

Sage Intacct R3 Revealed Boosting Efficiency & Insights

September 18, 2024



Sage Partner

**forv/s
mazars**

Global Presence

Top 10

Global Network*

\$5bn

Combined Revenue (2023)

100+

Combined Countries & Territories

400+

Combined Offices & Locations

1,800+

Combined Partners

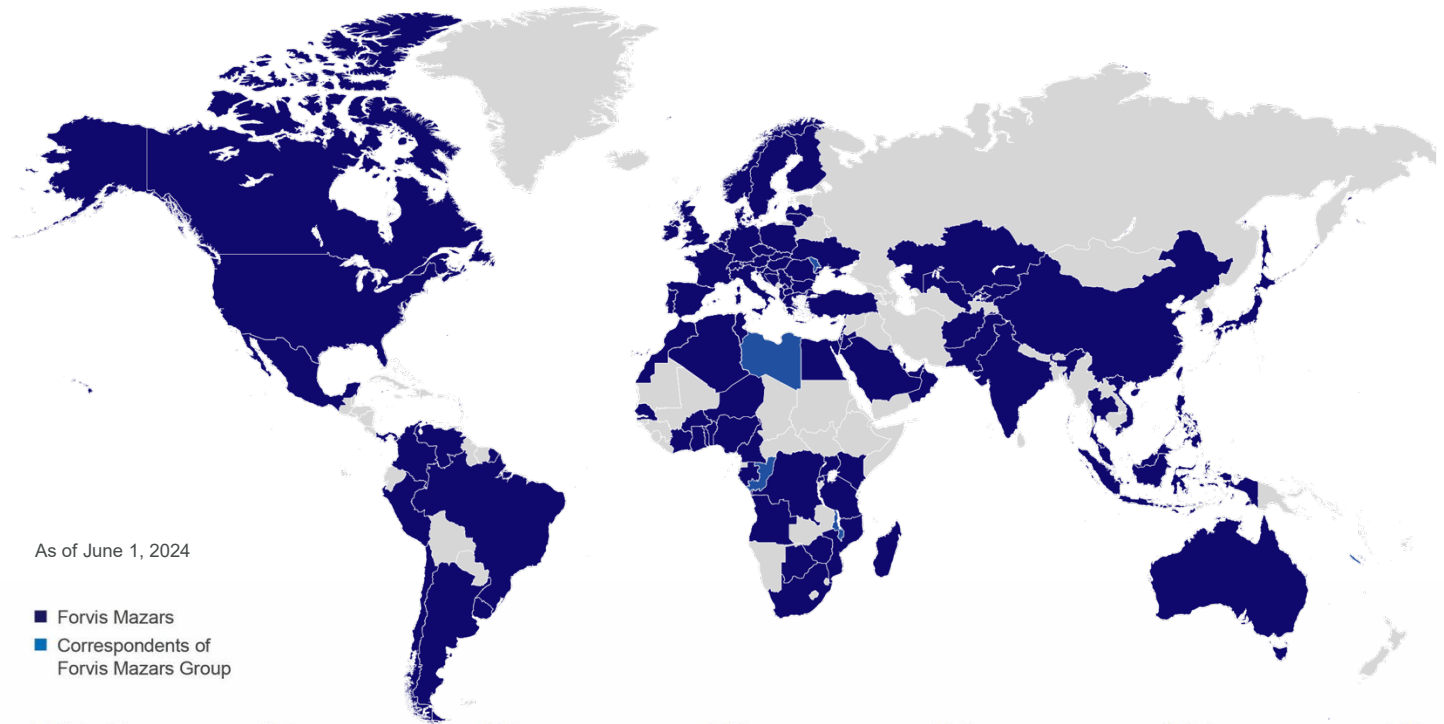
40,000+

Combined Employees

* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (expected) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

- | | | | | | | |
|--------------------------|--|--------------|--------------|-------------------|----------------|------------------------|
| ■ Afghanistan | ■ Cameroon | ■ France | ■ Korea | ■ Morocco | ■ Qatar | ■ Togo |
| ■ Albania | ■ Canada | ■ Gabon | ■ Kosovo | ■ Mozambique | ■ Romania | ■ Tunisia |
| ■ Algeria | ■ Cayman Islands | ■ Germany | ■ Kuwait | ■ Netherlands | ■ Rwanda | ■ Türkiye |
| ■ Angola | ■ Chile | ■ Ghana | ■ Kyrgyzstan | ■ New Caledonia | ■ Saudi Arabia | ■ Uganda |
| ■ Argentina | ■ China | ■ Greece | ■ Latvia | ■ Niger | ■ Senegal | ■ Ukraine |
| ■ Australia | ■ Colombia | ■ Hong Kong | ■ Lebanon | ■ Nigeria | ■ Serbia | ■ United Arab Emirates |
| ■ Austria | ■ Congo | ■ Hungary | ■ Libya | ■ North Macedonia | ■ Singapore | ■ United Kingdom |
| ■ Bahrain | ■ Côte d'Ivoire | ■ India | ■ Lithuania | ■ Norway | ■ Slovakia | ■ United States |
| ■ Belgium | ■ Croatia | ■ Indonesia | ■ Luxembourg | ■ Oman | ■ Slovenia | ■ Uruguay |
| ■ Benin | ■ Cyprus | ■ Ireland | ■ Madagascar | ■ Pakistan | ■ South Africa | ■ Uzbekistan |
| ■ Bermuda | ■ Czech Republic | ■ Israel | ■ Malawi | ■ Palestine | ■ Spain | ■ Venezuela |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Italy | ■ Malaysia | ■ Panama | ■ Sweden | ■ Vietnam |
| ■ Botswana | ■ Denmark | ■ Japan | ■ Malta | ■ Peru | ■ Switzerland | ■ Zimbabwe |
| ■ Brazil | ■ Egypt | ■ Jordan | ■ Mauritius | ■ Philippines | ■ Taiwan | |
| ■ Bulgaria | ■ Finland | ■ Kazakhstan | ■ Mexico | ■ Poland | ■ Tanzania | |
| ■ Burkina Faso | | ■ Kenya | ■ Moldova | ■ Portugal | ■ Thailand | |

Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions



Business Technology Services

ERP

Microsoft Dynamics 365	
Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP
NetSuite	
Sage & Sage Intacct	
Trimble Viewpoint Spectrum & Vista	

CRM

Microsoft Dynamics 365	
Sales	Customer Service
Customer Insights	Field Service
Salesforce	
Marketing Automation	

Advanced Technology

Insights
Microsoft Power BI
Solver Planning & Analysis
Automation
Microsoft Power Platform
Robotic Process Automation (RPA)
App Development

 **Managed Services** for business applications, IT, and cybersecurity support.

Microsoft Partner

ORACLE NETSUITE
Solution Provider

Sage Partner

salesforce PARTNER

solver

forvis
mazars

Today's Presenter

Sage Practice

“It was refreshing to know so many of our processes would be streamlined and that Sage Intacct’s capabilities could keep up with our growing demand.”

– Chase Patterson, VP of Operations & Sales

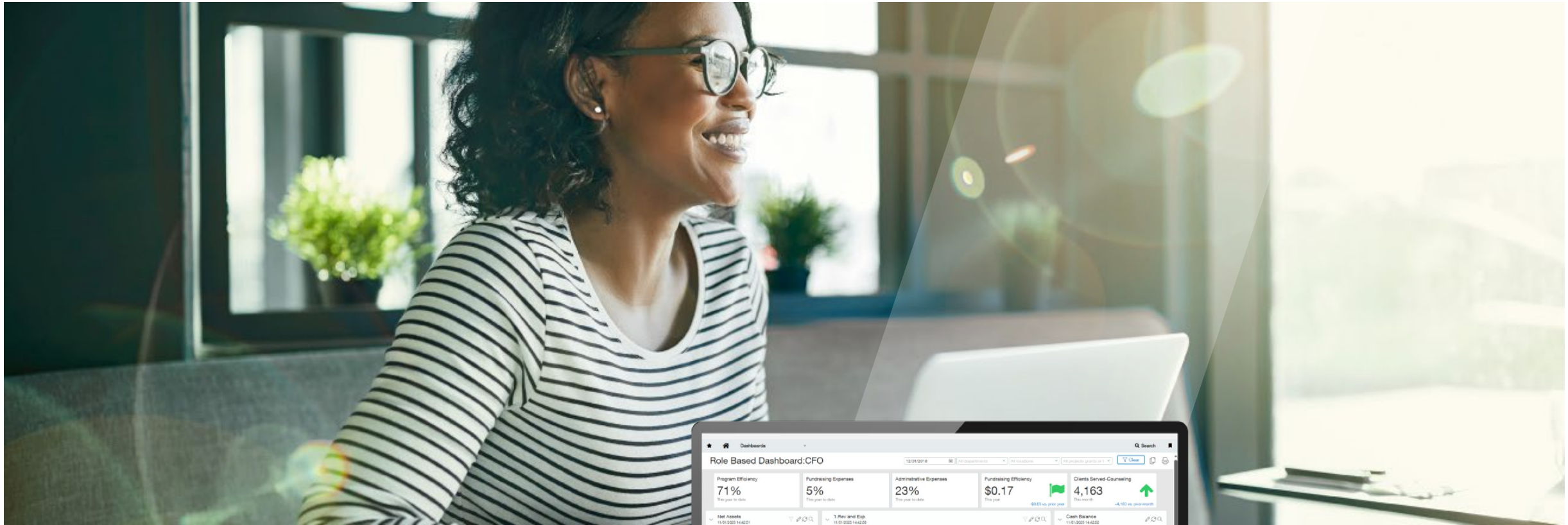


Gabi Fontanes

Senior Managing Consultant

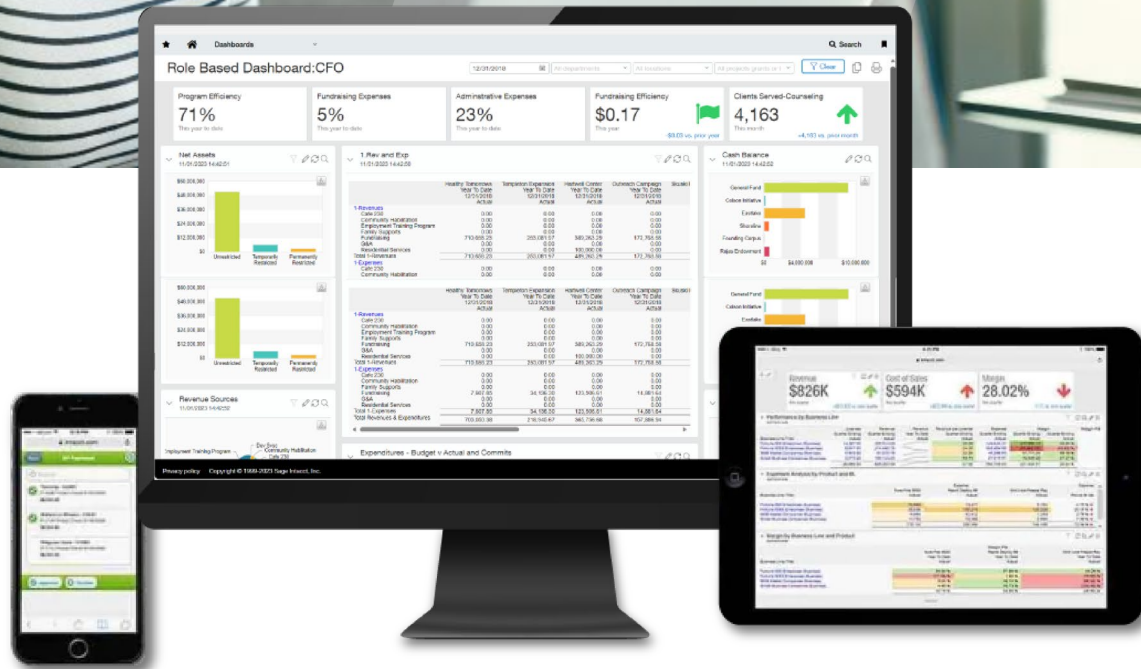
IntacctSupport@us.forvismazars.com





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September 18, 2024



Sage Partner

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Sage Intacct

Innovative accounting & ERP tools for midsize organizations.

