

## Sage Intacct Course Catalog for Customers

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

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

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

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

| On-demand Course Offerings                                                                                                                                                                                                                                  | Audience                                                                       | Length   | CPE |
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| <p><b>Working with Sage Intacct Budgeting and Planning</b></p> <p>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.</p>          | Members of the finance team who are new to Sage Intacct Budgeting and Planning | .5 hour  | n/a |
| <p><b>LM Working with Sage Intacct Construction</b></p> <p>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.</p> | Members of the finance team new to Sage Intacct Construction                   | 1 hour   | n/a |
| <p><b>LM Working with Sage Intacct Construction: Retainage</b></p> <p>This course reviews how to configure and use Sage Intacct with the retainage features and related workflows of Sage Intacct Construction.</p>                                         | Members of the finance team new to Sage Intacct Construction                   | .75 hour | n/a |
| <p><b>LM Working with Sage Intacct Construction: Change Management</b></p> <p>This course teaches how Sage Intacct Construction change management tools help you capture project changes as they happen.</p>                                                | Members of the finance team new to Sage Intacct Construction                   | .75 hour | n/a |

**Questions?**

Contact us at [info@dsdinc.com](mailto:info@dsdinc.com)