



Intacct Webinar

Benefits of Smart Rules & Smart Events

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

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Learning
at CLA

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Learning Objectives

- Define smart rules and smart events
- Recognize the possibilities of smart rules and events
- Outline the processes for smart events and smart rules
- Identify how to build your own smart rules and events
- Describe the limitations between smart rules and smart events





The Basics

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Smart Rules – The Basics

- A **Smart rule** generates a warning or error message when a user saves data that does not meet the specified data validation requirements
 - Used to validate Data before it enters the system
 - Smart Rules can be added to most standard objects



Smart Events – The Basics

- A **Smart Event** triggers an email, posts to the web, posts to a web application, or writes to the audit log based on the data in the record
 - One operation per Smart Event
 - Smart Events can be added to most standard objects



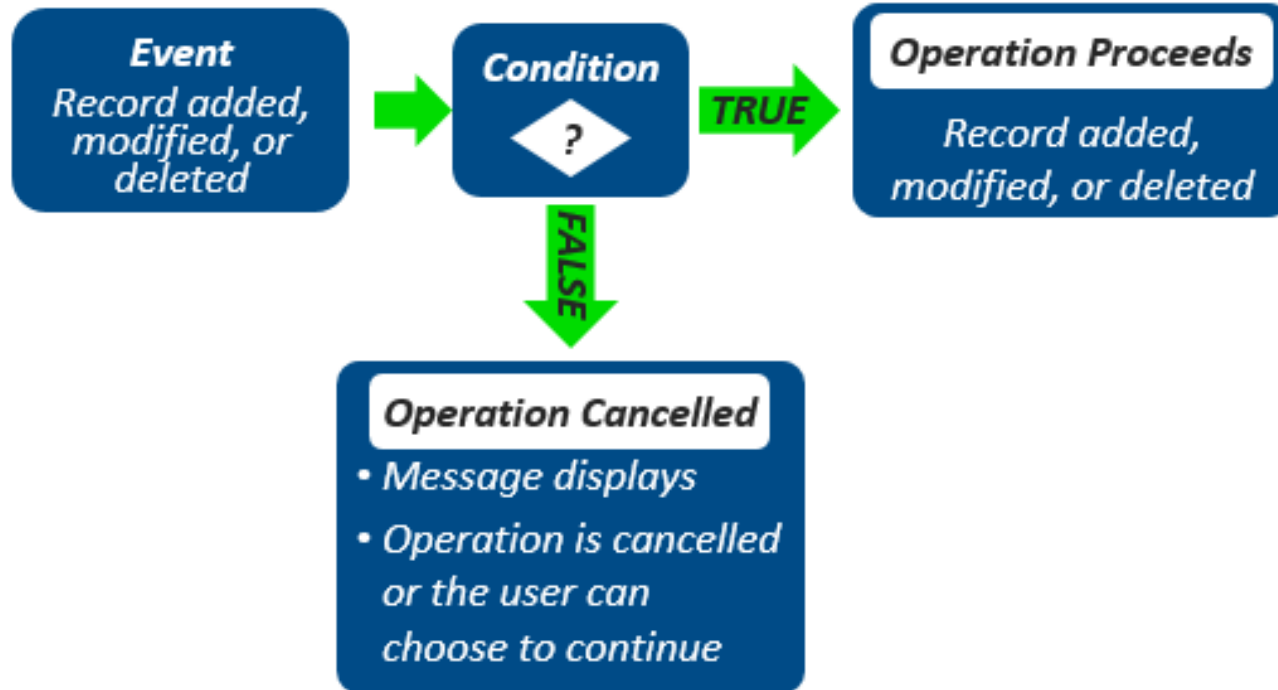


Process of Smart Rules

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Smart Rule Process



What are the parts of a Smart Rule?