1st

AICPA Preferred Accounting Application

[\(https://www.sage.com/en-us/sage-business-cloud/intacct/\)](https://www.sage.com/en-us/sage-business-cloud/intacct/)

30+

Years as a Sage Partner

Sage Partner

100+

Awards for Customer Support, Software Innovation, & More

[\(https://www.sage.com/en-us/blog/sage-intacct-tops-g2s-winter-2023-grid-reports-in-customer-satisfaction-and-wins-100-awards/\)](https://www.sage.com/en-us/blog/sage-intacct-tops-g2s-winter-2023-grid-reports-in-customer-satisfaction-and-wins-100-awards/)



Objectives

1. Explain release notes for key updates
2. Identify which updates can help enhance your business processes
3. Describe new functionality, including AI & automation enhancements



01

Release Notes

Let's dive into Sage Intacct 2024 Release 3 key updates.



Topics

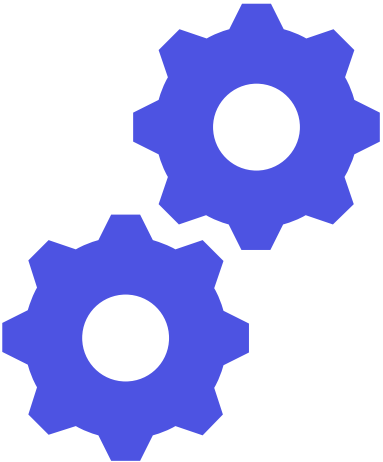


1. Company & Administration
2. Industry Solutions
3. User Interface

How Will Users Access New Features & Where Is It Available?

We will use the icons below to identify which release features will auto update & which will need intervention before customers can take advantage of them.

Configuration Needed



Permissions Update Required



No Action Needed



Region Availability



What Is the Early Adopter Program?



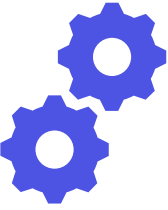
These programs are available to a limited number of partners & customers with the agreement that they will help test & give feedback on the functionality of the feature.

- As an early adopter, you can influence how Sage Intacct can develop the product so that the product meets your business needs
- Early adopter program participants work closely with Sage Intacct product managers to help keep focus on what matters
- Early adopter participants are expected to periodically respond to surveys & provide feedback on new features



Company & Administration

Company & Administration



Enhanced Email Delivery & Insights

- Allows you to send emails from Sage Intacct with your domain
- Also supports the use of subdomains
 - 123abc.com vs. [invoice.123abc.com](#) OR [billing.123abc.com](#)

Configure your email domain settings

▼ Email sender domain settings Let Intacct send emails on my behalf ?

[Add domain](#)

	Domain name	Domain status
1	cfo.21st-century-cfo.com	Validated
2	ads.21st-century-cfo.com	Authenticated
3	billing.21st-century-cfo.com	Authenticated



Company & Administration



Apply User Permissions & Roles Faster

- Apply roles for users in a one-step setup process
- Creates a seamless experience for users

The screenshot shows the Sage Intacct user management interface. At the top, it displays 'Sage Intacct FA v8.3 | PEA v3.4' and a 'Top level' dropdown. Below the navigation bar, the page title is 'User information'. The form contains the following fields:

- User ID: rama.ali
- Username: Rama Ali
- Account email address: rama.ali@sage.com
- Status: Active
- Contact name: Ali, Rama
- Last name: Ali
- First name: Rama
- Primary email address: rama.ali@sage.com
- Keep password until admin resets it:

Under 'Sage Intacct Financials permissions', the 'User type' is set to 'Business' and 'Admin privileges' is set to 'Full'. At the bottom, a table lists roles:

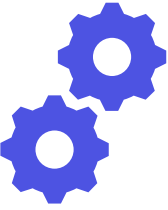
	Role	
1	Admin	+ -
2		+ -





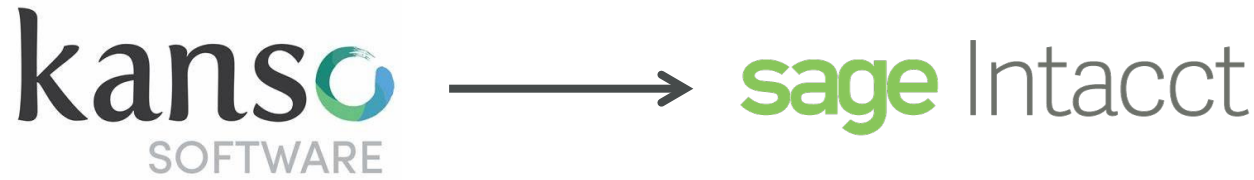
Industry Solutions

Industry Solutions – Nonprofit



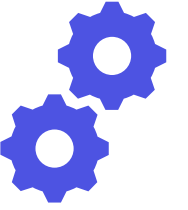
The Kanso connector allows tenant billing & payment data to flow from Kanso to Sage Intacct for a 360-degree view of your organization's health.

- 1 New Connector**
 - Kanso offers robust housing management solutions for public housing, native communities, & supportive housing
- 2 Integrated With Sage Intacct**
 - Provides a seamless & connected experience with Sage Intacct for enhanced efficiency
- 3 Employee Expense Automation**
 - Simplify expense reporting by allowing users to submit receipts via email, seamlessly integrated into Sage Intacct
- 4 AI-Powered Receipt Capture**
 - Use AI to capture & prepopulate expense receipts, reducing manual entry & improving accuracy



Public & affordable housing connected suite

Industry Solutions – Nonprofit



Ministry Intelligence enhancements help seamlessly connect accounting & business operations by delivering key church management data & visibility into KPIs & insights critical to strengthening congregation health.

