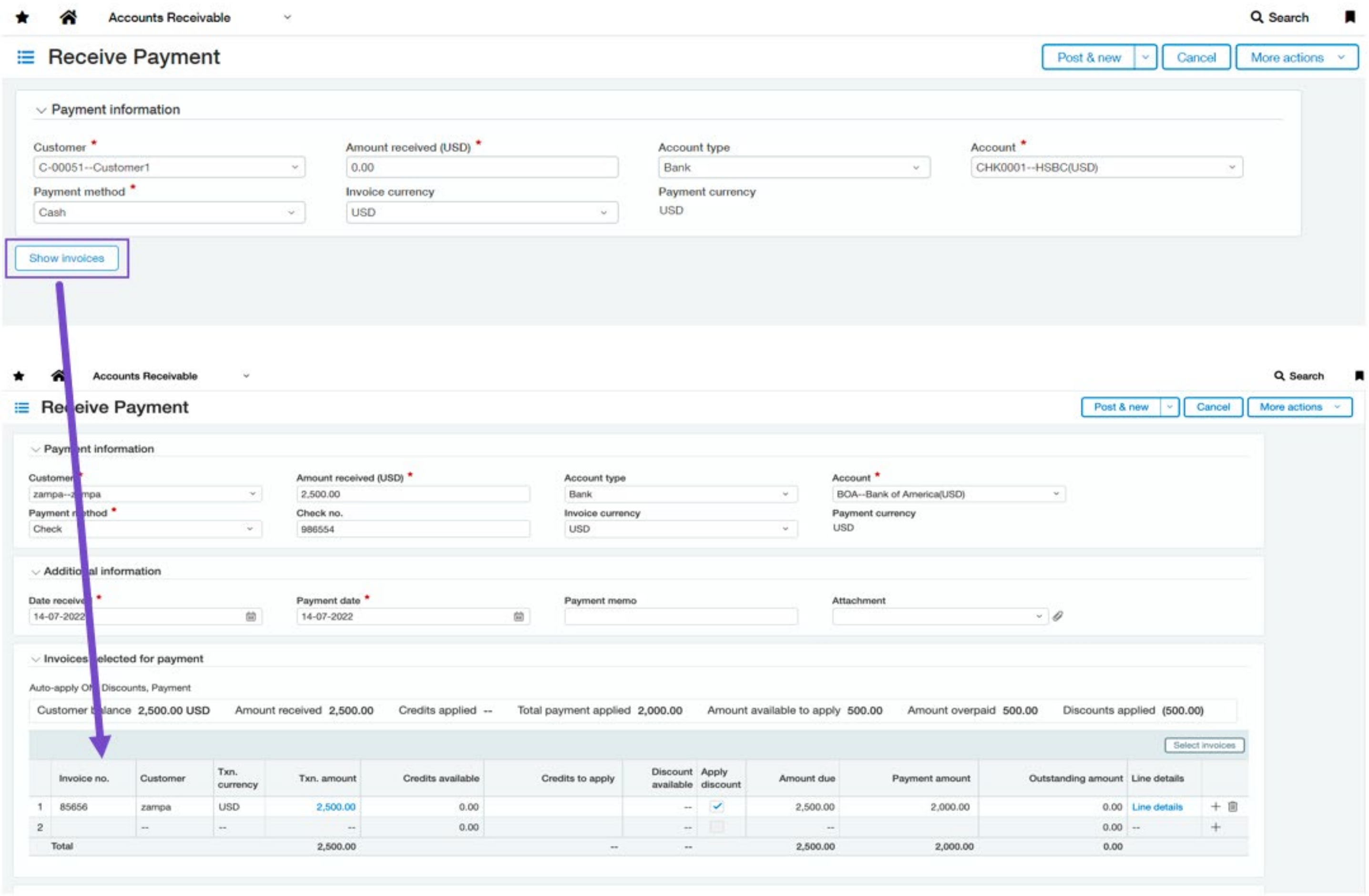
QuickStart Dashboards

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



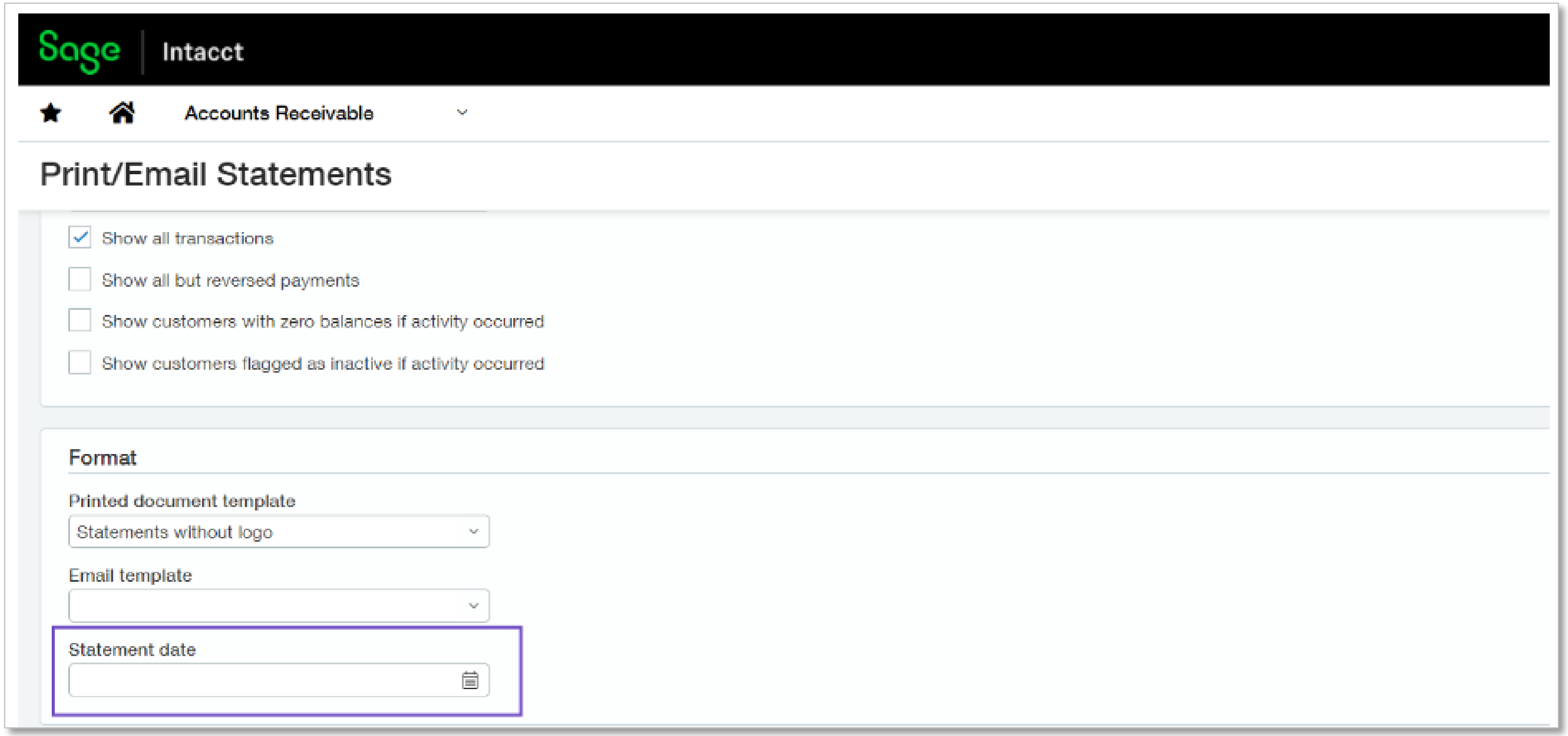
Accounts Receivable

- Enhancement to Receive Payments
  - Simplified Workflow



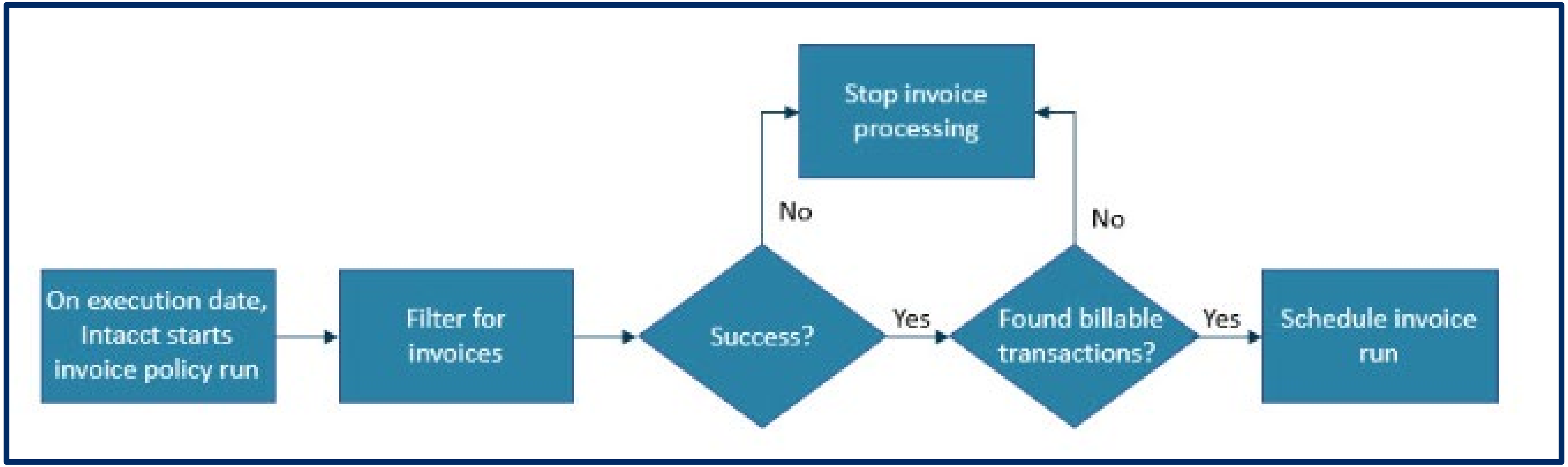
Accounts Receivable

