Working Smarter with Smart Rules, Events, and Platform Tools

September 22, 2020

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Create Opportunities

Session Objectives

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

- Identify the possibilities of smart rules and events.
- Identify how to build your own smart rules and events.
- Recognize the potential of Platform Applications.

Smart Rules

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Create Opportunities

Imagine the Following Scenario

- You have several projects setup in Intacct
- Project can be for a specific time period
- You don't want to inactivate Projects as you want them to appear on your drop-down lists
- You're running into issues with AP bills continuing to be tagged to projects that are outside of the defined start/end dates and this is causing issues reconciling the billing each month

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.
- Custom data validation rules can be added to most standard objects
- Used to validate data before it enters the system

Smart Rule Logic

Event

Record added, modified, or deleted

Condition

?

TRUE

Operation Proceeds

Record added, modified, or deleted

FALSE

Operation Cancelled

- Message displays
- Operation is cancelled or the user can choose to continue

Components of a Smart Rule

Object	• Which object the smart rule should apply to. (Vendor, Customer, Invoice, etc.)
Event Type	• Error or Warning
Event Triggers	• Trigger - when the smart rule should be initiated/fired. (Add, set, delete)
Condition	• A logic expression that evaluates to true if the data passes validation, false if the data fails validation.
Message	• The message text to display to the user if the validation fails.

Solution: Disallowing Project Expense Outside of Project Dates

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Solution Overview

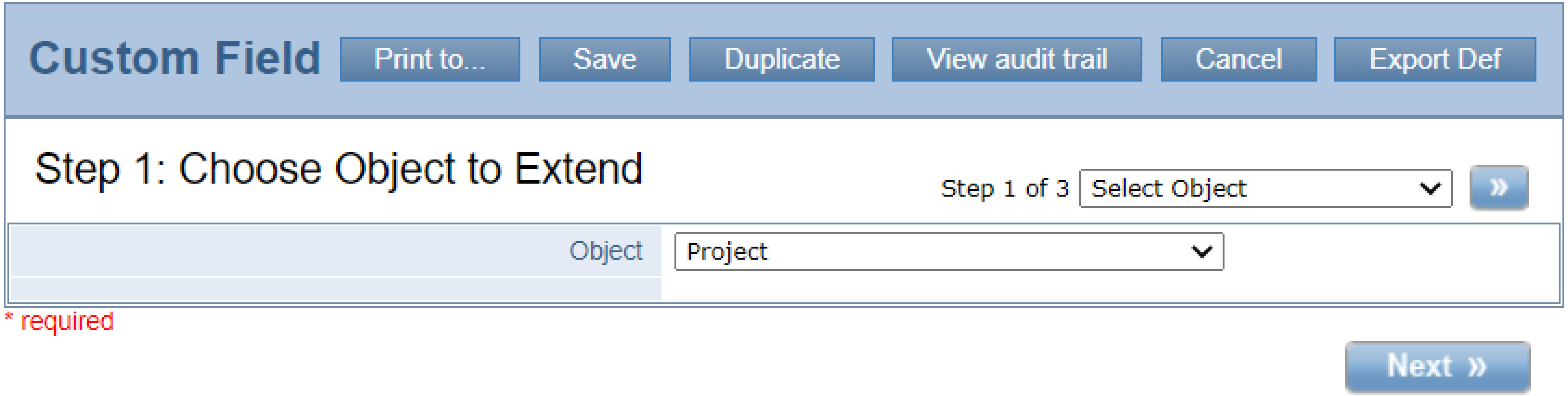
Custom Field

- Create a custom field to note projects that require expenses within their begin/ends dates.
- Update Project records that meet this requirement.

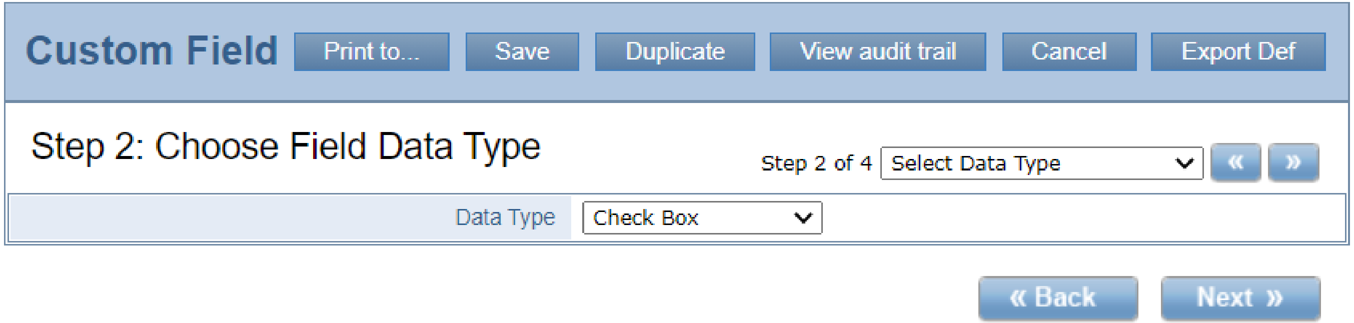
Smart Rule (Error)

- Prevent users from tagging those specific projects outside their begin/end dates

