2018 Release 2.0 and 2.1

Release highlights 2.0

- **Nonprofit Financial Board Book powered by GuideStar®** — Get the metrics that matter for nonprofit organizations, in a set of ready-made dashboards. We've teamed up with GuideStar to bring you the Nonprofit Financial Board Book for unparalleled visibility into your financial health and how you compare to similar organizations.
- **Advanced Audit Trail** and **GDPR** — Are you ready for new standards for managing access to personal data? We've got you covered with Advanced Audit Trail for tracking access to personal data, as well as a new GDPR service for organizations that need General Data Protection Regulation (GDPR) compliance for storage and retention of personal data.
- **Contracts** — Control the timing of contract bookings, revenue recognition, and renewals. Key features include the ability to defer revenue recognition until performance obligations are met, define when a contract line should book, and convert revenue and expense schedules from manual to automatic as of a selected date.
- **Inventory** — *Coming soon after R2*--new capabilities just around the corner.
  - Use the new Warehouse user type to give users access to select activities in Order Entry, Purchasing, and Inventory Control.
  - Use Landed costs and Replenishment to transform inventory; you can track true inventory costs and even automate reordering and fulfillment for cost-effective inventory.
- **Action UI menu changes** — If you've been using our new Action UI already, you'll notice dramatic changes to menus and navigation. If you haven't used Action UI yet, it's time to give it a try — just click **Enable Beta UI** in your main menu bar. Either way, we want your input! Learn what's changed in Action UI and how to provide feedback.

Are you a Global Consolidation company? With this release, our old UI no longer supports Global Consolidation; in fact, you won't even find it in the menu. Global Consolidation exists solely in our new Action UI with exciting new GC features and enhancements.

- **Administration** and **Web Services/API access** — We added loads of new features for administrators, giving you insight and control over what's happening in your Sage Intacct company. Check out the changes to users, user types, and security, then try out our new Queue Administration screen for tracking offline jobs.

Does your company have integrations or otherwise exchange data with other systems via Web Services and the Sage Intacct API? If so, there are R2 changes that affect you. In addition to moving Web Services users to their own list, you are now required to authorize Web Services activity that occurs through the API.

Release highlights video (8:14)

Tour the release with VP of Product, Dan Miller.

All release notes and videos

Want a quick summary, in one place? Use the table below to:

- See the full list of features, with a short description of each change.
- Dive into specific areas — click to read release notes or watch selected videos.

Product area	Feature	Description
Accounts Payable	Streamlined workflow for merging payments: **Merge draft payments for the same vendor** **Use the vendor Pay to contact when merging payments** **Overview (6:40)**	We've made it easier to create just one payment per vend • If you're paying the same vendor in the same way, why multiple payments? Now you can merge draft payment using the AP workbench in the Action UI. • Plus, there's a new option on the Pay Bills screen for me based on "Pay to" contact that was selected on the bill. solves for bills that have different Pay to contacts for th vendor.
	New requirements for American Express ACH Payment Service	American Express ACH Payment Service now requires a **Na the account** as well as a **full bank address** for each checkin you use with the service.
Administration	**Introducing the Advanced Audit Trail**	Take your audit capabilities one step further with Advance Trail. Track all access to personal data stored in contact, cu or vendor records, then use this information to create rep

	GDPR, Sage Intacct, and your data	Worried about GDPR? We offer a new service that helps yo with the new General Data Protection Regulation (GDPR) f and retention of personal data.
	New Queue Administration screen offers insight into offline jobs	Track your offline jobs with **Queue Administration**. Now, y view your offline job queue and history in real time. You ca take control of your queue and prioritize offline jobs with t subscription.
	More control over access to your data from outside systems: **Web Services users moved to their own list** **Take control with Web Services authorizations**	We've made it easier to understand and control who has a your data from the Sage Intacct API. • **Web Services users** moved to their own list. Now, you c determine which users are exchanging information with company via Web Services API calls. • The **Company screen > Security tab** now enables you to Web Services activity to your company. If someone wan make Web Services calls to your company, they need to to your Web Services authorizations list first.
Contracts	**Control when your contract line books with the new GL posting date field** **Overview (6:52)**	We added a new **GL posting date** so you can separate the date from the contract line Start date. It also handles scen posting to the GL when the contract line start date minus a bill-in-advance period occurs in a closed period.
	Automatically defer revenue until a performance obligation is delivered **Overview (7:00)**	Prevent revenue schedules from starting for specific items Delivery status is set to Delivered.
	Convert a revenue schedule's posting type from manual to automatic **Overview (3:03)**	It is now possible to convert revenue and expense schedul manual to automatic as of a selected date.

