

sage Intacct

Intacct Release 4 2024 Highlights

Note: Audio will be silent until the presentation begins.



CPAs & ADVISORS

Agenda



Welcome/Introduction



Sage Intacct Release 4 2024 Highlights



Sage Intacct Release 4 2024 New
Feature Highlights Demonstration



Velixo Demonstration



Meet the Presenters



Heather Broberg

GRF CPAs & Advisors

Senior Manager



Jeremy Myers

Velixo

Channel Sales Manager



Sage Intacct Release 4 2024 Highlights

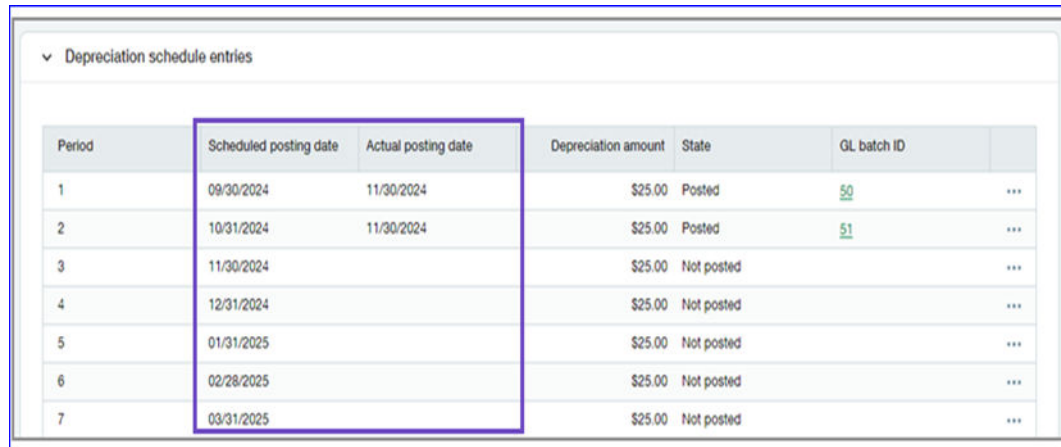


CPAs & ADVISORS

Sage Fixed Asset Management (SFAM)

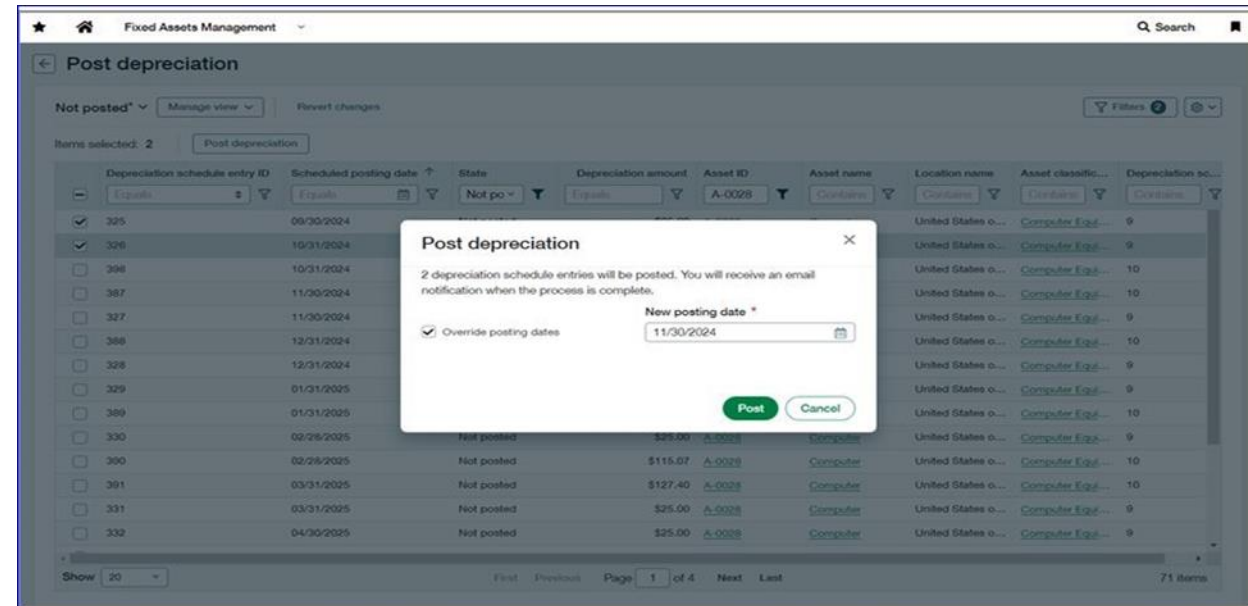
Override Posting Dates

- Allow user to post the depreciation of the closed period to the current open period
- A new field called 'Actual posting date' will be displayed on the depreciation schedule entries
- The existing "Posting date" will be renamed to "Scheduled posting date"



Depreciation schedule entries

Period	Scheduled posting date	Actual posting date	Depreciation amount	State	GL batch ID	
1	09/30/2024	11/30/2024	\$25.00	Posted	50	...
2	10/31/2024	11/30/2024	\$25.00	Posted	51	...
3	11/30/2024		\$25.00	Not posted		...
4	12/31/2024		\$25.00	Not posted		...
5	01/31/2025		\$25.00	Not posted		...
6	02/28/2025		\$25.00	Not posted		...
7	03/31/2025		\$25.00	Not posted		...