Event

Determines when the rule is checked

Type

The response when the data fails, either error or warning

Condition

The logic to validate the data:

- True, if the data passes
- False, if the data fails

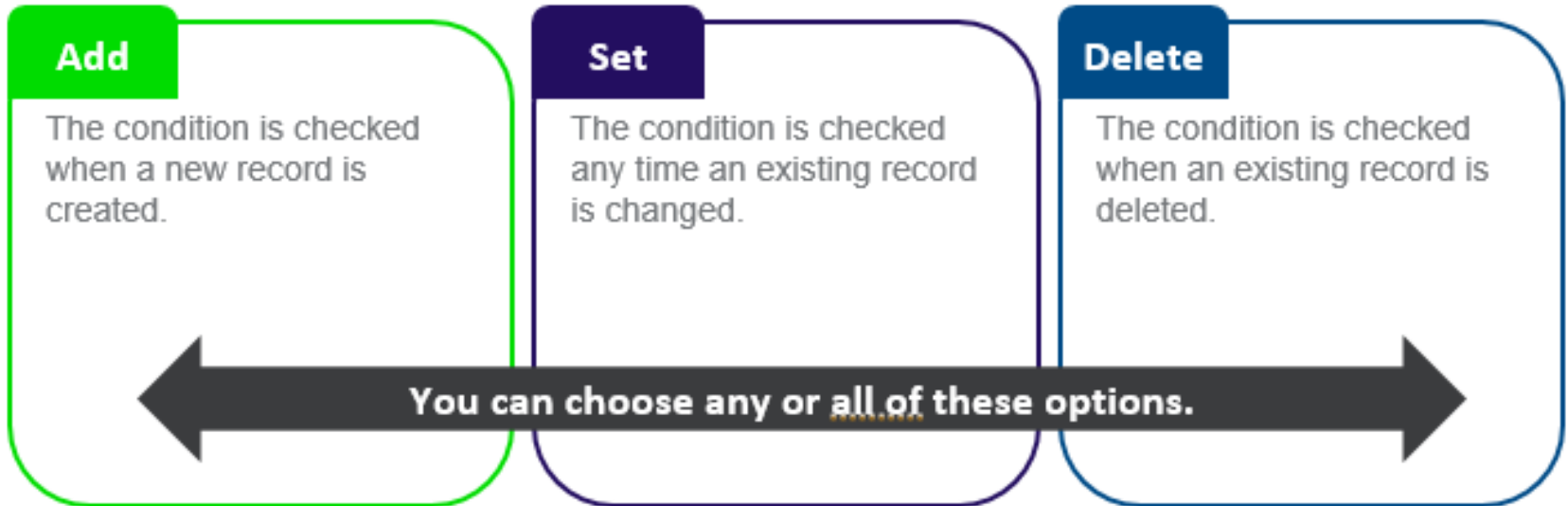
Message

Text displayed to the user when validation fails



Rule Triggers

Smart Rules are triggered by inputs within Intacct, through the API, or by an Excel CSV upload





Possibilities with Smart Rules

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Problem/Solution – Smart Rules

Problem

- Require Customers or Vendors to be created at the Top Level
- Do not allow Credit Memo to be created > \$1,000
- Restrict users from posting journal entries to the APJ and ARJ journals

Solution

- Smart Rule to enforce creation of Customers and/or Vendors at the Top Level only
- Smart Rule to disallow certain user types from creating Credit Memos > \$1,000
- Smart Rule to disallow users from manually creating Journal entries to the sub-ledger journals



The Possibilities – Smart Rules

- Require customers to be created at the top-level:

Type	Error
*Events	<div>Delete Set</div> <div>Add</div>
*Condition	<pre>((!CUSTOMER.MEGAENTITYID!) == "")</pre>
*Message	Customers must be created at the top-level. To restrict a customer to one or more entities, use the "Restrictions" tab on the customer record.



The Possibilities – Smart Rules - Demo

- **Use case:** Client wants to disallow users from manually creating journal entries into the APJ and ARJ journal.



