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Sage Intacct: The possibilities with Smart Rules and Smart Events

October 31st, 2023



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Learning Objectives

At the end of the session, you will be able to:

Define

Define what Smart Rules and Smart Events are

Recognize

Recognize the difference between Smart Rules and Smart Events

Review

Review use case scenarios where smart rules and smart events have automated processes





Define what Smart Rules and Smart Events are

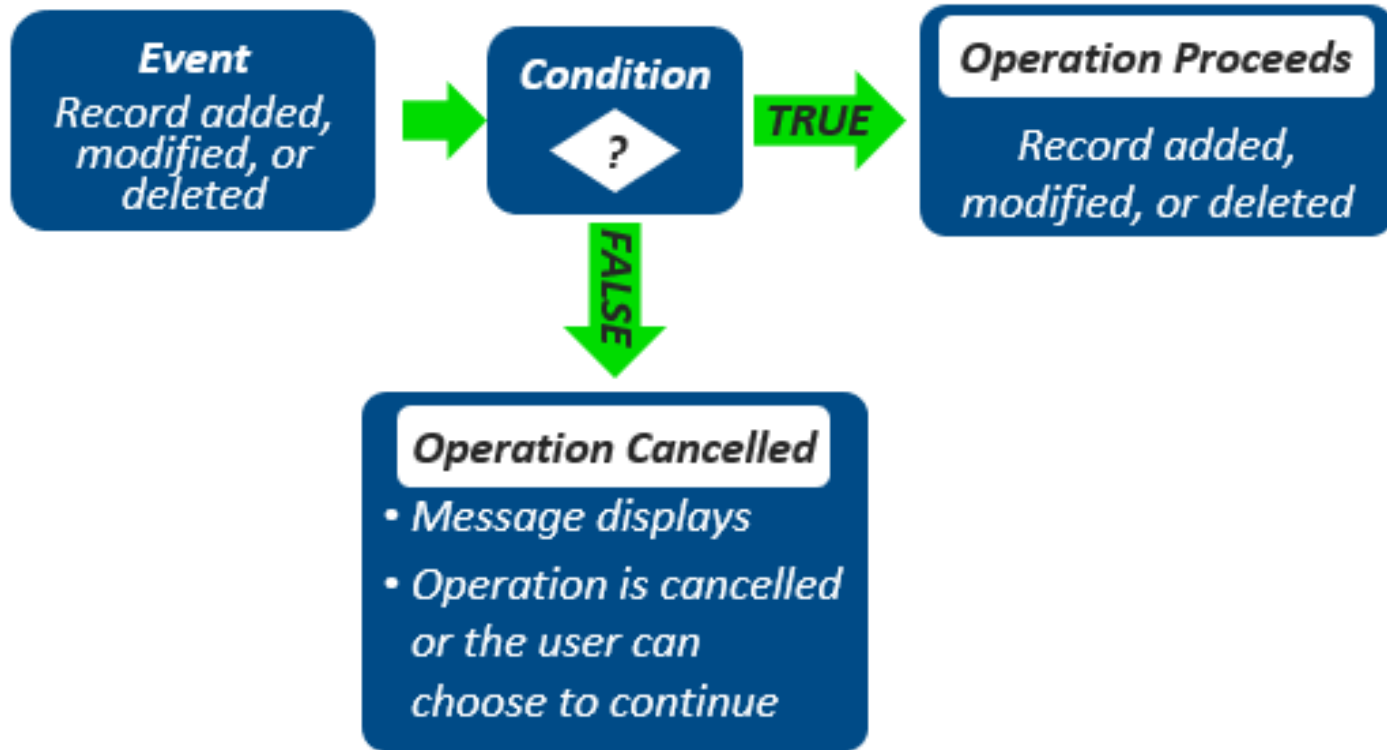


What is a Smart Rule?

- 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 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.

