

Sage Intacct Tips and Tricks

Getting the most out of your Sage Intacct

June 23, 2026





1

Introductions

Joe Gubser, CPA.CITP
Partner – Sage Software

Sage Intacct Certified Implementation Consultant

joe.gubser@martinandassoc.com
(513) 782-6101

Brett Pensinger
Director – Sage Software

Sage Intacct Certified Implementation Consultant

brett.pensinger@martinandassoc.com
(513) 782-6119

Pat Anson
Sage Intacct Practice Manager

Sage Intacct Certified Implementation Consultant

pat.anson@martinandassoc.com
(513) 782-6128





2

Agenda

- User Preferences
- Duplicate Tab
- Data Entry Shortcuts
- Favorites Menu
- Bookmarks
- Statistical Accounts
- GL Outlier Detection
- Demo
- Questions



Sage

3

User Preferences

Sage Intacct user preferences allows each user the ability customize their workspace, security, and notifications setting to fit their workflow. Personalized options can be configured at any time to setup your daily experience, layout and system defaults.

- Name & Address Setup
- Security Preferences
- Email Notifications
- Display & Interaction Settings
 - My Start Page
- General Preferences
 - Language
 - Time & Date Format
 - Numeric Format

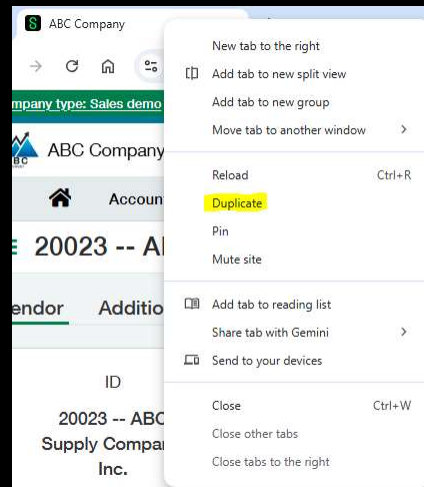


Sage

4

Duplicate Tab

- To duplicate a tab in Sage Intacct, use your web browser's built-in tab duplication feature.
- This allows you to open multiple tasks to work in multiple Sage Intacct screens at the same time.
- **How to Duplicate Your Tab**
 - Right-click the browser tab where you currently have Sage Intacct open.
 - Select Duplicate or Duplicate Tab depending on your browser.
 - A new tab will appear in addition to the original.
- You can also create a duplicate tab by selecting ALT-D-Enter as well.



5

Data Entry Shortcuts

General Navigation and Record Management

- Keyboard shortcuts when working with records and transactions:
 - **ALT S** – Save record or transaction
 - **ALT Q** – Cancel
 - **ALT W** – Save/Post and start new record/transaction
 - **ALT K** – Go back from an error message
 - **Tab/Shift Tab** – Move between fields
 - **Spacebar** – Select/clear checkbox



6

Data Entry Shortcuts

Dropdown List Navigation

- Keyboard shortcuts when working with dropdown list fields:
 - **Down Arrow** – View the dropdown list
 - **Up/Down Arrows** – Navigate dropdown list
 - **Tab/Enter** – Select highlighted item
 - **Letter Keys** – Jump to the first matching item
 - **Sequence of letter keys** – Autofill input box based on match



7

Data Entry Shortcuts

Date Field Manipulation

- Keyboard shortcuts Calendar Navigation:
 - **Ctrl Home** – Open calendar/current month
 - **PgUp/PgDn** – Previous/next month
 - **Ctrl Up/Down Arrow** – Previous/next week
 - **Ctrl Left/Right Arrow** – Previous/next day
 - **Enter** – Accept selected date
 - **Esc** – Close calendar without selecting



8

Data Entry Shortcuts

Date Field Manipulation

- Keyboard shortcuts when entering and modifying date fields:
 - **T** – Today's date
 - **+/-** – Increment/decrement date by one day
 - **W** – First day of week
 - **K** – Last day of week
 - **M** – First day of month
 - **H** – Last day of month
 - **Y** – First day of year
 - **R** – Last day of year
 - **[#]** – 'n-th' month, current day and year
 - **/[#]** – 'n-th' day of the current month and year
 - **//[#]** – 'n-th' year, current day and month



