

Sage Intacct 2024 R3 Product Release Notes



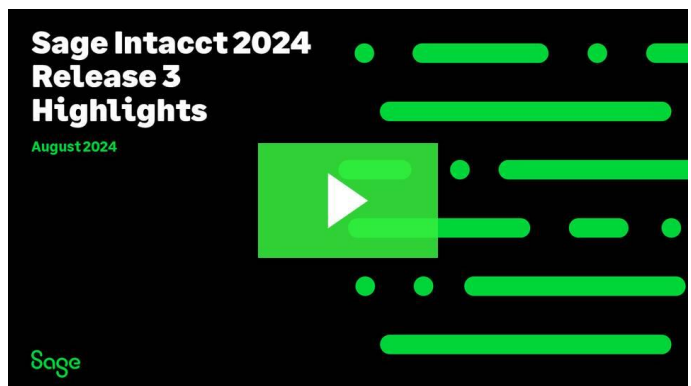
Sage Intacct 2024 R3 will be live on Friday, August 9th

We're excited to unveil the **Sage Intacct 2024 R3 Guide!** This guide is your essential resource for all new features, enhancements, and updates in Sage Intacct's 2024 third release, aimed at providing insights and streamlining business processes. Committed to delivering superior solutions, this update focuses on enhancing efficiency, usability, and data-driven decision-making. **Please note: this update will take place on the night of Friday, August 9th, 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 3 Highlight video, please [click here](#) or the image on the right.

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



Strength in financials

Easily trace original source documents in Order Entry and Purchasing

Now you can link back to reference the very first transaction document in your workflows.

Bank transaction assistant file import supports additional file formats

Increase flexibility and import BAI2 and CAMT.053 bank transaction files for reconciliation.

Fiscal year rollover for General Ledger document sequences

Document sequences for journal entries now support fiscal year rollover to help you manage document sequences with year-end transitions.

Platform efficiency

Enhanced email delivery and insights

Boost your email security with DKIM, the industry-leading standard for email security. This service is now available to everyone.

Usage insights

Optimize your company's operations and make better business decisions with Intacct usage insights coming soon!

Time entry descriptions with AI Assistant—Sage Intelligent Time

Leverage AI to generate accurate context-aware time entry descriptions, reducing manual effort and saving time.

Industry insights

Categorize Order Entry transactions with the contract dimension

Improve visibility and reporting capabilities for Revenue Management by using the contract dimension.

Enhancements in Forms and Operational Workflows

Simplify onboarding your clients and streamline interactions with new onboarding workflows and client portals.

Convert multiple documents into a single Purchasing transaction

Streamline your workflow and convert multiple documents into one transaction so you can pay a vendor in just one payment.

Reporting & Automation

ICRW: New and enhanced reports

Improved tracking and analyzing with new and updated reports in the ICRW Report Library: Construction, Purchase Order, and Order Entry! Release note and new reports available on August 9, 2024!

Streamline expense reporting with automated receipts submission—Early adopter

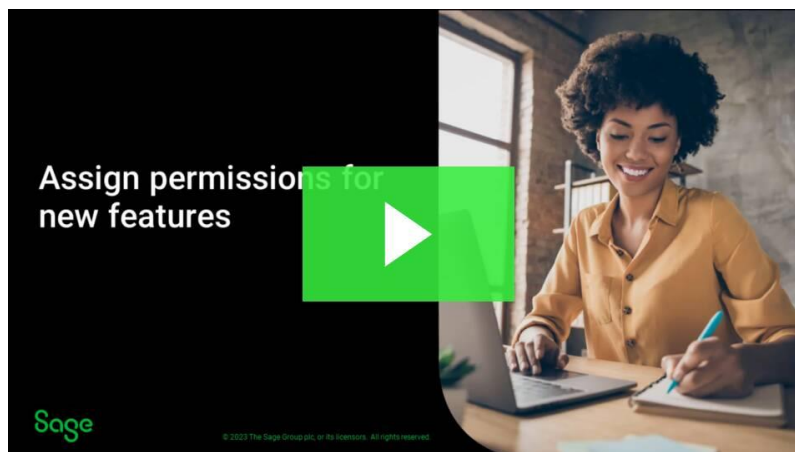
Save time and ensure accuracy by emailing your employee expense receipts from any device directly to Sage Intacct.