Fixed Assets Management

Post depreciation

Not posted* Manage view Revert changes

Items selected: 2 Post depreciation

Depreciation schedule entry ID	Scheduled posting date	State	Depreciation amount	Asset ID	Asset name	Location name	Asset classific...	Depreciation sc...
325	09/30/2024	Not posted		A-0028	Computer	United States o...	Computer Equip...	9
326	10/31/2024	Not posted		A-0028	Computer	United States o...	Computer Equip...	9
327	11/30/2024	Not posted		A-0028	Computer	United States o...	Computer Equip...	10
328	12/31/2024	Not posted		A-0028	Computer	United States o...	Computer Equip...	9
329	01/31/2025	Not posted		A-0028	Computer	United States o...	Computer Equip...	9
330	02/28/2025	Not posted		A-0028	Computer	United States o...	Computer Equip...	10
331	03/31/2025	Not posted		A-0028	Computer	United States o...	Computer Equip...	9
332	04/30/2025	Not posted		A-0028	Computer	United States o...	Computer Equip...	9

Post depreciation

2 depreciation schedule entries will be posted. You will receive an email notification when the process is complete.

Override posting dates

New posting date * 11/30/2024

Post Cancel

Show 20 of 71 items

Sage Fixed Asset Management (SFAM)

Transaction Allocations for Assets to Manage Depreciation

Restrictions:

- Allocations are **not** supported for companies subscribed to the Taxes application
- Location dimension must be the same on each line of the allocation definition
- Location dimension on the asset must match the one used in the allocation definition
- Allocation definitions must be created in the entity where they will be used

The screenshot displays the 'Edit asset: A0008--Van' form in the Sage Fixed Asset Management (SFAM) application. The form is organized into a grid of fields. The 'Allocation' dropdown menu is highlighted with a red box, showing 'Departments split' selected. The form includes the following fields:

Asset ID	Asset name	Serial number	Asset tag
A0008	Van		
Status *	State	Acquisition date	In-service date
Active	In service	09/19/2024	09/19/2024
<input checked="" type="checkbox"/> Depreciate	Quantity	Asset cost	Salvage value
	1	\$30,000.00	\$5,000.00
Asset type	Parent asset	Description	Notes
Tangible		2022 black 4-door	Next major service due at 40,000 miles
Attachment	Allocation	Source	Source line no.
	Departments split	--	--

Sage Fixed Asset Management (SFAM)

Custom Decline Balance Depreciation Methods

Custom Declining Balance with True-up (CDBT)

- Remaining depreciation is fully applied in the final period
- Ensures total depreciable cost is fully accounted for

Custom Declining Balance without True-up (CDB)

- Depreciation rate is consistently applied over the asset's life
- Any remaining depreciation at disposal is treated as a loss

Fixed Assets Management

← Create depreciation rule Save and close Cancel

Summary

Depreciation rule ID: -- Asset classification: BU--Buildings

Journal posting rule *: PR-BAJ--PostingRule_JournalBAJ_ConvFY_T Journal: Bank Journal Book: A Convention: Full year

Depreciation method *: CDBT--Custom declining balance with true up Depreciation rate (%): 66.67 Useful life *: 18 Useful life units: Years

Sage Fixed Asset Management (SFAM)

Enhancement – Notes Field

- Notes Field - utilized to record information such as service history, condition, comments, etc.
- The field is optional and supports up to 2,000 characters

The screenshot displays the Sage Fixed Asset Management interface for an asset named 'Asset: A15641--Van'. The interface includes a navigation bar with a search icon and a 'Fixed Assets Management' title. Below the navigation bar, there are buttons for 'Place in service', 'Edit', and a menu icon. The asset details are presented in a grid format:

Asset cost	Salvage value	State	In-service date	Asset classification
\$30,000.00	\$5,000.00	Ready for review	--	VE--Vehicles

Below the grid, there are tabs for 'Overview' and 'Depreciation schedules'. The 'Overview' tab is active, showing a 'Summary' section with the following details:

Asset ID	Asset name	Serial number	Asset tag
ADJDEC0008	Van	--	--
Status	State	Acquisition date	In-service date
Active	Ready for review	09/19/2024	--
Quantity	Asset cost	Salvage value	
1	\$30,000.00	\$5,000.00	
Asset type	Parent asset	Description	Notes
Tangible	--	2022 black 4-door	Next major service due at 40,000 miles
Attachment	Allocation	Source	Source line no.
--	--	--	--

General Ledger

GL Outlier Detection – Streamlined Setup

- GL (General Ledger) Outlier Detection is a Machine Learning service that compares your historical transaction patterns to current transactions in the approval cycle, and flags transactions that do not match
- To create the model, Outlier Detection needs data that meets the following requirements:
 - **At least 1 month of data that's less than 2 years old**
 - **At least 1,000 posted General Ledger journal entry lines**
- Under Subscriptions> AI Machine Learning, select the **Enable data service** checkbox and then select the **Enable for General Ledger Approval** checkbox
- If your organization's data meets the minimum requirements to build a data you can set up detection rules and use Outlier Detection within 1 to 2 days.

