

# Sage Intacct Custom Documents

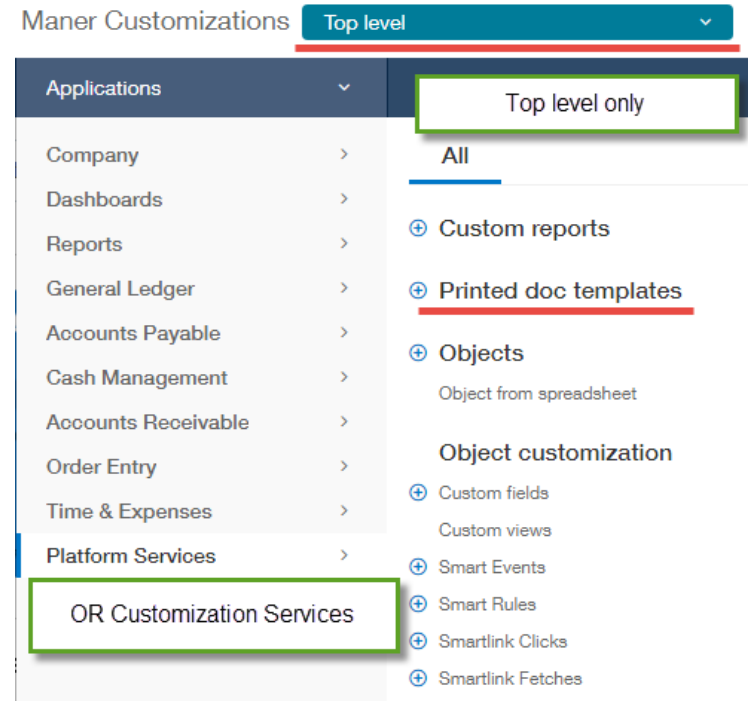
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## Custom Documents: Get the right info printing

- Pull in standard and custom fields for printing
- Add logos and other branding/formatting
- Set up unique printouts for different users/purposes
- Utilize MS Word functions (calculations, logic, etc.)

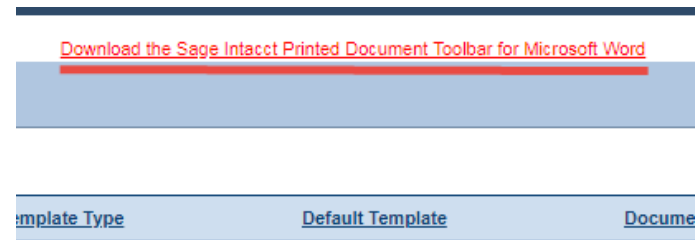
# Where to access Custom Docs

- Platform Services or Customization Services
- Printed Doc Templates
- Ensure you are at top level if you have a multi-entity instance



# Downloading the document toolbar

- Although not required, it's suggested that you use the document toolbar add-in for MS Word.
- Located as a red link at the top of the document templates.
- This toolbar allows you to pick + choose fields to pull in without having to hand-key in merge fields.
- If you use the toolbar, you need to add cdocs\_v2 as a trusted web service authorization under Company -> Security.



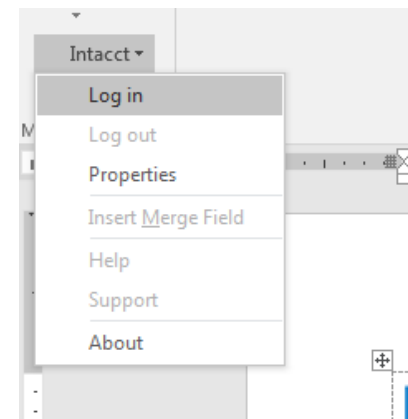
# Find a sample document and save it

- Not required, but suggested best practice.
- View sample documents by selecting Template next to each sample.
- Choose one that you like, save a version of it locally, and prepare to make modifications.
- This provides a good base to build off of and is almost always better than starting from nothing.

Duplicate	Template
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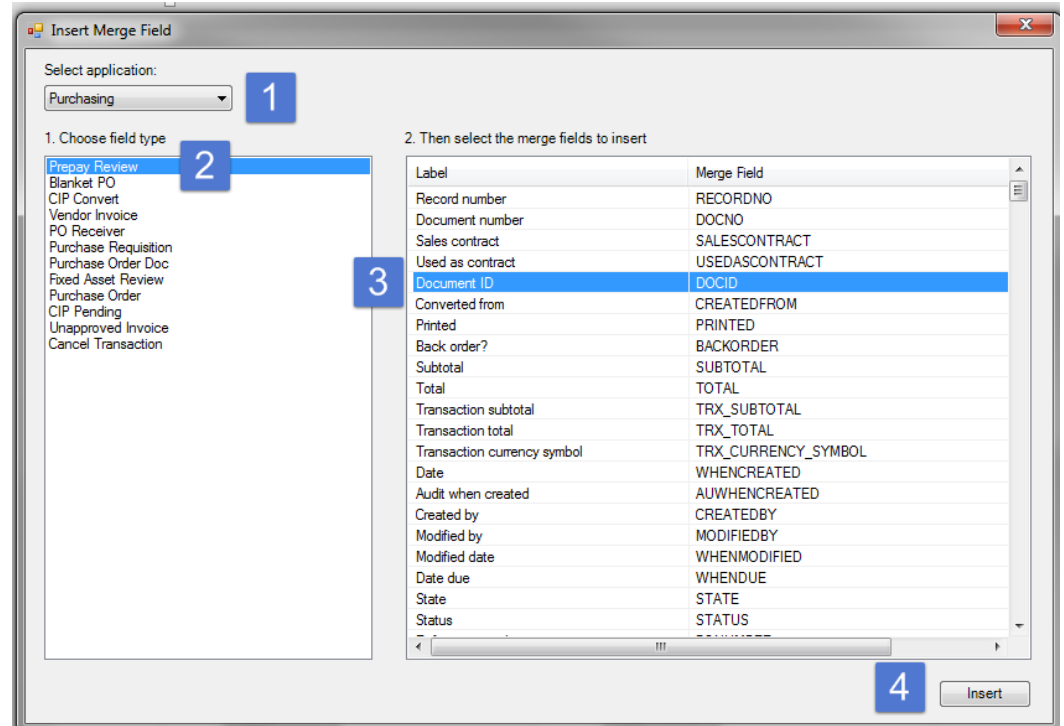
# Open sample doc and open toolbar

- The toolbar should appear now on the Add-ins tab in MS Word.
- Open the Intacct menu command, select Log In, and enter in your credentials



# Change template as needed

- At this point, you are now ready to add fields as appropriate and modify formatting.
- Using the add-in, use Insert Merge Field to choose an application and transaction type to pull fields and values from. Choose a field and select Insert to place the field at the point of the cursor
- Note that you do not need to log into the toolbar if you're just making formatting changes.



# DEMONSTRATION

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# Q&A

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# THANK YOU!

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