

May 14, 2025

# Latest Updates in the Sage Intacct 2025 Release 2



WELCOME

# Today's Presenters



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Managed Services Sr.  
Consultant, will be on today's  
presentation to answer any  
questions



KNOWLEDGE

# Learning Objectives



**Define** the new features in your solution's latest release.



**Illustrate** the updated user interface and navigation for easier adoption.



**Identify** the potential of the latest solution update to enhance your system's performance.

## CPE Information

Recommended CPE: 1

Delivery Method: Group  
Internet Based

Field of Study: Computer  
Software & Applications

Program Level: Basic

Target Audience: Sage  
Intacct clients and users

Advanced Preparation: None

Prerequisite: None



Exploring New Areas: Updates To Be Discussed

# Agenda

Company and Administration	Purchasing	Accounts Payable	Platform Services	Nonprofits	Accounts Receivable	Order Entry
APIs and Web Services	Cash Management	Consolidation	Construction	Inventory	Contracts	Time
	Expenses	Healthcare	Fixed Asset Management	Reporting	Tax	



# Company and Administration



## Company and Administration

# Sage Intacct Import Service – Generally Available

- Importing data is a critical function for accountants and partners, and we're making it easier than ever with the new import service. Instead of sending your data into a "black box" and waiting for error reports via email, you now have a dedicated import workspace that provides real-time visibility and control.
- The new import service provides the following benefits:
  - **Expanded capabilities:** Import from multiple tabs, use formulas and add extra columns.
  - **Real time error handling:** Errors are displayed on the page at the field level and easy to understand and correct before finalizing your import.
  - **Intuitive interface:** You can use find/replace to correct errors, search for specific values and filter by errors.
- With an intuitive, spreadsheet-like interface, you can import files, see errors at the field level, and make corrections on the spot, eliminating frustration and saving time. The new import service is now generally available for a limited set of import types. It redefines the way that you manage imports ensuring efficiency, accuracy and ease of use.



The import service is only currently available for use from the Company Setup Checklist page. Permissions to this page are required to use the import service at this time.



## Company and Administration

# Authenticate and Validate Your Custom Email Domain During May 2025

- Starting **May 2025**, all customers who send emails using a custom domain must authenticate and validate their domain with the enhanced email delivery service.
- This is a non-negotiable requirement as we transition fully to the enhanced email delivery service.
- **Why is this important?**
  - Authenticating your domain helps ensure that your email communications are secure and reliable.
  - Improved email deliverability, reducing the chances of your messages being marked as spam or not reaching recipients.
  - Protects your domain from being used in phishing attacks or other fraudulent activities.
  - Aligns with best practices for email security and compliance.
  - To ensure smooth email delivery to customers and partners, authenticate your domain during May 2025 or within the following single release.



## Company and Administration

# Monitor the Creation Process of Instances and Console Templates

- Previously, after you created an instance or console template, the State column defaulted to Ready. Now, after you create an instance or console template, the State column displays Ready, In progress or Failed.
- We enhanced the State column so that you can monitor the creation process of instances and console templates to ensure they're created successfully.

### Details

- Sage Intacct updates the State column for instances and console templates with information about the state of the creation process.
- The State column displays the following information:
  - **Ready.** The instance or console template is ready to use.
  - **In progress.** The instance or console template is in the creation process.
  - **Failed.** The creation of the instance or console template is unsuccessful.



## Company and Administration

# Language Support for Spanish and Canadian French – Generally Available

- Setting the language preference at the Company level changes the language for all the users in your company. Setting the language preference at the User level changes the language just for that user.
- When you set your Intacct local language, the following areas appear in your preferred language:
  - Sage Intacct User interface
  - Help Center
  - Community
  - Release notes
- However, the following will not change:
  - Custom terminology
  - User data
  - Platform applications
  - Marketplace applications



## Company and Administration

# Permission Changes

We've updated aspects of the following permissions.

### Accounts Payable

- **Adjustments:** Add, Post

Previously, only the Adjustments Add permission was required to import posted AP adjustments using CSV import. Now, the Adjustments Add and Post permissions are required.

### Accounts Receivable

- **Invoices:** Add, Post

Previously, only the Invoices Add permission was required to import posted invoices using CSV import. Now, the Invoices Add and Post permissions are required.

- **Adjustments:** Add, Post

Previously, only the Adjustments Add permission was required to import posted AR adjustments using CSV import. Now, the Adjustments Add and Post permissions are required.

### Projects, Time and Expenses

Previously, Time and Expenses were a single application. Now, they are 2 separate applications that each have their own set of permissions. The separation has also impacted the Projects permissions, with some permissions moved to either the Time or Expenses permissions.

### Projects and Time

- **My timesheets:** List, View, Add, Edit, Delete

Previously, these permissions affected both the Projects and Time applications. Now, these permissions affect the Time application only.

- **Staff timesheets:** List, View, Add, Edit, Delete

Previously, these permissions affected both the Projects and Time applications. Now, these permissions affect the Time application only.



# Purchasing



## Purchasing

# Automated Transactions Streamlined for AP Automation with Purchasing – Early Adopter

- AP Automation with Purchasing streamlines transaction entry by automatically creating draft transactions from documents that you email or upload. Sage Intacct identifies the vendor and fills in certain transaction details for you, such as location, department and item IDs.
- With this update, you can do the following:
  - Configure transaction definitions to automate transactions that do not have a previous transaction to match with in the purchasing workflow.
  - Change the transaction type for incorrect predictions, which feeds back to the machine learning model to improve future predictions.
  - Get the benefits of both automated transaction matching and standalone transactions. You have the flexibility to set up both options or use just one, as matches your needs.
  - When you have automation enabled for both transactions with matching and transactions without matching, AI will first look for a transaction match. If AI cannot predict a match, it will identify the document type and draft a transaction without a match.
- Go to the release notes in the Community to sign up for this program or alert your Customer Account Manager.



## Purchasing

# Hide the Price for Certain Transactions

- You can now hide the price column on Purchasing transactions for instances where the price is not relevant to the document type. For example, with receiver documents, your receiving department might only want to confirm the items they received and how many of each. This is especially useful when you receive high-value items and prefer that the item price is not visible.

## Details

- When you hide the price for a transaction, the price column is hidden in both the transaction list page and each transaction record.
- The price is hidden in the following places for each transaction:
  - The transaction header values, including the transaction total and subtotal.
  - The transaction line-item totals and subtotals in the line entries table.
- This is especially useful for the following scenarios:
  - Your receiving department does not care about the item price, they just want to record that they've received ordered items and how many.
  - You're receiving high-value items, such as computers, and prefer that warehouse employees not see the price of items received.





## Purchasing

# Match Tolerance Exceptions are Now Flagged for Drafts

- Now, line items that are exceptions to your tolerance settings are flagged for draft transactions in addition to posted transactions.
- This allows you to see line item discrepancies before you post the transaction, so you can catch issues before they hit the books.