9

Data Entry Shortcuts

Numeric Field Calculation Manipulation

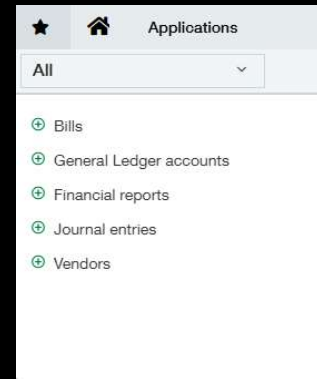
- Keyboard shortcuts when performing calculations on numeric fields:
 - **+ - * /** – Type an operator (plus, minus, multiply, or divide) to open the calculation tape
 - **=** – Displays the result in the tape
 - **Enter** – Returns the calculate result into the entry field



10

Favorites Menu

- The favorites menu, which is user-specific, allows users to build a personalized, user-specific shortcut list for their frequently used menu options like tasks, reports and dashboards.
- Instead of searching through multiple application applications every time you want to perform an action, you can pin items to your favorites.
- Menu options on the Favorites can be re-ordered in whatever order desired via drag-and-drop.
- To add an item to the favorites menu, hover over the task and click the star icon to the right of the item. The star will turn yellow once it has been added to your favorites
- To remove an item from the favorites menu, hover back over the task in either the main menu or click the star directly in your Favorites menu to deselect it.
- Items on the favorites menu can be viewed by module or combined.



11

Bookmarks

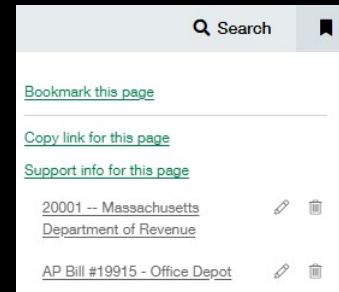
- Bookmarks in Sage Intacct let you quickly jump to frequently-used tasks and views.
- You can bookmark any page to which you have access and open it from anywhere in Sage Intacct.
- You can create, edit or delete bookmarks as desired.
- Bookmarks are different from favorites in that bookmarks take you to specific transactions or records where favorites apply to menu options and open pages such as tasks, reports and dashboards.
- To add a bookmark:
 - Navigate to the page of interest. For example, a specific vendor or AP bill.
 - Once on the transaction or record, select the Bookmarks icon (🔖) in the top-right portion of the navigation bar.
 - Once the drop-down list appears, select Bookmark this page.
 - This creates a bookmark and places it in the dropdown list under the bookmark icon.



12

Bookmarks

- **To access a bookmark:**
 - Select the bookmark icon (🔖) in the top-right portion of the navigation bar.
 - In the dropdown, select the appropriate bookmark and the bookmarked page will display.
- **To change the name of a bookmark:**
 - You can change the name of a bookmark to make it be more meaningful.
 - Select the bookmark icon (🔖) in the top-right portion of the navigation bar.
 - Select  beside the desired bookmark and the Update bookmark window appears.
 - Enter the new name for the bookmark and select Save.
- **To delete a bookmark:**
 - Select the bookmark icon (🔖) in the top-right portion of the navigation bar.
 - Select  beside the bookmark you want to delete.
 - Confirm the deletion if requested.



13

Statistical Accounts

- Statistical accounts are specialized accounts in Sage Intacct that are used to track non-financial data like number of employees, hours worked, daily attendance, patient days, or other key metrics.
- By combining this non-financial data with financial data in reports and dashboards, you can easily calculate crucial business KPIs like revenue per employee or revenue per hour worked as examples.
- You record data to your statistical accounts by posting to statistical journals.
 - You can set up a single, system-wide statistical journal or create dedicated journals for specific metrics.
- Statistical transactions do not need to balance. Instead, you increase or decrease a value instead of traditional debits and credits.
- You can either input entries manually in the General Ledger module or use import tool and templates available.



14

Statistical Accounts

Automate Dimension Count Posting

- A feature in Sage Intacct that automatically updates statistical accounts based on changes to dimension members.
- Setup under the Advanced GL Options section under Configure General Ledger
- Dimension count rules are used to track specific organizational metrics, such as employee numbers, customer numbers, etc. and posts journal entries to statistical accounts accordingly.
- Based on these dimension count rules, when a dimension record changes a transaction is created in the statistical journal defined whenever the dimension record count increases or decreases.
- A statistical account displays the change of the dimension records and tracks the dimension counts automatically.



