# Sage Intacct 2024 R1 Product Release Notes

Sage Intacct 2024 R1 will be live on Friday, February 16th

We're excited to unveil the **Sage Intacct 2024 R1** Guide! This guide is your essential resource for all new features, enhancements, and updates in Sage Intacct's 2024 first release, aimed at elevating your financial management system. Committed to delivering superior solutions for your business, this update focuses on boosting efficiency, usability, and performance. *Please note: this update will take place on the night of Friday, February 16th 2024.*

For full descriptions, screenshots, videos, links, and more, please visit the Sage Intacct technical release webpage here: **FULL RELEASE NOTES**

To watch the Sage Intacct 2024 Release 1 Highlight video, please click here or the image on the right.

It you have questions, please reach out to your DSD Account Manager **Gregg Lukoskie: 800-627-9032 x255** **GreggL@dsdinc.com**
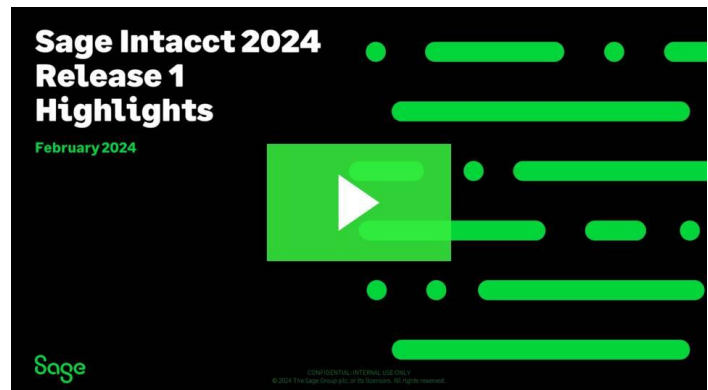
Seamless data integration

Sage Intacct Data Flow

Seamlessly integrate your other applications with Sage Intacct. Data Flow automates secure and reliable data transfer between your operational and finance systems on a schedule that works for you.

Benefits include:

- Scheduling of automated data flow
- API-level integrations
- Extract, transform, and load capabilities
- Handling of large data sets
- Support for multiple connection types

Sage Intacct Forms and Operational Flows

Streamline and digitize data collection and organization workflows. Sage Intacct Forms and Operational Workflows includes the following benefits:

- Fully digitized workflows tailored for your organizational needs.
- Flexible form builder for data collection and sharing information.
  - Collect any type of data required for tracking.
  - Drive entries into other Sage Intacct application areas from the data collected.
  - Deliver insights with enhanced form options.
- Easily customizable and manageable workflows with approvals.
- Portal capability to facilitate communication with constituents.

Automation Advancements

Sage Intacct Professional Services Automation

Work smarter with an AI-powered project resource management solution.

- **Learn from wins and losses:**
  AI learns from successful projects and resource utilization patterns to guide future planning.
- **Mitigate risk and look into the future:**
  Analyze patterns of delivery, determine which factors are critical, and get notice of optimization opportunities.
- **Keep the whole team on point:**
  Tailored insights to improve efficiency, planning and scheduling for individual team members.

AP automation multi-line GL coding (Early Adopter)

Increase the accuracy of automated draft bills with our latest enhancements to GL account and dimension coding, providing intelligent predictions at the line level. With the latest improvements, AP Automation detects patterns in how you select dimension values for individual line items. This means that over time, as machine learning recognizes changes that you repeat, Sage Intacct is able to create draft bills that include the dimension values you intend. You spend less time correcting coding details and can post bills more quickly. **LEARN MORE**

PO line level matching (Early Adopter)

Let Sage Intacct create draft vendor invoices for you and match them to existing purchasing transactions, with

Automated transaction matching for Purchasing workflows. **LEARN MORE**

Industry Insights

Commitment compliance

Ensure purchase orders and subcontracts meet your compliance requirements with compliance rules. We're excited to add the Commitment compliance tab on primary documents(commitments) for compliance records. This tab contains insurance, miscellaneous, and lien waiver compliance records associated with a primary document ID. You can add, edit, and delete compliance records from the Commitment compliance tab. **LEARN MORE**

Enhanced project contract billing details

We added the Project contract billing details tab on to Accounts Receivable invoices. Use the read-only Project contract billing details tab to view the latest invoice billing totals for project contract lines and project contracts. **LEARN MORE**

Comprehensive List of Changes Made in 2024 R1

Company and Administration

Added:

- **Permission changes:** We changed and added new permissions for Contracts, Interactive Custom Report Writer, Order Entry, Projects, and Time & Expenses. Learn more about permission changes.