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



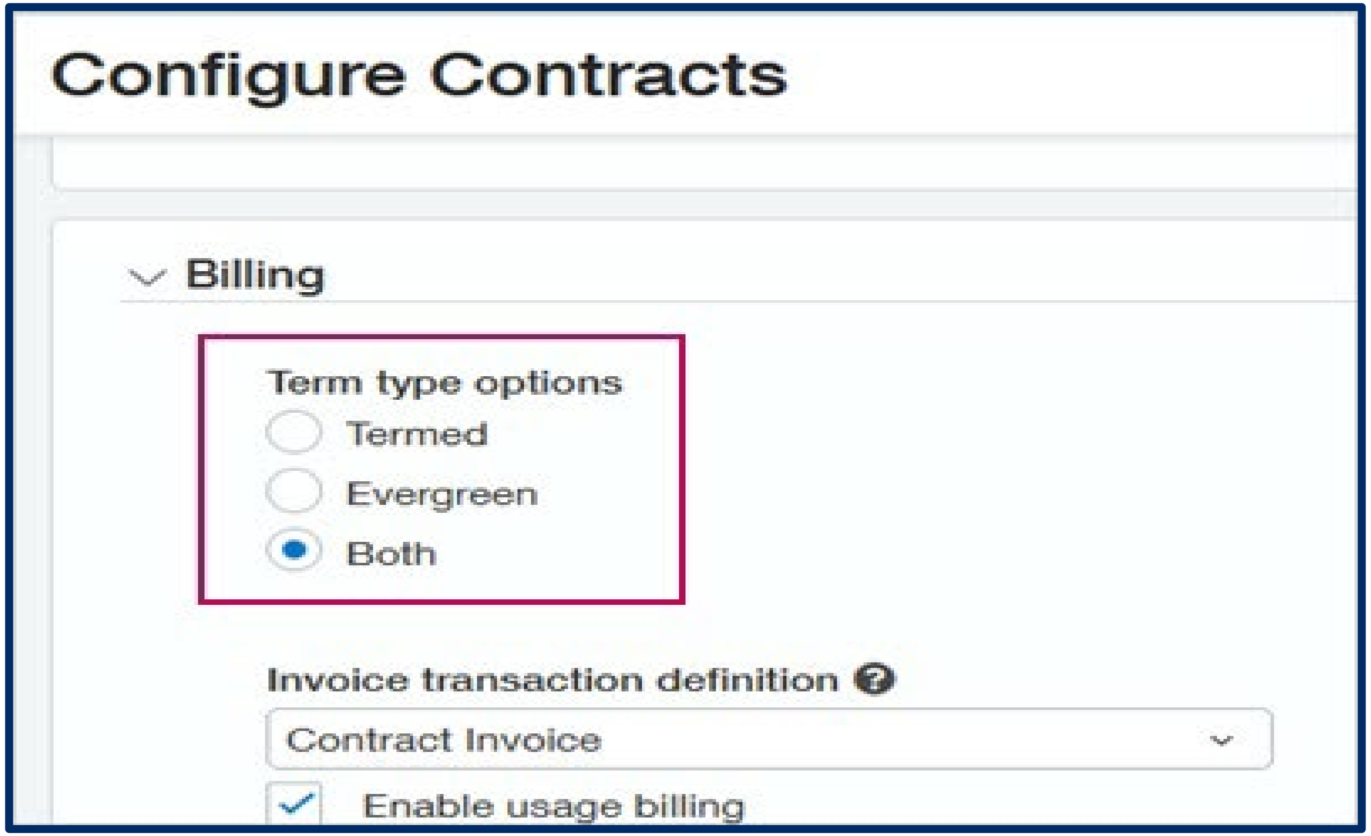
Contracts – Automatic Invoicing

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



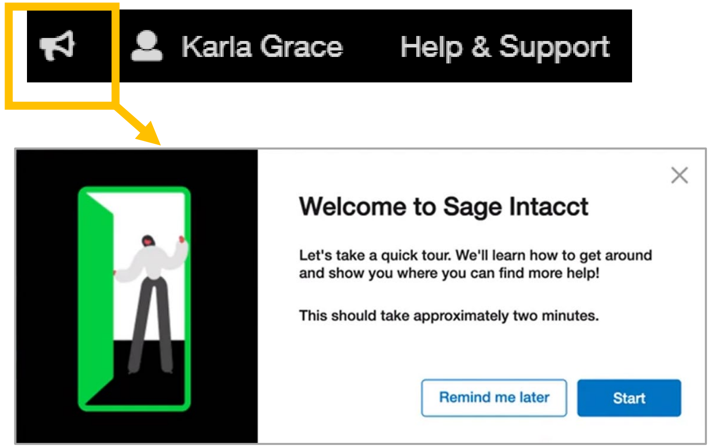
Contracts – Renewals

Automatically renew term contracts as evergreen