Comprehensive List of Changes Made in 2024 R3

Company and Administration

- [Enhanced email delivery and insights for everyone](#): The enhanced email delivery service boosts your email security and gives you better delivery insights. This service is now available to everyone.
- [Fiscal year rollover for General Ledger document sequences](#): Document sequences for journal entries now support fiscal year rollover to help you manage document sequences with year-end transitions.
- [Usage insights show admins key metrics for customers, vendors, users, and more](#): Learn more about how your business is using Intacct and make better decisions based on this data.
- [The User information page has been streamlined](#): We've updated the User information page to simplify your workflow, saving you time and clicks.
- [Barcode fonts now available for printed document templates](#): Two Google barcode fonts are now available for use in printed document templates. Download the fonts from Google and then use them in Microsoft Word.
- [Permission changes](#): We added new permissions for General Ledger and Order Entry.

[New permissions](#)



Accounts Payable

- [Restricted users can void top-level payments](#): Restricted users with top-level access can now void payments they create at that level.
- [Unapply credits more easily](#): Unapply a vendor credit from the Posted payments page.
- [Uniform treatment for user restrictions](#): We've updated how user restrictions are enforced when approving payments.
- [Void payments more quickly](#): Void payments directly from Posted payments and skip the bank and check registers.
- [Vendor Payments for American Express is being retired](#): Make sure to process all payments by December 20, 2024.

Accounts Receivable

- [Edit discount amount](#): Customize the discount applied to an invoice without altering the term.

APIs and Web Services

- [Check out the REST API](#): Now available in an Open Beta for you to try out.
- [Stay up-to-date on great new Web Services features](#): Read the Sage Intacct Developer portal blog.

Cash Management

- [Save time while reconciling](#): The reconciliation page now defaults to show all unmatched transactions.
- [Bank transaction assistant file import](#): Import more file types for bank reconciliation.
- [Control who can view bank account information](#): Configure Cash Management to restrict access to account reconciliation information by user restrictions.
- [Save time when creating journal entries during reconciliation](#): The exchange rate posting date for a journal entry now defaults to the bank transaction date.

Consolidation

- [Streamlined book deletion](#): When you want to delete a consolidation book, we delete the book and its data in the background. You can navigate away and continue working.

Fixed Assets Management

- [New reports for Fixed Assets Management](#): Three new reports are now available to gain insight into your fixed assets: Net Book Value, Assets by Employee, and Assets by Location.
- [Other updates in Fixed Assets Management](#): We made information more easily accessible, added support for custom fields in the AP and Purchasing integrations, and updated some user permissions.
- Import assets offline and other improvements: The import service now supports offline processing, allowing you to start an import and continue with other tasks while it runs in the background. We've also made several other enhancements to the import service to improve your overall experience.
Release note coming soon!

General Ledger

- [Fiscal year rollover for General Ledger document sequences](#): Document sequences for journal entries now support fiscal year rollover to help you manage document sequences with year-end transitions.
- [Quickly delete unneeded reporting periods](#): You can now save time by deleting multiple reporting periods at the same time.
- [Easy access to Sage Intacct Planning](#): You can now access the Sage Intacct Planning log-in page directly from the Budget planning page.

Healthcare

- [Enhancements in EMRConnect](#): Recent enhancements include improved email notifications, support for larger files, and the option to automatically summarize GL entries.

Industry

- [Enhancements in Sage Intacct Forms and Operational Workflows](#): Simplify onboarding your clients and streamline interactions with new onboarding workflows and client portals.

Inventory Control & Supplies Inventory

- [Keep your company supplies in stock](#): You can now choose to replenish only the inventory you need to keep your operation running smoothly.
- [Improved data tracking in inventory utilities reports](#): Learn more from your reports - quickly identify unmatched quantity or value transactions, and track corresponding transaction date history.
- [Include barcodes on inventory forms](#): If you have Sage Intacct Inventory Automation, you can now use barcodes to make inventory tasks faster and easier.