Auto Distinguish Contributions

- Automatically distinguish one-time gifts from recurring contributions
 - For ex., a donor gives \$50 every month to the General Fund. One month, they give \$1,000 to the General Fund, & the next month they return to the consistent \$50 gift. The \$1,000 donation will be flagged as an outlier & considered a one-time gift

Daily Notification

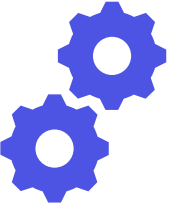
- You'll now get only one email informing you of the results of processing (previously, you could receive multiple emails). Also, this single email provides more useful information, including the following:
 - Number of successful givers
 - List of failed givers with information explaining why they failed
 - Start time & end time of processing

Integrate With Rock RMS

- Integrate Ministry Intelligence with Rock RMS. When synced, new givers, transactions, & bank deposits are created automatically
 - Information from these transactions is used in your giving dashboards



Industry Solutions – Healthcare



Sage Intacct Release 3 features EMRConnect enhancements. EMRConnect works with most delimited flat files that are exported from EMR systems. You can set up field mappings for as many formats as needed.

1

Email Notifications

- Set up multiple email addresses to receive email notifications from Sage Intacct about batches success or failure

2

New Configuration Options

- Choose whether to automatically summarize GL entries

3

Single-Digit Dates

- Entries that include single-digit dates can now be processed

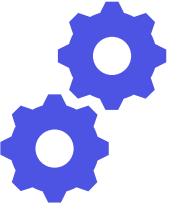
4

Validations

- Email notifications now warn you if the General Ledger is unbalanced



Industry Solutions – Multiple



Sage Intacct Release 3 features updated forms & operational workflows. Simplify onboarding & streamline interactions with new onboarding workflows & client portals.

Client Onboarding

- Workflows to share contractual documents & speed up the onboarding process
 - Set up for success, foster engagement, & enhance overall satisfaction

Client Portal

- Customizable portal with streamlined interactions on account changes, answering questions, feedback forms, & more

Vendor Contracting

- Use CharityAPI.org to check if a vendor is a 501(c) registered nonprofit organization



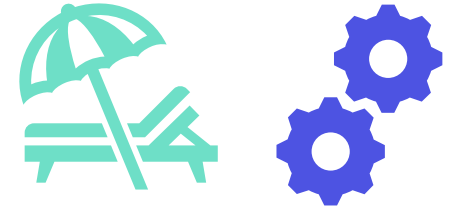
USA, Canada



User Interface

User Interface

List Enhancements – Beta



Turn on the lists beta interface to personalize your list views, leverage advanced filters, manage list & record details side-by-side, & more.

- Personalize your list views
- Refine your results with advanced filters
- View record details next to your list
- Even more enhancements

The screenshot shows the Sage Intacct Vendors Beta interface. The header includes the Sage logo, version information (Intacct FA v8.3 | PEA v3.4), and a 'Top level' dropdown. The main content area is titled 'Vendors Beta' and includes a 'Send us feedback' link and a 'Turn off beta' toggle. There are buttons for '+ Create', 'Import', and 'Export'. The interface features a search bar, a 'Manage view' dropdown, and a 'Revert changes' button. A 'Display hierarchy' checkbox is also present. The table below shows a list of vendors with columns for Vendor ID, Vendor Name, Address Line 1, State, Postal Code, Country, Total Due, and Status. The table is filtered to show 13 items.

Vendor ID	Vendor Name	Address Line 1	State	Postal Code	Country	Total Due	Status
V-151	1099 Test Vendor				United States	3000.00	Active
V-165	1099 Vendor				United States	16925.00	Active
V-100	4imprint	PO Box 1641	WI	53201-1641	United States	2002652.32	Active
V-101	600 MetroNorth Corporate Center, LLC	C/O National De...	MA	24620	United States	479779.47	Active
V-102	A&B Vending Company	50 New Salem St...	MA	18800	United States	343388.17	Active
V-103	A. Duie Pyle, Inc.	PO Box 564	PA	19381-0564	United States	34950.00	Active
V-104	ab consulting	Andree Buckley	MA	19500	United States	6150.00	Active
V-105	Able Courier	PO Box 1005	MA	01701-1005	United States	4696222.22	Active
V-106	AccountAbility Outsourcing, Inc	Two Newton Exe...	MA	24620	United States	14862.12	Active
V-141	ACH Test Vendor				United States	1500.00	Active
V-107	Adam Forrest				United States	1007550.00	Active
V-108	Adam Koch	460 Townsend St...	MA	14200	United States	14500.00	Active
V-109	ADP	225 Second Ave...	MA	24540	United States	161500.00	Active
V-110	ADP - 401k	71 Hanover Road	NJ	79320	United States	0.00	Active
V-111	ADP - FSA	2575 Westside P...	GA	30004	United States	0.00	Active
V-112	Akamai Technologies, Inc.	General Post Office	NY	10087-6590	United States	0.00	Active
V-113	Alan Gagne	15 Granite Ave	NH	30790	United States	14200.00	Active



02

Enhance Processes

Identify which updates can help enhance your business processes.



Topics

1. Financials

- General Ledger
- Cash Management
- Accounts Payable
- Accounts Receivable
- Order Entry
- Purchasing

2. Financial Add-Ons

- Inventory
- Revenue Management
- Contracts



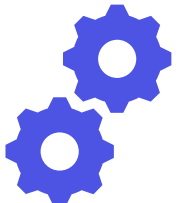


Core Financials

General Ledger

Core Financials – General Ledger

Fiscal Year Rollover for Document Sequencing



If your company has a legal requirement to number transactions using a sequence that includes the fiscal year, you can accomplish that with document numbering sequences.

