

# Sage Intacct Smart Events and Smart Rules

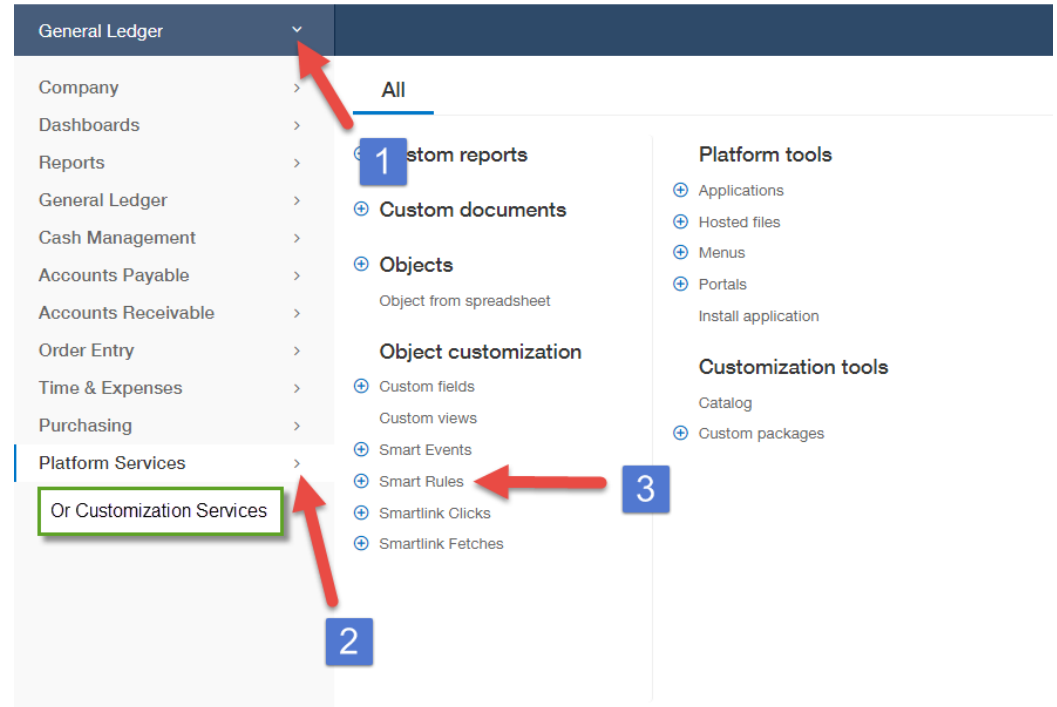
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# Smart Rules: Put some some law in your ERP System

- Require certain fields to be populated on all records
- Do not allow certain types of postings to accounts
- Require master record data entry @ top level as opposed to entity.
- Require AP/AR entry at top level
- Require attachments on transactions (Auditors love this)
- Much, much more.

# Where to write Smart Rules

- Platform Services or Customization Services
- Object Customization
- Smart Rules

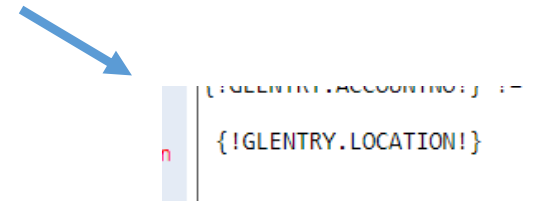
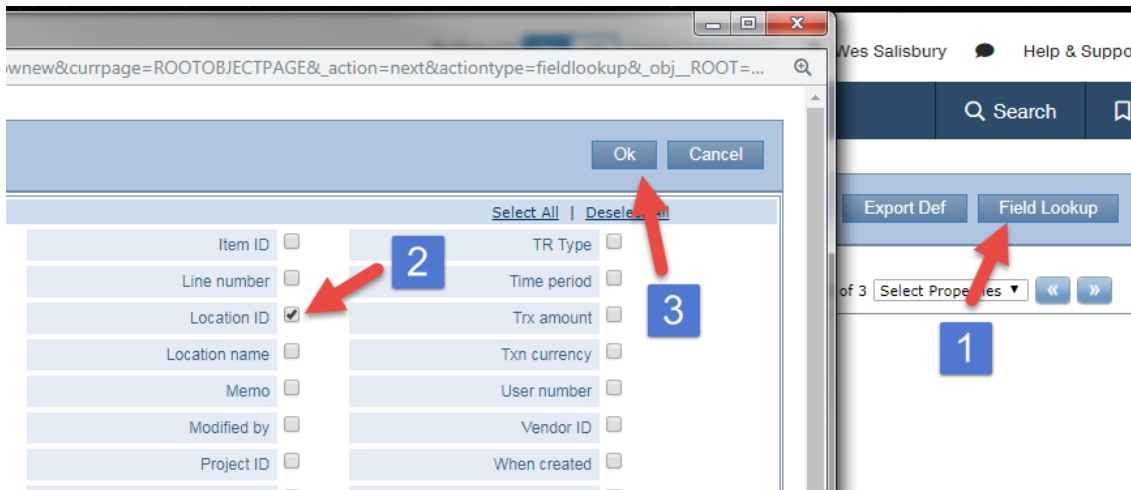