Configure AI service

AI services

Enable data service

Outlier detection

Enable for General Ledger approval ⓘ

We'll start building your data model as soon as you save your changes. Analyzing your data will take some time. The model will be ready to use within 24 to 48 hours for most environments. Outlier Detection needs a minimum amount of data to work with to ensure the best results.

Status
Ready

Accounts Receivable

AR Statements - Customization

- Ability to add column for a running balance total – need to customize statement to include field
- Merge Field = <<PREENTRY_BALANCE>>
- Currency symbols now included for all numbers

Sage Statement of account
10/31/2024

Sage Product Demo
125, S Market Street
San Jose, CA 95113

Attention: Customer_001
THIS DOCUMENT IS NOT AN INVOICE.
Intacct. A Better Way to Run Your Business
Currency: USD

Date	Document	Doc amount	Charges	Payments	Total
01/01/2015	Inv-0001	\$600.00	\$600.00		\$600.00
01/01/2015	Inv-0015	\$600.00	\$600.00		\$1,200.00
01/02/2015	Inv-0002	\$33.00	\$33.00		\$1,233.00
01/02/2015	Inv-0007	\$90.00	\$90.00		\$1,323.00
01/02/2015	Inv-0008	\$600.00	\$600.00		\$1,923.00
01/02/2015	Inv-0016	\$33.00	\$33.00		\$1,956.00
01/02/2015	Inv-0021	\$90.00	\$90.00		\$2,046.00
01/02/2015	Inv-0022	\$90.00	\$90.00		\$2,136.00
01/03/2015	Inv-0003	\$90.00	\$90.00		\$2,226.00
01/03/2015	Inv-0017	\$33.00	\$33.00		\$2,259.00
01/04/2015	Inv-0004	\$90.00	\$90.00		\$2,349.00
01/04/2015	Inv-0018	\$90.00	\$90.00		\$2,439.00
01/05/2015	Inv-0005	\$90.00	\$90.00		\$2,529.00
01/05/2015	Inv-0019	\$90.00	\$90.00		\$2,619.00
01/06/2015	Inv-0006	\$90.00	\$90.00		\$2,709.00
01/06/2015	Inv-0020	\$90.00	\$10.00		\$2,719.00
Totals:			\$2,719.00	\$0.00	
Current	1-30	31-60	61-90	Over 90	Total due
\$0.00	\$0.00	\$0.00	\$0.00	\$2,719.00	\$2,719.00

Superior financial Applications. Real-time business visibility. Open, on-demand platform.

Accounts Receivable

Automated AR Subledger Reconciliation Tool with Automatic Matching

- Automatically matches payments with the corresponding invoices and adjustments
- Flexible filters for matched/unmatched/ partially matched transactions

Customer reconciliation

[Customize](#)
[View](#)
[Print](#)
[Process & store](#)
[Email](#)

As of date: 10/01/2024 - 10/31/2024
Created on: 10/28/2024, 6:51 AM PST

Customer	Date	Document	Memo	Txn Type	Txn currency	Txn amount	Match sequence	Charges (USD)	Payments (USD)	Balance (USD)
2200091 - Macys.com	10/01/2024		Balance forward							1,470,531.88
	10/28/2024	INV000554		Invoice	USD	14,000.00	AR-AAAAAAA	14,000.00		1,484,531.88
	10/28/2024	INV000555		Invoice	USD	12,000.00	AR-aaaaaab	12,000.00		1,496,531.88
	10/28/2024	INV000556		Invoice	USD	5,000.00		5,000.00		1,501,531.88
	10/28/2024			Payments	USD	14,000.00	AR-AAAAAAA		14,000.00	1,487,531.88
	10/28/2024			Payments	USD	7,000.00	AR-aaaaaab		7,000.00	1,480,531.88
	10/28/2024			Payments	USD	3,000.00	AR-aaaaaab		3,000.00	1,477,531.88
Total for Macys.com								31,000.00	24,000.00	1,477,531.88
				Totals				31,000.00	24,000.00	1,477,531.88

Uppercase Letters – Fully matched

Lower Case Letters - Partially paid

No Sequence – Unpaid

Accounts Payable

Automatic Vendor Payment Notifications to more Recipients

- Enable the option to include secondary email addresses in AP configuration
- Enable payment notifications on the vendor record
- Payment notification sent to the Primary email address and Secondary email address of the Pay-to Contact specified on the Contact list tab of the vendor record
- If the Pay-to contact is set to **same as vendor**, Intacct uses the Primary and Secondary email addresses for the vendor primary contact, shown on the first Vendor tab.