- Allows users to have sequences that are fiscal year specific
- The fiscal year can show as a prefix or suffix
- Can be created at the top or entity level
- Available for Contracts, Fixed Assets, & General Ledger
- Requires Accounting Sequencing (permanent change)
- Currently, enabled by Provisioning, contact your account manager for more information

Fiscal year rollover

Enable sequence fiscal year rollover

Fiscal year end: 11 30 2024 Rollover start date: 07 17 2024

Append fiscal year to sequence
 Prefix

Rollover prefix: 2024 Separator: - Fixed prefix: GJ Separator: - Primary sequence*: 1 Separator: - Fixed suffix: FR

Sequence without fiscal year rollover

Fiscal year	Next primary sequence *	Next unused sequence	Sequence maximum
All	1	GJ-0001-FR	GJ-9999-FR

Sequences with fiscal year rollover

Fiscal year	Next primary sequence *	Next unused sequence	Sequence maximum
2024	1	2024-GJ-0001-FR	2024-GJ-9999-FR
2025	1	2025-GJ-0001-FR	2025-GJ-9999-FR
2026	1	2026-GJ-0001-FR	2026-GJ-9999-FR



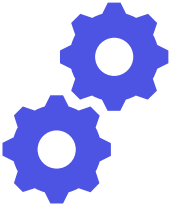


Financials

Cash Management

Financials – Cash Management

Bank Transaction Assistant File Import Enhancements



Bank transaction assistant file import now supports BAI2 & CAMT.053 file types & the process for uploading files is more streamlined.

There's a new way to import your bank transactions for reconciliation that focuses on flexibility, control, & visibility—it's now generally available.

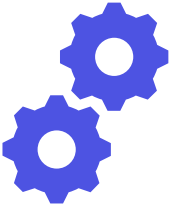
- Imported transactions appear in a centralized location for all bank accounts on the bank transactions page
- Transactions you import remain in Sage Intacct, even after reconciliation
- More file formats are supported, giving you extra flexibility
- You can increase control of who imports bank transactions using permissions
- A new import activity list provides added insight



All Regions

Financials – Cash Management

Canadian Bank Enhancements



Sage Intacct is expanding its Canadian banking functionality.

Bank Files

- Expanded bank format support: Additional bank file formats supported to enhance banking integration
- 1464-byte format: Support for 1464-byte format files for seamless transactions
- Major Canadian banks: Integration with TD Bank, CIBC, BMO, RBC, & HSBC for enhanced banking support

Check Printing Enhancements

- New out-of-the-box blank check stock supported
- Pre-printed check now supports middle & bottom formats
- Two new vendors available to purchase blank & pre-printed checks
 - [ChequePrint.ca](https://chequeprint.ca)
 - [Chequesnow.ca](https://chequesnow.ca)





Financials

Accounts Payable

Financials

Accounts Payable



AP Bill Automation

- Add-on feature to AP
- Streamlines your data entry process
- Automatically creates draft bills from uploaded or emailed bill documents
- Uses data from the original document & vendor information record
- AP Automation does not populate tax detail

Restricted Users Void Top-Level Payments

- Entity-restricted users who have top-level access can now void transactions that they create at the top level, provided they have the appropriate permissions

Unapply Credits Quickly

- Improve workflow efficiency by unapplying credits from posted payments, when the credits are applied without an associated payment
- You can unapply credits of all types, including the following:
 - Advances
 - Debit memo adjustments (vendor credits)
 - Negative bills
 - Negative line items applied from one bill to another bill



All Regions

Financials

Accounts Payable



Enforce Payment Approvals

- Restricted users can no longer approve or decline payments that contain line items coded to departments & locations for which they do not have access
- They can approve or decline a payment only when all line items for a payment are for departments or locations for which they have access

Void Posted Payments

- Save time by voiding posted payments directly from the posted payments page

Vendor Payments AMEX Retiring

- On December 31, 2024, the following American Express payment services will no longer be available in Sage Intacct
 - Sage Intacct Check Delivery Service
 - American Express ACH Payment Service
 - American Express Card Payment Service
- Make sure to process all payments by **December 20, 2024**, to avoid potential issues



All Regions

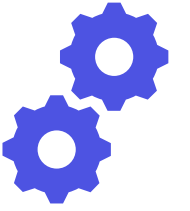


Financials

Accounts Receivable

Financials – Accounts Receivable

Customize Discount When Receiving Payment



Sometimes you need to edit a discount on the fly.

- Customize the discount when receiving a payment
- This feature helps address challenges such as:
 - Remittance includes a rounding error
 - Customer missed the grace period
 - Customer took a smaller or larger discount than terms allow
 - Multiple payments were sent for a single invoice
- Only available to companies that are not subscribed to taxes





Financials **Order Entry**

Financials – Order Entry

Trace Original Transaction Documents



Order Entry workflows provide great flexibility with multiple potential transaction entry & exit points. Now you can easily track which transactions started a workflow. A more traceable workflow helps inventory reconciliation accuracy.

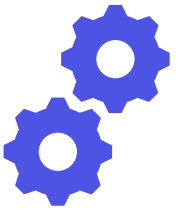
Item ID *	Warehouse	Quantity *	Quantity on hand	Unit	Price *	Extended price
1 Kit-1006--Specialty Bil	W-110--Downtown HC	1.00	2.00	Each	4,600.00	4,600.00

DETAILS		
Item description	Quantity available	Source document line ID
Specialty Bike Kit	2.00	1--Kit-1006
Memo	Quantity uncommitted	Originating document ID
	2.00	Sales Order-SO-10005
Price calculation memo	Source document ID	Originating document line ID
	Shipper-SH-10004	1--Kit-1006



Financials – Order Entry

View Conversion Type in Recurring Sales Orders



If your Order Entry application is configured to allow conversion by price, you now can view the default conversion type in your recurring transaction templates. This increased flexibility helps you keep track of remaining contracted quantity or price on recurring Order Entry transactions.