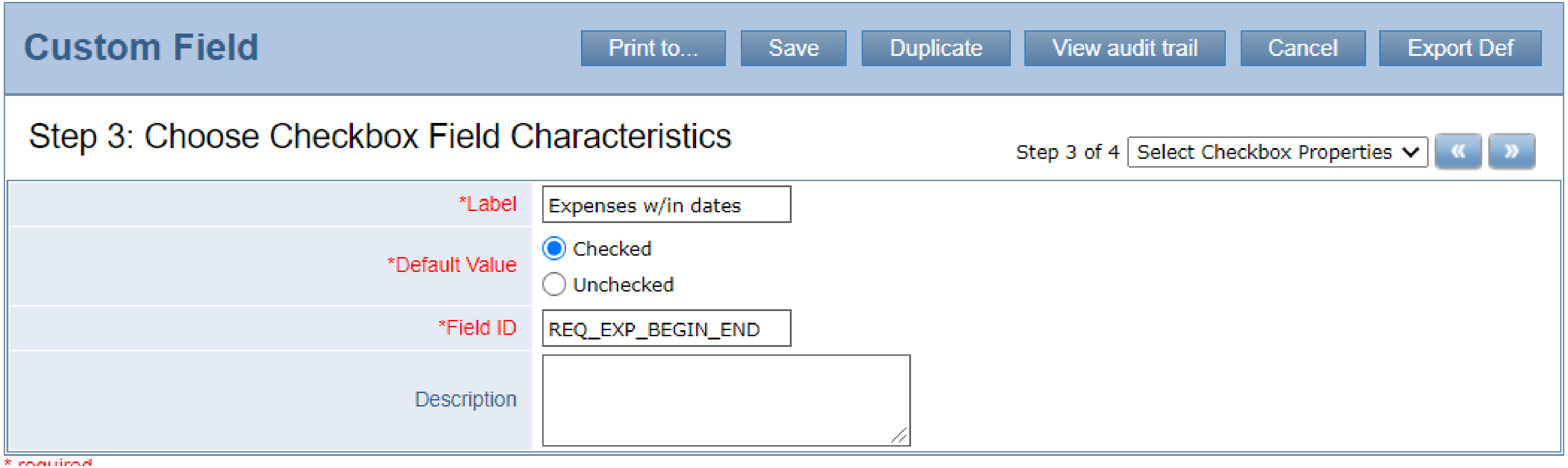
Custom Field – Step 1



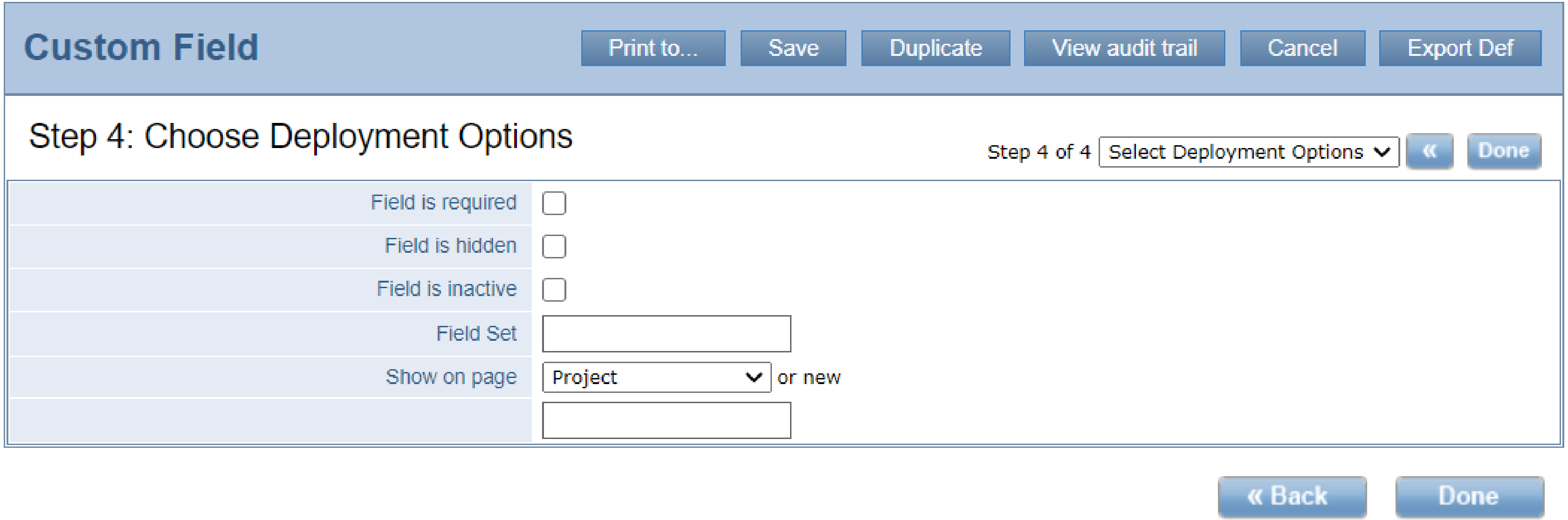
Custom Field – Step 2



Custom Field – Step 3



Custom Field – Step 4



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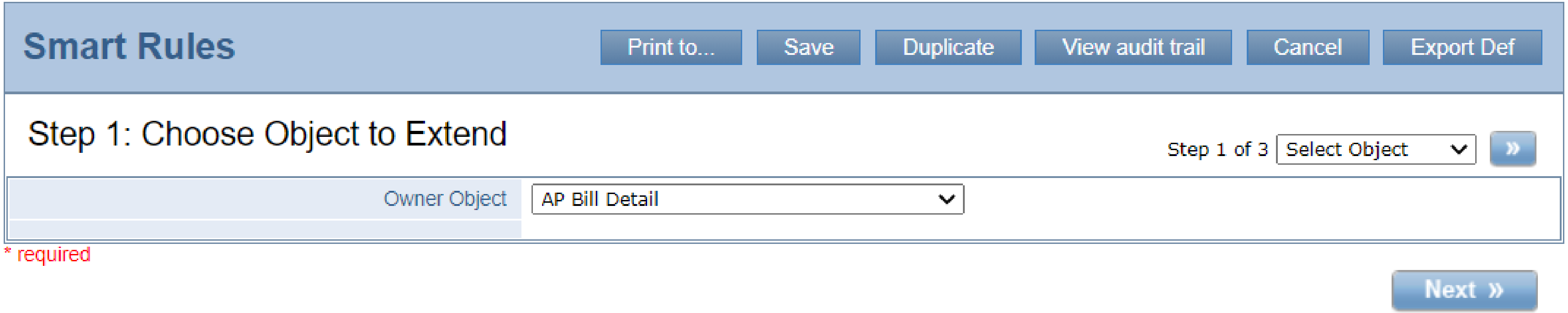
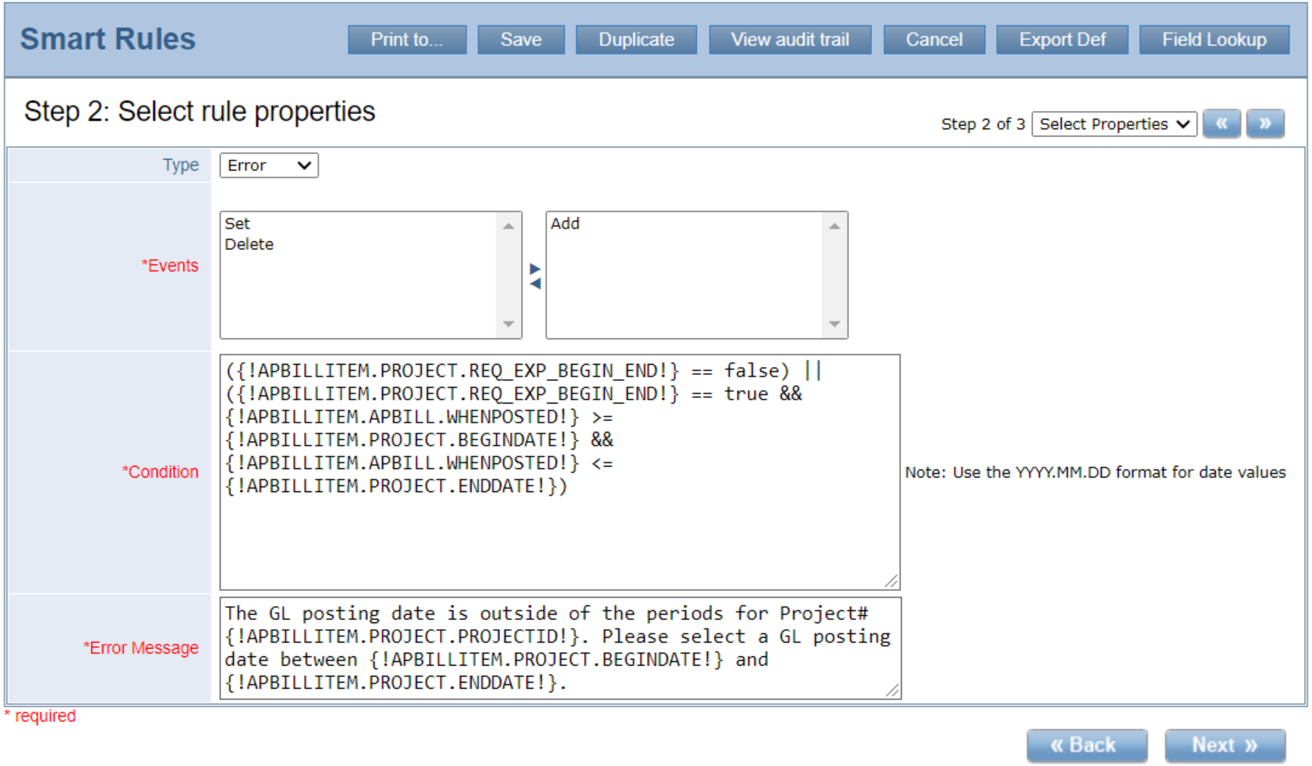
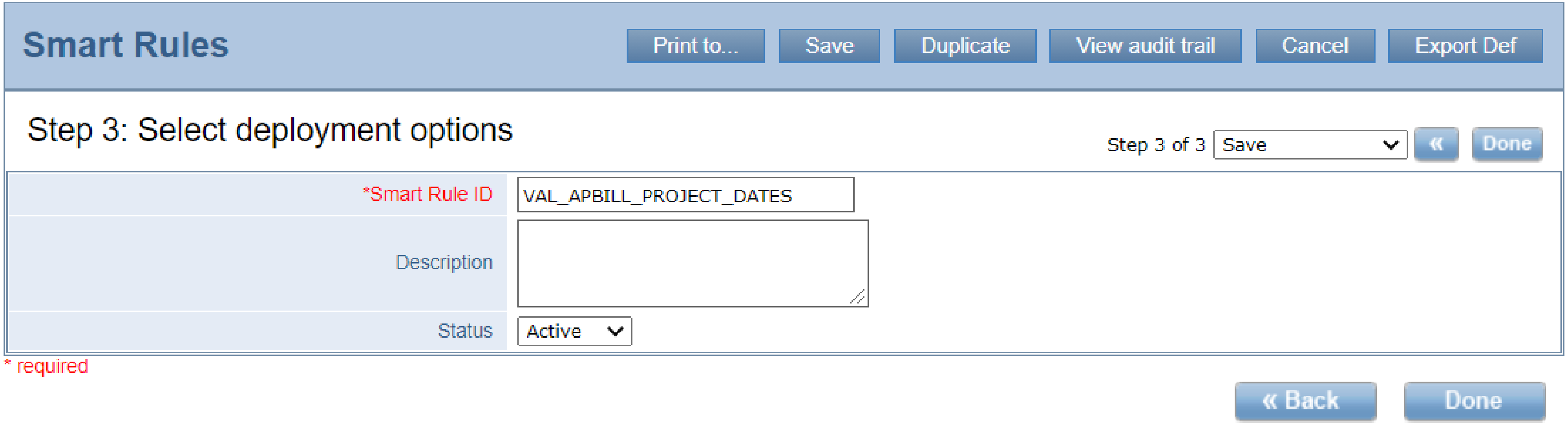


Smart Rule – Step 2



Smart Rule – Step 3



Smart Rule Possibilities

Problem	Solution
1. GL Accounts are added but a category was not populated.	1. A smart rule can prevent the user from adding the new GL Account if the category field is missing.
2. In a multi-entity shared environment, prevent certain transactions from being tagged to the Entity ID rather than Location ID.	2. A smart rule can restrict posting transactions to the Entity ID and only allow tagging transactions to the Location.
3. Disallow Credit Memos to be created greater than $x.	3. A smart rule can disallow all or certain users from creating Credit Memos greater than $x.
4. Require that Customers and/or Vendors are created at the top level.	4. A smart rule that validates that the “MEGAENTITYID” is blank.

Smart Rule Demonstration

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Smart Events

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Create Opportunities

Imagine the Following Scenario

- Purchase Request > PO > Vendor Invoice
- Shipping and handling costs??? Small price variances?
- Allow for changes in dollar amounts upon conversion.
- Limit the amount changed and send an email when over a certain threshold.

Smart Events – The Basics

- A Smart Event is similar to a Smart Rule but instead of resulting in a warning or error it results in an action when a given event occurs and certain conditions are met.

Components 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.

Smart Event Process

Event
- Add
- Set
- Delete

Condition

?

TRUE

Action
- Send email
- Make API call
- Send Http post
- Append to audit log

FALSE

No Action

Smart Event Triggers

Add

When a new record is created.

Set

When an existing record is modified.

Delete

When an existing record is deleted.

Smart events can be triggered by user interface, API, or CSV upload.

Smart Event Actions

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.

Purchasing Scenario Solution

Solution Overview

Custom Field

- Create a hidden custom field to enable change comparison.