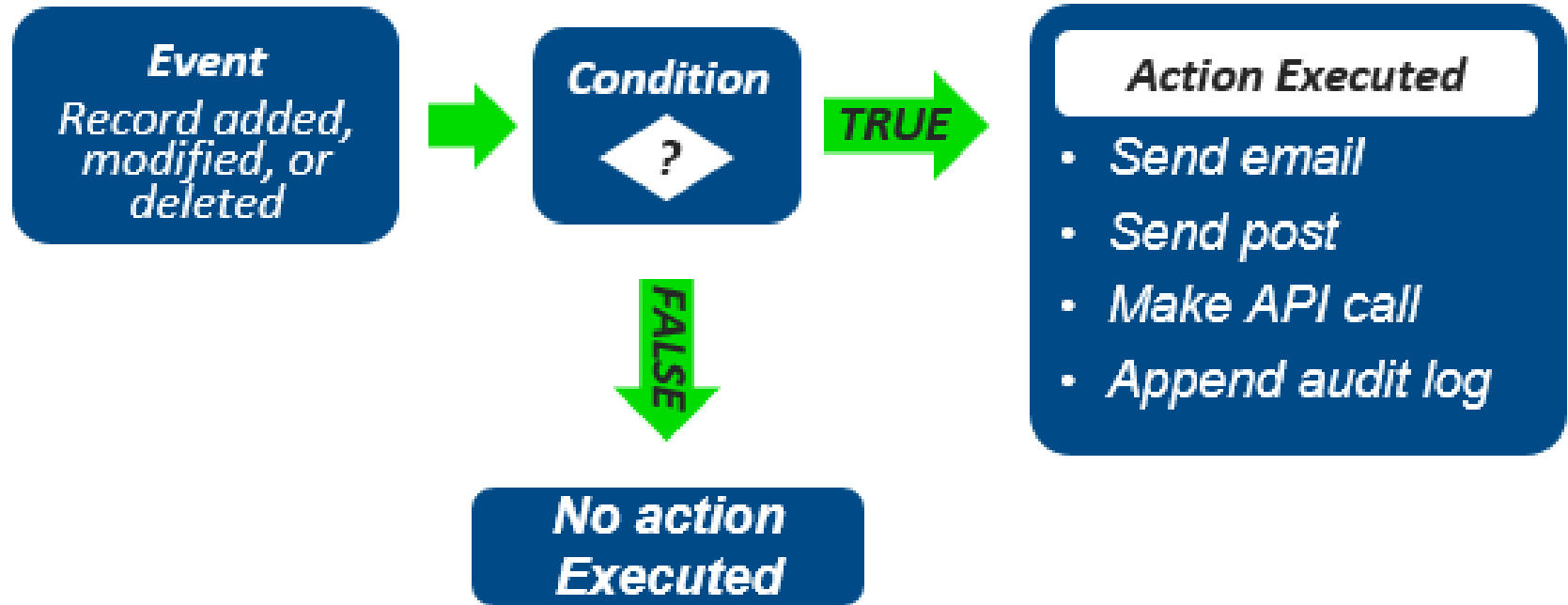


Process of Smart Events

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Smart Event Process



What are the parts of a Smart Event?

Object

- Which object the smart event should apply to. (Vendor, Customer, Purchasing Transaction, etc.)

Event

- Action within the system which initiates/kicks off the sequence.