Entries [Show defaults](#)

		Item *	Warehouse	Conversion type	Quantity *	Unit	Price *	Extended price	
☰	1	Cartons--12 box Cartc	1--US TX Warehouse 1	Quantity	1.00	Each	200.000	200.00	+ 🗑
☰	2	COVERS--Phone Cow ▾	1--US TX Warehouse 1 ▾	Quantity ▾	1.00	Each ▾	45.000	45.00	+ 🗑





Financials

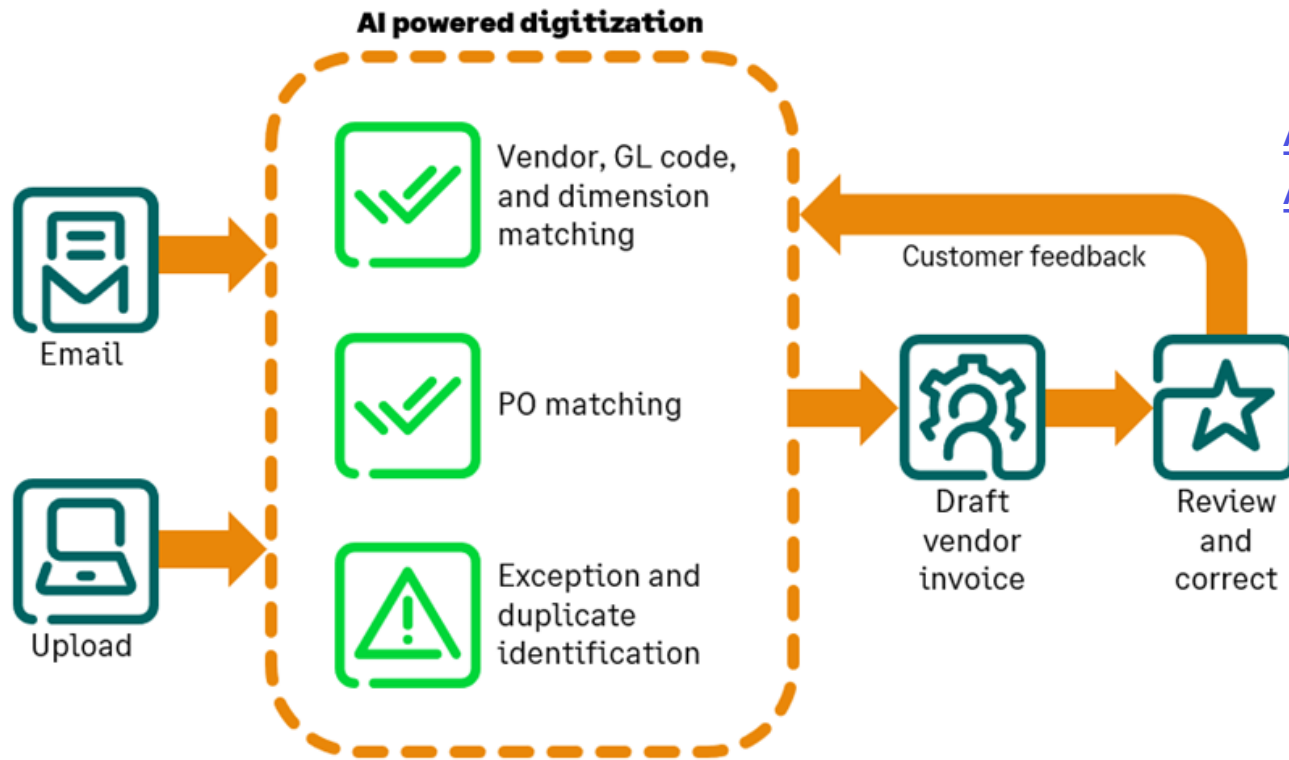
Purchasing

Financials – Purchasing

Automated Transaction Matching – Early Adopter



Streamline your purchasing workflow by letting Sage Intacct create draft transactions from incoming vendor invoices & match them to existing purchase transactions.



[Automated Transaction Matching – Apply to Become an Early Adopter](#)



All Regions

Financials – Purchasing

Trace Original Transaction Documents



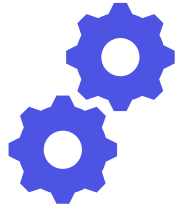
Purchasing workflows provide great flexibility with multiple potential transaction entry & exit points. Now you can easily track which transaction started a workflow. A more traceable workflow helps inventory reconciliation accuracy.

3	Item-1007--Wheelset -	Cross-reference item ID	W-110--Downtown HC	5.00	Each	625.00	3,125.00
DETAILS							
Source document ID Receiver-RCV-10004		<input checked="" type="checkbox"/> Taxable	Form 1099 box None				
Source document line ID 3--Item-1007		<input type="checkbox"/> Form 1099	Originating document ID Purchase Order-PO-10004				
Item description 35 mm rim		Form 1099 type None	Originating document line ID 3--Item-1007				
Memo							



Financials – Purchasing

View Conversion Type in Recurring Purchase Orders



If your purchasing application is configured to allow conversion by price, you now can view the default conversion type in your recurring transactions. With this increased flexibility you can keep track of remaining contracted quantity or price on recurring purchasing transactions.

Entries [Show defaults](#)

		Item *	Warehouse	Conversion type	Quantity *	Unit	Price *	Extended price	
☰	1	Cartons--12 box Cartc	1--US TX Warehouse 1	Quantity	1.00	Each	200.000	200.00	+ 🗑️
☰	2	COVERS--Phone Cow ▾	1--US TX Warehouse 1 ▾	Quantity ▾	1.00	Each ▾	45.000	45.00	+ 🗑️



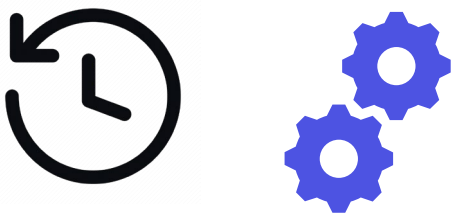
All Regions



Financial Add-Ons **Inventory**

Financials – Inventory

Supplies Inventory – Early Adopter



The Supplies workbench provides a convenient way to manage employee requests for supplies inventory items. The supplies manager can generate a report on all incoming supplies requests, evaluate reorder needs, & quickly replenish needed items.