## Details

- With match tolerances, Sage Intacct automatically compares the quantities and unit prices when you convert from one Purchasing transaction to the next.
- If the quantity or unit price in any line item is not within the tolerance limit you set, Sage Intacct flags the converted to transaction as an exception.
  - You can then choose to accept or fix the differences.



## Purchasing

# Increase Transaction Workflow Efficiency

- Sage Intacct now permits users to save draft purchase transactions without a document number. This change ensures more efficiency in completing your transaction workflows, and greater flexibility during purchase transaction processing.

### Details

- By relaxing the document number requirement in draft sales transactions, you'll be able to leverage additional document tracking options:
  - Save transactions in draft state when you are not sure of the document number.
  - Automatically assign draft transactions the next sequence number. To avoid any confusion, the document number field is not visible until the draft is saved.

### Notes

- After a document number is assigned to a draft document, it cannot be changed.
- If you convert sales transactions that automatically use the source document number, you can change or delete the number when saving as a draft.



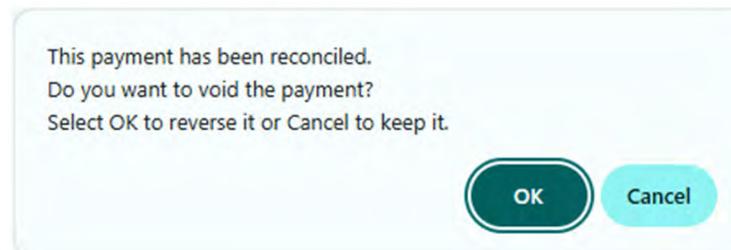
# Accounts Payable



 This idea came from you

## AP New Warning When Voiding a Reconciled Transaction

- We're introducing a new warning feature to enhance your control over voiding payments and help you avoid unintended changes to your reconciled periods.
- When you try to void a reconciled payment, manual payment, or AP advance, Sage Intacct notifies you that the transaction has already been reconciled. The notification allows you to make an informed decision on whether to proceed or cancel the operation.
- This alert helps you maintain the integrity of your reconciled periods while giving you the flexibility to manage your transactions effectively.



This release does not change the rules of what you can and cannot void in a reconciled period. Only the warning message is new.



## AP

# Post Permissions Required When Importing Posted Adjustments

- We've updated the CSV import for AP adjustments to enforce the permissions required for importing posted transactions. This change provides greater security and control over your financial data.
- By requiring specific post permissions, we ensure that only authorized users can import posted transactions, protecting your financial data from unauthorized changes. This update aligns with permissions required for CSV import requirements in other areas of Sage Intacct, improving consistency. Users without post permissions can still import transactions as drafts, provided they have Add permissions.

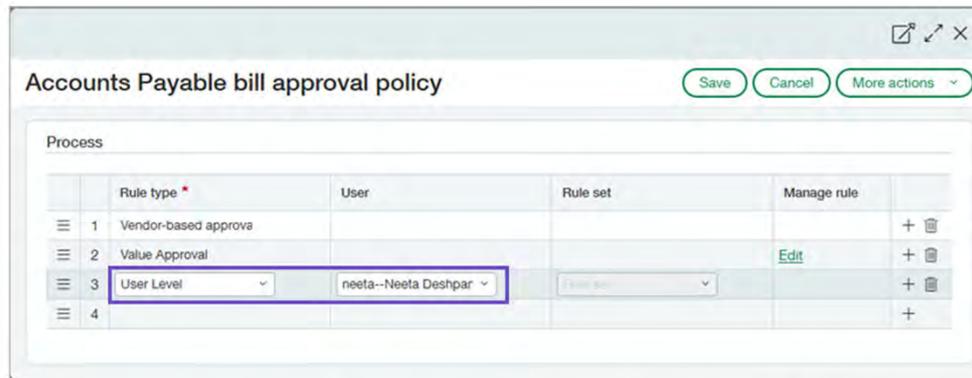
### Details

- Users importing posted AP adjustments must have Adjustments: Add, Post permission.
- Users without Post permissions can import adjustments as drafts, as long as they have Add permissions.



## AP New Rule Type for Named Users in Bill Approvals

- We've updated the way you add approval users to your bill approval policy to remove clutter from the Rule type list and make the approval policy easier to scan.
- The Rule type column, which previously included rule types and users with bill approval permissions, now contains only rule types. To add a named user, select the new **User Level** rule type. Then, in the new User level column, select an approver from the list of users with bill approval permissions.



Accounts Payable bill approval policy

Save Cancel More actions

Process

	Rule type *	User	Rule set	Manage rule	
1	Vendor-based approva				+ [trash]
2	Value Approval			Edit	+ [trash]
3	User Level	neeta--Neeta Deshpar			+ [trash]
4					+ [trash]



Already have named users as part of your bill approval policy? You're all set! Sage Intacct automatically converts your named users to User Level rule types.



## AP Special Characters Restricted in Certain Fields

We've updated the types of characters allowed in specific fields. The following special characters are no longer supported:

< > @ # & " \ ' ` ; =

This change affects only the following fields:

Record type	Field name
AP term	Name
AP account label	AP account label

### Details

If you try to save an AP term or AP account label with one of these special characters, Sage Intacct gives you an error message. To save your record, just remove the special character first.



If you're already using one of these characters, no immediate action is required. However, if you edit the record in the future, you'll need to remove the special character before you save your changes.



# Platform Services



## Platform Services

# Platform Event Queue Trigger—Early Adopter

- Triggers continue to offer more functionality: Now you can create a trigger to queue payloads in storage. External systems can retrieve the stored events based on your schedule.

### Details

- Last release, we introduced a Platform Trigger so that you could define a client ID for HTTP POST requests and take advantage of webhooks. With the introduction of the event queue, you can create a trigger to store these events.

**Trigger type**

Select the type of action to perform when this trigger is activated.

Trigger type	Type	Description
<input type="radio"/>	Validation	Formula-based data validation
<input type="radio"/>	Change workflow status	Create at least one workflow status before using this event type.
<input type="radio"/>	Update field value	Update the value of a field in this record or a related record
<input type="radio"/>	Create activity trail record	Enable the Audit trail property for this object before using this event type.
<input type="radio"/>	Create new record	Create at least one conversion map before using this event type.
<input type="radio"/>	Attach related record	Attach this record to a related record (establish a relationship between two records)
<input type="radio"/>	Run triggers on related records	Run triggers on related records based on selected relationships. Note: Other trigger types do not invoke triggers on related records.
<input type="radio"/>	Send email	Send an email based on an email template
<input type="radio"/>	Create template document	Create at least one File upload field before using this event type.
<input type="radio"/>	HTTP get	Create at least one Integration link field before using this event type.
<input type="radio"/>	HTTP post	Send a request to an external system using HTTP POST
<input type="radio"/>	Intacct API	Send a request to the Intacct API
<input type="radio"/>	Event queue	Queue payloads in a temporary storage for later consumption. You will be able to poll the payloads.