Nonprofit

- [Integrate Kanzo with Sage Intacct](#): Gain greater insight into your organization so you can improve efficiency, make better business decisions, and ensure compliance with rules and regulations for public and affordable housing.
- [Enhancements in Sage Intacct Ministry Intelligence](#): Get clearer sustained giving metrics by automatically distinguishing between one-time gifts and recurring contributions; enjoy simpler, more informative email notifications after processing; and integrate with Rock RMS.

Order Entry

- [Tracing original source documents is now easier](#): Easily reference the very first transaction document in your sales order workflows to help ensure inventory reconciliation accuracy.
- [Include line conversion type in recurring templates](#): If you have set up blanket sales orders as recurring transactions, you can now include line items with a default quantity or price conversion type.

Platform Services

- [Include Interactive Visual Explorer and Interactive Custom Reports in application packages](#): You can already use menus to add reports to your application. Now add additional advanced report selections from the edit application page to include in your application package.
- [Barcode fonts now available for printed document templates](#): Two Google barcode fonts are now available for use in printed document templates. Download the fonts from Google and then use them in Microsoft Word.

Purchasing

- [Automated transaction matching](#): Save time by having Sage Intacct create vendor invoices and match them to purchasing transactions in our Early Adopter program, which is now available in all regions.
- [Enhancements to PO Automation](#): You can now unlink or change the matched PO document and view all automated transactions from a single list.
- [Tracing original source documents is now easier](#): Now you can link back to reference the very first transaction document in your purchase order workflows.
- [Include line conversion type in recurring templates](#): If you have set up blanket purchase orders as recurring transactions, you can now include line items with a default quantity or price conversion type.

Revenue Management

- [Track Order Entry transactions with the contract dimension](#): Create contract dimensions and tag them to Order Entry transactions for better insights and reporting capabilities.

Sage Intacct Advanced CRM

- [New way to create sales transactions in the Advanced CRM Integration](#): There's a new way to create sales transactions in Salesforce and sync them to Intacct.

Tax

- [Support for term discounts in Canadian taxes](#): Customers using the Canadian tax solution in the Taxes Application can use Accounts Payable and Accounts Receivable term discounts in their transactions.
- [Important changes in UK tax reporting for reverse charge](#): To support updates in compliance, we refined the workflow for reporting input and output taxes on reverse charges.
- [T5018 for Canada](#): The ability to generate a T5018 file for Canadian taxes is now generally available.
- [Export your TPAR](#): Australian companies and entities can speed up the TPAR lodging process using a new export option.

Time & Expense

- [Automatically generate time entry descriptions with AI Assistant \(beta\)—Sage Intelligent Time](#): We've elevated our AI time entry experience by offering the option to automatically generate time entry descriptions and improving the titles of activity cards.
- [New time approvals experience—Sage Intelligent Time](#): We've redesigned the approvals page and added a new page for approving time entries.
- [Recall timesheets—Sage Intelligent Time](#): You can now recall timesheets to correct mistakes without needing manager involvement.
- [View audit trail—Sage Intelligent Time](#): The audit trail is now available on timesheets in Sage Intelligent Time.
- [Streamline expense reporting with automated receipts submission—Early adopter](#): Now you can email your receipts to Sage Intacct from any device and then use artificial intelligence to help you code them.

User Experience

- [Lists enhancements](#): Personalize your list views, leverage advanced filters, manage list and record details side-by-side, and so much more. Try it!

[Lists enhancements - Try it!](#)



- [Updated user interface labels](#): We updated labels in Accounts Receivable, Company, Contracts, and Order Entry.

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!

DSD Sage Intacct Support Team

Email: sageintacctsupport@dsdinc.com

Phone: 800-627-9032

Strategic Account Manager

Contact: Gregg Lukoskie

Email: GreggL@dsdinc.com

Phone: 800-627-9032 x255