ABC Distribution Top level

JW Smith Help & Support

Inventory Control

Supplies Workbench

Supplies requests

Items selected 1

Issue Print ... << < Page 1 of 2 > >>

Request date	Document no.	Line no.	Item name	Unit	Quantity	Source	Sourced quantity	Warehouse ID	Price	Employee	Line status	
02/27/2024	SYS-Supplies requisition-PSRQ-00000001	1	Wireless mouse	Each	1.00	Direct ship	1.00	WH10001--US AZ Warehouse 10001	37.50	4475-Johnson	Needs acknowledgment	Action
02/28/2024	SYS-Supplies requisition-PSRQ-00000002	1	20 Lb bond paper	Each	1.00	Direct ship	1.00	WH10001--US AZ Warehouse 10001	12.99	4124-Atkins	Available	Action
02/28/2024	SYS-Supplies requisition-PSRQ-00000003	1	36 inch monitor	Each	1.00	Issued	1.00	WH10001--US AZ Warehouse 10001	375.00	3882-Taylor	Completed	Action
02/28/2024	SYS-Supplies requisition-PSRQ-00000004	1	Magnetic white board	Each	1.00	Direct ship	.00	WH10001--US AZ Warehouse 10001	89.00	4807-Reser	Available	Action
03/11/2024	SYS-Supplies requisition-PSRQ-00000005	1	Bluetooth headset	Each	1.00	Purchase	1.00	1--US TX Warehouse 10004	34.99	3975-Eberhardt	Multiple	Action
03/13/2024	SYS-Supplies requisition-PSRQ-00000006	1	Paper shredder	Each	1.00	Purchase	1.00	1--US TX Warehouse 10004	164.99	4116-Cox	Available	Action
03/15/2024	SYS-Supplies requisition-PSRQ-00000007	1	Sticky notes	Each	1.00	Direct ship	.00	1--US TX Warehouse 10004	5.00	3914-Murdock	New request	Action
03/22/2024	SYS-Supplies requisition-PSRQ-00000008	1	36 inch monitor	Each	1.00	Issued	1.00	1--US TX Warehouse 10004	375.00	4812-Hatcher	Completed	Action
03/22/2024	SYS-Supplies requisition-PSRQ-00000009	1	Bluetooth headset	Each	1.00	Issued	1.00	1--US TX Warehouse 10004	34.99	3988-Comer	Completed	Action



Supplies Inventory – Apply to Become an Early Adopter

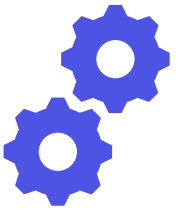




Financial Add-Ons Revenue Management

Financials – Order Entry Revenue Management

Track Order Entry Transactions With Contract Dimension



Now, you can use the contract dimension to categorize, track, & analyze Order Entry transactions without a subscription to the contracts application. Tag Order Entry transactions with the contract dimension to expand reporting visibility, streamline data analysis, & improve forecasting.

The screenshot shows a web-based form for creating a contract. At the top, there is a navigation bar with a star icon, a home icon, the text 'Company', and a search icon with the word 'Search'. Below the navigation bar, the form title 'Contract' is displayed on the left, and a 'More actions' button is on the right. The form is organized into two main sections. The first section contains three columns of fields: 'Contract ID *' (text input), 'Contract name *' (text input), and 'Description' (text input). Below these are 'Customer' (dropdown), 'Bill to' (dropdown), and 'Ship to' (dropdown). The second section contains 'Start date' (calendar icon), 'End date' (calendar icon), 'Additional contact' (dropdown), and 'Attachment' (dropdown with an edit icon). There are also two empty rows with double dashes (--) in each column.



USA, Canada, Australia, United Kingdom, South Africa



Financial Add-Ons Contracts

Financials – Contracts

Hold & Resume Schedules in Bulk



Sage Intacct has added new bulk actions so you can manage your contracts from a centralized view. They've also revamped the user interface to improve your experience.

Manage schedules

Update percent complete schedules Preview Hold More actions

Options

Action: Hold As of date: 07/15/2024

Filters

Customer or customer group Location or location group Project or project group Maximum number of records to select

Customer type Department or department group Project type Sort by/sort order

Contract or contract group Class or class group Task or task group Contract

Contract type Item or item group Project manager Ascending

Transaction currency Template Employee or employee group

Hold options

Schedules to hold: Billing schedules Revenue schedules Expense schedules

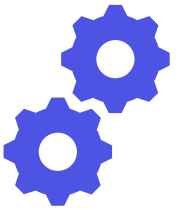
Hold date: Hold memo:



USA, Canada, Australia, United Kingdom, South Africa

Financials – Contracts

Create Dimension-Only Contracts



Create a simplified, non-posting version of a contract for reporting purposes. These dimension-only contracts can be tagged to transactions & reported on in the same way as any other dimension.

The screenshot shows the 'Contract' form in Sage Intacct R3. The form is titled 'Contract' and has a 'More actions' button in the top right. The form is divided into two main sections. The top section contains fields for 'Contract ID *', 'Customer', 'Contract name *', 'Contract tracking' (with radio buttons for 'Full contract' and 'Dimension-only contract'), 'Description', 'Ship to', and 'Bill to'. The bottom section contains fields for 'Start date', 'End date', 'Additional contact', and 'Attachment'. The 'Dimension-only contract' radio button is selected.



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03

AI & Automation

Explore new functionality, including AI & automation enhancements.



Topics



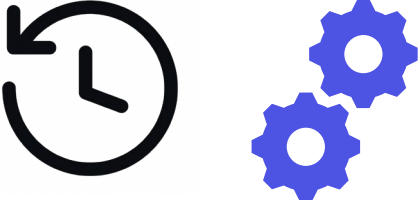
1. Sage Intelligent Time
2. Fixed Asset Management
3. Sage Intacct Advanced CRM
4. Reporting
5. Platform Services



Automation Time & Expense

Automation – Time & Expense

Automate Your Employee Expenses – Early Adopter



Sage Intacct is announcing a new automated workflow for submitting employee expenses. Save time & improve accuracy by emailing your employee expense receipts from any device directly to Sage Intacct. You can get a sneak peek at what's coming by joining the Early Adopter program.