15

GL Outlier Detection



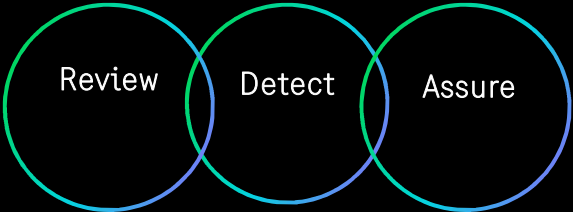
- No additional subscription required
- The first real-time AI-powered outlier detection tool for a general ledger.
- The GL Outlier Detection feature uses machine learning to automatically identify unusual journal entries that don't match your company's historical transaction patterns.
- This provides an additional control measure to help ensure accuracy in your journal entry approval process.
- Key capabilities:
 - Automatically flags journal entries that are outliers based on your company's specific data and transaction history.
 - Provides approvers with an indicator to easily identify entries that require extra scrutiny.
 - Learns and adjusts its pattern recognition over time as more data is accumulated and you respond to outlier notifications.
 - Helps improve the overall accuracy and trust in your financial data by proactively detecting potential errors or anomalies.



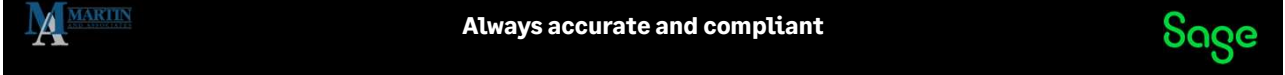
16

GL Outlier Detection

- You must enable GL Outlier Detection in your subscriptions and will take 24-48 hours to set up the initial data model.
- To use GL Outlier Detection effectively, companies must have at least one month of data less than 2 years old and at least 1,000 posted General Ledger journal entry lines.
- Once enabled, any journal entries routed through the approval process will be evaluated by the outlier detection algorithms.
- Approvers can then use the outlier indicators as an additional tool to assess the entries before making their final decision.