ContactTest -- ContactTest

Vendor Additional information Contact list **Payment information** Ban

Payment details

Preferred payment method
Select

Vendor Bank Acct No

Vendor Routing Number

Send automatic payment notification

Vendor billing type
Open item

Payment priority
Normal

ContactTest -- ContactTest

Primary contact

Last name
Contact

First name
Test

Middle name

Print as *
ContactTest

Country
United States

Address line 1

Address line 2

Address line 3

City

Primary phone

Mobile phone

Pager

Fax

Email address
sally.smith@gmail.com

Secondary email address
johndoe@hotmail.com

URL

Exclude from the company contact list

Configure Accounts Payable

- released for payment
- Enable and show only items released for payment
- Enable reclassification for bills and adjustments
- Enable reversal of unpaid bills
- If enabled for reversal, bills cannot be deleted.
- Enable creating, editing, and deleting foreign currency bills
- Payment dates must be greater than their bill dates
- Include secondary email contacts in automatic payment notifications
- Do not include payment copy PDF in payment notification email
- Include payment details in payment notification email

Accounts Payable

Automated Subledger reconciliation tool with automatic matching

- Automatically matches payments with the corresponding bills and adjustments
- Flexible filters for matched/unmatched/ partially matched transactions

Vendor reconciliation

[Customize](#)
[View](#)
[Print](#)
[Process & store](#)
[Email](#)

As of date: 10/01/2024 - 10/31/2024
Created on: 10/29/2024, 8:48 AM PST

Vendor	Date	Document	Memo	Txn Type	Txn currency	Txn amount	Match sequence	Charges (USD)	Payments (USD)	Balance (USD)
V00050 - Acme Printing	10/01/2024		Balance forward							3,167.40
	10/29/2024	Test APMatch		Bill	USD	1,500.00	AP-AAAAAAAAA	1,500.00		4,667.40
	10/29/2024	TestAP match 2		Bill	USD	3,000.00		3,000.00		7,667.40
	10/29/2024	TestAP Match 3		Bill	USD	7,000.00	AP-aaaaaaaab	7,000.00		14,667.40
	10/29/2024			Payments	USD	1,500.00	AP-AAAAAAAAA		1,500.00	13,167.40
	10/29/2024			Payments	USD	1,200.00	AP-aaaaaaaab		1,200.00	11,967.40
	10/29/2024			Payments	USD	2,000.00	AP-aaaaaaaab		2,000.00	9,967.40
Total for Acme Printing								11,500.00	4,700.00	9,967.40
				Totals				11,500.00	4,700.00	9,967.40

Uppercase Letters – Fully matched

Lowercase Letters - Partially paid

No Sequence – Unpaid

Annual 1099 Filing

1099 e-filing powered by TaxBandits

Skip the manual printing of 1099 forms and send tax information directly to our trusted partner, TaxBandits, which is authorized by the IRS as a 1099 e-filing provider.

From TaxBandits, you can also file state forms, send forms by postal mail, and grant online access to recipients.

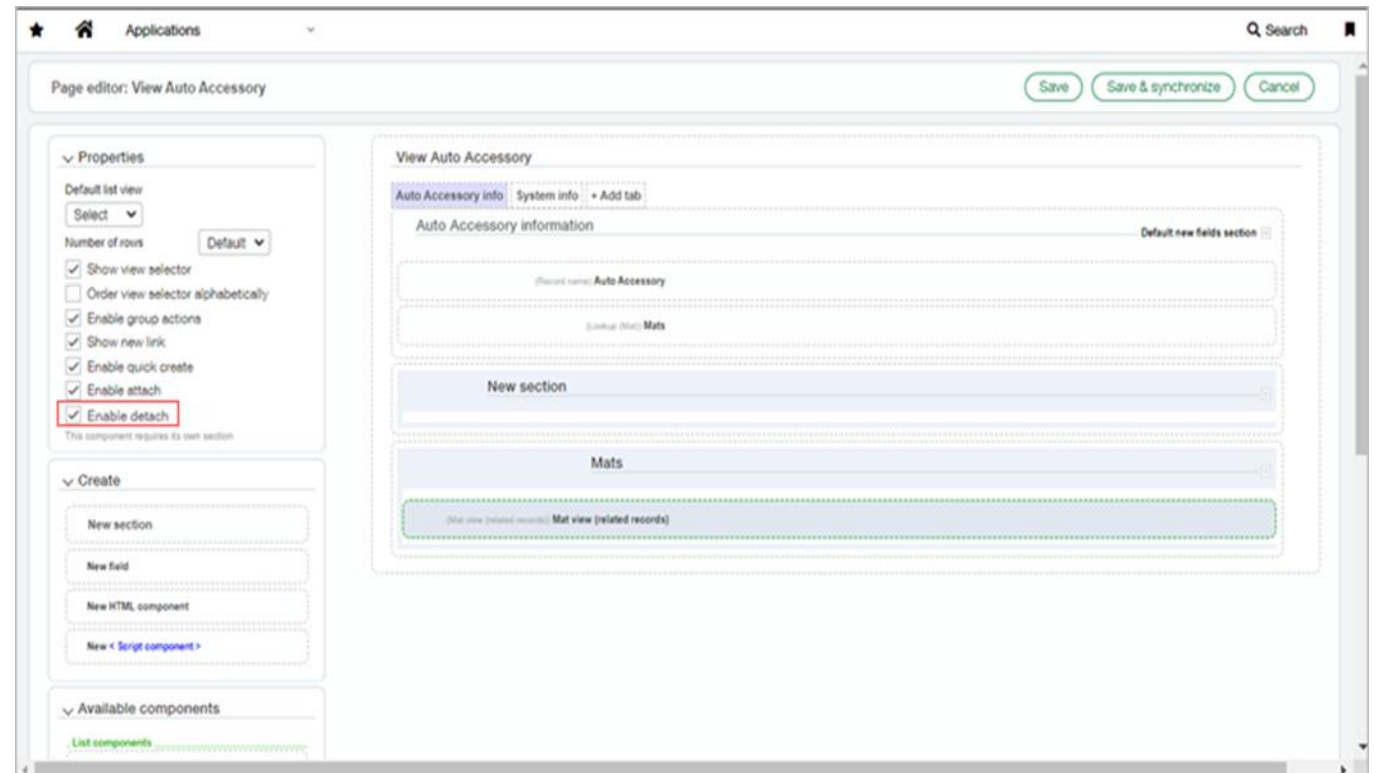
If you have 10 or more 1099 forms to file, the IRS requires that you file electronically.



