

sage Intacct

2019 Release 2 Highlights

Presented by:



Product area	Feature	Description
Accounts Payable	Filter then pay	Load bills by applying a filter to focus on just the bills you need to pay now.
Administration	More insight into Smart Events	Monitor the Smart Event jobs queued in your company and view a history of completed jobs. Get deeper insight and drill down into the details of queued or completed Smart Event jobs, which is particularly useful if multiple Smart Events are triggered by the same event.
	More control over content security policy	Control how Sage Intacct handles third-party content not whitelisted in your content security policy.
Budgets and Plans	What's new?	Check out the Sage Intacct Budgeting and Planning release notes to keep up with the latest features and improvements.
Cash Management	Enhancements to bank reconciliation	Bank Reconciliation enhancements enable you to:

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		<ul style="list-style-type: none"> • set new permissions to separate reconciliation duties and keep your company data secure. • manually select and match voided and reversed transactions within Intacct when reconciling via import.
Consolidations	Update to historical rate calculation	Now, when you consolidate your books, Sage Intacct uses the Exchange Rate Date defined on each individual transaction line instead of the date of the transaction, providing additional flexibility and predictability, especially when deferred revenue or expenses are involved.
Contracts	Categorize contracts with new contract types	Use contract types to group contracts in meaningful ways to provide additional insight into your business. You get to decide what categories make the most sense for your contracts.
	Estimated variable consideration for Time & Materials projects	In this release, we provide the infrastructure to defer estimated time-based revenue for Time & Materials projects.
	Bill projects at percent complete threshold levels	With either project- or task-based percent complete billing, you can now set percentage threshold values in billing templates so that a project is only invoiced when certain thresholds are met.

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Customization and Platform Services	New samples and other updates to document templates	Take advantage of our new sample templates for invoices and other documents. We added nine new samples to use as a starting point, and improved usability to speed up the document template creation and management process.
General Ledger	Dynamic Allocations continue to grow	We extended automation with recurring allocations, and the allocation definition has again grown to include more adjustment (true-up) options for your source pool, and more basis calculation options. And now you can attach documents to your definition.
	Prevent direct journal entries to control accounts	We added a new control option at the account level to help ensure entries to subledger accounts are recorded through the subledger applications into the general ledger journals to keep them in sync.
Inventory	Replenish items with varying sales volumes with greater ease	When the demand for items varies over time, use fluctuating forecasts to keep your inventory levels lean. Project the demand in a forecast and skip the work of adjusting quantities each time demand changes.
	Increased selectivity over which warehouses to replenish	If items aren't stocked in every warehouse, use new options to streamline the replenishment results. Include only the item-warehouse combinations you want to restock.
	More visibility into actual landed cost distribution details	As you enter an actual landed cost, you'll now see how the cost will be distributed to the items in the original

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		purchase. Before, you had to check the system-generated adjustment transactions.
Projects	Transaction rules filter	Restrict transaction rules to only run for billable timesheet entries.
Reporting and Insights	More out-of-box dashboards	Save time during your dashboard creation and use the two new, out-of-box dashboards added for companies that use the General QuickStart template. These dashboards are set up to help you capture your cash analysis and key financial ratios and in one centralized place.
Salesforce Integration	Sage Intacct Advanced CRM Integration	We updated the Sage Intacct Advanced CRM Integration to include resynchronization of managed lists, improved error validation, and other smaller updates.
User Experience	Transition to Sage Intacct Action	<p>Shortly after this release is generally available, we'll automatically default all users to Action UI so that everyone can discover how it works.</p> <p>You can still switch back to the previous UI if needed.</p>
	Latest page conversions: Action UI	We continue to convert pages from our previous UI to our current Action UI. Check out what we converted for this release
Web Services	What's new?	Get a summary of highlights from the Sage Intacct Developer portal blog.

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Workflow	Post sales and purchase transactions to user-defined books	With automated additional postings on user-defined books, you can now manage and report on sales and purchase commitments much faster and with fewer errors. And, you can create other time-saving workflows!
More	New and updated help and training now available.	<ul style="list-style-type: none"> • Check out the list of the in-depth help added in this release. • View the list of self-paced training courses that are newly available in our Action user interface.

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