



The Resource Group

Sage Intacct Quarterly Release R4 2017 Overview

November 10th 2017

System-Wide Updates

New User Interface Improvements

Spacing has been tightened, reconciliation pages are getting facelifts and have been reverted to the old UI, certain Dialog box interactions now operating correctly, and Audit Trail is fully functional in Action UI.

Audit Trails: Increased Insights

Export audit trail tables to PDFs for auditors or other administrative review; View audit trails from directly within the Report Center and save some clicks.

Disabled Support for TLS 1.0

As early as December 15th 2017, any browser access from a resource that does not support Transport Layer Security (TLS) 1.1 or above will fail – most modern browsers are compliant, but confirm with your IT.

Company Module Updates

Improved Email Domain Setup

Setup the subdomain "intacct-mail-verify" and add your email sender key to avoid changing your company's domain record, and Enforce DNS is now standard.

General Ledger Module Updates

Faster Close Function

Dramatic improvements in platform performance remove the need to process offline – it happens instantly!

Accounts Payable Module Updates

AP Workbench Enhancements

Auto-apply in-line credits functionality (from R3) is now available for cash and multi-book companies, and Group by Entity and Pay Source Entity filtering has been added for paying bills.

Purchasing Module Updates

Approval Policy Validations

When approval policies are created or modified, the system will run a validation check to make sure any other configuration or data involved is not incomplete.

Spend Management Module Updates

Faster GL Account Mapping

Item GL Group to GL Account mapping now has an import template for more efficient updates.

Order Entry Module Updates

New Print/Email Features

Print and/or email multiple Order Entry documents at once, and additional filters for the Print/Email lookup have been added.

Sales Transaction Improvements

The History tab now displays the document template associated with the sales transaction, and the Print/Email button is now available in Edit mode as well as View mode.

Multiple Ship-To Contacts Supported

Ability added to specify a ship-to address by line item for multiple sale destinations within a single invoice.

Projects Module Updates

Observed Percent Completed Table

Users can now enter and maintain a history of observed percent completed values, using as-of dates, to provide valuable insight into the progression of the project life.

Inventory Module Updates

Enhanced Cost Management

Improved Intacct automation to reorder transaction documents from purchase to receipt, recalculating inventory costing to keep inventory valuation, current unit costs, and cost of goods sold (COGS) up to date.

Transaction Validation

Several validations to Inventory and Order Entry transaction definitions have been added to help ensure Inventory values more accurately reflect asset balance, and so Stockable Kits are properly configured for posting.

Expanded Warehouse Transfers

Inventory transfers between entities with different base currencies is now supported.

More Efficient Kit Costing Reports

Create custom Kit Costing reports for specific time periods, source transaction visibility, and full dimensional breakout.

Improve Auto-Reversals of On Hold and On Order Quantities

System now looks back up the workflow for two transactions (instead of one), allow more options for affecting On Hold or On Order item quantities and more accurate inventory counts.

Contracts Module Updates

Multiple Element Arrangement (MEA) Enhancements

Set up new automatic bundlings for easier exception management, and validations have been added to ensure that revenue and billing schedules match by accounting for every contract line in an allocation process.

Separated Holds for Billing and Revenue Schedules

Place separate holds on billing or revenue schedules for more flexible management and more precise control of transaction recognition.

Aligned Straight-Line Revenue Calculation

Calculation used for periodic revenue has been better aligned with industry norms for consistency with straight-line recognition over partial periods.

New Invoice Generation Permission

Explicit permission for Generating Invoice now exists to control access and protect segregation of responsibility.

Salesforce Integration Updates

Easier Renewal Management

Advanced CRM Integration now enables the contract renewal process in Salesforce to automate the creation of opportunities in Salesforce for contract renewals using Intacct-based renewal templates.

Web Services Updates

Blog Updates

Many of the new features above in the standard modules are now available in Development environments as well – check out the blog for more details.

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