

Sage Intacct 2024 R4 Product Release Notes



Sage Intacct 2024 R4 will be live on Friday, November 8th

We're excited to unveil the **Sage Intacct 2024 R4 Guide!** This guide is your essential resource for all new features, enhancements, and updates in Sage Intacct's 2024 fourth 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, November 8th, 2024.**

For full descriptions, screenshots, videos, links, and [2024 R4 Release Notes](#)

more, please visit the Sage Intacct technical release webpage here: [FULL RELEASE NOTES](#)

To watch the Sage Intacct 2024 Release 4 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 x 255 greggl@dsdinc.com**



Strength in financials

Reconcile customer payments and credits to invoices and Reconcile payments and credits to bills

Review how multiple payments and credits matched to an invoice or a bill and track unpaid transactions.

Enhancements to Accounts Receivable statements

Create clearer statements for your customers with enhancements to Accounts Receivable custom statements.

Automation support for tax solutions

Expanded support of AP Automation for companies using the Taxes application.

Control and compliance

Get ready for 1099 season and 1099 e-filing powered by TaxBandits

Prepare for 1099 season with some helpful resources to guide you through the process of filing tax forms.

And, improve efficiency and ensure IRS compliance by e-filing your forms with our seamless integration with TaxBandits.

Override tax schedules in Purchasing and Order Entry

Calculate taxes on transactions that cross tax jurisdictions with tax schedule override.

Tax detail enhancements for tax submission

Mark tax details as Reporting or Not reporting. Transactions using Not reporting tax details will be excluded from tax submissions.

Tax submissions extended to custom VAT—Early Adopter

New workflow streamlines the tax filing process for companies using a custom tax solution.

Platform efficiency

Lists enhancements – Try it!

Increase your personalization and efficiency with our configurable new lists.

REST API – Early Adopter

We continue to offer more functionality. Watch for the Early Adopter release documentation soon!

Platform services translation management

Manage translations, streamline localization, and expand global reach with bulk translation management.

Industry insights

Multi-device employee expense automation—Generally Available

Optimize expense reporting with automated receipt submission and AI-powered efficiency.

Retainage for Projects and Grants

Use the retainage feature in Accounts Receivable and Accounts Payable without a Construction subscription.

Continental Utility integration for utility billing

Integrate Sage Intacct with Continental Utility for a complete billing solution for public utilities.

Kanso integration for residential housing

Expanded and improved integration between Sage Intacct and Kanso provides a solution for residential housing.

Sage Intelligent time: Rate cards

Easily achieve precise time tracking and compliance.

Coming at the end of November!

Fixed Assets Management improvements

- **Override posting dates:** Gain flexibility when booking asset depreciation.
- **Allocation for assets:** Allocate depreciation expenses across different dimensions.
- **Custom declining balance depreciation methods:** Customize the rate at which assets depreciate for enhanced flexibility.

Training

Announcing the first customer certification for Sage Intacct

Introducing the Accounting Specialist Certification. Assess your knowledge of Sage Intacct and skills outlined in the certification guide and get ready for the exam!

Comprehensive List of Changes Made in 2024 R4

Company and Administration

- [Easily find your customer ID](#): Your Sage Intacct customer ID is now shown on the Company information page.
- [Introducing new language options for Canadian French and Spanish—Beta](#): You can now set your preferred Company and User languages to Canadian French or Spanish.
- [Permission Changes](#): We added new permissions for Accounts Payable, Accounts Receivable, and Time and Expenses.

Accounts Payable

- [AP Automation support for taxes](#): AP Automation now supports tax information for companies that use the Tax application.
- [Send automatic payment notifications to more recipients](#): Configure Intacct to automatically send notifications to both the vendor primary and secondary email addresses.
- [Review how payments reconcile to bills](#): Run the Vendor reconciliation report to see how adjustments, advances, and payments match to bills.

- [Pay bills enhancements](#): Act on more bills at once while enjoying sort, filter, and drill down enhancements as an Early Adopter.
- [Vendor Payments for American Express is being retired](#): Process all payments by December 20, 2024.