## Platform Services

# Improved Platform Trigger Creation for POST Requests— General Availability

### Details

- Our new option for Platform trigger POST requests offers reliable and consistent webhook delivery with automatic retries for handling delivery failures. For example, let's say that every time a location is updated in your Sage Intacct company, you need an external inventory supplier's system updated for your account:
  - A location in Intacct is updated.
  - The updated location information is sent using a POST request to the external system using a webhook URL.
  - The inventory supplier's system receives the call and one of the following occur:
    - The relevant database with the revised location gets updated.
    - If a failure occurs, the call is retried until a successful HTTP status code of 200 is returned to Intacct, up to 4 attempts total.

### HTTP status codes that trigger retries

- 408 Request Timeout -- 429 Too Many Requests -- 500 Internal Server Error -- 502 Bad Gateway -- 503 Service Unavailable --n 504 Gateway Timeout



## Platform Services

# Platform Installed Components Update

To improve your experience when using Platform features, we've hidden the **Installed components** menu option from the main Platform menu. You can continue to view installed components in the individual applications' overview pages.

We made this update to simplify the menu based on customer usage. If you prefer to retain the **Installed Components** option in the main Platform menu, ask your designated support user [to log a Support case](#).

### Permissions and other requirements

Subscription	Platform Services
Regional availability	All regions
User type	Business
Permissions	Permissions to the Platform Services application



# Nonprofits



Nonprofit

# Sage Intacct Fundraising Powered by DonorPerfect—General Availability

- **Empower development:** Manage donor data, donor communications, and execute successful fundraising campaigns with an end-to-end solution.
- **Boost contributions:** Use tools for online fundraising and monthly giving programs.
- **Increase actionable insights:** Leverage connected fundraising and financial data, feeding dashboards and reports to elevate decision-making.



# Accounts Receivable



## ACCOUNTS RECEIVABLE

# Retiring Customer Payment Service Integrations this Year

- Our customer payment service integrations with Authorize.net and PayPal are going away on November 7, 2025.
- This means that customer payment services and APIs for customer bank and credit card accounts will no longer be supported to process payments after this time.
- [Check out Versapay](#), a Sage recommended solution, to continue accepting customer payments in Sage Intacct.
- Sage is working to reduce the amount of cardholder data we manage.
  - This decision is driven by a strategic goal to minimize the audit requirements associated with handling sensitive data.
  - By exploring alternatives to storing and processing card data, we aim to enhance operational efficiency while maintaining the highest standards of security for customer information.



## ACCOUNTS RECEIVABLE

# Special Characters Restricted in Certain Fields

- We've updated the types of characters allowed in specific fields. The following special characters are no longer supported:
  - <>@#&"\';=
- If you try to save an AR term, AR account label, or Customer type with one of these special characters, Sage Intacct gives you an error message.
  - To save your record, just remove the special character first.

Record type	Field name
AR term	Name
AR account label	AR account label
Customer type	Customer type



## ACCOUNTS RECEIVABLE

# Record Customer Refunds—Coming soon!

- Customer refunds streamline your refund management process, ensuring that the refunds that you initiate outside of Sage Intacct are accurately documented and the refunded credits are cleared. Eliminate the tedious step of creating balancing adjustments for refunded credits. Instead, record the amount refunded and pay available credits simply by selecting them.
- Customer refunds offers the following benefits:
  - **Increased reporting accuracy:** Up-to-date customer balances keep your financial reports on track.
  - **Tidier books:** Close out credits easily and effectively, maintaining clean and organized financial records.
  - **Easily resolve inactive accounts:** Efficiently refund and zero out accounts for customers who have credit balances with no planned future invoices.
  - **Refund audit trail:** Provide a clear audit trail for all refunds, enhancing transparency and accountability.



## ACCOUNTS RECEIVABLE

# Retirement of Receive a Payment is Postponed

- You spoke and we listened! We're pausing the retirement of Receive a payment while we work on making the new pages easier to use and more efficient.
- We'll notify you when we've perfected the experience, so that your transition goes as smoothly as possible.



## ACCOUNTS RECEIVABLE

# New Warning When Reversing a Reconciled Advance

- We're introducing a new warning feature to enhance your control over reversing advances and help you avoid unintended changes to your reconciled periods.
- When you try to reverse a customer advance, Sage Intacct notifies you that the transaction has already been reconciled. The notification allows you to make an informed decision on whether to proceed or cancel the operation.
- This alert helps you maintain the integrity of your reconciled periods while giving you the flexibility to manage your transactions effectively.
- This release does not change the rules of what you can and cannot reverse in a reconciled period. Only the warning message is new.

This advance has been reconciled.  
Do you want to void the advance?  
Select OK to reverse it or Cancel to keep it.

OK

Cancel



## ACCOUNTS RECEIVABLE

# Inter-entity Bill Back Now Supports Child Locations

- When creating an invoice using a bill back template, you can select a child location in the line items. Sage Intacct refers to the parent entity to find the associated vendor.
- A corresponding bill is created in Accounts Payable for the vendor associated with the parent entity.
- A few things to note for this update:
  - All line item locations in an invoice must share the same parent entity when a bill back template is applied.
  - The bill created in Accounts Payable shows the entity as the location, rather than the child location.
  - As long as an entity record specifies an associated vendor, you can use that entity's child locations for line items on invoices with bill back templates.
  - No additional setup is required to use child locations on invoices if you're already set up for inter-entity bill back.



## ACCOUNTS RECEIVABLE

# External Credits Included in Entity-level AR Statements

- Align entity-level AR statement balances with your AR Ledger and AR Aging reports by showing credits that you applied from other entities.
- When you select **Show external credits** in AR statement filters, Sage Intacct includes any adjustments and negative invoices owned by other entities that were applied during the selected period.
- Adjustments and negative invoices appear on the statement using the following format:
- External credit applied from <entity ID> <adjustment or negative invoice number> to <location ID> <invoice number>
- Previously, all external credits applied to transactions in the entity showed in the reports but only advances and overpayments showed in AR statements run at the entity level.

DATE	INVOICE	CHARGES	PAYMENTS	BALANCE
	Balance forward	\$1,054.04		
04/07/2025	Payment applied to invoice Pymt-000017		\$854.04	\$200.00
04/07/2025	External credit applied from E300 CM-0018-AR to 210 INV0291		\$200.00	\$0.00
				<b>Total Due: \$0.00</b>



## ACCOUNTS RECEIVABLE

# Post Permissions Required When Importing Posted Transactions

- We've updated the CSV import for AR invoices and AR adjustments to enforce the permissions required for importing posted transactions. This change provides greater security and control over your financial data.
- By requiring specific post permissions, we ensure that only authorized users can import posted transactions, protecting your financial data from unauthorized changes. This update aligns with permissions required for CSV import requirements in other areas of Sage Intacct, improving consistency. Users without post permissions can still import transactions as drafts, provided they have Add permissions.
- Users importing posted AR invoices must have Invoices: **Add, Post permissions**.
- Users importing posted AR adjustments must have Adjustments: **Add, Post permission**.
- Users without Post permissions can import invoices and adjustments as drafts, as long as they have Add permissions.