Platform Services

Manage your Dimension Relationships

- New properties added for managing dimension relationships
- Can now control the option to detach related dimensions from your object records
- This is not permission based but set within individual page properties
 - More Actions->Edit this page



Employee Expenses

Electronic Receipts in Time and Expense

Company	▼	
Reports	>	All Setup
Company	>	
General Ledger	>	⊕ Employees
Accounts Payable	>	Expenses
Purchasing	>	Electronic receipts
Time & Expenses	>	⊕ My expenses
Accounts Receivable	>	⊕ Staff expenses

Employee Expenses

Electronic Receipts – Edit, View and Delete

Electronic receipts Beta [Send us feedback](#) [Turn off beta](#) Export ▼

All ▼ Manage view ▼ Filters Settings ▼

Items selected: 0 Delete

<input type="checkbox"/>	First name	Last name	Date filed	Total amount	Electronic recei...	Reason for receipt	State	Currency	
<input type="checkbox"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Equals"/>	<input type="text" value="Equals"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Equals"/>	<input type="text" value="Contains"/>	
<input type="checkbox"/>	Harpreet	Hansra	03/02/24	\$1,060.00			Draft	USD	
<input type="checkbox"/>	Bob	Blake	02/25/24	\$0.00			Draft	USD	View
<input type="checkbox"/>	Bob	Blake	08/20/24	\$1,207.00			Draft	USD	Edit
<input type="checkbox"/>	Bob	Blake	08/20/24	\$1,625.24			Draft	USD	Delete
<input type="checkbox"/>	Bob	Blake	02/25/24	\$21.99			Draft	USD	...
<input type="checkbox"/>	Bob	Blake	03/01/24	\$15.97			Draft	USD	...

Show First Previous Page of 1 Next Last 6 items

Employee Expenses

Electronic Receipts – Utilize in an expense report

- Choose “Select electronic receipts” from the My Expense or Staff Expense report
- A list of inbounded receipts will appear for insertion to the expense report; check off the receipts to add to the current expense report and press “Add Selected”

Select electronic receipts ↗ ✕

Total selected amount
--

Items selected 0

<input type="checkbox"/>	Expense type	Date	Description/memo	Amount	Amount remaining	Amount to apply	Paid to	Paid for
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/>	General Travel	08/20/24	--	1,207.00	1,207.00	Amount to apply	Paid to	Paid for
<input type="checkbox"/>	General Travel	08/20/24	MGM	1,625.24	1,625.24			
<input type="checkbox"/>	General Travel	--	--	21.99	21.99			
<input type="checkbox"/>	General Travel	08/26/24	Uber	15.97	15.97			

Employee Expenses

Electronic Receipts – Permissions & Other Requirements

Subscription	Time and Expense Sage Cloud Services
Regional availability	United States
User type	Business Employee
Permissions	Time and Expenses Electronic receipts: List, View, Edit, Delete, Upload, Manage staff electronic receipts
Configuration	Ensure that all employee contact records use an assigned primary email address, which associates the receipt with that email Ensure that the primary email address is associated with only one employee

Employee Expenses

Electronic Receipts – Configuration

- Email address will be company name or instance id and @ai.sage.com
- Can be changed once
- Recommend number sequence to automatically number receipts

IF:

Unrestricted User – will load at top

User restricted to multiple entities – will load at the top

Restricted to one entity – will load at entity level

The screenshot displays the 'Configure Time & Expenses' interface. At the top, there is a search bar containing the text 'grants'. Below this, a section titled 'Electronic receipts inbounding' is expanded, showing a checked checkbox for 'Enable electronic receipt inbounding'. Underneath, the 'Electronic receipts automation settings' section is visible, featuring a checked checkbox for 'Enable email services'. The 'Mailbox' field is populated with the email address 'pm_editions_nfp_22r1_receipts@ai.sage.com'. The 'Electronic receipt number sequence' is set to 'Expense_Report' via a dropdown menu. At the bottom, the 'Load receipts' section has two radio button options: 'Top' (which is selected) and 'Entity'.