Always accurate and compliant



17

GL Outlier Detection

SageIntacctS+ Copilot

★🏠Approve Journal Entries

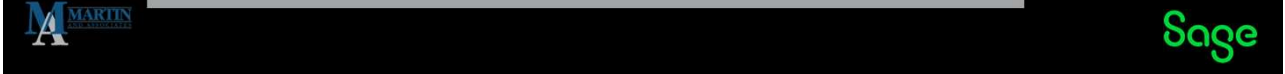
View AllApproveDeclineDoneExport

Select

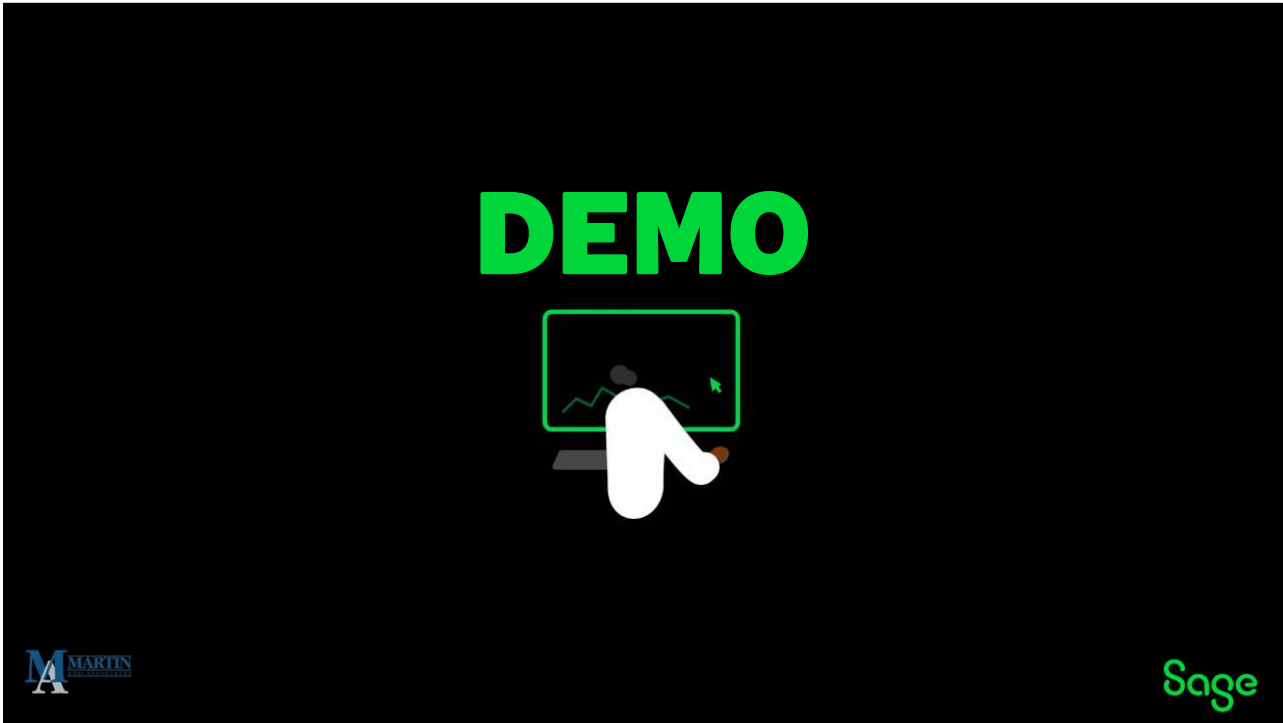
Outlier

	Request status	Requester	Journal	Transaction type	No	Reference #	Description	Date requested
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	19		reclassification	Date & Time
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	18		adjustment	Date & Time
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	16		adjustment	Date & Time
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	13		adjustment	Date & Time
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	9		adjustment	Date & Time
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	5	Reversed -	Reversed - Accrued Salaries	Date & Time
☐ View Approve Decline	Submitted	Grace, Karla	AAJ	Journal Entry	4		Accrued Salaries	Date & Time

	Outlier	Account	Department	Shil Dim	Location	Txn currency	Transaction debit	Transaction credit	Base debit (USD)	Base credit (USD)	Allocation	Memo
1	1	100.99-Bank of America 2	11-Accounting	--	1-USA	USD	1.00	--	1.00	--	--	Entry 1
2	1	4000-Sales	11-Accounting	--	1-USA	USD	--	1.00	--	1.00	1.00	Entry 2
Total		These combinations are unusual - Account, Department, Location, Amount										



18



19

Upcoming Sage Intacct Webinars

Sage Intacct Workflows and Approvals

Wednesday, July 8th @ 2:00 pm EST

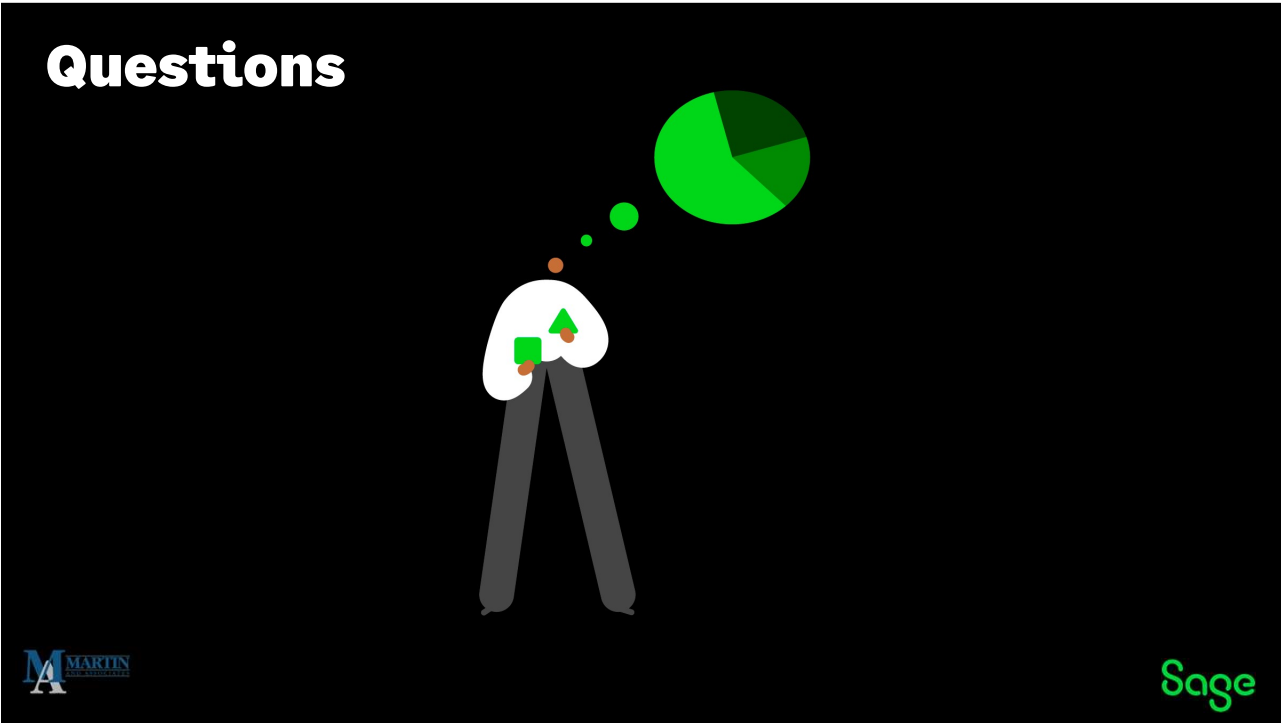
Sage Enterprise Intelligence by Nectari

Thursday, July 23rd @ 1:00 pm EST





20



21



22