



# The Resource Group

## Sage Intacct Quarterly Release Overview R1 2018

February 9, 2018

### Accounts Payable Module Updates

#### AP Workbench: "My Checks" Enhancement

With a personalized view of printable checks, users can improve organization and eliminate errors caused by two people printing a check at the same time. A new My Checks view under the Print Checks page will display a list of only the checks for which you have processed payment requests.

### Order Entry, Purchasing, and Inventory Module Updates

#### Modified Date Stamp

For Order Entry, Purchasing, and Inventory transactions, new modified by and date stamps will appear on the history tab.

#### Update without Posting

For Order Entry, Purchasing, and Inventory transactions, users can now edit non-accounting fields, such as Reference or Ship Via, and "Post" the transaction to save without recreating the journal entry.

### Inventory Module Updates

#### Substantial Costing Improvements

Logic changes for setting up costing layers and the calculation of COGS are just a couple of the wide-spread costing calculation improvements that have pervasive benefits across this module as well as the Purchasing and Order Entry modules.

#### Linked Inventory Adjustment Transactions

Create an inventory adjustment that will modify the quantity and/or value of an item, and link it to the source purchasing or inventory transaction that was its impetus.

#### Recalculation Inventory Costs => Maintain Inventory Valuation

Sage Intacct has renamed the Recalculate tool to "Maintain Inventory Valuation", to reinforce that updating inventory costs should be a standard process in your organization. In addition, a start date field has been added to the configuration screen to tell the system from what point to maintain valuation.

#### New Inventory Journal Report Filters

Use the new "From" and "To" Warehouse filters to see specific transactions related to one or more warehouses.

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

## Projects Module Updates

### Timesheet Posting Control Update

If and when a timesheet date falls within a closed period, you can have the system automatically post or pre-warn and post it to the next open period.

### Preview Invoices for Project Managers

PM users can now run and view the Preview mode of Generate Invoices.

## Contracts Module Updates

### New Bill-In-Advance Feature

Enables users to automatically create and control billing schedules that start before the contract or its renewal, which will allow earlier cash investment and can potentially avoid service/delivery delays for customers.

### Fair Value Price Calculation Enhancements

In order to improve the MEA accounting experience, users can now determine fair value price for an item based on a percentage of other items, see improved price normalization against flat/fixed amounts, and enjoy a new calculation details field in the allocation table.

### Offline Scheduled Entries Posting

Post revenue and/or expense recognition schedules offline, allowing users to continue working while the schedules are processed in the background. When finished, an email notification will be sent on the status.

### Redirected Renewal Failure Email Notifications

Renewal failure notification emails will now be sent to the email address defined in the Main contact section of the Company Information page, instead of the user who created the contract.

## Global Consolidation Updates

### Released in Action UI Beta

This module is now fully function in the new user interface with new features, such as the ability to duplicate a consolidation book, bulk override for accounts, and integrated support information in the help center guide.

## Salesforce Integration Updates

### Advanced CRM Data Sharing

When sales reps add products to an opportunity, the system can now add information needed by finance at the same time, including defaults for fixed flat fee amount frequency and billing methods, as well as validation for information that was entered.

### Bulk Update

Update all contract opportunity products by selecting specific records and fields to change at once.

### New Billing Method

Project Time & Materials has been added to the opportunity product billing method picklist; available in the newest package code update.

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## Platform & Web Services Updates

### **New Logic Operators for Smart Rules & Events**

"IN" is the new shorthand code for multiple OR-type conditions. "NOTIN" will allow for the exclusion of multiple values or conditions.

### **Increased API Character Limit**

API call compositions have increased limitation of characters from 500 to 5,000.

### **New Object: USERRESTRICTION**

Allows administrators to access information about which users are restricted to given entities or departments.