Smart Event (API)

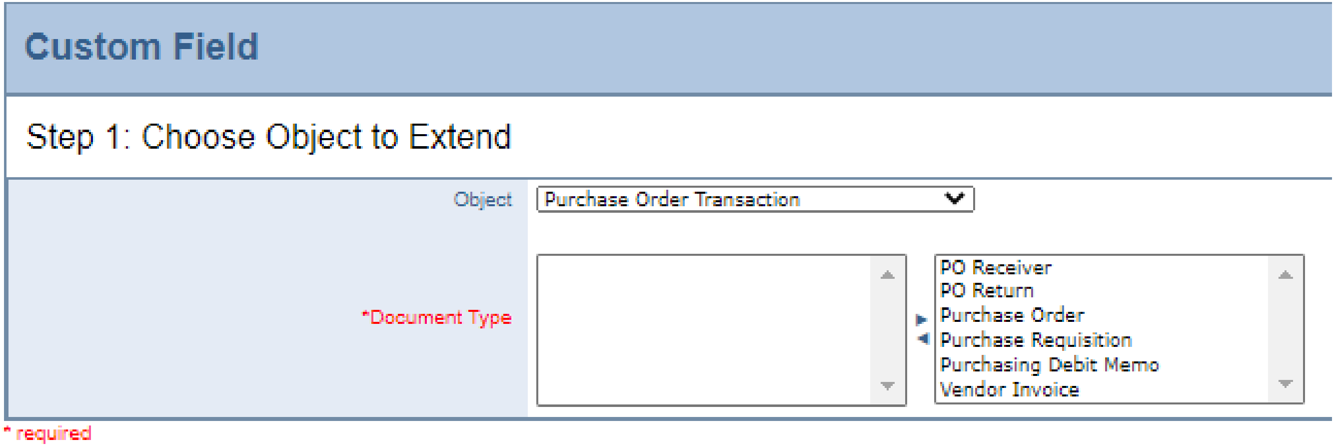
- Auto populate the custom field.

Smart Event (Email)

- Email price changes – amount or percentage.

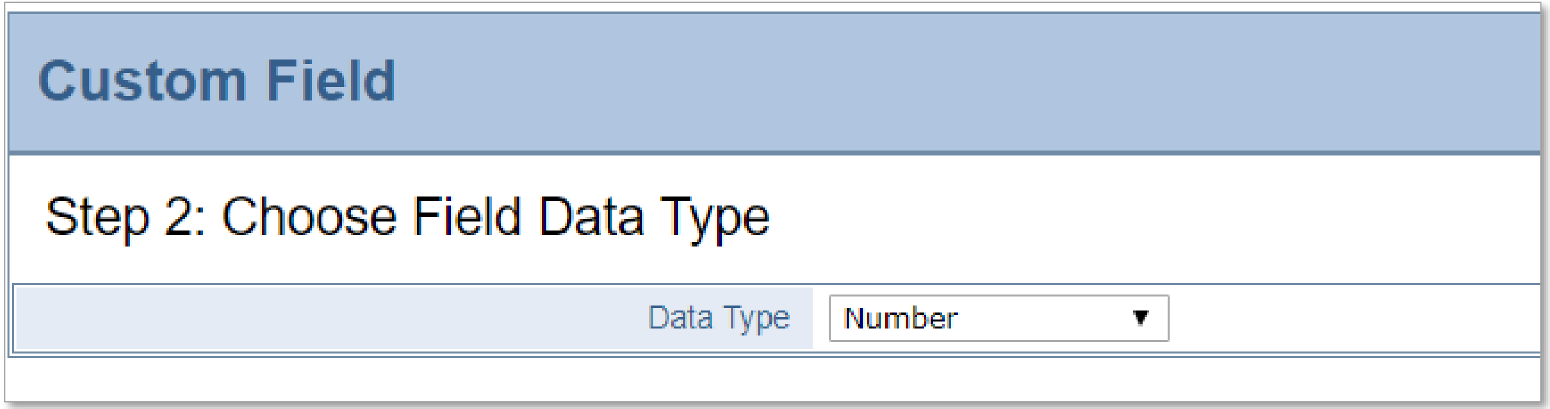
Custom Field – Step 1

- Purchase Order Transaction
- All available documents



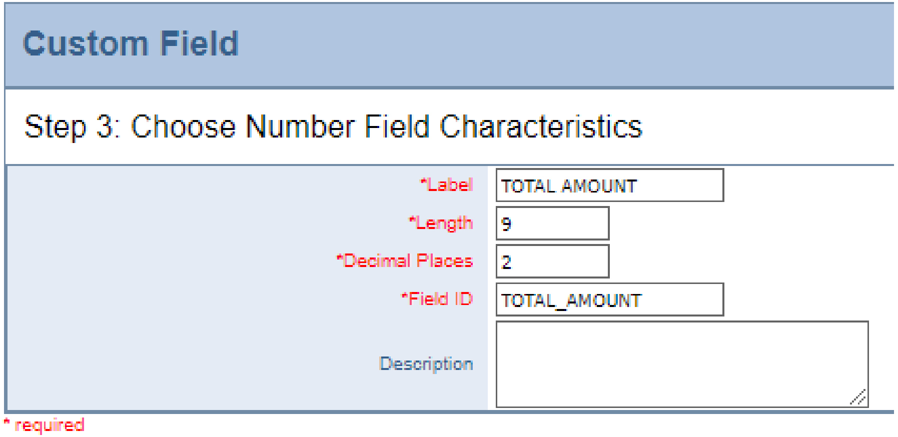
Custom Field – Step 2

- Numerical Data Element



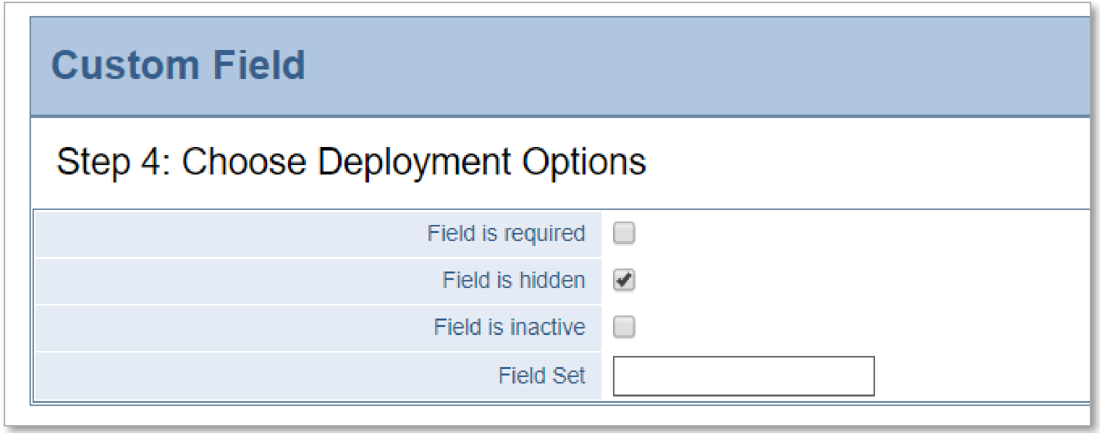
Custom Field - Step 3

- Label for what this is for (won’t be visible)
- Desired length and decimals
- ID to refer to in the smart event



Custom Field – Step 4

- Mark as hidden
- No user will be able to see or change data
- Used for comparisons only



Solution Overview

Custom Field

- Create a hidden custom field to enable change comparison.