- **API usage dashboard for consoles:** The API usage dashboard is now available for consoles, providing users with a centralized place to view usage for all of their companies. Learn how to view the API usage dashboard for consoles.

- **A new user account email has been added! To** provide more security and a quicker time to lockout resolution, set up your new user account email today! Learn more about the new account email address.

- **Sage Intacct empowers users to help themselves.** If you're ever locked out of Intacct, you can get back to business with our self-service account recovery process. Learn how to use this process, just in case!

See how to assign permission changes
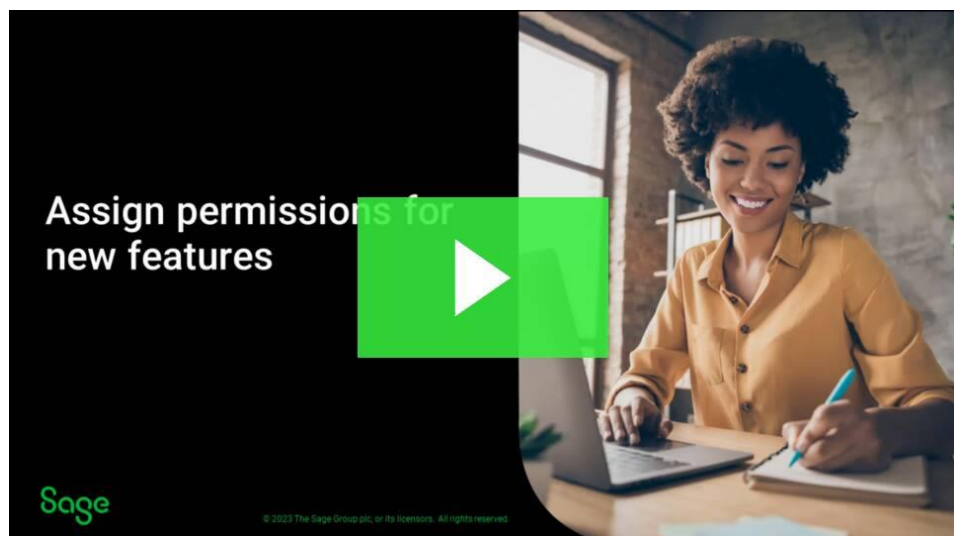
Accounts Payable

Added:

- **Enhanced GL/dimension coding**: Learn how AP Automation users can join the Early Adopter program to try out line-level GL/dimension coding using AI/ML.

- **Simplify contact lists in Accounts Payable:** You can now limit the contacts available in Pay to and Return to fields during transaction data entry.

- **AP Automation usage report enhancement**: Learn how to export details of AP automation usage.

- **Submitters now receive approval notifications:** Users who submit bills for approval can be notified when the bill is approved or declined. Learn how to set up notification as a submitter.

- **Other updates in Accounts Payable:** Other updates include changes to restricted users' ability to reverse bills and administrative users can now delete advanced filters on the Pay Bills page. Read about additional changes in Accounts Payable.

Updated:

Accounts Receivable

Added:

- **Simplify contact lists in Accounts Receivable:** You can now limit the contacts available in Bill to and Ship to fields during transaction data entry. Learn how to simplify contact lists.

Updated:

- **Other updates in Accounts Receivable:** Restricted users can no longer reverse invoices that meet certain criteria. Learn more about this change to restricted users.

Budgeting and Planning

Updated:

- **The latest updates in Sage Intacct Planning:** See who else is working on shared budgets, save models and statistical accounts for reuse, and create custom views for your data. To learn more about reusing models and custom views, see Enhancements in Sage Intacct Planning.

Cash Management

Added:

- **Bank transaction dating:** Determine how bank feed transactions are dated by setting the time zone for a bank account.

Updated:

- **Reconciliation match sequence report:** Identify transactions that matched for reconciliation. Learn how to create a reconciliation match sequence report.

Consolidation

Added:

- **A new custom report for Advanced Ownership Consolidation** enables running detailed reports generated by consolidation entries. Learn about creating custom consolidation reports for Advanced Ownership Consolidation.