	Contract renewals: **Improved email notifications** **Select how far to bill in advance** **Overview (4:16)**	Determine when customers should be notified, and billed, contract renewals. Plus, you can optimize your emails with more information for your customers.
	Uncancel a contract **Overview (4:11)**	Need a do-over? Uncancel contract or contract line when t revenue recognition method is Straight line or Daily rate.
	Calculate MEA allocations using the Residual method or just enter your own value **Overview (5:16)**	We introduced two new ways to determine the fair value f item: • Support for calculating MEA allocations using the Residu method • Override the MEA amount with your own calculated am
	Recognize project revenue at percentage of completion threshold levels **Overview (6:50)**	With either project- or task-based recognition methods, yo now set percentage threshold values in revenue templates project revenue is only recognized when certain threshold
Customization and Platform Services	**Customization Services and Platform Services enhancements**	Improved error checking means new requirements in Sma Smart Rules, Smartlink Clicks, Smartlink Fetches.
Global Consolidations	**Big changes to Global Consolidations**	Global Consolidations is now available **only** in our new Act And, we've added a few new features along the way.

Inventory Control	**Coming soon — Landed costs** **Overview (1:19)** **Setup (2:25)**	Available soon after R2, landed costs will help you ensure y inventory valuation reflects the full cost of your purchased You'll be able to add back any additional expenses you incu purchase to the original purchase costs.
	Coming soon — Replenishment **Overview (1:05)** **Setup (2:45)**	Available soon after 2018 R2, the new replenishment proc automate reordering and fulfillment for cost-effective inve management. We'll calculate how much to reorder and ge the purchase orders for you.
	Coming soon — Warehouse user type	Available soon after 2018 R2, you can use the new Wareho type to give users access to select activities in Order Entry, Purchasing, and Inventory Control at a subscription cost th matches.
Projects	**Project managers gain ability to draft invoices** **Overview (5:00)**	New "save as draft" capability streamlines invoice prepara enabling Project Managers to create draft invoices, which routed to an approver to approve and post.
	Manage Timesheets and Manage Resource Schedule pages get new names	We renamed pages to better reflect how they are used: • Manage Timesheets is now named **Timesheet inquiry**. • Manage Resource Schedules is now named **Resource ca**
Reporting and insights	**Introducing the Nonprofit Financial Board Book powered by GuideStar®** **Overview (2:42)**	Get instant insight into your not-for-profit organization's fi health and viability with this set of key metric dashboards by GuideStar, the world's leading source of nonprofit infor

	Sort financial graphs by timeline	See expanded, direct comparisons by timeline on your fina graphs. Instead of expanded periods, each portion (month and so on) of a period appears next to the same portion fo periods. Great for spotting trends!
Salesforce integration	**Advanced CRM Integration updates**	We've updated and extended functionality of the Sage Inta Advanced CRM Integration, including updates to the Intacc Configuration page in Salesforce, new Account sync optior addition of bi-directional sync for contract line custom ma
User experience	**Action UI** **Overview (4:10)**	We listened to your feedback. If you've been using Action (accessible by clicking **Enable Beta UI** in your main menu b notice some dramatic changes to menus and navigation. If haven't been using Action UI yet, it's time to give it a try. E we want your feedback.
Web Services	**What's new?**	A summary of highlights from the Sage Intacct Developer portal blog.
Workflow	**New "Deliver to" contact for tax calculations on Purchasing transactions**	You can now configure Purchasing to use a Deliver to addr calculate line level tax.
	Override Simple Tax at the line level to apply different tax rates	Apply different tax rates in a single transaction at the line l Simple Tax.
	Transactions definitions – subtotal templates streamline the work	Are you in a multi-entity environment and need to apply d subtotals for different entities for Order Entry or Purchasir Subtotal templates let you apply different subtotals depen where the transaction is created.
More	**Additional changes in 2018 Release 2**	Plus, you'll find these additional changes and enhancemen • Additional Data Delivery Service objects • Currency symbol no longer appears for statistical accour • Changes to permissions to preview financial reports • Save Order Entry, Purchasing, and Inventory transaction reposting • Change in requirements for Smart Events

		• Manage parent and child Order Entry Print/Email docum • Calculate sales tax using line level Ship to contact - Adva • Change timesheet quantity during Contracts invoice ger

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Inventory

Modeled off the concept of a Project Manager user, the new Warehouse user provides a level of access to Sage Intacct that's between an Employee user and a Business user—and, at a subscription cost that matches! Now, you can set up users who only need access to select features and tasks in Order Entry, Purchasing, or Inventory Control as Warehouse users.

Read more about the new Warehouse user type.

Contracts

- The **Multiplier** field in the contract line calculator now accepts up to 10 decimal places.
- The **Exchange rate date** field on the contract line defaults as follows when the contract uses a currency other than the base currency:
  - If the GL posting date is today's date or earlier, this field defaults to the GL posting date.
  - If the GL posting date is in the future, this field defaults to today's date. The Exchange rate date can't be a future date.
  - In the contract line API, if no exchange rate date is specified for a contract line with a future date, the Exchange rate date defaults to today's date. Previously, the API resulted in an error condition if no Exchange rate date was specified.
- Users with Contracts - Add permissions can now import contracts and contract lines directly from the **Contracts** and **Contract Lines** list pages using the **Import** button. Previously, importing contract and contract lines required permissions to the **Company Setup Checklist**page.

American Express Corporate Card Payment Service

All Open Cards and Corporate Cards are now compatible with American Express Corporate Card Payment Service, regardless of corporate liability. You enroll the card the same way you enrolled previous cards, and your payment workflow remains the same.

Learn more about the Open Cards and Corporate Cards available for American Express Corporate Card Payment Service.