Smart Event (API)

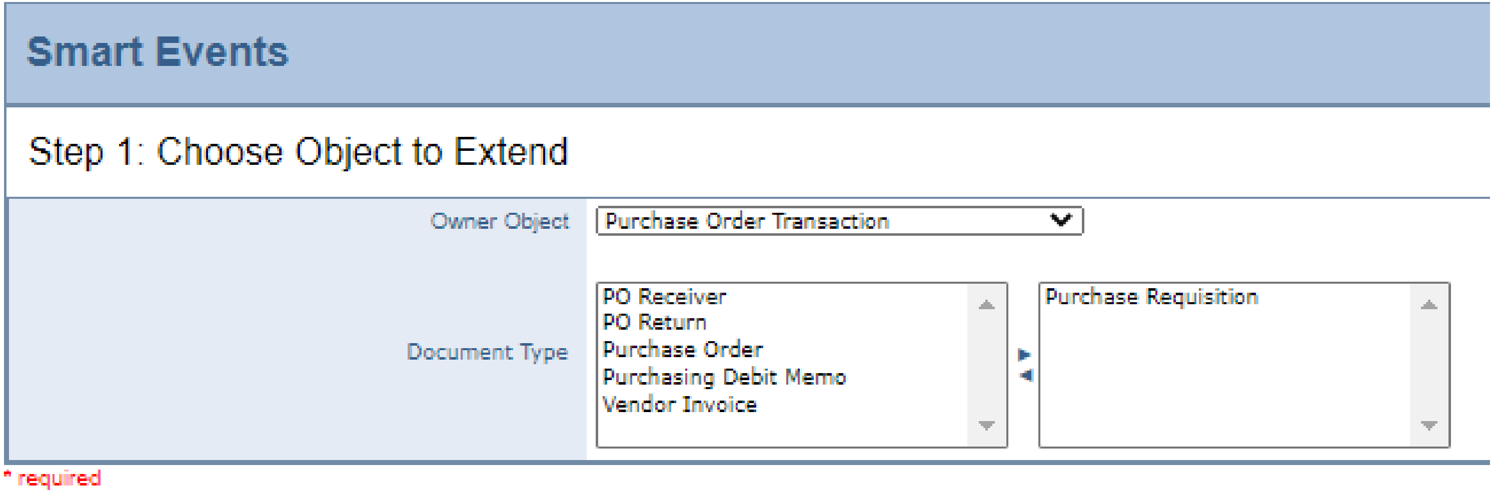
- Auto populate the custom field.

Smart Event (Email)

- Email price changes – amount or percentage.

Smart Event (API) – Step 1

- Purchase Order Transaction
- Placed on initial requisition



Smart Event (API) – Step 2

- API
- Add and set
- Condition – do not fire during conversion

Smart Events

Step 2: Select event properties

Action	**api**
Events	**Add** **Set**
Condition	**{!PODOCUMENT.STATE!}!="Converted"**

Smart Event (API) – Step 3

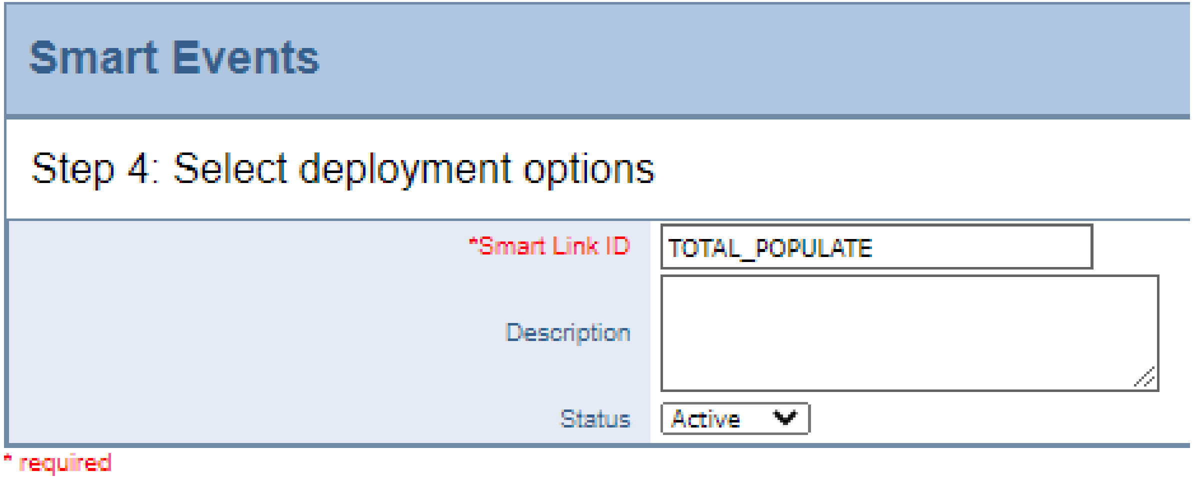
Smart Events

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

API Body	<update> <PODOCUMENT> <docparid>Purchase Requisition</docparid> <RECORDNO>{!PODOCUMENT.RECORDNO!}</RECORDNO> <TOTAL_AMOUNT>{!PODOCUMENT.TRX_TOTAL!}</TOTAL_AMOUNT> </PODOCUMENT> </update>
Synchronous Smart Event	false

Smart Event (API) – Step 4

- Name of event



Solution Overview

Custom Field

- Create a hidden custom field to enable change comparison.

