



Smart Event - New GL Code Email

This Smart Event sends an email when a new GL Code is created in Sage Intacct. My customers have asked for this when they want the management accountant to know that the new GL Account has been created and allowing them to check budgets and reporting

Navigate to the Smart Event Wizard either by Customisation Services or Platform Services > Smart Events > Add

The wizard guides you through the process of designing your smart Event

Step 1 Choose object to extend Step 1 of 3

Owner object

* Required

Step 1 Choose object to extend | Owner object **Select** GL account | **Click** Next

Step 2 Select event properties Step 2 of 3

Action

Events *

Condition

Note: Use the yyyy.mm.dd format for date values

* Required

Step 2 a. Select event properties **Action Select** Email | b. Events **Select** Add | c. Condition **Enter** `{!GLACCOUNT.TITLE!} <> ""` | **Click** Next



Step 3 Select email properties

Step 3 of 4 Select email properties

<< Back

Next >>

Email *

finance@viscus.co.uk

Subject *

New GL Code {!GLACCOUNT.ACCOUN

Attach PDF

Body

A new GL Code has been created {!GLACCOUNT.ACCOUNTNO!} -
{!GLACCOUNT.TITLE!}.

Please check that it has been included in the budget.

* Required

Step 3 Select Email Properties **Email** Enter The email address* | **Subject** New GL Code {!GLACCOUNT.ACCOUNTNO!} {!GLACCOUNT.TITLE!} | **Body** A new GL Code has been created {!GLACCOUNT.ACCOUNTNO!} - {!GLACCOUNT.TITLE!}. Please check that it has been included in the budget. | **Click** Next

Step 4 Select deployment options

Step 4 of 4 Save

<< Back

Done

Smart link ID *

NEW_GL_GLCODE

Description

A new GL Code has been
created

Status

Active

* Required

Step 4 Select deployment options **Smart link ID** Enter NEW_GL_GLCODE | **Description** A new GL Code has been created | **Status** Active | **Click** Save

*In a later article we will look at using dynamic rather than static email addresses.