# Order Entry



## ORDER ENTRY

# Increase Transaction Workflow Efficiency

- To align with automation requirements and ensure consistency across applications, Sage Intacct now permits users to save draft sales transactions without a document number. This change ensures more efficiency in completing your sales transaction workflows, and greater flexibility during transaction processing.

### Details

- By relaxing the document number requirement in draft sales transactions, you can leverage additional document tracking options:
  - Save transactions in draft state when you are not sure of the document number.
  - Automatically assign draft transactions the next sequence number. To avoid any confusion, the document number field is not visible until the draft is saved.
  - After a document number is assigned to a draft document, it cannot be changed.
  - If you convert sales transactions that automatically use the source document number, you can change or delete the number when saving as a draft.



# APIs and Web Services



## API AND WEB SERVICES

# Welcome to Our Latest REST API Release

- The Intacct REST API covers all product areas:
- [Company Configuration](#)
- [General Ledger](#)
- [Cash Management](#)
- [Accounts Payable](#)
- [Accounts Receivable](#)
- [Time & Expenses](#)
- [Purchasing](#)
- [Order Entry](#)
- [Inventory Control](#)
- [Project and Resource Management](#)
- [Construction](#)
- [Contract and Revenue Management](#)
- [Tax](#)
- [Fixed Assets Management](#)
- [Common Services](#)
- Refer to the [XML-to-REST object map](#) to find the objects that you're familiar with.
- <https://developer.sage.com/intacct/docs/developer-portal/release-notes/2025-r2/>



## API AND WEB SERVICES

# Stay Up-to-Date on Great New Web Services Features

- Read the Sage Intacct Developer portal blog: <https://developer.intacct.com/blog/>
- The following example shows how to retrieve the audit history for a Purchasing transaction using a record number instead of a document number:
  - `<readByQuery>`
  - `<object>AUDITHISTORY</object>`
  - `<fields>*</fields>`
  - `<query>OBJECTTYPE='podocument' and OBJECTKEY = '1165'</query>`
  - `<pagesize>100</pagesize>`
  - `</readByQuery>`



# Cash Management



## CASH MANAGEMENT

# Classic Import for Reconciliation is Retiring

- Since 2024 Release 2, we've been enhancing our bank transaction import process to boost your efficiency. Many of you have already switched to the newer **Bank transaction assistant file import** experience and are enjoying its benefits. However, some are still using the older **Classic import** method.
- This is an announcement that we plan to retire the Classic import method no earlier than **May 2026**.
- Bank transaction assistant file import introduces a fresh approach to importing.
- Imported transactions appear in a centralized location for all accounts on the Bank transactions page.
- Transactions you import remain in Sage Intacct, even after reconciliation.
- Multiple file formats are supported, giving you extra flexibility.
- You can increase control of who imports bank transactions using permissions.
- A new import activity list provides added insight.
- Import credit card transactions for reconciliation.
- Learn more about [importing credit card transactions](#).



## CASH MANAGEMENT

# Import Credit Card Bank Transactions for Reconciliation with Bank Transaction Assistant File Import

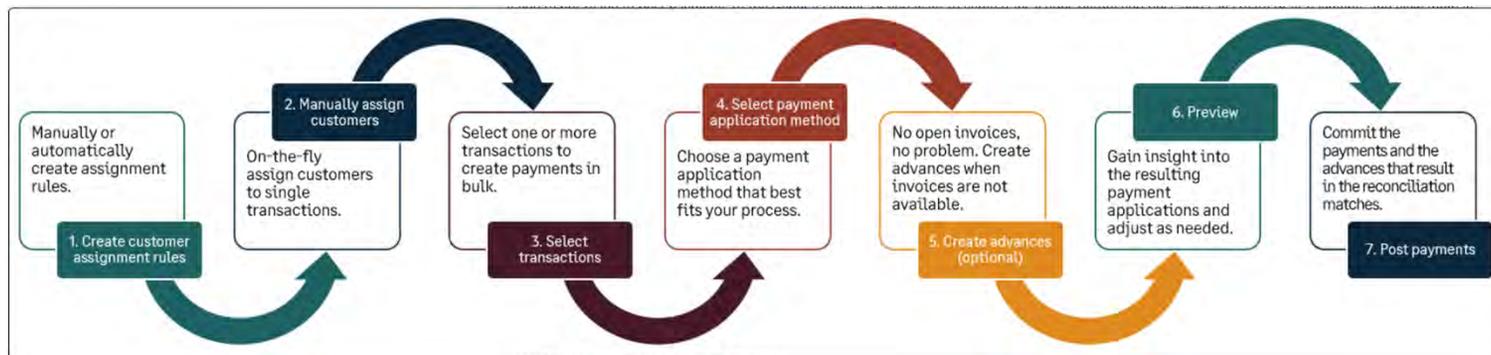
- Import credit card transactions for reconciliation. Control who imports bank transactions with a new permission and view a list of all import activity for added insight.
  - Multiple file formats are supported, which gives you extra flexibility.
- Import CSV, QIF, XLS, XLSX, OFX, CAMT.053, BAI2, and ASO files.
  - To ensure a smooth import process, make sure that your file is formatted correctly.
- For CSV, XLS, and XLSX files, specify whether your file displays amounts in two columns (money in and money out) or one column (positive and negative amounts appear in this column).
  - You select a 3 column or 4 column file type, respectively.
  - There are also additional columns to add for even more insight into transactions.



## CASH MANAGEMENT

# Bank Transaction Assistant

- Use Bank transaction assistant to assign customers and receive payments in bulk from unmatched bank transaction data.
- First assign customers to unmatched bank transactions. Then, begin the receive payment process. After you receive a payment, a posted payment is created and matches with the bank transaction for reconciliation.
- If you're not ready to post payments to the General Ledger, or you want to verify transactions before you post, you can create draft payments and view them in Accounts Receivable. Currently, creating draft payments is not supported for companies enabled for French taxes.
- On the Bank transactions page, use the **Cash in** view to display unmatched credit type transactions. This view includes the Customer ID and Customer columns so you can quickly check which transactions need to be assigned to a customer.





## CASH MANAGEMENT

# Reclassify GL Account for Credit Card Transactions and Partially Edit

- Reclassify the GL account for credit card transactions that are reconciled or are in a Paid or Partially paid state, as long as the period is open. Plus, you can now partially edit Paid credit card transactions.
- Reclassify top-level transactions from the top level and entity-level transactions from within the entity. However, you cannot reclassify across entities. In a multi-entity, multi-currency company, always reclassify transactions at the entity level.
- Credit card transactions need to originate from Cash Management to be eligible for reclassification. The following scenarios are not available to reclassify:
  - The transaction originates from paying a bill in Accounts Payable.
  - The transaction is associated with an employee expense report.
  - For Paid credit card transactions, you can update the Reference number, Payee, Description, Attachment, and line item Memo fields.