****Note**** You can choose any or all these options

Add

- Rule is checked when a new record is created

Set

- Rule is checked anytime an existing record is changed

Delete

- Rule is checked when an existing record is deleted

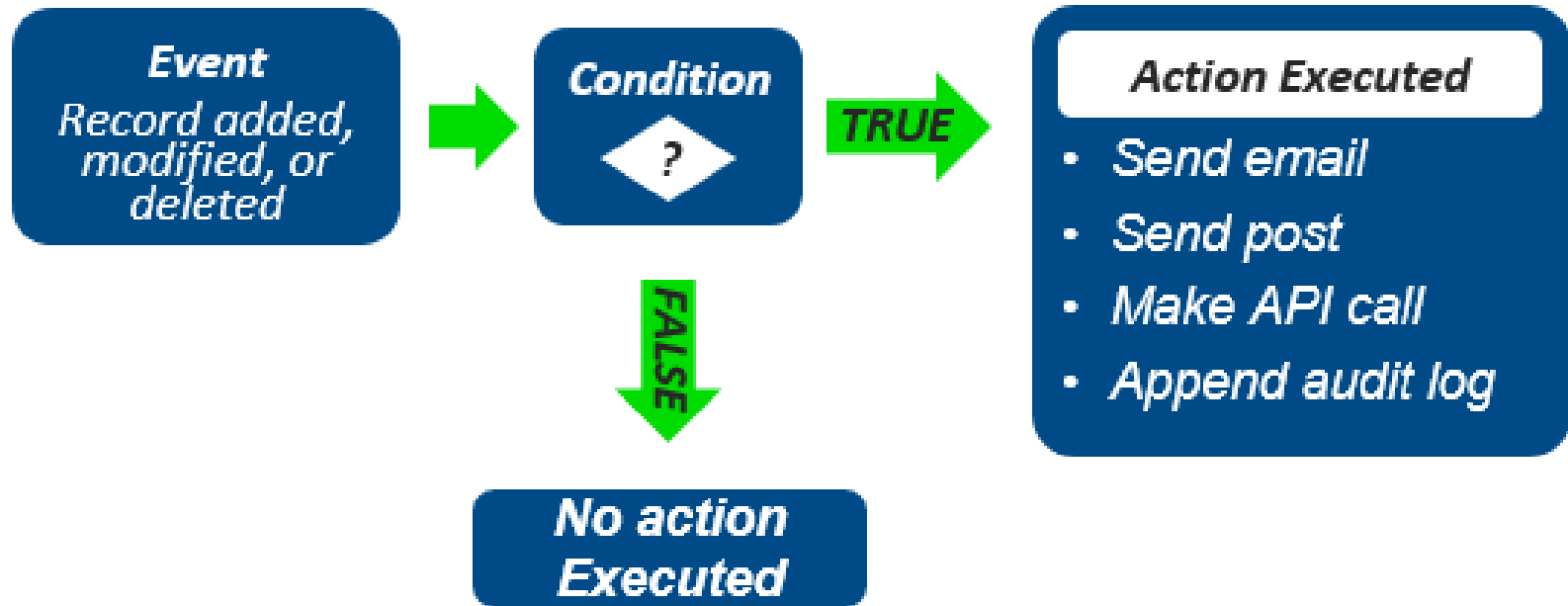


What is a Smart Event?

