



Sage Intacct Training Program

CPE Credits: 4.8

Session 1 – 60 minutes – Program Level: Basic

- Installation/configuration
- Velixo Ribbon
- Arrays and Excel 365
- Financial reporting techniques
- Hide Zero Rows & Auto-Hide
- Drilldown feature
- Snapshot feature

After completing this course, you will be able to:

Install Velixo within Excel, configure a data connection to your ERP, insert Velixo functions into your Excel workbook, use Velixo functions to create basic financial reports.

Prerequisite: none

Advanced prep: Register on Velixo Academy

Session 2 – 60 minutes- Program Level: Intermediate

- Introduction to Distribution Lists
- Introduction to Sage Intacct Objects
- Using Sage Intacct Dimensions
- Distribution Lists

After completing this course, you will be able to:

Retrieve financial and non-financial data from Sage Intacct Objects, apply Sage Intacct dimensions to your retrieved data, and create an automated method for distributing reports to others.

Prerequisite: Session 1

Advanced prep: None

Session 3 – 60 minutes – Program Level: Advanced

- Using multiple Sage Intacct Dimensions
- Aggregation with Objects
- Introduction to Writeback features
- More uses for Distribution Lists

After completing this course, you will be able to:

Apply multiple dimensions to your retrieved data, apply aggregation functions (SUM, MAX, COUNT) to your retrieved object data, create and send budget and journal transaction data to Sage Intacct, and distribute reports through personalized emails.

Prerequisite: Session 2

Advanced prep: None

Session 4 – 60 minutes – Program Level: Advanced

- Advanced report writing techniques
 - Balance sheets (detailed and summary)
 - Project reporting techniques

After completing this course, you will be able to:

Use a combination of Velixo and Excel functionality to create financial and project reports which adjust automatically to changes in structures within Sage Intacct.

Prerequisite: Session 3

Advanced prep: None



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National Registry Statement

Velixo is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Registration Instructions

All courses are accessed through Velixo Academy (learning.velixo.com). Once an organization has subscribed to any particular course through their Customer Success Manager (customersuccess@velixo.com), that course becomes available to the individuals who are registered on Velixo Academy using their Microsoft Account credentials associated with that organization's email domain.

Students simply need to follow the course link on their Velixo Academy home page to register for the desired session of each level of the training program. Registrants will receive a confirmation email with additional information, including links for rescheduling and cancelling their registration.

Field of Study

The Sage Intacct Training Program is a course in **Computer Software and Applications**.

Program Delivery Method

The Sage Intacct Training Program is **Group Internet Based** – meaning it is delivered by your instructor using an online video conferencing platform accessible through Velixo Academy once an individual has registered for a specific session.



Refund Policy

The Velixo Training Programs are offered on a yearly subscription basis.

- **Refunds:** The fees paid by you for this training license are in consideration of the access granted to the training materials and services as outlined. Velixo does not offer refunds for training license fees. You acknowledge and agree that once payment for the training license is made to Velixo, you will not be entitled to a refund of any portion of those fees, except as otherwise provided herein.
- **Subscription Changes:** Requests to change your subscription type or term will be considered on a case-by-case basis and may be subject to different pricing or conditions.
- **Technical Issues:** In the event of significant technical issues directly attributable to Velixo that prevent access to the training programs for an extended period, Velixo will make reasonable efforts to provide alternative access or a pro-rated credit or refund, as determined on a fair and equitable basis.

Please note that this policy is subject to the terms and conditions agreed upon at the time of purchase.

Complaint Resolution Policy

At Velixo, we are committed to providing high-quality training programs. Should you experience any issue or have a concern regarding your Velixo Training Program, we encourage you to follow these steps:

1. **Initial Contact:** Please contact your Velixo Customer Success Manager as the first point of contact to discuss your issue. You can use their direct email address or customersuccess@velixo.com or via phone at 1-855-583-5496. Your Customer Success Manager will work to understand your concern and provide initial assistance.
2. **Escalation:** If your concern is not resolved to your satisfaction by the Customer Success Manager, you may escalate your complaint in writing to the Customer Success leadership team at customersuccess@velixo.com. Please provide a detailed description of your issue, relevant dates, and any supporting documentation.
3. **Review and Response:** Velixo will acknowledge receipt of your escalated complaint within five (5) business days and will undertake a reasonable review of the matter. We will aim to provide a substantive response and proposed resolution within fifteen (15) business days of receiving your escalated complaint.

Velixo is committed to addressing concerns fairly and in a timely manner.