# Consolidation



## CONSOLIDATION

# New Affiliate Entity Standard Dimension—General Availability

- Introducing the new affiliate entity standard dimension, generally available in 2025 R2 to customers with a Consolidation subscription. With the affiliate entity dimension, Sage Intacct automatically tags automated inter-entity journal entries. You can also use the affiliate entity dimension to manually tag General Ledger journal entries.
- By enabling affiliate entity dimension tagging, you enrich and enhance inter-entity activity and balance information. You'll glean more details such as clearly delineated due to and due from amounts, [EXAMPLE 2], and [EXAMPLE 3] when you run dimension balance, General Ledger, and financial reports.
- Affiliate entity tagging also benefits the inter-entity reconciliation process. You can get the balance of accounts by the affiliate entity dimension value. For example, suppose that your management company entity E101 has inter-entity receivables for 15 entities. You can now use the affiliate entity dimension to report on that inter-entity activity and easily reconcile it against the inter-entity payables for all 15 entities. You can do all this using only one inter-entity receivable account and one inter-entity payable account.
- Use the affiliate entity dimension to automate eliminations in your consolidations by eliminating activity between entities in the same reporting book. You can use affiliate entity in Domestic, Global, or Advanced Ownership Consolidation. Auto-eliminate across more complex direct and indirect inter-entity relationships in Advanced Ownership Consolidation.



## CONSOLIDATION

# Where Can I Use the Affiliate Entity Dimension?

- You can use the affiliate entity dimension in the following Sage Intacct subscriptions and product areas:
  - General Ledger
  - Budget
  - Platform Services
  - Consolidation (Domestic Consolidation, Global Consolidation, Advanced Ownership Consolidation)
  - Reports (standard, financial, custom)
  - Automated inter-entity transactions (IETs)
- The affiliate entity dimension does not currently support the use of inter-entity bill back.



## CONSOLIDATION

# How it Works

- Enable the affiliate entity dimension to make it available to all General Ledger (GL) journal entries and automated inter-entity transactions (IETs).
- When auto-generating inter-entity lines for GL journal entries, Sage Intacct does the following:
  - Auto-creates inter-entity lines using the inter-entity account mapping for your company.
  - Auto-tags these inter-entity lines with the affiliate entity dimension value.
- You can also tag manually created journal entries by selecting the **Affiliate entity** dimension in the **Show details** dropdown. You can move this field to the entries table by customizing the entries layout.



# Construction



## CONSTRUCTION

# Enhanced Support for Smart Events and Smart Rules on Vendor Compliance Records

- We are excited to announce that smart events and smart rules are now supported on compliance records. Now you can set up smart events and smart rules to streamline your compliance processes and ensure that your compliance records are accurate and up to date.
- Smart rules can be used with manually-created compliance records. Smart rules are not active on compliance records that are system-generated, but they are active when the compliance record is opened and saved.
- **Examples of Smart Rules:**
  - Expiration Date Validation: Issue a warning or error if a compliance record is saved without an expiration date.
  - Document Received Validation: Issue a warning or error if a compliance record is saved without a contact.
- **Examples of Smart Events:**
  - Email Notification: Create a smart event that sends an email notification when a compliance record is created from a specific compliance type.
  - API Update: Create an API update where the API sets the document received checkbox to true when a lien waiver compliance record is created.



## CONSTRUCTION

# Generate Lien Waivers for Secondary Vendors

- You can now automatically generate lien waivers for secondary vendors on AP bills, all payments, or joint checks.
- We have introduced two new settings for generating invoice lien waivers and payment lien waivers.
- **Generate additional invoice lien waivers checkbox:** Select this checkbox to generate an additional lien waiver for the secondary vendor whenever you create an Invoice and generate a lien waiver for the primary vendor. This secondary vendor lien waiver is identical to the primary vendor lien waiver.
- **Generate additional payment lien waivers:** Select to generate for joint check payments or to not generate at all. Optionally, you can select to generate secondary vendor lien waivers for all payments.
- We advise caution with the **Generate for all payments** setting, as it can generate a very large number of lien waivers. Lien waiver creation follows the rules set up on the compliance definition.
- We have also added a **Secondary vendor name** field to the compliance record. This text field is automatically populated with the secondary vendor's name from the Secondary vendor tab on the primary document, but you can edit it as needed.



## CONSTRUCTION

# New Primary Document Details Tab in Purchasing

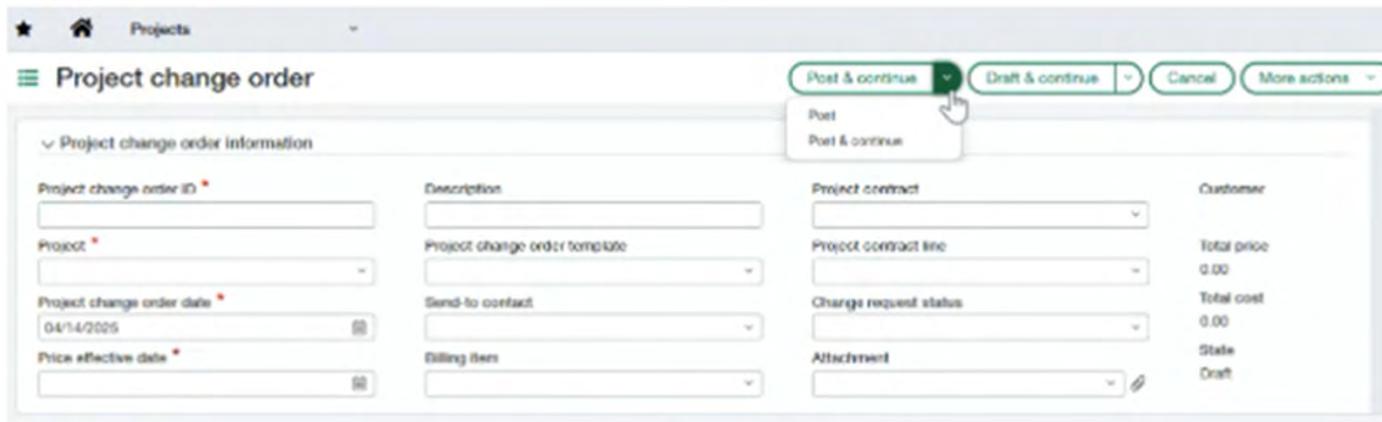
- The new Primary document details tab is designed for a more efficient and organized approach to managing your purchasing order document and invoices.
- You can now quickly view and modify purchasing order documents and invoice-related details. The new details tab is available on primary documents with the Order template type.
- These fields are not yet available in CRW, ICRW, or in the printed doc template. These are planned for a future release.
- **Comprehensive View:** Access all purchasing order documents and invoice details for primary documents in one central location. This new tab provides a summary and line-item details, ensuring you have all the information you need at your fingertips.
- **Summarized Information:** Easily view summarized payable invoice and payment information, both by document and by individual document line.
- **Update totals:** Totals automatically update when an invoice posts to AP or a new change order is added.
- **Refresh all data:** Select this button to manually update totals.
- **Primary document summary**
  - View a summary of all transactions for the document, then scroll to the details where you can drill into AP bills, retainage release bills, and AP payments.