Accounts Receivable

- [Review how customer payments reconcile to invoices](#): Run the Customer reconciliation report to see how adjustments, customer advances, and payments match to invoices.
- [Reduce manual work on AR statements](#): Automatically include a running balance in AR statements with our statement enhancements.
- [Customer payment services](#): We're working to sunset our Authorize.net and PayPal integrations in November of next year. Check out the Sage Intacct Marketplace to explore other solutions for a customer credit card integration.

APIs and Web Services

- [Check out the REST API](#): We continue to offer more functionality that you can begin using now.
- [Stay up-to-date on great new Web Services features](#): Read the Sage Intacct Developer portal blog.

Cash Management

- [Restrict GL account for bank accounts and credit card accounts](#): Default AP and Default AR GL accounts are no longer selectable during bank and credit account creation.
- [NACHA ACH payment files](#): You can now generate NACHA-compliant ACH payment files in Sage Intacct.
- [Improved printing format for preprinted Canadian checks](#): Use the print format CAD check 2.0 with checks purchased from one of our Sage-approved vendors.
- [Enhanced Canadian blank check stock](#): To stay consistent with Canadian check standards, order checks from our Sage-approved vendors.
- [Bank transaction assistant now available in France](#): Easily and quickly assign customers to bank transactions and receive multiple payments for multiple customers.

Dashboards

- [Enhancements in SaaS Intelligence](#): Learn about the latest changes in SaaS Intelligence.

Fixed Assets Management

- [Override posting dates](#): We added the flexibility to choose a different posting date when posting depreciation manually.
- [Transaction allocations for assets](#): Now you can allocate depreciation expenses across different dimensions.
- [Custom declining balance depreciation methods](#): We added two new depreciation methods that allow you to customize the rate at which assets depreciate.
- [Other updates in Fixed Assets Management](#): We added a new field for adding notes to assets, upgraded two lists, and made enhancements to the import service.

General Ledger

- [Streamlined setup for GL Outlier Detection](#): We've simplified the setup process for GL Outlier Detection.

- [Enhancements for the Accounting entries file \(FEC\) report](#): Access the report in any entity with France as the operating country and select user-defined books for inclusion in your reports. In the generated report, foreign currency credits now appear as negative amounts.
- [Manual lettering for General Ledger for France](#): Perform transaction matching with flexible filtering and assigned lettering sequence.
- [Intermediary account for DATEV export](#): This new account facilitates the transfer of balances in the General Ledger CSV before you run the DATEV export.

Healthcare

- [Enhancements in EMRConnect](#): Learn about the latest changes in EMRConnect.

Industry Solutions

- [Approvals in Sage Intacct Data Flow](#): Require that selected data be approved before it flows to Sage Intacct.
- [Enhancements in Sage Intacct Forms and Operational Workflows](#): Recent enhancements make it easier and faster to verify tax data like federal ID numbers, and to reproduce fillable PDF forms.
- [Announcing Sage Intacct and Continental Utility](#): Integrating Sage Intacct with Continental Utility gives you a complete billing solution for public utilities (water, sewer, gas, and electric).

Inventory Control

- [Easier tracking of inter-entity transactions](#): View inter-entity transactions in your entity-level valuation report details.
- [Sage Intacct Inventory Automation and Fulfillment](#): Together, Sage Intacct Inventory Automation and Fulfillment let you have a true multi-step order fulfillment process with barcode scanning.

Nonprofit

- [Use retainage without Construction](#): Customers with only a Grants or Projects subscription can now use the retainage feature in Accounts Receivable and Accounts Payable.

Payroll

- [Streamlined integration with Sage Intacct Payroll](#): You no longer need to log in to a separate application to manage the integration between Payroll and Intacct!

Platform Services

- [Add more custom fields for the Location dimension](#): You can now add up to 100 custom fields for the Location dimension.
- [Offer additional options to users](#): Enhance the user experience by providing labels in more languages.
- [More flexibility and control in the page editor](#): Read about the option to enable or deactivate the **Detach** link property.
- [Simplify internationalization](#): Import and export translations for your applications easily so that you can increase user adoption.