Condition

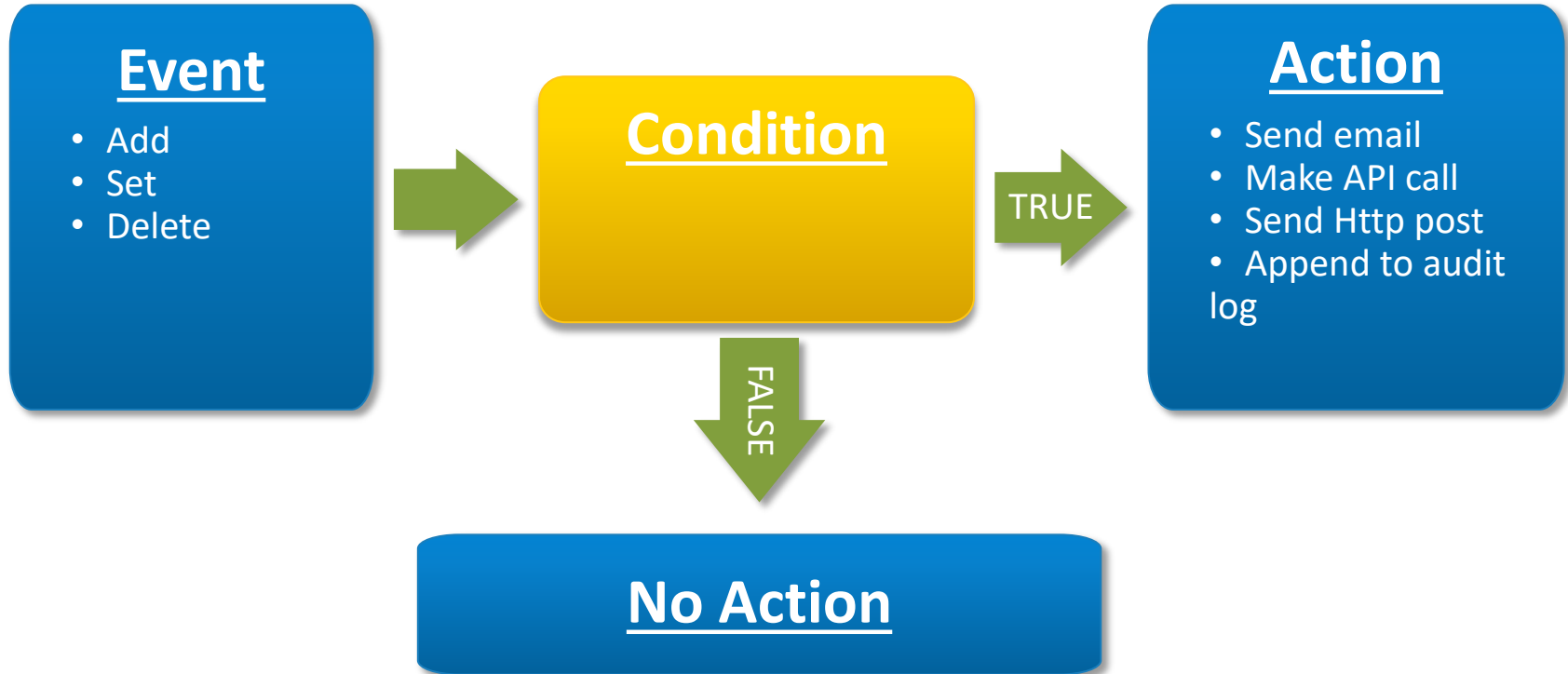
- True/False logic to determine if an action should be executed.

Action

- The action to execute when the condition is true.



What are the parts of a Smart Event?...cont.



Event Trigger



Action

Email

- Send an email to one or more people.

API

- Make an API call on this instance of Intacct
- Used to invoke an operation in Intacct in response to an event.

Http Post

- Send an HTTP request to a URL
- Used to program an action that affects an external system
- Often used for integrations

Audit Log

- Add a record to the audit log.



The Possibilities with Smart Events

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The Possibilities – Smart Events

Problem

- Email: Accounts Payable clerk never knows when Vendor Invoice is created in Purchasing
- API Call: Auto-pay AR invoice
- HTTP: External Script for advanced processing
- Audit Log: Determine who did what and when

Solution

- Email sent to accounts payable clerk when new transaction is posted from Purchasing
- AR Invoice needs to get paid immediately upon invoice creation
- Partially convert document based on specific business logic
- Know who deleted an AR Invoice or Journal Entry



The Possibilities – Smart Events - Demo

- **Use case:** Client wants AP clerk notified when Vendor invoice is posted in Purchasing





Limitations

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Smart Rules – Limitations

- Cannot “Look Back” at Previous field values
- Cannot loop over record sets
- Cannot access related lists
- Cannot auto-populate data
- Cannot create Smart Rules on objects that are not listed



Smart Events – Limitations

- Cannot “Look Back” at Previous field values
- Cannot loop over record sets
- Cannot use methods in API events
- Cannot be executed in a specific sequence
- Cannot create smart events on objects not listed
- Cannot auto convert Order Entry or Purchasing transactions
- Cannot evaluate related lists





Intacct Resources

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Sage Intacct Account Groups: Rule of Ranges and Smart Event Email

April 4, 2019 | by Kathy Jastrzebski

Learn two handy tips to ensure accurate financial reporting in Sage Intacct. First, the “Rule of Ranges” in regards to Account Groups for Financial Reports and second, Smart Event Emails to notify your financial report guru when a new account is added.

Read More



Thank you!



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