

The Story Continues: Evolve with *Sage Intacct*

Stop Errors Before They Post

July 16, 2026

QUICK TIPS

Zoom Webinars



Ask Questions in Q&A Box

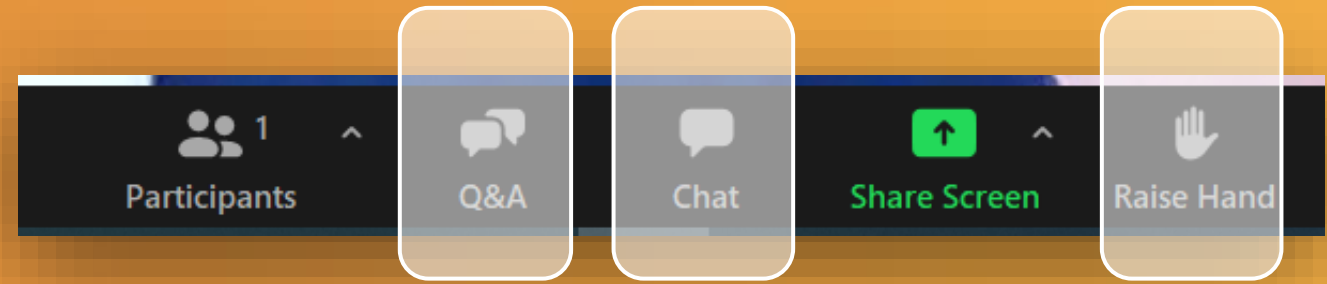
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand

- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button



Today's *Presenters*



Jeremy Anderson
Manager

Jeremy Anderson is a Sage Intacct consultant at Armanino with four years of experience implementing and supporting Sage Intacct solutions. He began his career in nonprofit accounting, where he used Sage Intacct as an end user, giving him a strong, practical understanding of the system from an accountant's perspective. Today, Jeremy works on the consulting side, partnering with organizations to implement Sage Intacct and provide ongoing support to help clients operate efficiently and meet their reporting needs.



Joseph Ocbena
Solution Architect

Joseph Ocbena is a Solution Architect with 9 years of experience in the Sage Intacct space, specializing in Sage Intacct implementations, customizations, integrations, and solution design. He helps organizations streamline operations by designing scalable integrations, automating business processes, and delivering tailored solutions that maximize the value of their Sage Intacct.



Agenda



Explore five high-
impact smart
rules



See automation in
real-world
scenarios



Learn to create
workflows that
scale with your
business

Effective Smart Rules

Are conditions that generate warning or error messages to the user.

Smart Rules are key to building compliance and ensures business practices are enforced within your organization.



Effective Smart Rules

Require W-9 & Tax ID on Vendor Creation

 Smart rules

Step 1 Choose object to extend

Owner object
Vendor

Step 2 Select rule properties

Type
Error

Events *

Selected items (2)

Add or edit

Add

Set

Condition *

{!VENDOR.FORM1099BOX!} != "" && {!VENDOR.SUPDOCID!} != "" && {!VENDOR.TAXID!} != "" ||
{!VENDOR.FORM1099BOX!} == ""

Error message *

If the vendor's 1099 box is set to true, please provide the W-9 and populate the Tax ID

Smart Rule Rationale

If the Vendor's 1099BOX is not blank **and** the attachment is not blank **and** the Tax ID is not blank

If condition not met, generate an error upon "Post"

Added rationale:

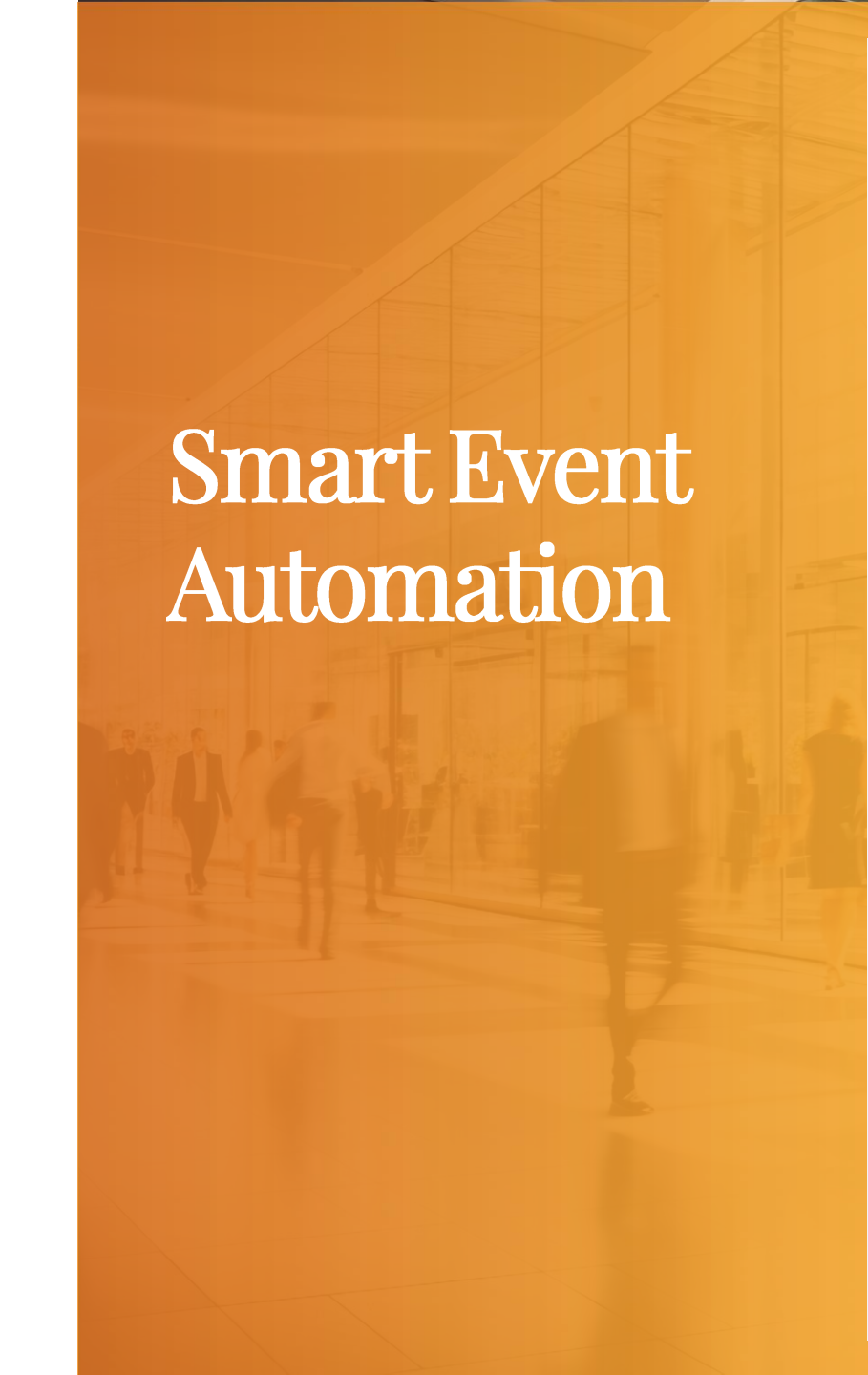
If the Vendor's 1099BOX is blank – **No errors are given for Vendors not requiring 1099s.**

Effective Smart Rules

Examples

- Require W-9 & Tax ID on Vendor Creation
- Require Attachments on AP Bills
- Rules around future posting
- Require billable check-box for project/grant related activity
- Require certain out of the box fields to be populated

Smart Rule Demo



Smart Event Automation

Smart events get triggered when a given event occurs and certain conditions are met.

Smart events allow you to auto-populate fields, auto-create transactions, send emails, etc.

Smart Event Automation

Auto-populate related objects

- Scenario: Push Customer comment & Sales Rep to AR Invoice

 **Smart events**

Step 1 Choose object to extend

Owner object

Invoice

Step 2 Select event properties

Action

API

Events *

Selected items (2) [Add or edit](#)

Add

Set

Condition

Note

Step 3 Enter API arguments for a Web Services API call.

API body *

```
<update_invoice key="{!ARINVOICE.RECORDNO!}">  
  <ponumber>{!ARINVOICE.CUSTOMER.CUSTREP.CONTACT.PRINTAS!}</ponumber>  
  <description>{!ARINVOICE.CUSTOMER.COMMENTS!} </description>  
</update_invoice>
```

☒ Synchronous smart event

* Required

<https://developer.intacct.com/>

Smart Event Automation

Examples

- Auto-populate related objects
 - **Scenario:** Push Customer comment & Sales Rep to AR Invoice
- Dynamic Bank Remittance Information by Currency
 - **Scenario:** Automatically update the Bank Remit Address per currency (USD, GBP, CAD)
- Email notification upon creation/modifying an object
 - Customer auto-email when edited

Smart Event Demo

Platform Trigger

Platform Services feature that allows you to automatically execute actions when records are created, updated, deleted, or posted in Sage Intacct. They are event-driven automation tools that run behind the scenes without user intervention.

In short, Platform Triggers are like Smart Events – but better!

Example

Invoice presentation to show discount amount (be able to perform formulas)



Questions?

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