Early Adopter Programs - Defined

- **Early adopters can influence how the product is developed so that our product meets business needs**
- **The Early adopter program participants work closely with Sage Intacct product managers to ensure the focus is on what matters most**
- **Early adopter participants are expected to respond periodically to surveys and provide input**

Must Sign-Up – participation not guaranteed

Early Adopter Features

Accounts Payable Pay Bills Enhancements

- Load up to 5,000 bills in Pay bills at one time (currently 1000 maximum)
- Sort and filter the list of bills by Bill number, Bill date, and Due date
- Drill down to credit details by selecting the Credit amount value for a bill, in the list of bills to pay.

If regularly process large volumes of bills at one time, we encourage customers to submit to be an Early Adopter - [sign up today](#).

Pay bills

Add to outbox Pay now Outbox payments: 0 Pay by entity More actions

Items selected 4890 Apply credits Clear credits Clear payment amount

	1	Vendor	2	Bill no.	Bill date	Due date	Currency	Amount due	Payment date	Preferred payment method	Credits available
1	<input checked="" type="checkbox"/>	V0026--Dr. Fluffypants Prescription Diets	CM0017	12/20/2023	--	USD	100.00	10/04/2024	--		0.00
2	<input checked="" type="checkbox"/>	V0006--Boop POS Systems	1745859	08/28/2024	09/27/2024	USD	15,000.00	10/04/2024	--		150.00
3	<input checked="" type="checkbox"/>	V0003--Allabuzz Telecommunications	47212	08/22/2024	09/21/2024	USD	500.00	10/04/2024	--		0.00
4	<input checked="" type="checkbox"/>	V0002--The Shopkeepers Shop	11248	08/08/2024	09/07/2024	USD	225.00	10/04/2024	--		100.00
5	<input checked="" type="checkbox"/>	V0018--Revere Electricity	RE-003	07/31/2024	08/30/2024	USD	500.00	10/04/2024	--		0.00
6	<input checked="" type="checkbox"/>	V0011--Diva Grooming	18980	07/30/2024	08/29/2024	USD	20.00	10/04/2024	--		0.00

3

Early Adopter Features

Copilot Variance Analysis

Copilot Variance Analysis provides insights into budget or prior period differences so business leaders can proactively investigate discrepancies and address spending concerns. Copilot notifications are designed to keep budget owners in the loop, whether it's a timely update or an on-demand review. You can drill into report insights to see exactly how your budget is doing, including detailed breakdowns and visualizations.

Early Adopter Features

Copilot Variance Analysis

Sage Intacct Keyword Top level

Applications

Keyword Financial Report, October 2024

Filters Print E Copilot

Insights Chat history

By department

	A Year To Date 10/31/2024			B Year To Date 10/31/2024			All Departments Year To Date 10/31/2024	
	Actual	Std Budget	Budget variance %	Actual	Std Budget	Budget variance %	Actual	Std Budget
▼ Net surplus (deficit)								
▼ Revenue								
▼ Revenue 1								
Revenue 1	5,324.00	275.00	1,836.00	368.00	301.00	22.25	6,054.00	939.00
Revenue 2	529.00	525.00	0.76	537.00	551.00	(2.54)	1,853.00	1,889.00
Total Revenue 1	5,853.00	800.00	631.62	905.00	852.00	6.22	7,707.00	2,628.00
▼ Revenue 2								
Revenue 3	772.00	775.00	(0.38)	767.00	801.00	(4.24)	2,381.00	2,439.00
Total Revenue 2	772.00	775.00	(0.38)	767.00	801.00	(4.24)	2,381.00	2,439.00
Total Revenue	6,625.00	1,575.00	320.63	1,672.00	1,653.00	1.14	10,088.00	5,067.00
▼ RevCost								
Cost of Revenue 1	168.00	138.00	21.73	182.00	150.00	21.33	551.00	470.00
Cost of Revenue 2	258.00	263.00	(1.90)	259.00	275.00	(5.81)	815.00	844.00
Cost of Revenue 3	368.00	388.00	(5.15)	382.00	400.00	(4.50)	1,191.00	1,220.00
Total RevCost	794.00	789.00	0.63	823.00	825.00	(0.24)	2,557.00	2,534.00
▼ Expenditures								
▼ Expenditures 1								
Expenditure 1	99.00	55.00	80.00	59.00	59.00	0.00	228.00	212.00
Total Expenditures 1	99.00	55.00	80.00	59.00	59.00	0.00	228.00	212.00
▼ Expenditures 2								
Expenditure 2	103.00	105.00	(1.90)	103.00	109.00	(5.50)	324.00	337.00

FYTD budget variance analysis

FYTD budget variance analysis for Department A

Account Group	FYTD Actuals	FYTD Budget	Variance
Revenue	6,625	1,575	5,050
Cost of revenue	794	789	(5)
Operating expenses	349	315	(34)
Net	5,482	471	5,011

AI content may be inaccurate. Check for mistakes.