Smart Event (API)

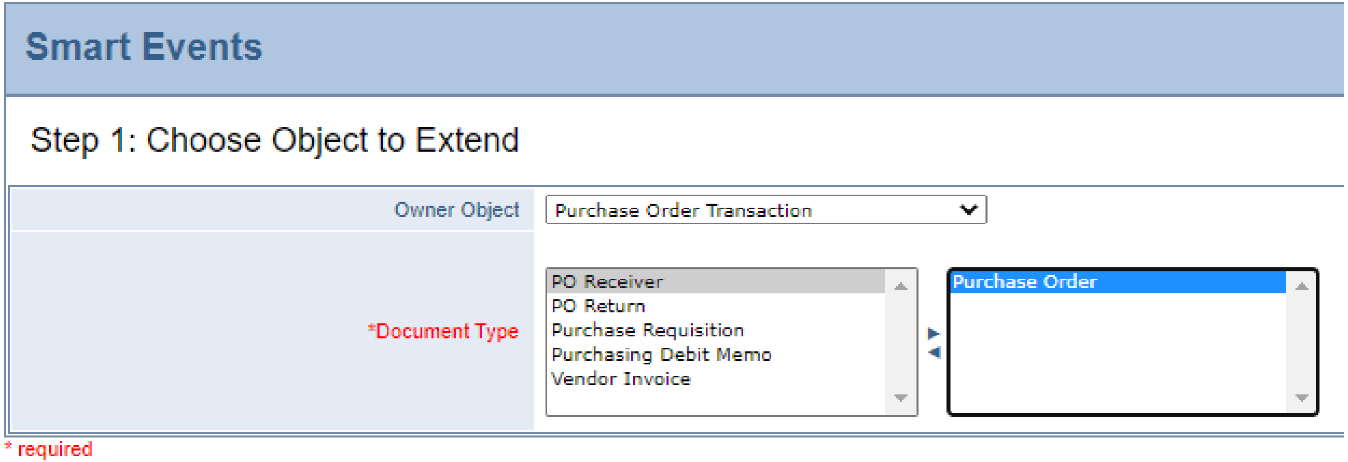
- Auto populate the custom field.

Smart Event (Email)

- Email price changes – amount or percentage.

