

Sage Intacct Catalog for Customers











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

Learning Membership On-demand

| Course Offerings | Audience | Length | CPE |
|---|--|-----------|-----|
| LM Financial Reporting and Dashboards On-demand Use the Financial Report Writer to create and manage financial reports, graphs, dashboards, and performance cards. | Accountants, accounting managers, controllers, and report writers | 10 hours | 10 |
| LM Nonprofit Financial Reporting and Dashboards On-demand Use the Financial Report Writer to create and manage nonprofit financial reports. Create nonprofit dashboards and performance cards. | Accountants, accounting managers, controllers, and report writers | 10 hours | 10 |
| LM Adding Data Using Imports On-demand In this course, you'll learn what can be imported, when to import, the steps on how to import data, and how to fix import errors. | Accountants, Sage Intacct administrators, and implementers | 2 hours | 2 |
| 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 |
| 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 |
| LM Viewing and Building Visual Insights with Interactive Visual Explorer (IVE) Learn how to view and build visual boards and presentations to explore your financial data and uncover insights and trends. | Explorers/analysts: experienced report builders and business analysts with deep knowledge of the data model. | 1.5 hours | n/a |

| Course Offerings | Audience | Length | CPE |
|---|--|-----------|-----|
| <p>LM Working with Sage Intacct Construction On-demand</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>LM Working with Sage Intacct Construction: Retainage On-demand</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>LM Working with Sage Intacct Construction: Change Management On-demand</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 |
| <p>LM Creating projects and project estimates in Sage Intacct Construction on-demand</p> <p>This course teaches you how to manage projects and project estimates in Sage Intacct Construction.</p> | Construction project administrators | 1.5 hours | n/a |
| <p>LM Automating Subscription Billing and Revenue Recognition with Contracts On-demand</p> <p>This course teaches you how to create and manage contracts. *Note this content is a subset of content covered in the instructor-led class Running the Business with Contracts</p> | Revenue managers, AR accountants, billing managers, and contracts administrators | 9 hours | 9 |
| <p>LM Automating Usage Billing with Contracts On-demand</p> <p>This course teaches you how to add contract lines that bill based on the quantity used each period. *Note this content is a subset of content covered in the instructor-led class Running the Business with Contracts</p> | Revenue managers, AR accountants, billing managers, and contracts administrators | 3 hours | 3 |
| <p>LM Managing Multiple-element Arrangement Allocations in Contracts On-demand</p> <p>This course teaches you how to allocate the total transaction price of a bundle across the separate performance obligations. *Note this content is a subset of content covered in the instructor-led class Running the Business with Contracts</p> | Revenue managers, AR accountants, billing managers, and contracts administrators | 2 hours | 2 |
| <p>LM Recognizing Expenses in Contracts On-demand</p> <p>This course teaches you how to create and manage contract expenses. *Note this content is a subset of content covered in the instructor-led class Running the Business with contracts</p> | Revenue managers, AR accountants, billing managers, and contracts administrators | 2 hours | 2 |
| <p>LM Tracking SaaS Metrics with the Contracts Digital Board Book On-demand</p> <p>This course teaches you how to view SaaS Metrics on the Contracts Digital Board Book.</p> | Revenue managers, AR accountants, billing managers, and contracts administrators | .33 hour | n/a |
| <p>LM Managing Evergreen Contracts</p> <p>This course teaches you how to create evergreen contracts.</p> | | 1 hour | n/a |