# Smart Rule Logic

## Step 2: Select rule properties

Type	Value
*Events	<p>If condition is TRUE, then allow posting of record.</p> <p>Delete</p> <p>Add Set</p>
*Condition	<p>If all conditions evaluate FALSE, then throw the error</p> <pre>{ !GLENTRY.ACCOUNTNO! } != "2000" &amp;&amp; { !GLENTRY.ACCOUNTNO! } != "1100"</pre> <p>Condition is stating "If the account does not equal 2000 and 1100, then allow posting." This prevents control AP and AR accounts to be affected by manual JEs.</p>

# Pro Tip: Use Field Lookup button



# LIVE WALK-THROUGH

# More info

- Smart Rules are incredibly valuable to help ensure that transactions are posted responsibly and records are complete.
- Although they're powerful, be careful not to overdo it with Smart Rules. Too many overlapping rules can hold up processes.
- Use only when data validation is crucial.
- Search keywords "Use Smart Rules" on the Intacct help file for more information.

# SMART EVENTS (MY FAVORITE)



# Intacct processes that require too many clicks

Just a couple of my favorites

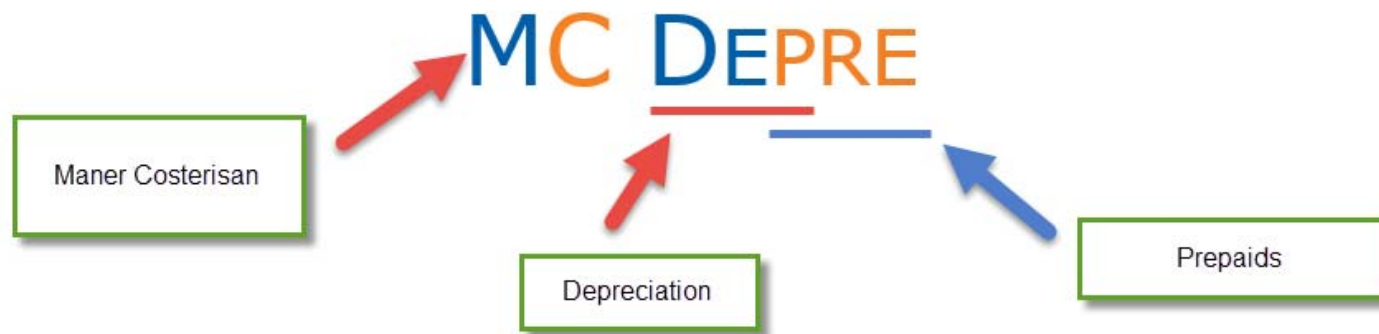
# 1: Purchasing or OE Price Lists

- With Purchasing and Order Entry, you cannot natively maintain the default price on item codes.
- Obviously, a major issue if you are billing out of OE or ordering items via Purchase Order.
- Requires 8 steps for both new items and updating items, hunting for the price list entry (potentially across thousands of entries), and keystrokes.

# LIVE SOLUTION FOOTAGE

## 2: Prepaids

- Natively, you need to manually track prepaid amortizations.
- The best solution you can get natively is recurring JEs, but this still requires plenty of clicks to get to that point.
- Add-on modules are not intuitive to use and rely on delayed integrations to generate postings.
- Lots of offline tracking needed to keep your prepaids listing up to date. Especially if the postings need to be highly dimensionalized/allocated.



# Q&A

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# THANK YOU!

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