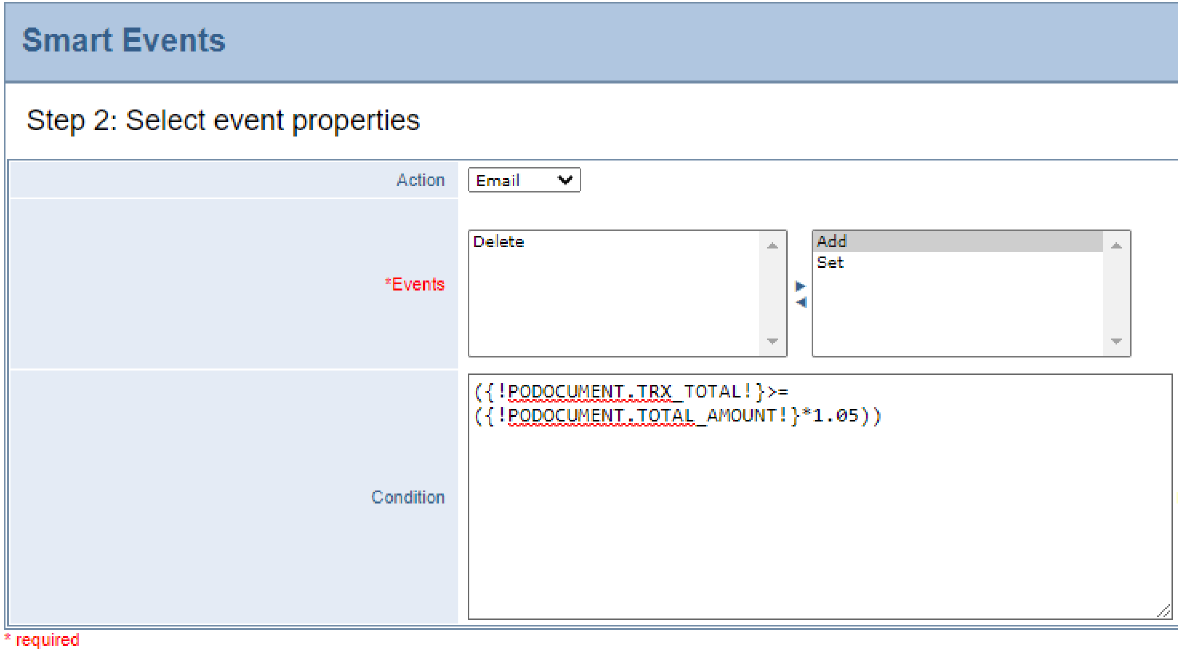
Smart Event Email – Step 1

- Place on Purchase Order Transaction
- Add to desired documents



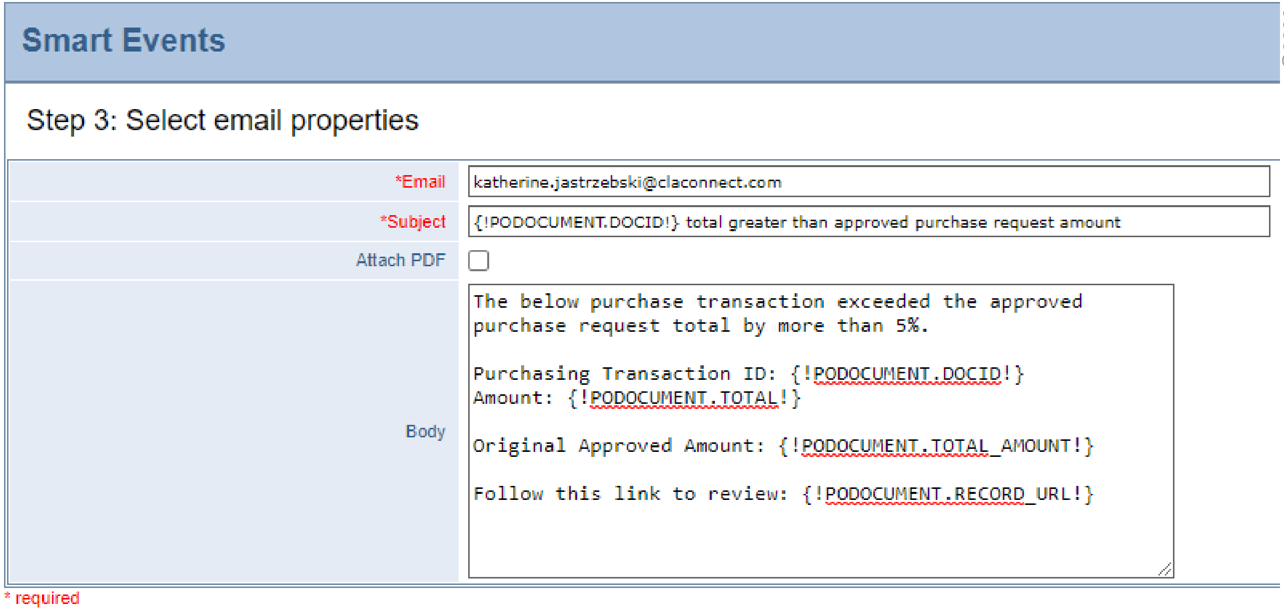
Smart Event Email – Step 2

- Email
- Add and Set
- Condition when to fire
  - New price exceeds 5% change



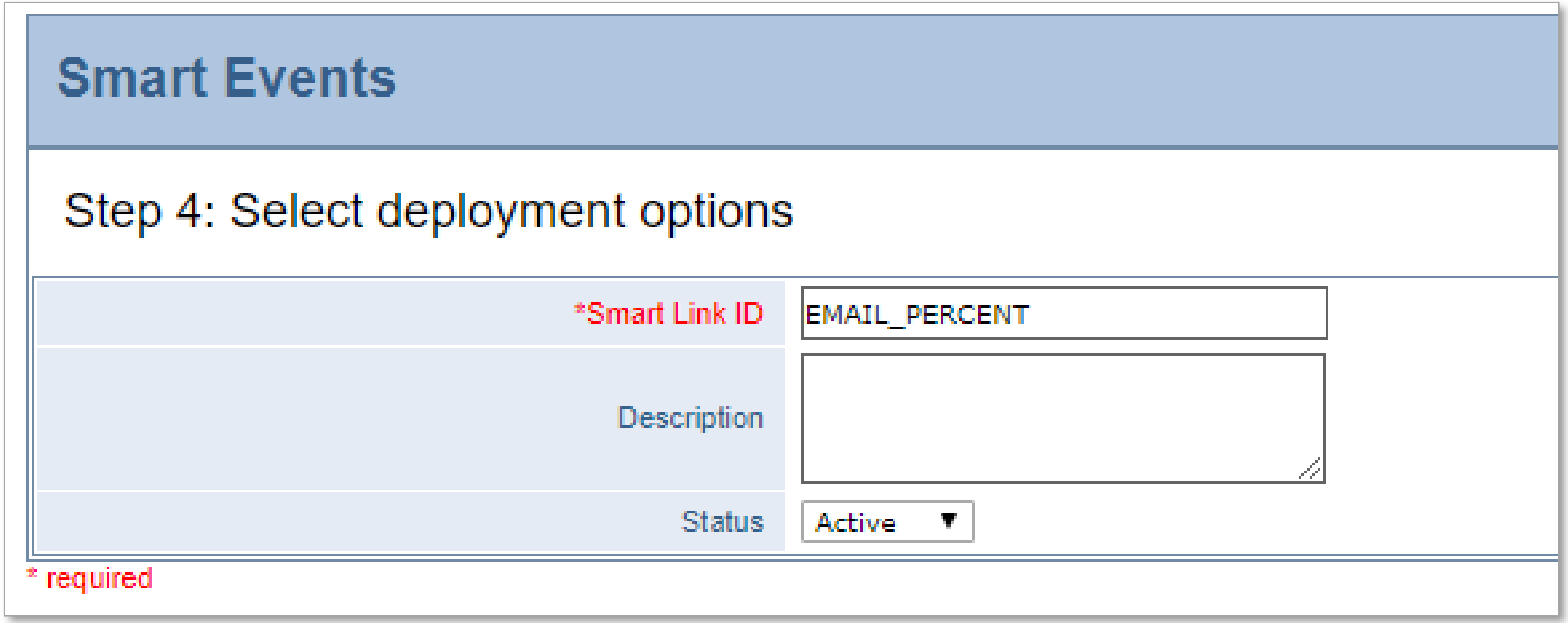
Smart Event Email – Step 3

- To
- Subject
- Customize body of message



Smart Event Email – Step 4

- Name of event



Smart Event Demonstration

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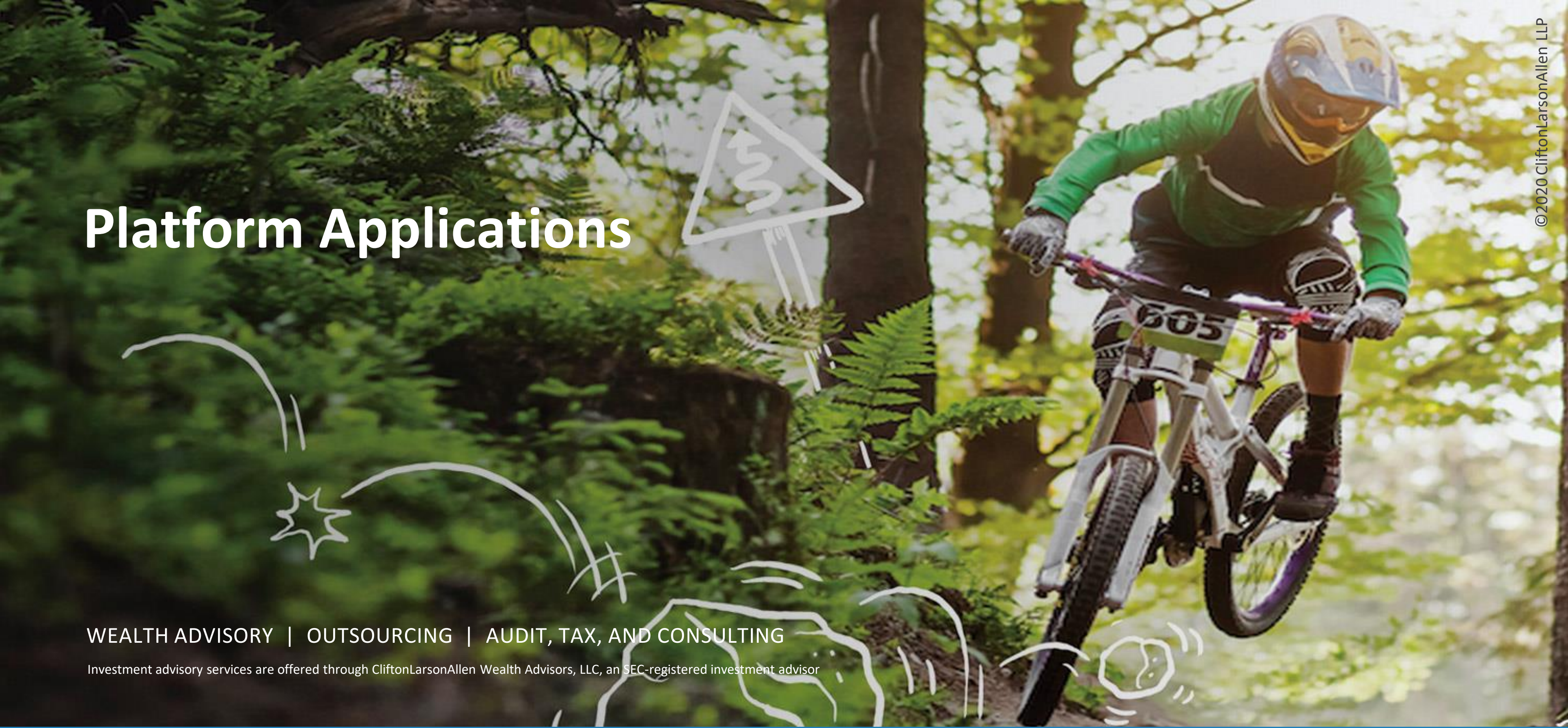
Smart Event Possibilities