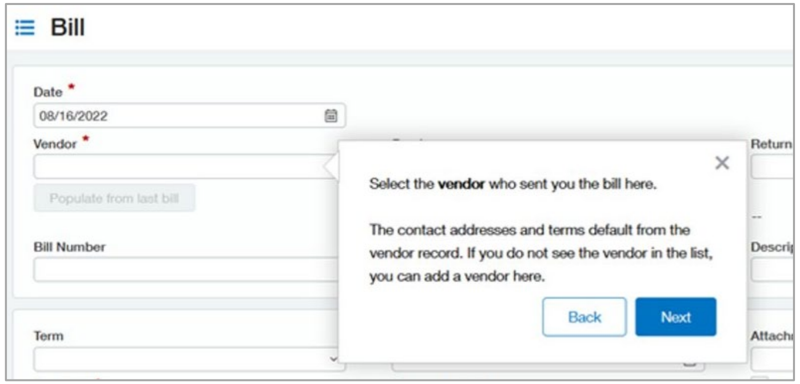
More Enhancements: Embedded Training

Welcome Tour



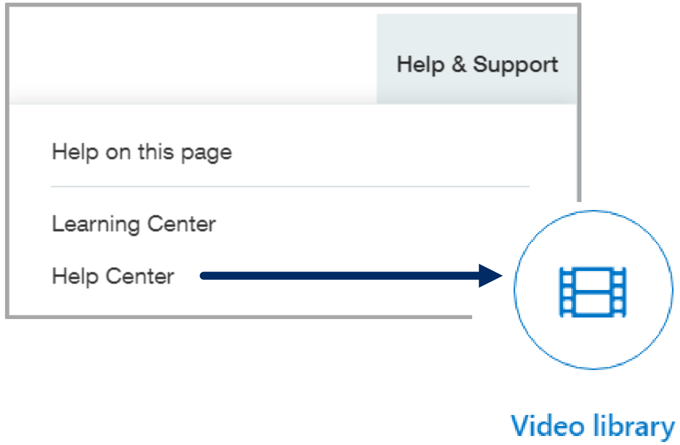
2-minute guided tour on navigating Intacct and accessing help, training, and videos

Feature walk-throughs



Tours appear automatically for new users on the Bill and Pay Bills screens.

More Learning & Help



Additional new user training, help topics, video library plus new on-demand courses

Recap

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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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