

## Sage Intacct 2018 R3 Release Notes

our company is evolving and scaling with a pressing need for insight, greater control, flexibility, and compliance. At Sage Intacct, we've anticipated those needs and are evolving and scaling right with you to meet them through technology and process innovation. Learn what's new, and the impact it can bring to you and your organization. Check back often as we add video demonstrations by the Product Managers.

### Release highlights

- **Contracts:**
  - Billing renewals: Got a new multi-year contract that you want to bill annually? We've just made that process a snap by adding an annual billing frequency option that simplifies the annual billing cycle set up process.
  - MEA enhancements: Get more flexible MEA allocations that include more use cases, such as including contract lines that have already-completed revenue schedules.
  - GL posting date: Get more control over your default billing schedule. You decide the billing schedule behavior when the contract line GL posting date is earlier than the internal billing schedule start date.
- **Spend Management:** As it already does with Purchasing, Spend Management now enables you to gain tighter control over much more of your spending vs budget, by validating spending for your AP bills and GL journal entries. To get earlier insight into possible budget issues, you can receive automated emails warning about any overages and look at the audit trail log to view entries for spending within or above budget. You can even enable a user to have insight into your budget and spending so they can make conscientious decisions before posting transactions.
- **Global Consolidation:** You're a consolidated company, but you need some flexibility to "decentralize" a bit so that your regional users can run consolidations. You can now enable users for an elimination entity. As long as a user has permissions to access the elimination entity and associated entities, the user can run consolidations for that consolidation book without depending on the top-level user.
- **Salesforce integration:** Get more flexibility in optimizing your integration with some new tool enhancements. Use new options in Opportunity Products to hide fields from specific profiles to streamline the process. And synchronization has gotten a lot smarter: A sync only starts when required fields in Salesforce are populated, ensuring that Intacct gets all the correct information. Finally, you can now use Salesforce Process Builder with the Intacct CRM fields, which means, for example, that you can create a workflow that starts the sync of the activated contract. Check out the release note for even more enhancements.
- **Reporting and insights:** We've notched compliance up a whole level by adding out-of-the box tools and reports to support your Not for Profit organization to comply with the FASB 958 guidelines.

## 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 as they become available.

Product area	Feature	Description
Global consolidations	<b>Customer advances at the top level</b>  <b>Overview (4:42)</b>	Advances can now be created at the top level of your multi-company.
	<b>Elimination entity restrictions</b>	You can now include a regional-level elimination entity in a consolidation book, making it possible for regional consolidations to consolidate their own area.
General Ledger	<b>Duplicate journal entries to other books</b>	To save time and effort, as well as avoid errors, we're extending the ability to duplicate journal entries across journals associated with different books.
Reporting and insights	<b>Prepare for the FASB 958 update</b>	Not-for-profit organizations can take advantage of our new out-of-box reports, dashboards, and account categories to...

	<p><b>Overview (2:12)</b></p>	<p>during your transition to the new FASB guidelines set to take effect as early as the end of 2018.</p>
	<p><b>Simple consolidation book selection in GL reports</b></p>	<p>Instead of seeing all the consolidation books listed in the book selection, you'll only see those books that you have permissions for on the entities and the elimination entity.</p>
Contracts	<p><b>Annual billing frequency and renewal billing templates</b></p> <p><b>Overview (1:46)</b></p>	<p>We've added a new annual billing frequency option to simplify the annual billing cycle set up process. We've also included the ability to specify a billing template for a contract line to use when the contract renews.</p>
	<p><b>MEA enhancements</b></p> <p><b>Overview (4:23)</b></p>	<ul style="list-style-type: none"> <li>• User interface changes</li> <li>• Support for the Predefined percentages recognition method</li> <li>• Date validation changes — no more "uncovered period"</li> </ul>
	<p><b>GL posting date configuration</b></p> <p><b>Overview (3:54)</b></p>	<p>We added a configuration option that lets you choose the book schedule behavior when the GL posting date is earlier than the internal billing schedule start date.</p>
	<p><b>Miscellaneous Contracts changes</b></p> <p><b>Overview (2:07)</b></p>	<p>We've released several user interface updates and validation changes that may have an impact on your company's environment.</p>
Projects	<p><b>Soft book task resources</b></p>	<p>Get soft booking to gain a better idea of hard commitments and soft commitments within your resource capacity.</p>
Salesforce integration	<p><b>Advanced CRM Integration enhancements</b></p> <p><b>Overview (3:53)</b></p>	<p>We've updated and extended functionality of the Sage Intacct Advanced CRM Integration, including updates to the Intacct Configuration page in Salesforce, new Account sync options and the addition of bi-directional sync for contract line custom mapping.</p>

Customization & Platform Services	<a href="#">New field lookup in Smart Events, Smart Rules, and Smartlinks</a>	Creating Smart Events, Smart Rules, and Smartlinks just got easier. You can now select injections from the Sage Intacct Developer portal instead of adding them manually.
Web Services	<a href="#">What's new in Web Services?</a>	A summary of highlights from the Sage Intacct Developer portal.
Workflow	<a href="#">Spend Management reaches prime time</a>  <a href="#">Overview (2:55)</a>	Manage your operations budget, project budget, or any other budget and gain much needed insight into your spending across all projects easier than ever before with our enhanced Spend Management tool.
Administration	<a href="#">Changes to administrative activities</a>	We've made minor changes across a number of administrative activities to improve your experience and ease-of-use, as well as to maintain more complete historical references.
Help content and training courses	New and updated <a href="#">help</a> and <a href="#">training</a> now available.	<ul style="list-style-type: none"> <li>• Brand new Search that enables targeted, more relevant search results.</li> <li>• Check out the list of the in-depth help and troubleshooting content added in this release.</li> <li>• View the list of training courses that are converted to our new Action user interface.</li> </ul>
More	<a href="#">Additional changes in 2018 Release 3</a>	In addition to big features and enhancements, we continuously release small changes that enhance productivity, capabilities, and ease-of-use.