2020 Release 4
Executive Summary

November 15, 2020

Top New Features

1. *Brand new screen for Accounts Receivable > Receive Payments*
2. *AP Bill Approvers can now modify and approve bills, instead of rejecting and restarting workflow*
3. *Create "reporting only" dimensions for better dimensional hierarchies while maintaining proper data tagging*
4. *New Healthcare and Hospitality Dashboards that are pre-built with industry metrics*
5. *Early adopters can access new A.I. features, like GL Outlier Detection and Interactive Visual Explorer*

Summary Statements on All Features

System Wide

- **New administrative contact** fields for any/all communication from Sage Intacct
- Option to **mask social security numbers** if they are imported with Employees
- **Data delivery service performance improvements** to shorten run times and streamline data extraction
- **Create one or more filters sets** with criteria to save and apply anytime to lists in Intacct
- **Attachment field labels changed** in the UI for clarity (e.g. before "Select Attachments" is now "Select Files to Attach")

General Ledger

- **GL Outlier Detection** available for early adopters to help identify potential errors in journal entries submitted for approval
- Generate dynamic allocations consecutively in **queued runs** over time

Multi-Entity

- New **report on all Inter-entity transactions** with links to the source transactions that originated them
- User with a single entity restriction will now be able to **access Top Level** as well

Reporting and Insights

- **Reporting-only dimensions** can now be created for proper dimensional hierarchies with the posting control desired
- **Interactive Visual Explorer** now available to Early Adopters for richer data visualization and presentation options for Dashboards or more
- **Freeze the first column** in financial reports run in the browser (HTML) for better analysis when scrolling

- **Filter for report type and/or report audience** when adding Report widgets to Dashboards for shorter selection lists
- **New Healthcare and Hospitality Dashboards** that are pre-built with industry metrics
- **GL Budget object** added to the standard Custom Report Writer
- Time attributes added to the Interactive Custom Report Writer (ICRW) to help **sort dates in reports** without creating new calculations
- New Reporting Areas (GL Budget vs. Actuals, GL Budget, and VAT/GST Tax) **added to the ICRW**

Cash Management
- Connect **multiple accounts to bank feeds at once** per banking institution with one login and configuration page
- Insight and **details on the Matching history** (matched by, matched date, etc.) in bank reconciliations
- **Certain new restrictions** on GL account, currency, and Location preventing changes after creation for data permanence and integrity
- **Credit Card account numbers are no longer stored** and not saved for more security

Accounts Payable
- **1099-MISC, Box 7 will be going away** effective this release; please update all applicable Vendors
- Approvers can now **Edit Bills during Approval** process to eliminate decline-and-restart for faster processing
- Report filter available to **exclude credit card transactions** from AP Aging and Ledger reports
- **Import to post A/P Adjustments** now (no longer just historical, non-posting import option only)
- Include transactions paid by **advances to adjustments on 1099 forms and reports**

Accounts Receivable
- New screen interface and **improved experience for Receive a Payment**
- **Email templates** from Order Entry now extended for use with AR Invoices and AR Statements delivery
- **Line item credit** application controls now available
- Merge field for **Entity Tax ID** now available for printed document templates
- Include **negative lines in manual deposits** now for discounts and credits on payments without an invoice
- **Import to post A/R Adjustments** now (no longer just historical, non-posting import option only)

Workflow Modules
Inventory Control
- **New Cycle Counts** functionality in Inventory Control module

Order Entry
- **Inter-entity sales are easier** for automatic accounting impact and warehouse transfer
- Ship By Date is now **automatically calculated** by the system for on-time shipping
- Control how Order Entry transactions with **future posting dates** are handled
- Associate **one customer purchase order number to recurring** sales transactions
- Enter transactions for **standard kits with all non-inventory items** when using Global Consolidations

Purchasing
- Assign allocation IDs to **non-posting transactions**, as well as posting
- Control how Purchasing transactions with **future posting dates** are handled
- Enter transactions for **standard kits with all non-inventory items** when using Global Consolidations
- **Month is now spelled** out in approval emails for approver communication clarity

Time & Expense
- **Sage Intelligent Time** AI-powered digital time assistant that improves timesheet maintenance released to all customers whose employees use Sage Intacct timesheets

Platform & Customization Services

- **Log for custom Triggers** to see history and failed triggers on custom objects
- **Action UI layout** setting options extended in user preferences for environments with customizations
- Get links to view **Content Security Policy violation details**

Web Services

- Use the **new query function** on custom objects
- **Budget API** users should prepare to migrate their data to take advantage of the new budget API (and avoid future problems)
- Various related or **like-kind improvements for API** related to modular improvements with this release

Contracts

- **Generate invoices by customer** in mass option now available
- Configuration **controls over journals** to reduce complexity when needed
- **Automatically prorate amounts** for partial periods in monthly billing schedules
- New Column **filters in transaction history** for faster identification of specific posting events
- Easily **open renewal history** controls and drill down to the source child and contract from renewal tabs
- **Contract page title** now includes the ID and the name

Sage Intacct Budgeting & Planning

- **Dimension mapping table** improved for visibility into unmapped dimensions
- Create budgets in the wizard with up to **four dimensional tiers**
- View **budgets by the currency** of each of your entities

Full Release Notes

For full descriptions, screenshots, videos, links, and more, please visit the online Sage Intacct Release Notes Center here:
https://www-p02.intacct.com/ia/docs/en_US/releasenotes/2020/2020_Release_4/2020-R4-home.htm

Did You Know?

As a current Sage Intacct customer, you are eligible for enrollment in the **Release Preview Program**. When enrolled, you will get access to a free, copy environment enabled with all the new features and functions, in advance of the official release date. This way, you can comfortably learn, play, and validate the new features before they are applied to your live Sage Intacct environment.

More Questions?

Please reach out to your DSD Account Manager if you would like more information!