New chat

Early Adopter Features

Search Help with Copilot

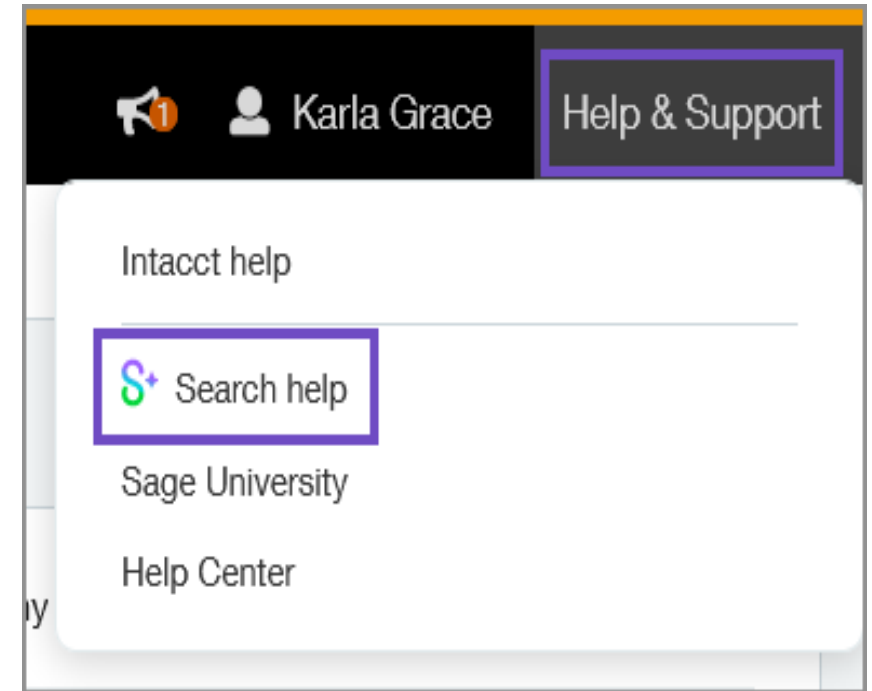
AI-powered search

Semantic search offers the following benefits:

- **Natural language understanding:** Copilot understands the nuances of Sage Intacct terminology and can interpret complex queries.
- **Increased efficiency:** Significantly reduces search time and the need for multiple searches by delivering more relevant results.
- **Intelligent recommendations:** Provides suggestions for related topics and articles to expand your knowledge.

How it works

When your company is enabled to use Search help with Copilot, you'll see a new **Search help** option in the **Help & Support** menu.