## CONSTRUCTION

# Stay on Project Change Order after Posting

- Previously, when you drafted or posted a project change order, the change order closed and the Project change order list appeared. If you had further work to do on the change order, you had to find it in the list and re-open it.
- Now when you post or draft a project change order, you can select Post & continue (or Draft & continue) to keep your document open and continue working with no interruption.



Project change order

Project change order information

Project change order ID *	Description	Project contract	Customer
Project *	Project change order template	Project contract line	Total price 0.00
Project change order date *	Send to contact	Change request status	Total cost 0.00
Price effective date *	Billing item	Attachment	State Draft



## CONSTRUCTION

# Enhancements in Sage Intacct Construction Payroll

- Sage Intacct Construction Payroll handles construction payroll complexities not found in general payroll solutions. It provides a complete view of your project costs with unprecedented visibility into each cost component.
- For more information, talk to your [Sage Intacct account manager](#).
- This release includes the following new features and enhancements.
- **Simplify construction payroll**
  - Easily access payroll setup information for employees and projects in Intacct setup pages.
  - Construction Payroll setup tables available in Custom Report Writer and Interactive Custom Report Writer for advanced reporting.
  - Approved timesheets can be sent directly to Construction Payroll, streamlining payroll processing.



## CONSTRUCTION

# Enhancements in Sage Intacct Construction Payroll

- **Improved performance**
- We've improved performance for creating and retrieving configuration items, timecards, and checks.
- **Expanded data syncing**
- The following data is synced between Construction Payroll and other Sage Intacct applications:
  - Jobs
  - Cost types
  - Cost codes
  - General ledger accounts
  - Entities
  - For example, new jobs and cost codes that are created in Intacct are available in Construction Payroll.



## CONSTRUCTION

# Enhancements in Sage Intacct Construction Payroll

- By default, payroll data is now automatically available for Sage Intacct reporting.
- You can continue using the manual process of selecting **Send Reporting Data** in the Checks page. To do so, contact your Sage partner or enter a support ticket for Sage Intacct Construction Payroll.
- **Improvements for timecards**
  - In the Timecards page, you can review employee timecards using the work week that's defined in the Pay Groups page.
  - For timecards, we've expanded and improved the automated checks that the system performs to help ensure that job cost distributions are valid and active.
- **Check stubs provide more information**
  - Check stubs now include the following information:
    - Year-to-date amounts for all employee taxes.
    - Pre-tax and post-tax 401k amounts shown separately along with the employer address.



## CONSTRUCTION

# Improved Work Order Activity View in Sage Field Operations

- **See key insights by hovering over any work order**
- See key insights for the work order, including the latest note and the three most relevant custom fields.
- **Drill through to full work order details**
- You can select **Drill through > Work Order Details** to see the full details for a work order and its items, including:
  - Sortable and more detailed lists of items. Notes and custom fields.
  - Sale and cost information for miscellaneous items.
- **Refine your work order data set by service location and custom fields**
  - You now have more control to refine your work order data set. Easily see work orders for specific locations or based on work order custom fields.
- **Learn about Sage Field Operations**
  - For more information, talk to your [Sage Intacct account manager](#).



## CONSTRUCTION

# Enhancements in Sage Intacct Paperless

- Improve and modernize your paper-heavy accounts payable document workflow. Sage Intacct Paperless is an intelligent, automated solution that lets you capture, index, route, and store documents in one secure place.
- In this release, you can find these enhancements:
  - Use the Advanced Tax configurations that are available in Intacct.
  - With the new Credit Card Importer module, you can match receipts, assign secondary vendors and import bank transactions or CSV files to create invoices in the AP workflow module.
- For more information, see the [Sage Paperless for Construction web page](#) or talk to your [Sage Intacct account manager](#).



## CONSTRUCTION

# See Historical Data for Projects in Work in Progress (WIP) Management

- A new WIP History page shows data from all your WIP schedules, so you can see historical trends and create customized sets of data for analysis.
- Also, the WIP History page is now where you export WIP schedule data, using an improved export process.
- We've renamed the WIP Management page to WIP Schedules, and you no longer export WIP schedule data from this page.



# Inventory



## INVENTORY

# Customize Supplies Pick Lists and Pick Reports

- Your business has unique operational needs with specific requirements for warehouse picking activities. You can now customize your Supplies Inventory pick list templates and pick reports to help your team fulfill requests quickly and track the data you need for accurate activity analysis.
- Customizable pick list document templates ensure that warehouse users have the information they need to quickly and accurately find requested items.
- Procurement users can sort and print required requisition lines in the pick report for more accurate evaluation and assessment of picking history.
- Users with Platform Services permissions can export the sample printed document templates, customize them and upload their new templates for use with Supplies Inventory transactions. A pick list template is generated for warehouse users to help find items for a specific supplies issue. A pick report template is generated from the Supplies Inventory workbench and is used by supplies management to review the accuracy of picking activities for selected requests.



## INVENTORY

# Streamline Your Supplies Workflow

- Order linking allows organizations to place bulk orders with suppliers to accommodate the need for different product delivery dates, or to keep extra supplies on hand for multiple departments. When a requested item is not stock with a specific supplier, the supplies manager can choose to allocate items from an existing PO for a different supplier. Linking requests to standing purchase orders can save costs with volume purchasing and speed up your procurement efficiency.
- The new supplies link purchase order functionality reduces the amount of manual data entry and expedites the fulfillment of supplies requests. It also helps you to:
  - Identify purchase orders with surplus quantities currently on order.
  - Allocate items on pre-order to higher priority requests.
  - Unlink requests when items are no longer needed.
  - For example, your supplies manager might create a purchase order for items required for a specific initiative, such as materials for an upcoming series of outreach programs. As programs roll out, supplies requests are submitted from different regions at different times. Each regional supplies request can be linked to the pre-existing order. The number of items needed at each requesting region is allocated against the total available in the purchase order.



## INVENTORY

# Increase Transaction Workflow Efficiency

- To align with automation requirements and ensure consistency across applications, Sage Intacct now permits users to save draft inventory transactions without a document number. This change ensures more efficiency in completing your transaction workflows, and greater flexibility during inventory transaction processing.
- By relaxing the document numbering requirement in draft transactions, you can leverage additional document tracking options:
  - Save transactions in draft state when you are not sure of the document number.
  - Automatically assign draft transactions the next sequence number. To avoid any confusion, the document number field is not visible until the draft is saved.
  - After a document number is assigned to a draft document, it cannot be changed.
  - If you convert transactions that use the source document number, you can change or delete the number when saving as a draft



## INVENTORY

# Autofill the Request Delivery Method

- As new requests are submitted for approval or processing, the delivery method ensures that requested items get delivered to the intended recipient efficiently. If all the supplies in a request are going to the same recipient or location, select a default delivery method to speed up order completion.
- The default delivery method helps facilitate faster completion of supplies requests:
  - Use the default selection to pre-populate the delivery method for each new line item requested.
  - If you change the default delivery method at the header level, Sage Intacct only updates new lines and lines without a manual override of the delivery method.
  - You can manually change a specific line item's delivery method at any time.