| Course Offerings | Audience | Length | CPE |
|---|---|-----------|-----|
|  Using, configuring, and administering Checklists On-demand This course teaches you how to use Checklists in Sage Intacct. | All Sage Intacct users | 1 hour | n/a |
|  Managing cash accounts with bank feeds on-demand Increase productivity, save time on reconciling, and simplify the close by learning how to use bank feeds. | Accountants, Sage Intacct administrators, and implementers | 1 hour | n/a |
|  Automating taxes with Sage Intacct Taxes On-demand This course teaches you how to record and report on transactions with tax implications. | Members of the finance team who record, submit, and report on taxes | .5 hour | n/a |
|  Using Dimension Structures in Financial Reports On-demand* This course teaches you how to build advanced financial reports by filtering reports using custom fields and use dimension structures to analyze financial and operational data. | Accountants, accounting managers, controllers, and report writers | 2.5 hours | 2.5 |
|  Reporting with an Alternate Chart of Accounts On-demand* This course teaches you how to create reporting account sets and use them with standard and financial reports. | Accountants, accounting managers, controllers, and report writers | .25 hour | n/a |
|  Using Books to Manage Reporting Standards On-demand* This course teaches you how to record transactions to different books and run reports including or excluding these transactions. | Accountants, accounting managers, controllers, and report writers | .5 hour | n/a |
|  Tailoring Account Groups for Financial Reports On-demand* This course teaches you how to alter account groups to build account groups tailored to your organization. | Accountants, accounting managers, controllers, and report writers | .75 hour | n/a |
|  Leveraging Dynamic Allocations On-demand This course is designed for members of the finance team and implementors who want to facilitate the splitting or shifting of amounts within Sage Intacct using Dynamic allocations. | Accountants, Sage Intacct administrators, and implementers | .75 hour | n/a |

* The following four on-demand courses combined contain the same content as the now retired Advanced Reporting & Insights instructor-led course:

- Using Dimension Structures in Financial Reports On-demand
- Reporting with an Alternate Chart of Accounts On-demand
- Using Books to Manage Reporting Standards On-demand
- Tailoring Account Groups for Financial Reports On-demand.

Coming Soon to the Learning Membership

| Course | Audience | Length | CPE |
|---|--|--------|-----|
|  Transacting and reporting in multiple currencies | Accountants, accounting managers, and administrators | TBD | TBD |

Additional On-demand Course Offerings

| Course (no charge) | 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. | Members of the finance team who are new to Sage Intacct | 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 |
| 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. *Note this content is also covered in Sage Intacct Fundamentals On-demand (NA) and (UK) | 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. *Note this content is also covered in Sage Intacct Fundamentals On-demand (NA) and (UK) | 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. *Note this content is also covered in Sage Intacct Fundamentals On-demand (NA) and (UK) | 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 |
| Viewing Visual Insights with Interactive Visual Explorer (IVE) In this course, you will learn how to view visual boards and presentations to gain insights into financial data. | Consumers/viewers: members of the finance team, executives and managers, and external stakeholders | 10 minutes | n/a |

| Course (no charge) | Audience | Length | CPE |
|---|--|---------|-----|
| 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 |
| 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 |

Instructor-Led Course Offerings

| Course (fee per seat) | Audience | Length | CPE |
|---|---|--|-----|
| Interactive Custom Report Writer Use the Interactive Custom Report Writer to create operational reports. | Accountants, accounting managers, controllers, and report writers | Virtual classroom: Three ½ day sessions | 9 |
| Configuring Global Consolidations Learn how to configure and use Global Consolidations. | Sage Intacct customers performing consolidations | Virtual classroom: Two ½ day sessions | 6 |
| Configuring Inventory Learn how to implement and configure the inventory control application. | Sage Intacct implementers and customers using Inventory | Virtual classroom: Three ½ day sessions | 9 |
| Running the Business with Contracts Learn how to create and manage contracts. You use these additional Contracts subscriptions: usage billing, expense recognition, and multiple-element arrangement allocations (MEA). *Note the content in this course is also available in on-demand format (4 courses): Automating Subscription Billing and Revenue Recognition with Contracts On-demand, Automating Usage Billing with Contracts On-demand, Recognizing Expenses in Contracts On-demand, and Managing Multiple-element Arrangement Allocations in Contracts On-demand | Revenue managers, accounts receivable accountants, billing managers, and contracts administrators | Virtual classroom: Five ½ day sessions | 20 |

Questions?

Contact Sage Intacct Learning at training.sageintacct@sage.com



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