Updated:

- **Streamline your General Ledger revaluation** reports by running your reports in summary format for more concise, easily scannable revaluation reports. Learn more about gleaning more precise information from your General Ledger revaluation reports.
- **Drill down to source domestic accrual data in the General Ledger report** when subscribed to Domestic Consolidation or Advanced Ownership Consolidation for improved traceability and audit. Read about drilling down to single currency source transactions when using Domestic or Advanced Ownership Consolidation.

General Ledger

Added:

- **Download import templates:** You can now download import templates directly from import pages.

Help and Training

Updated:

- **Get the help you need:** We regularly expand our online help and training beyond just new features and enhancements. Each release, we often add in-depth, best-practice help and training on existing features also. See our new or enhanced help and training content.

Integrated Applications

Added:

- **Announcing Sage Intacct Forms and Operational Workflows:** Streamline and digitize data collection and organization workflows. Read about Forms and Operational Workflows.

- **Announcing Sage Intacct Data Flow:** Sage Intacct Data Flow automates secure and reliable data transfers between your operational and finance systems on a schedule that works for you.
- **Announcing Sage Intacct Professional Services Automation:** Work smarter with an AI-powered project resource management. Read more about Professional Services Automation.

Inventory Control

Added:

- **Inventory utilities provide insight into your data:** Use Inventory utilities to get a clearer view of how transaction definitions affect report totals and troubleshoot landed cost and General Ledger reconciliation issues. Learn about Inventory utilities.

Lease Accounting

Updated:
- Lease Accounting enhancements: Lease Accounting has improved the experience of creating and updating leases and lease schedules. Additionally, users can now add attachments, view a configuration audit trail, use tooltips, and more. Learn about new Lease Accounting enhancements.

Payroll

Updated:
- **Sage Intacct Construction Payroll:** Learn about the latest changes in Construction Payroll.

Platform and Customization Services

Coming Soon:
- **Smart event log changes:** We're changing how Smart events are logged to streamline your workflow, and we want you to be in the loop. Read about the upcoming Smart event log change that will eliminate the need for you to install a separate package.

Added:
- **API usage dashboard for consoles**: The API usage dashboard is now available for consoles, providing users with a centralized place to view usage for all of their companies. Learn how to view the API usage dashboard for consoles.

- **Platform custom help:** Want to learn how to add your own custom help to Sage Intacct? Read up on how you can do so and check out our new video.

Updated:
- **Platform tutorial:** Learn to build your own Platform application. Read about our updated tutorial that walks you through the process of creating your own application.

Purchasing

Added:
- **Automate transaction matching:** Create a more efficient workflow by letting Sage Intacct create vendor invoices for you and match them to existing purchasing transactions. Read about our expanded Early Adopter program.

Updated:
- **Submitters now receive approval notifications:** Users who submit purchasing transactions for approval are now notified when the transaction is approved or declined.

Reporting - Financial

Added:
- **Version history for financial reports:** If a financial report is no longer working the way you want, the report's history can help you get it working again. Learn more.

Updated:
- **Improved process for setting up report schedules:** We've improved report schedules to prevent your system from getting stuck running a large number of reports for past dates.

Time and Expenses

Added:

- **New permission for employee bank details:** Assign the new permission to unmask employee bank details, which allows users to see and verify account numbers. Learn about the new employee permission to unmask bank details.

Updated:

- **Enhancements to bank file payments:** Now you can import and update employees for bank file payments through CSV import and filter by expense currency on the Select to Pay page. Enhancements to bank file payments.

User Interface

Updated:

- **Lists enhancements:** Get key improvements to more easily drill down to view required data. Learn more about the enhanced list features.

- **Updated user interface labels:** We updated labels in Accounts Receivable, Company, General Ledger, Inventory Control, Order Entry, Projects, Purchasing, and Time and Expenses. Learn more about label changes.

List enhancements

Web Services

- Dev Portal: Stay up-to-date on great new Web Services features in the Sage Intacct Developers portal blog.

Closing Thoughts

We're thrilled to bring you a suite of updates focused on improving your efficiency and effectiveness.
For any questions or further assistance, don't hesitate to reach out to your DSD Account Manager or DSD Sage Intacct Support team. Let's enhance your financial management journey together!

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