- 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



Smart Event Process



Parts of a Smart Event

Event

Determines when the rule is checked

Condition

The logic to determine if the action is executed

- *True, the action is executed*
- *False, the action is not executed*

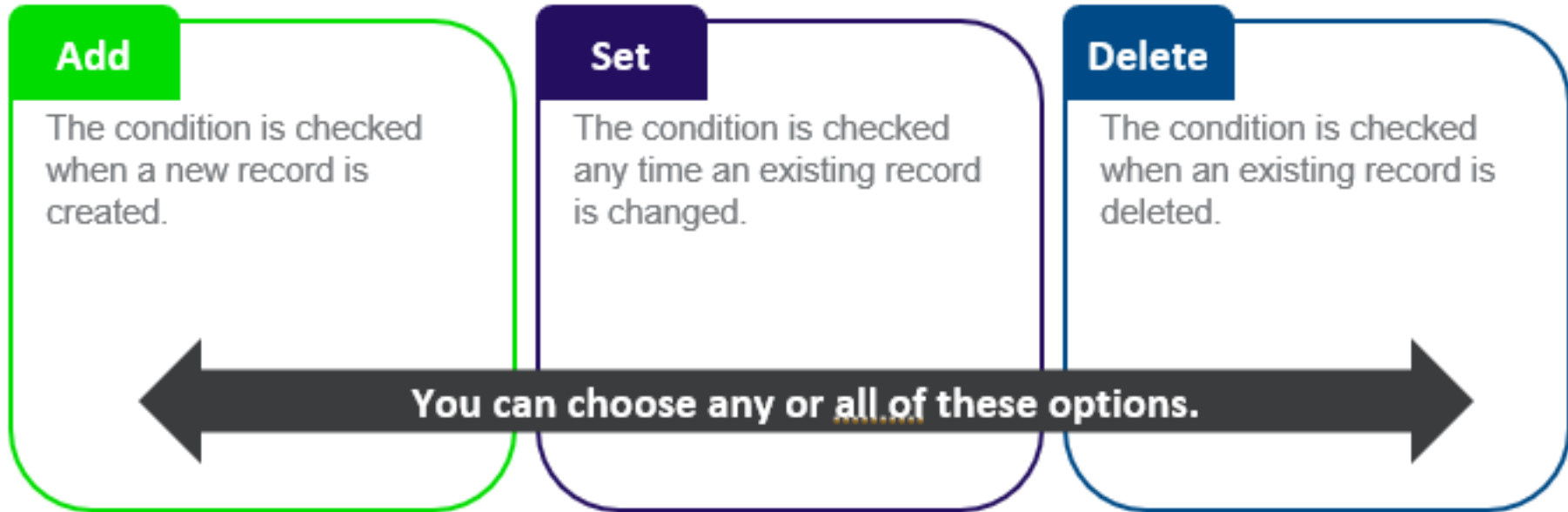
Action

The action to execute when the condition is true



Event Trigger

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



Action

Email

- Send an email to one or more people

API Call

- 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





Understanding the difference between Smart Rules and Smart Events



Limitations on Smart Rules

- Cannot “Look Back” at previous field values
- Cannot loop over record sets or related lists



Limitations of Smart Events

- 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





Review use cases for Smart Events and Smart Rules



Problem/Solution – Smart Rule

Problem

1. Require specific location on line item
2. Do not allow Credit Memo to be created > 1K
3. Ensure timesheet entry is not less than .25 hour increments

Solution

- ✓ 1. Smart Rule to enforce specific location is used
- ✓ 2. Smart Rule to disallow certain user types from creating Credit Memos > 1K
- ✓ 3. Smart Rule to disallow entry of time in increments other than .25 hours



Example – Smart Rule

- 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.



Smart Rule Use Cases..

- **Use Case:** Client wants to disallow 4 or 5 specific users from manually creating journal entries into the AR and AP journals
- **Use Case:** Client wants to ensure all Customers created in Intacct with an established term
- **Use Case:** Client wants to restrict users from posting to certain GL account



Problem/Solution – Smart Events

Problem

1. Email: Customer address is updated
2. API Call: auto-pay AR invoice
3. HTTP: External script for advanced processing
4. Audit Log: Determine who did what and when

Solution

- ✓ Email sent to account owners of updated records
- ✓ 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



Smart Event Use Cases..

- **Use Case:** Client wants Controller notified with a new user is added to Sage Intacct
- **Use Case:** Client wants to copy the Project ID into the Reference field on their AR Invoice
- **Use Case:** Client has a third-party AP integration that does not pull project defaults and wants to populate the billable checkbox on creation of an AP bill



DEMO



Resources

- Sage University Training & Release Notes
- Intacct Customer Office Hours
- View and Subscribe to the CLA Intacct Blog

<https://blogs.claconnect.com/intacct/>

- Continue to join our monthly Sage Intacct Webinars

[2023 Sage Intacct Webinar Series : 2023 Events : CLA \(CliftonLarsonAllen\) \(claconnect.com\)](https://blogs.claconnect.com/intacct/)



Customized Data Validation with Smart Rules

April 20, 2021 | by Ashley Klapperick

Did you know that the new 'Disallow Direct Posting' checkbox on GL Accounts is only designed to eliminate direct posting in the General Ledger application? This is great, however, when coding AR invoices and AP bills the GL account lists don't filter to just your revenue and expense accounts, leading to accidental data entry errors. Today we'll look at a simple smart rule, custom system data validation, you can set up to prevent these mistakes. Then join us for our complimentary webinar on April 27th covering smart rules and smart events.

[Read More](#)



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