Problem	Solution
1. GL Accounts are added but forgotten in reports until month end.	1. A smart event email to notify the financial report admin whenever a new account is added so they can add it to account groups.
2. Printing a field on an invoice that is not entered on the invoice for example a sales rep, VAT ID, or other field.	2. A smart event API call which updates the invoice transaction with the sales rep or VAT ID set on the customer.
3. Would like to sync paid order entry invoices to Intacct from an ecommerce site but don't want to have to then manually record payments.	3. A smart event API call which creates an AR payment automatically whenever this type of OE transaction definition is recorded in Intacct.



Platform Applications

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Create Opportunities

Platform Apps – The Basics

- An application is a wrapper around a group of custom objects, standard objects, and menus that work together as a solution. An application can be published (as an XML file) and installed in target companies.

Problems Solved with Platform Apps

Custom Workflows	• Would like approvals/workflow around vendor setup.
Eliminate Spreadsheets	• Would like a store manager (employee user) to be able to enter checks received each day. Then have accounting review and post.
Eliminate Potential for User Error	• Would like to import external system file and have Intacct map the external string to Intacct's COA and dimensions, then review for posting.

Resources

- Smart Rules and Events Cheat Sheet:

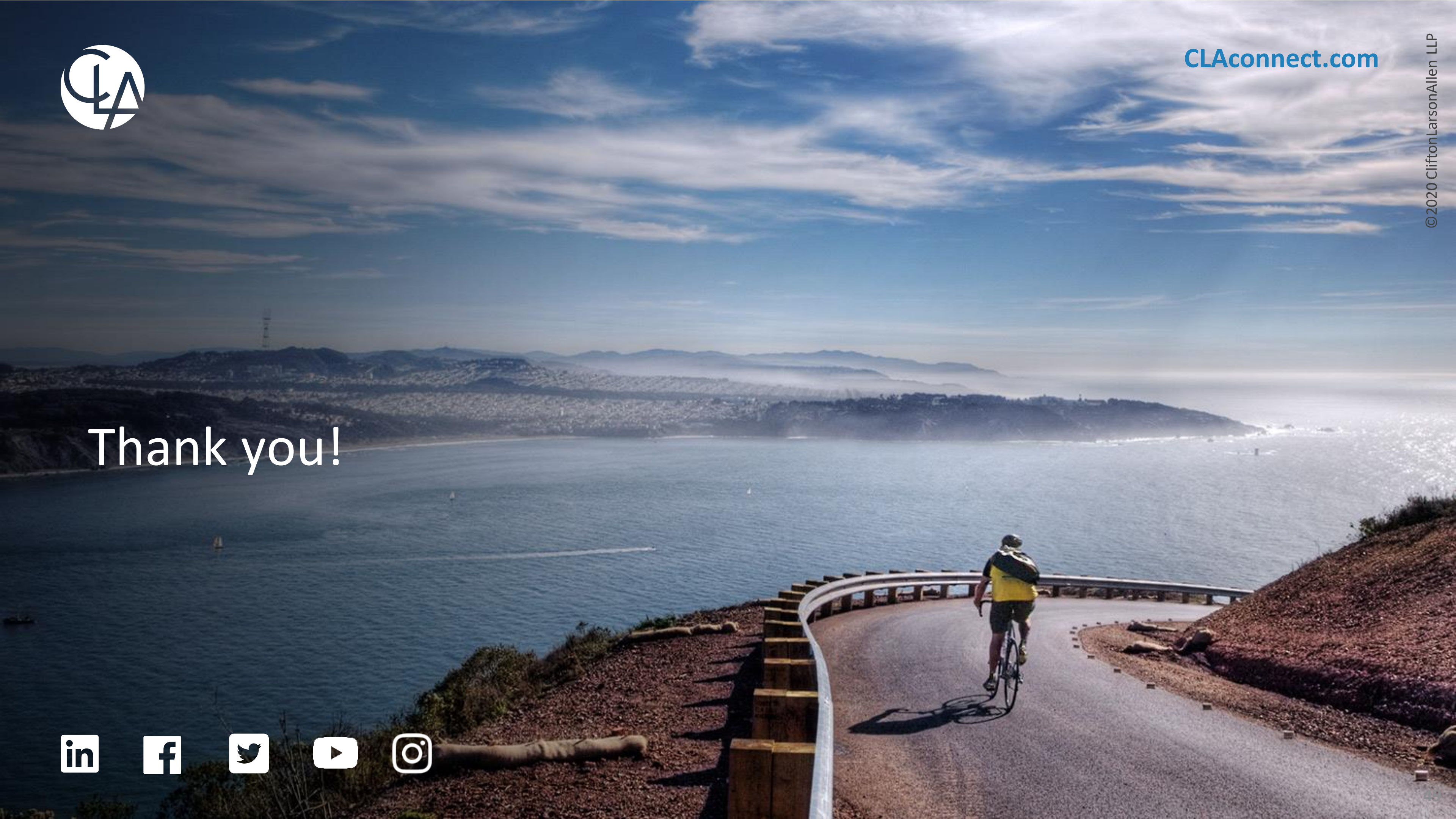
https://developer.intacct.com/downloads/customization-services/customization-services-cheatsheet.pdf

- Developer Site:

https://developer.intacct.com/

- Intacct Help:

https://www.intacct.com/ia/docs/en_US/help_action/More/Customization_and_Platform_Services/aa-TOC-customization-and-platform-services.htm?cshid=TOC_customization_and_platform_services



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Thank you!