The screenshot shows the 'Electronic receipts' interface in Sage Intacct. It includes a header with a home icon, a star, and the text 'Time & Expenses'. Below the header, there are options for 'Beta', 'Send us feedback', and 'Turn off beta'. The main area shows a table of expense items with columns for First name, Last name, Date filed, Total amount, Electronic receipt status, Reason for receipt, State, and Currency. Each row has a checkbox for selection and a 'Delete' button. The table contains six rows of data, all with 'Draft' status and 'USD' currency.

	First name	Last name	Date filed	Total amount	Electronic receipt	Reason for receipt	State	Currency	
<input type="checkbox"/>	Contains	Contains	Equals	Equals	Contains	Contains	Equals	Contains	
<input type="checkbox"/>	2nd, 4th, 6th Level Approver	Auto	03/06/2013	\$1,482.39			Draft	USD	...
<input type="checkbox"/>	2nd, 4th, 6th Level Approver	Auto	07/10/2024	\$91.77			Draft	USD	...
<input type="checkbox"/>	2nd, 4th, 6th Level Approver	Auto	10/20/2022	\$74.05			Draft	USD	...
<input type="checkbox"/>	2nd, 4th, 6th Level Approver	Auto	02/25/2021	\$483.00			Draft	USD	...
<input type="checkbox"/>	2nd, 4th, 6th Level Approver	Auto	03/02/2020	\$277.55			Draft	USD	...
<input type="checkbox"/>	2nd, 4th, 6th Level Approver	Auto	07/10/2024	\$842.89			Draft	USD	...



[Expense Receipt Inbounding – Apply to Become an Early Adopter](#)



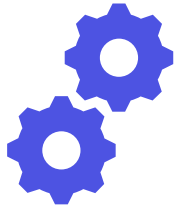
Automation **Fixed Asset Management**



Automation **Sage Intacct Advanced CRM**

Automation – Advanced CRM Integration Updates

Sync Accounts & Contacts Only Once



You now can choose to sync Accounts or Contacts from Salesforce to Sage Intacct only once when an Account or Contact is created. This improves data accuracy & consistency across both systems & reduces the risk of conflicting updates.

- Enabling sync only once prevents updates from being synced to Intacct through the following methods:
 - The “Sync to Intacct” button
 - Mass sync tools
 - Salesforce Process Builder workflows
 - APEX methods

▼ Synchronization options

Enable Intacct Salesforce synchronization

Accounts What can I do here? ?

Sync account or contact first

Add new account to Intacct

Sync only once

Update billing and shipping address categories

Update bill-to and ship-to address categories

Update customer bill-to and ship-to default contacts from []

Contacts

Require bill-to and ship-to contacts ?

Sync only once

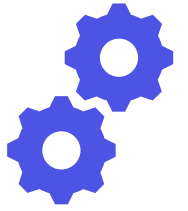
Field mapping

[Contacts](#)



All Regions

Automation – Advanced CRM Integration Updates



1 Improved Task Sync

- When you create & sync a project in Salesforce, tasks associated with the project are now automatically synced as well
- This eliminates the need to sync manually & streamlines the project workflow

2 New Template Sync

- Contract revenue recognition template sync is now supported
- This update allows you to sync your revenue recognition templates directly to your contracts

3 Error Log Improvements

- Improve error management with the ability to add error log related lists to key objects, such as Account & Opportunity
- These lists provide a centralized view of sync errors directly on the relevant record
- Easily access error details without going to the Error Log object, streamlining troubleshooting & resolution

4 Support for Nonprofit Cloud

- Sage Intacct Advanced CRM Integration now works with Salesforce Nonprofit Cloud
- This platform from Salesforce streamlines operations for nonprofits, replacing the previously used Nonprofit Success Pack



All Regions



Automation **Reporting & Analytics**

Automation Reporting & Analytics



New Reporting Areas

- New reporting areas are now available for Interactive Custom Report Writer (ICRW) & Interactive Visual Explorer (IVE)
- A new Assets reporting area for the Asset dimension with Fixed Assets Management
- A new Depreciation Schedule reporting area to track depreciation schedule entries & related fields with Fixed Assets Management
- A new Depreciation Schedule Detail reporting area provides a Depreciation Schedule header for Fixed Assets Management

Construction Joint Payee CRW

- You can now add Joint Payee name & Joint Payee print fields to your Construction Custom Report Writer (CRW) reports
- Now when you create joint checks, Joint Payee print allows you to create a CRW report that shows the check payee print as information within the report
- Likewise, Joint Payee name (for which the check was created) allows you to track joint checks & the payee names

New Workflow Walk-Through Examples

- Workflow 4: Projects & tasks performance shows you how to create Project Overview report, apply calculations, & then explore projects & tasks with a variety of visualizations
- Workflow 5: Projects sales order performance shows you how to create a project that allows you to explore & analyze trends in company transactions across Projects & Tasks.
- Workflow 6: Narrate & present shows you how to construct a story with your visualizations & share the presentation

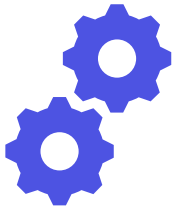


CRW, ICRW & IVE: All Regions
Constructions: USA, Canada, Australia, United Kingdom



Automation **Platform Services**

Automation Platform Services



Reports in Application Packages

- Another way to add Interactive Visual Explorer & Interactive Custom Reports to an application so that you can include them in your package

New Fonts Available

- New fonts available on our servers for use in printed document Microsoft Word templates
- These new fonts include:
 - Libre Barcode 39 Extended
 - Libre Barcode 128
 - Cordia New

No More Audit Log Package Installation

- Reminder: Sage Intacct will block the installation of the Audit Log package & prevent the execution of the events associated with it
- This enhancement means that you do not need an application package to add events to object changes
- Instead, you can easily create audit reports & share them



All Regions

Q&A



Business
Technology
Services

Questions?

Contact

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