Projects & Grants

- [Use retainage without Construction](#): Customers with only a Projects or Grants subscription can now use the retainage feature in Accounts Receivable and Accounts Payable.
- [Improved syncing with Sage Intacct PSA](#): We've improved syncing of data between Sage Intacct and Sage Intacct PSA (Professional Services Automation).

Purchasing

- [Enhancements to Purchasing automation](#): This release, we're continuing the Early Adopter program for AP Automation with Purchasing and delivered enhancements.

Revenue Management

- [Updates to Manage Revenue Schedules](#): We added new selection options and now automatically hide outdated results.

Sage Intacct Real Estate

- [Add more custom fields for the Location dimension](#): You can now add up to 100 custom fields for the Location dimension.
- [Sage Intacct and Kanso for residential housing](#): We've expanded and improved the integration between Sage Intacct and Kanso to provide a solution for residential housing.
- [Enhancements in Sage Intacct Real Estate](#): We've improved processes and added new options for managing lease renewals, late fees, rent calculations, and more.

Tax

- [Tax detail enhancements for tax submission](#): Now you can mark tax details to exclude transactions using them from tax submissions.
- [Tax submission for custom tax solutions—Early adopter](#): Our new tax submission workflow streamlines the tax filing process for any company using a custom tax solution. Join our early adopter program to get early access to this feature.
- [Override tax schedules](#): Companies that use Advanced Tax or a VAT tax solution can override the default tax schedules in Purchasing and Order Entry transactions.
- [Get ready for 1099 season](#): Get a head start on what you need to know for this tax season. Tax forms are available now.
- [1099 e-filing powered by TaxBandits](#): Skip the manual printing of 1099 forms and send tax information directly to TaxBandits to file with the IRS.
- [Enhancements for Canadian Sales Tax](#): Use our streamlined Canadian Sales Tax solution to calculate and submit taxes for Federal and Harmonized Sales Tax. Exclude transaction line items from being included in tax submissions using tax detail reporting.

Time & Expense

- [Accurately record clock-in and clock-out times—Sage Intelligent Time](#): Achieve effective time collection and ensure compliance with labor laws by maintaining detailed records of hours worked.

Coming at the end of November!

- [Create and apply clear pricing structures—Sage Intelligent Time](#): Use rate cards to apply standard billing rates for employees, tasks, and projects.

Coming in December!

- [Streamline expense reporting with automated receipts submission](#): Now you can email your receipts to Sage Intacct from any device and then use artificial intelligence to help you code them.

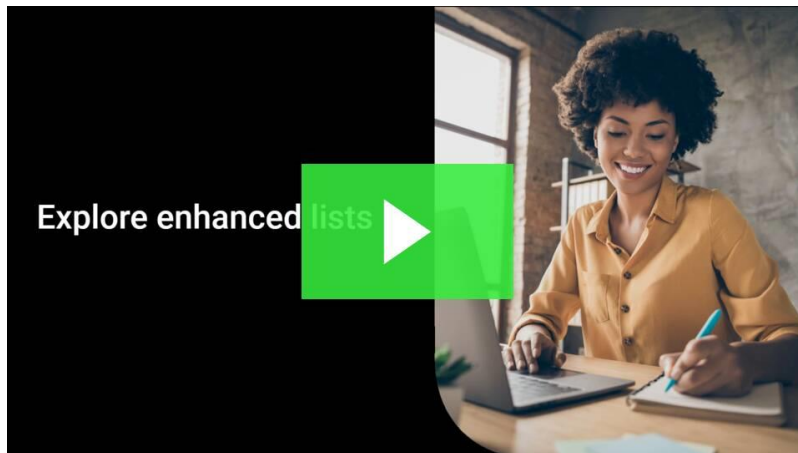
Training and videos

- [We're proud to announce the Sage Intacct Accounting Specialist Certification](#): Learn how to register for certification and prepare for the exam!
- [New training and videos](#): We added new training courses and videos to help you get the most out of Sage Intacct.

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 Company and Administration, Fixed Assets Management, Inventory Control, Order Entry, Projects, and Purchasing.

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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