## Do I need a shipping method or a delivery method?

- For each supply request you specify both a shipping method and a delivery method:
  - **Shipping method:** How an item travels from its originating location to a receiving location. For example, a ground or air courier service.
  - **Delivery method:** How an item gets to the recipient's final destination. For example, if an item is shipped to a warehouse, the recipient could request to have it hand-delivered to their upstairs office.

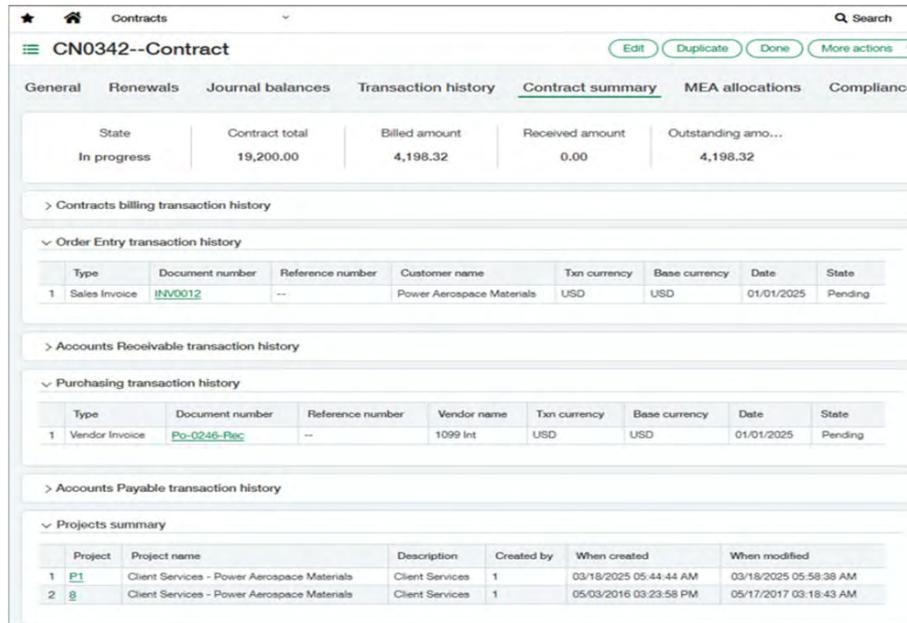


# Contracts



# Introducing the Contract Summary Tab

- Get a quick, comprehensive review of Contract's activity all in one place
- Replaces the Billing transaction history tab



Contracts

Search

CN0342--Contract

Edit Duplicate Done More actions

General Renewals Journal balances Transaction history **Contract summary** MEA allocations Compliance

State	Contract total	Billed amount	Received amount	Outstanding amo...
In progress	19,200.00	4,198.32	0.00	4,198.32

> Contracts billing transaction history

Order Entry transaction history

Type	Document number	Reference number	Customer name	Txn currency	Base currency	Date	State
1 Sales Invoice	<a href="#">INV0012</a>	--	Power Aerospace Materials	USD	USD	01/01/2025	Pending

> Accounts Receivable transaction history

Purchasing transaction history

Type	Document number	Reference number	Vendor name	Txn currency	Base currency	Date	State
1 Vendor Invoice	<a href="#">Po-0246-Rec</a>	--	1099 Int	USD	USD	01/01/2025	Pending

> Accounts Payable transaction history

Projects summary

Project	Project name	Description	Created by	When created	When modified
1 P1	Client Services - Power Aerospace Materials	Client Services	1	03/18/2025 05:44:44 AM	03/18/2025 05:58:38 AM
2 8	Client Services - Power Aerospace Materials	Client Services	1	05/03/2016 03:23:58 PM	05/17/2017 03:18:43 AM

This tab improves visibility and makes it easier for stakeholders to understand the full financial picture of a contract.



# Edit Custom Fields on Canceled Contract Lines

- You can now edit custom fields on canceled contract lines, allowing you to update information for reporting, compliance or adjustment purposes without reactivating the contract.

☰ Contract line 1 of CON-011 -- Contract (Save) (Duplicate) (Cancel) (More actions ▾)

Contract line | Renewal | Expenses | Journal balances | Transaction history | Accounts and journals | MRR history

State Canceled	Total flat/fixe... 2,400.00
-------------------	--------------------------------

<p>Contract <a href="#">CON-011</a></p> <p>Item <a href="#">7--Web server</a></p> <p>Line start 01/01/2017</p> <p>Line end 12/31/2017</p> <p>Item description</p> <p><input type="checkbox"/> Renew</p> <p>Cancel date 04/01/2017</p> <p>Exchange rate type Intact Daily Rate</p>	<p>Exchange rate date 01/01/2017</p> <p>Exchange rate 1.00</p> <p>Delivery status Delivered</p> <p>Delivery date 01/01/2017</p> <p>Revenue recognition deferral status Defer revenue until item is delivered</p> <p>Custom notes <input type="text" value="This custom field is editable."/></p>
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## Contracts

# Other Updates to Contracts

- Quick Pay Shortcut
- We added a **Pay** link to the Billing transaction history section on contracts (which is now on the new [Contract summary tab](#)).
- Generate Invoices Shortcut
  - We added a **Generate Invoices** link to the Contracts list
- Relax GL posting date rules for evergreen contracts
  - We added a new configuration setting to help prevent evergreen contract renewal failures caused by closed periods, scheduling delays or date mismatches.



# Time



## Time

# Sage Intelligent Time Mobile App Now Supports Employee Expense Automation—Early Adopter

## Details

Previously, the Sage Intelligent Time mobile app allowed you to manage timesheets and time clocks only. Now, you can do the following using the [Sage Intelligent Time](#) mobile app:

- Create, edit, delete, split and submit expense reports
- Upload, edit and delete expense receipts
- Create and edit time clocks
- Create and submit timesheets
- Approve or decline expense reports and timesheets



## Time

# Distribute Time Based on Transaction Allocations– Intelligent Time

- To distribute time, an admin must select the Enable allocation to distribute expense entry checkbox on the configure expenses page
- Only use transaction allocations that are percentage based in a timesheet entry
- You cannot delete distributed entry lines directly. You can delete the entry line that contains the total work hours, which also delete the distributed entry lines.



## Time and Expenses

# Time and Expenses Split into Two Applications

- Now 'Time and Expenses' is split into two applications:
  - **'Time'**
  - **'Expenses'**
- Each application has its own set of permissions



# Expenses



## Expenses Mobile App

# Sage Intelligent Time – Mobile Expenses

- Mobile app now supports employee expense automation.
  - Early Adopter: The Sage Intelligent Time mobile app now supports employee expense automation so that you can capture receipts, submit expense reports and approve or decline them from a mobile device quickly.
- Previously, the Sage Intelligent Time mobile app allowed you to manage timesheets and time clocks only. Now, you can do the following using the Sage Intelligent Time mobile app:
  - Create, edit, delete, split and submit expense reports
  - Upload, edit and delete expense receipts
  - Create and edit time clocks
  - Create and submit timesheets
  - Approve or decline expense reports and timesheets
- Requires Time & Expense module plus named Employee, Project Manager, Warehouse or Business Users.



