

Sage Intacct 2018 Release 3.1

In between releases, we often add small changes and enhancements, which can have an impact on your company environment. Below are the product areas we enhanced since Sage Intacct 2018 Release 3:

Vendor requirements and billing limits for American Express Vendor Payment Services

For your banking security, American Express now requires newly added and edited vendors to each have a valid phone number and email address on their vendor record. This requirement applies to all services offered by American Express through the Vendor Payment Services module.

The phone number must be ten-digits without spaces or special characters. For example, "8005551234". The email address must include an "@" symbol and a domain. For example, "Name@yourcompany.com".

For enhanced processing performance, there is a limit on how many bills you can include for each payment. This limit applies to all services offered by American Express through the Vendor Payment Services module. See the table below for specific limits per service.

Service	Maximum number of bills per payment
Intacct Check Delivery Service	25 bills per payment
American Express ACH Payment Service	125 bills per payment
American Express Corporate Card Payment Service	125 bills per payment

Advanced CRM Integration updates

We've made some small updates to the Advanced CRM Integration Salesforce package.



Opportunity Stage selection

You can now select the type of Opportunity Stage to be pre-populated when you create Add-on Opportunities in Salesforce. Previously, this option defaulted to *Prospecting*, but now you can select any of your stage values.

Change to the Billing Method option for *Project Time & Materials*

We've added a custom field called **Billing Method** (ia_crm__Billing_Methdod__c) that creates a picklist of values for use in Salesforce.

The new custom field requires existing users to update the API name for one of the picklist values. The *Project time & materials* API name should be updated to *Project T&M* to function correctly:

Label	<input type="text" value="Project time & materials"/>
API Name	<input type="text" value="Project T&M"/> 
Default	<input type="checkbox"/> Make this value the default for the master picklist
Chart Color	Assigned dynamically 

New users will have this updated automatically.