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Leveraging Project and Resource Management with Sage Intacct PSA

October 28, 2025



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Session CPE Requirements

- You need to attend 50 minutes to receive the full 1 CPE credit.
- 4 Attendance Markers that read: “I’m Here,” will be launched during this session. You must respond to a minimum of 3 to receive the full 1 CPE credit.

****Both requirements must be met to receive CPE credit****



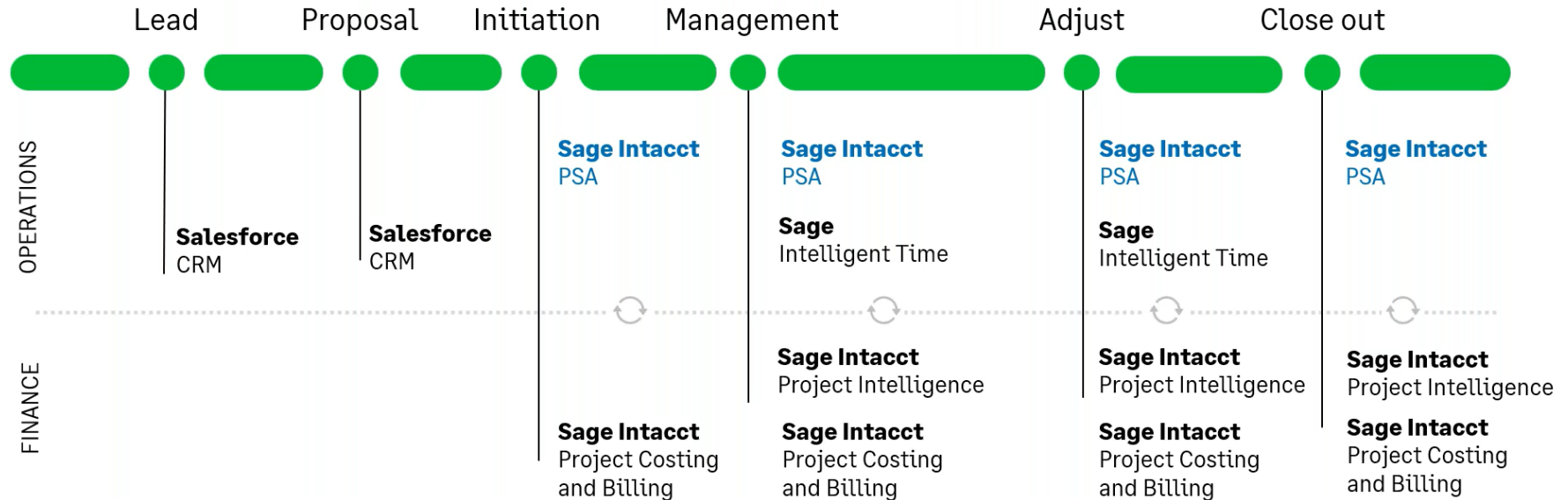
Learning Objectives

- *At the end of the session, you will be able to:*
 - *Identify the integration paths between Intacct and PSA*
 - *Review how to manage and allocate resources in PSA*
 - *Recall ways to streamline your processes with PSA*



Project Life Cycle: Our Solution Stack

How technology products fit into the overall workflow



Automation tools enable firms to scale as they grow

Starting out

QuickBooks
Excel
Manual processes

Sage Intacct (Ai)

General Ledger
Procure to Pay
Consolidations
Dimensions
Multi entity
Cash Management

Project Accounting (Ai)

Project Costing & Billing
Intelligent Time

Project Intelligence

Project Analytics
Utilization
Realization
Project Delivery
Profitability

PSA (Ai)

Project Management
Resource Management
Capacity Planning



Sage Intacct PSA

AI-driven, full-scale Professional Services Automation



Intelligent recommendations for risk management, budgets, and on-time delivery

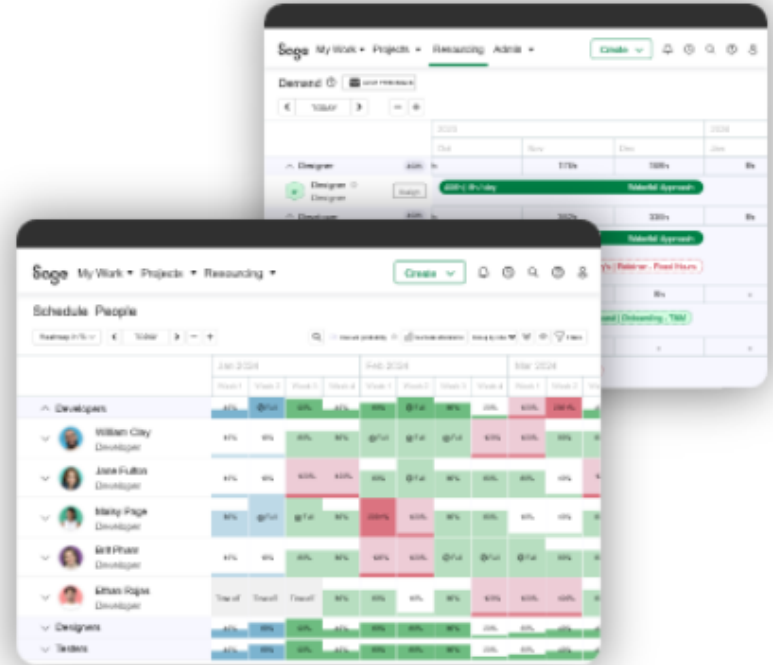


Features include:

- Gantt Charts
- Resource Planning
- Tasks, Sub-tasks
- Commenting
- Fixed price, Time & Materials, Retainer



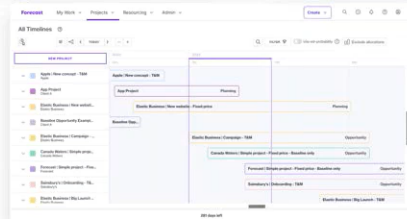
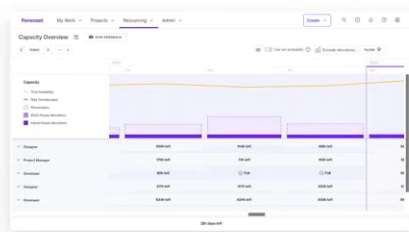
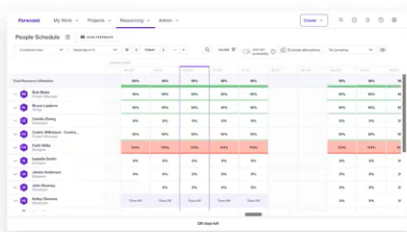
Intuitive drag & drop interface



Resourcing and Project Management

Powered by Ai

The most advanced technology ever applied to boosting financial returns on your resources and projects.



Effective Resourcing

- Understand estimates vs actuals vs capacity
- Quickly adjust over- and under-allocated staff
- Alignment across project teams and finance

Predictive Planning

- Predict project milestones
- Automatically get alerted to potential issues

Seamless Integration Across Tech Stack

- Fully integrated with Sage Intacct
- Connects to other key business applications like Salesforce, Hubspot or other CRMs
- Connect task management solutions like Asana, Monday, and Jira



Best-in-class PSA deeply integrated with Sage Intacct

Capacity Planning

Availability



Project Management

Programs



Resource Planning

Workload



Demand



GANTT Charts

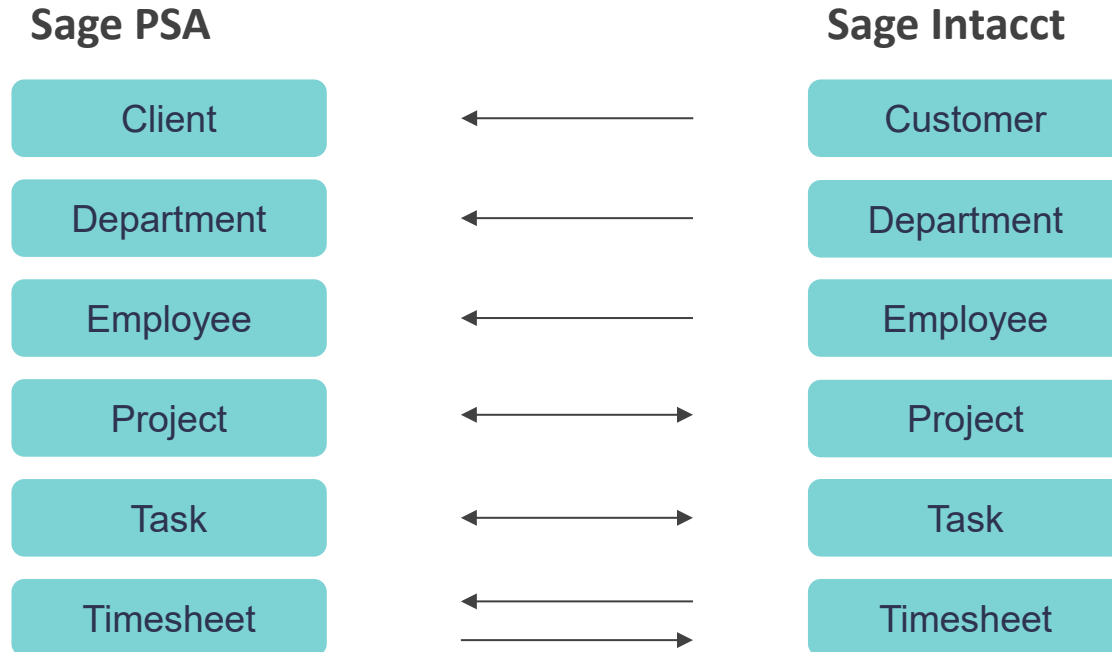


Utilization



Sage PSA and Intacct Connection Points

- Arrows denote data flow



Product 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
 - <https://godigital.claconnect.com/insights/webinar/2025-sage-intacct-webinar-series/>
 - 2026 coming soon!



SAGE | 2/19/2025

Using Sage Intacct to Track
Restricted Net Assets: Part 1



SAGE | 2/5/2025

Mastering Sage Intacct
Financial Reports: Format



Thank you!



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