

Sage Intacct Course Catalog for Customers

 denotes that this course is part of the Learning Membership. Contact your Account Manager for more information.

Instructor-Led Course Offerings	Audience	Length	CPE
<p>Sage Intacct Fundamentals Learn how to navigate and perform accounting functions using Sage Intacct. <i>*Note there is an on-demand option for this course.</i></p>	Members of the finance team who are new to Sage Intacct	Virtual classroom: Four ½ day sessions	12
<p>Financial Reporting and Dashboards Use the Financial Report Writer to create and manage financial reports. Create dashboards and performance cards. <i>*Note there is an on-demand option for this course.</i></p>	Accountants, accounting managers, controllers, and report writers	Virtual classroom: Four ½ day sessions	12
<p>Nonprofit Financial Reporting and Dashboards Use the Financial Report Writer to create and manage nonprofit financial reports. Create nonprofit dashboards and performance cards.</p>	Accountants, accounting managers, controllers, and report writers	Virtual classroom: Four ½ day sessions	12
<p>Advanced Reporting and Insights Use the Financial Report Writer to build advanced financial reports.</p>	Accountants, accounting managers, controllers, and report writers experienced with the Financial Report Writer	Virtual classroom: Two ½ day sessions	6
<p>Interactive Custom Report Writer Use the Interactive Custom Report Writer to create operational reports.</p>	Accountants, accounting managers, controllers, and report writers	Virtual classroom: Three ½ day sessions	9
<p>Configuring Global Consolidations Learn how to configure and use Global Consolidations.</p>	Sage Intacct customers performing consolidations	Virtual classroom: Two ½ day sessions	6
<p>Configuring Inventory Learn how to implement and configure the inventory control application.</p>	Sage Intacct implementers and customers using Inventory	Virtual classroom: Three ½ day sessions	9
<p>Running the Business with Contracts Learn how to create and manage contracts.</p>	Revenue managers, accounts receivable accountants, billing managers, and contracts administrators	Virtual classroom: Five ½ day sessions	20

On-demand Course Offerings	Audience	Length	CPE
Getting Started with Sage Intacct This course familiarizes you with the Sage Intacct workspace and core functionality.	New Sage Intacct users	.75 hour	n/a
Sage Intacct Fundamentals (NA) or (UK) Learn how to navigate and perform accounting functions using Sage Intacct. <i>*Note there is an instructor-led option for this course.</i>	Members of the finance team who are new to Sage Intacct	8 hours	8
LM Financial Reporting and Dashboards Use the Financial Report Writer to create and manage financial reports, graphs, dashboards and performance cards. <i>*Note there is an instructor-led option for this course.</i>	Accountants, accounting managers, controllers, and report writers	8 hours	8
Creating Transaction Definitions This course demonstrates how users can create transaction definitions with advanced workflows in the Order Entry and Purchasing applications.	Sage Intacct administrator and advanced user	1 hour	n/a
Managing Users, Roles, and Permissions This course teaches how to give users the access they need to manage data and reports in Sage Intacct.	Sage Intacct administrator and accounting managers	.75 hour	n/a
LM Automating Processes with Smart Events On-demand This course teaches you how to customize Sage Intacct to automate processes using smart events.	Sage Intacct administrator and accounting managers	1 hour	1
LM Customizing Documents with Printed Document Template On-demand This course teaches you how to make your invoices and other documents reflect the unique look and feel of your business using printed document templates.	Sage Intacct administrator and accounting managers	1 hour	1
LM Validating Data with Smart Rules On-demand This course teaches you how to customize Sage Intacct to validate data using smart rules.	Sage Intacct administrator and accounting managers	1 hour	1

On-demand Course Offerings	Audience	Length	CPE
LM Creating Custom Fields On-demand This course teaches you how to create custom fields in Sage Intacct to meet your business needs.	Sage Intacct administrator, report writers and accounting managers	1 hour	1
Working with the Multi-tax Feature This course teaches how to leverage the multi-tax feature of Sage Intacct to create transactions and tax submission.	Accountants, accounting managers and controllers	.15 hour	n/a
Working with the General Ledger Learn how to use the General Ledger to add accounts and dimensions, use account groups, create journal entries, and import transactions with templates. <small>*Note this content is also covered in Sage Intacct Fundamentals On-demand (NA) and (UK)</small>	Members of the finance team who are new to Sage Intacct	1 hour	n/a
Working with Accounts Payable Learn how to use Accounts Payable to manage vendors, bills, adjustments, and process 1099 forms. <small>*Note this content is also covered in Sage Intacct Fundamentals On-demand (NA) and (UK)</small>	Members of the finance team who are new to Sage Intacct	2 hours	n/a
Working with Accounts Receivable Learn how to use Accounts Receivable to manage customers, print invoices, adjustments, receive payments, and run reports. <small>*Note this content is also covered in Sage Intacct Fundamentals On-demand (NA) and (UK)</small>	Members of the finance team who are new to Sage Intacct	1.25 hours	n/a
Working with Multi-Entity Shared Environments This course teaches you how to navigate and transact in multi-entity shared environments.	Accountants, accounting managers, and administrators	.5 hour	n/a
Working with Budgets Learn how to add, import, modify, and manage budgets in the system.	Accountants, accounting managers, controllers, and report writers	.5 hour	n/a
Working with Projects This course teaches project managers how to use the Sage Intacct Projects application to create projects, tasks, and resources, enter and approve timesheets, and generate project reports.	Members of the finance team new to Sage Intacct Projects	1 hour	n/a

On-demand Course Offerings	Audience	Length	CPE
Working with Sage Intacct Budgeting and Planning Learn how to use Sage Intacct Budgeting and Planning to create and share a budget, view budget versus actuals, integrate with Sage Intacct, and create forecasts and models.	Members of the finance team who are new to Sage Intacct Budgeting and Planning	.5 hour	n/a
LM Working with Sage Intacct Construction Learn how to set up a standard work breakdown structure for your projects, enter project estimates, and use workflows for tracking committed costs and revenues from construction contracts.	Members of the finance team new to Sage Intacct Construction	1 hour	n/a
LM Working with Sage Intacct Construction: Retainage This course reviews how to configure and use Sage Intacct with the retainage features and related workflows of Sage Intacct Construction.	Members of the finance team new to Sage Intacct Construction	.75 hour	n/a
LM Working with Sage Intacct Construction: Change Management This course teaches how Sage Intacct Construction change management tools help you capture project changes as they happen.	Members of the finance team new to Sage Intacct Construction	.75 hour	n/a

Questions?

Contact us at info@dsdinc.com