Early Adopter Features

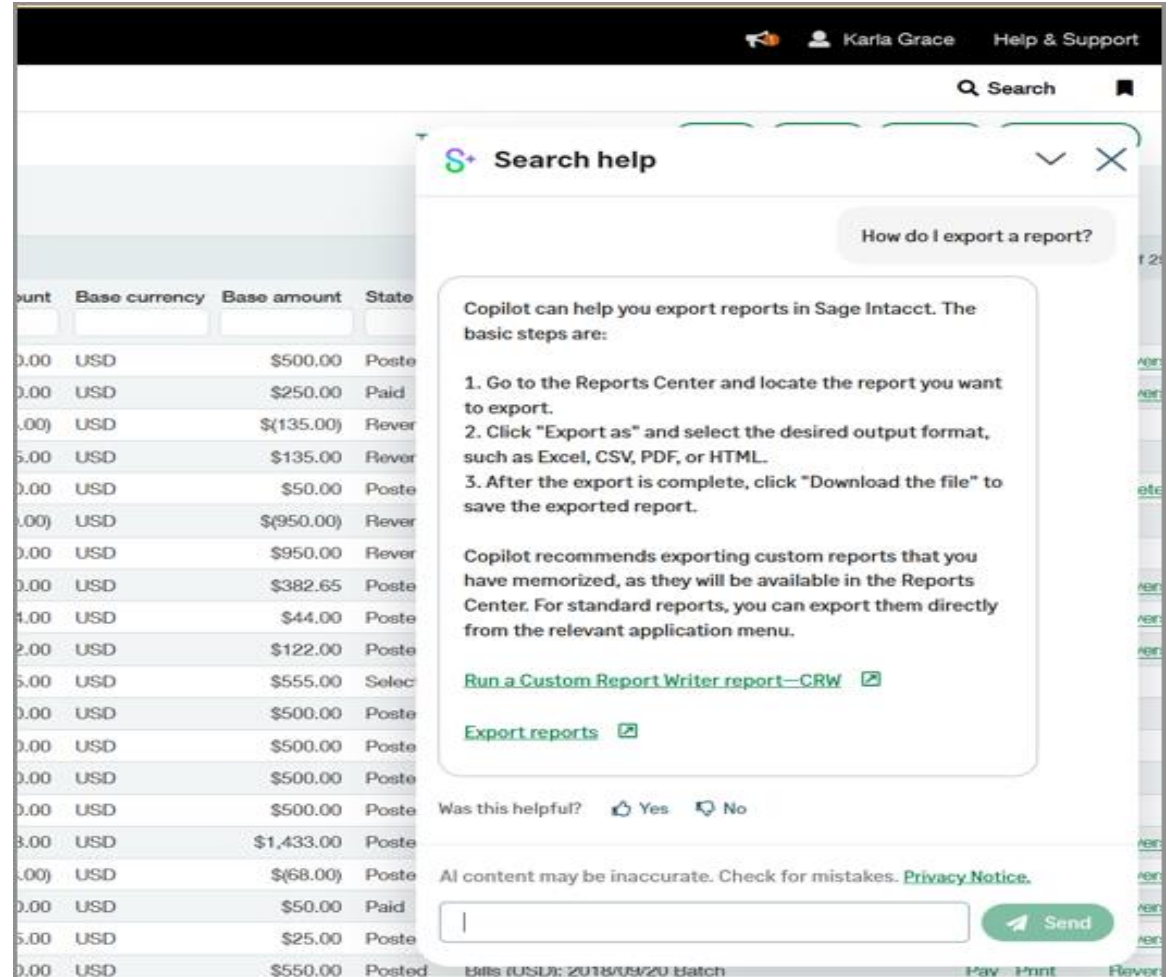
Search Help with Copilot

Selecting **Search help** opens the Copilot panel on the right side of your Intacct page.

Enter a query using natural language in the search box located at the bottom of the **Search help** panel.

The more specific you are, the more accurate the results will be.

Copilot responds with an answer and provides links to additional information.



The screenshot shows the Sage Intacct interface with the 'Search help' Copilot panel open. The panel displays the search query 'How do I export a report?' and provides a step-by-step guide on how to export reports. The background shows a table with columns for 'Amount', 'Base currency', 'Base amount', and 'State'.

Amount	Base currency	Base amount	State
0.00	USD	\$500.00	Poste
0.00	USD	\$250.00	Paid
0.00	USD	\$(135.00)	Rever
5.00	USD	\$135.00	Rever
0.00	USD	\$50.00	Poste
0.00	USD	\$(950.00)	Rever
0.00	USD	\$950.00	Rever
0.00	USD	\$382.65	Poste
4.00	USD	\$44.00	Poste
2.00	USD	\$122.00	Poste
5.00	USD	\$555.00	Selec
0.00	USD	\$500.00	Poste
0.00	USD	\$500.00	Poste
0.00	USD	\$500.00	Poste
0.00	USD	\$500.00	Poste
3.00	USD	\$1,433.00	Poste
0.00	USD	\$(68.00)	Poste
0.00	USD	\$50.00	Paid
5.00	USD	\$25.00	Poste
0.00	USD	\$550.00	Posted

Search help

How do I export a report?

Copilot can help you export reports in Sage Intacct. The basic steps are:

1. Go to the Reports Center and locate the report you want to export.
2. Click "Export as" and select the desired output format, such as Excel, CSV, PDF, or HTML.
3. After the export is complete, click "Download the file" to save the exported report.

Copilot recommends exporting custom reports that you have memorized, as they will be available in the Reports Center. For standard reports, you can export them directly from the relevant application menu.

[Run a Custom Report Writer report—CRW](#)

[Export reports](#)

Was this helpful? Yes No

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Bills (USD): 2018/09/20 Batch

Early Adopter Features


Copilot – Early Adopter Programs

What's the Early Adopter program?

The Early Adopter program allows a select group of customers to test and provide feedback on new features. Their input will help us refine and improve these features before the general release.

The Early Adopter program is actively monitored. We work closely with the early adopters to ensure that we focus our time and attention on what matters most to you.

If you would like to be considered as an early adopter of Copilot Variance Analysis, take this short [survey](#).



Sage Intacct Release 4 2024

New Feature
Highlights
Demonstration



Sage

New Feature Highlights



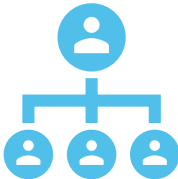
Accounts Receivable

Subledger Reconciliation Tool



Accounts Payable

Vendor Payment Notifications
Subledger Reconciliation Tool



Fixed Asset Management

Allocations

Velixo

Excel Based Reporting Automation



Closing/Q&A Responses

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CPAs & ADVISORS



DC | New York

877-437-4771 | www.grfcpa.com



Heather Broberg

Senior Manager

hbroberg@grfcpa.com

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