



The Resource Group

Intacct Quarterly Release R2 2017 Overview

Prepared: May 3rd 2017

System-Wide Updates

Beta Test the new "Intacct Action" User Interface

The new interface is aesthetically pleasing and incorporates more intuitive navigation. Try it out on a user-by-user basis today – no data or other users are affected!

Company Module Updates

Customize Email Domain Name

Allow Intacct to send emails on behalf of your domain, for increased branding and more ensured delivery.

Increased Audit Trail

Any changes are instantaneously logged with the sources of an action (by System, UI, Import, or API), in addition to tracked user action on GL transactions (Print, Approve, Reverse, etc.).

Purchasing Module Updates

Value-Level Approvals for Department Managers

Customize transaction approval routes for a Department's workflow, which overrides any default.

Delegate Approval Permissions

If your Approver is out of office, the system can now reroute any new approval requests to assigned delegates who can approve on the original approver's behalf.

Stricter Budget Policies in Spend Management

For missing budget information in a reporting period or for certain dimensions, transactions are validated as if it has a budget value of \$0.00. The system then warns or stops the purchase, depending on configuration.

Projects Module Updates

Resource Scheduling Automation

Create recurring schedules for Resources on Tasks, as well as automatically shift Task Dates assignments based on changes to Project Dates.

Rely on Base Price Lists for Billing Rates

If a transaction rule can't find a billing rate for an employee or item within the Project details, system will search the Base Price List to automatically determine your billing amount for you.

Inventory Module Updates

Easier Serial Numbering

Serial numbers can now be assigned to Inventory Items via Import or API, as well as through an updated, easier UI table.

Effective Dates for Standard Costs

To make managing standard costs easier and more robust, you can now enter different costs for different date ranges.

One-Step Warehouse Transfer

Transfer items from one warehouse to another within the same entity in one transaction screen.

Reporting and Dashboard Updates

Create Reports or Graphs within a Dashboard

You can now launch the Report or Graph writer directly from the Dashboard's Add Component link, instead of having to navigate away.

Leaner Creation Lists

When you add a new component to a dashboard, the selection list doesn't contain system-based reports or graphs. You can now use the installed report as-is or take advantage of filtering and customization. System reports and graphs can't be modified, so installing the report and running it as-is gives you the same information as before.

Contracts Module Updates

Multiplier Field available on Invoices

For Fixed Fee Contracts, generated Invoices now show the one-to-one mapping relationship for all calculator fields.

Salesforce Integration Updates

Advanced CRM Integration

Combines best of SFDC and Intacct to integrate workflows and record synchronization between Intacct and Salesforce for contract billing, Quote-to-Cash workflow, Record Lists syncs, and more.

Note: All Intacct features and functions highlighted in Release Notes are subject to modification or delay.