# Fixed Assets Management



## Sage Fixed Assets Management

# Custom Declining Balance Depreciation Methods

- We added two new depreciation methods to help you comply with financial and tax regulations in Australia, Canada, South Africa and the United Kingdom.
  - Custom declining balance with true-up
  - Custom declining balance without true-up



## Sage Fixed Assets Management

# New Report- Depreciation Roll-Forward

- The depreciation roll forward report provides a detail view of changes in accumulated depreciation for your fixed assets over a specified period.
- It shows the beginning accumulated depreciation balance, depreciation charges recorded during the period, and the ending accumulated depreciation balance, so you can reconcile differences.

### Depreciation Roll Forward Report

[Customize](#)
[Graph](#)
[View](#)
[Print](#)
[Process & store](#)
[Email](#)
[Add to dashboard](#)
[Memorize](#)
[Export](#)

Subtotal name	Asset ID	Asset name	Asset cost	Salvage value	Depreciation schedule ID	Location ID	Department ID	Acquisition date	In-service date	Beginning depreciation balance	Period depreciation balance	Ending depreciation balance	Total remaining depreciation	Journal	Book
▶ BU															
Sum for BU										105,021.62	55,361.20	160,382.82			
▶ CE															
Sum for CE										24,300.32	3,542.42	27,842.74			
Sum Total										129,321.94	58,903.62	188,225.56			



## Sage Fixed Assets Management

# List and Page Enhancements

- Export lists for Assets, Asset Classifications and post depreciation. (Word, Excel, PDF, .csv)
- Manage depreciation rules more easily.
  - Add, edit, remove depreciation rules directly from the edit and create pages of Assets and Asset classification.



## Sage Fixed Assets Management

# Other Updates to Asset Management

- Mark assets as intangible
- Edit certain fields on disposed assets
- Simplified allocation assignments
- Improved asset cost calculation for ITC-Canada (Input Tax Credit)
- User Interface updates
- Import service updates

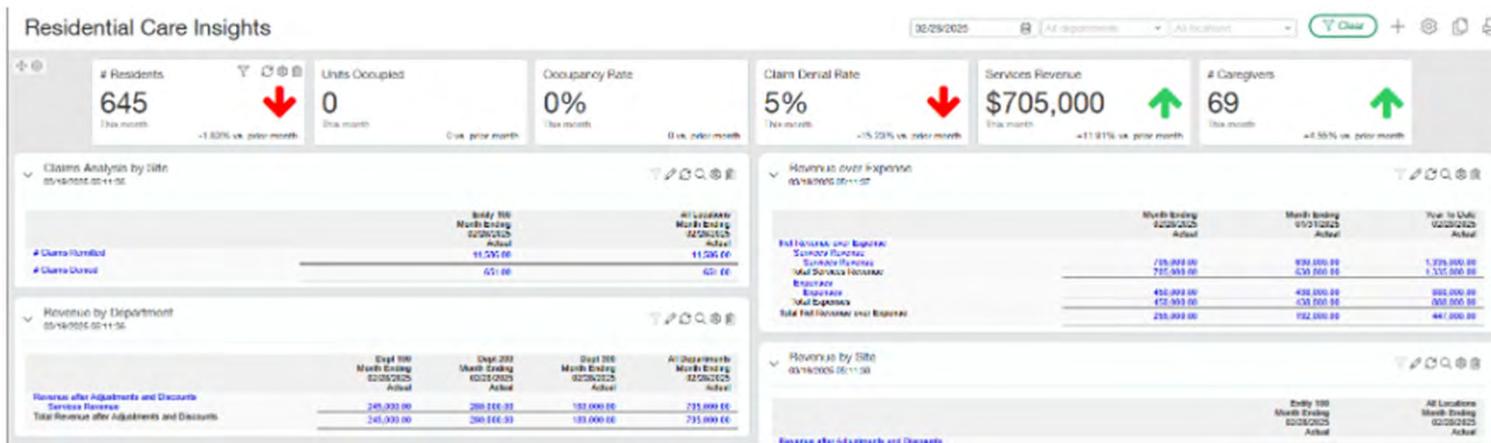


# Healthcare



# New Dashboards for EMRConnect

- EMR Residential Care Insights
- EMR Ambulatory Care Insights





## Healthcare

# Enhanced Connections and Value Transformations

- For EMRConnect
  - Refine the set of data for a value transformation by configuring the value transformation with the condition '**not equals**'.
  - Improve access control and security by using SFTP for connections made through a proxy.



# Reporting



# Optimize the Performance of Financial Reports

- When you save a report in Financial Report Writer, Sage Intacct will analyze your report and potentially offer recommendations to make your report run faster.
- Or, based on the nature of the report, Sage Intacct might suggest a better way to achieve your goals.

**Optimize reporting performance** ✕

Your report probably cannot be generated online due to the following reasons:

The report contains **more than 12 columns**. Consider these tips to optimize the report:

- Split it into multiple reports.
- Include a mix of periods. For example, include the current month and 2 prior months plus the current quarter and 3 prior quarters.

The report contains **4 or more expanded columns or rows**. Consider these tips to optimize the report:

- Split it into multiple reports.
- If you're expanding by dimension, run an individual report for each dimension.

If you cannot make the recommended modifications to this report, [run the report offline](#) using the Process & Store option. You can also consider [alternate reporting options](#).

Don't show me this again Continue



# Tax



## Tax

# Support for Canadian Sales Tax in French

- To support multilingual requirements in Canada, Sage has added French versions of the tax details and schedules that you can import to use with the standard tax solution for Canada.
- Setup instructions can be found in the full release notes accessible within your Sage Intacct environment.



## Tax

# Use Custom Discounts for Canadian Sales Tax

- If your company uses the standard tax solution for Canada, you can now use custom discounts in certain Accounts Receivable transactions.

## Limitations

- When you create an invoice with a term discount, you can only use a custom discount to override a term that calculates based on the line-item total, excluding taxes.
- If you apply a custom discount to a partial payment, then you cannot use a term discount in that transaction.
- If you make a partial payment and then pay off the invoice using a term discount, you cannot apply a custom discount.



Tax

# Additional Country Support for Taxes (EA)

- Singapore
  - Newly added tax solution for domestic GST
- New Zealand
  - Newly added tax solution for domestic GST
- Canada
  - French versions of tax details and schedules
  - Custom discounts for taxable transactions in Accounts Receivable

# Armanino Led Intacct Virtual Classes



Whether you have new employees that need to get up to speed quickly or simply need to learn more about the features and functionality of Sage Intacct, check out our [Armanino Academy](#)!





Thank you for attending  
**Additional Questions?**

Reach out to us!

**Sean DeMuro**

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