



THE POWER OF MORE

NEWS & UPDATES

Welcome to Gray Gray & Gray's Sage Intacct newsletter where we provide helpful insights and information on the many great benefits of the Sage Intacct solution, and ways you can realize their usefulness.

Happy Holidays!

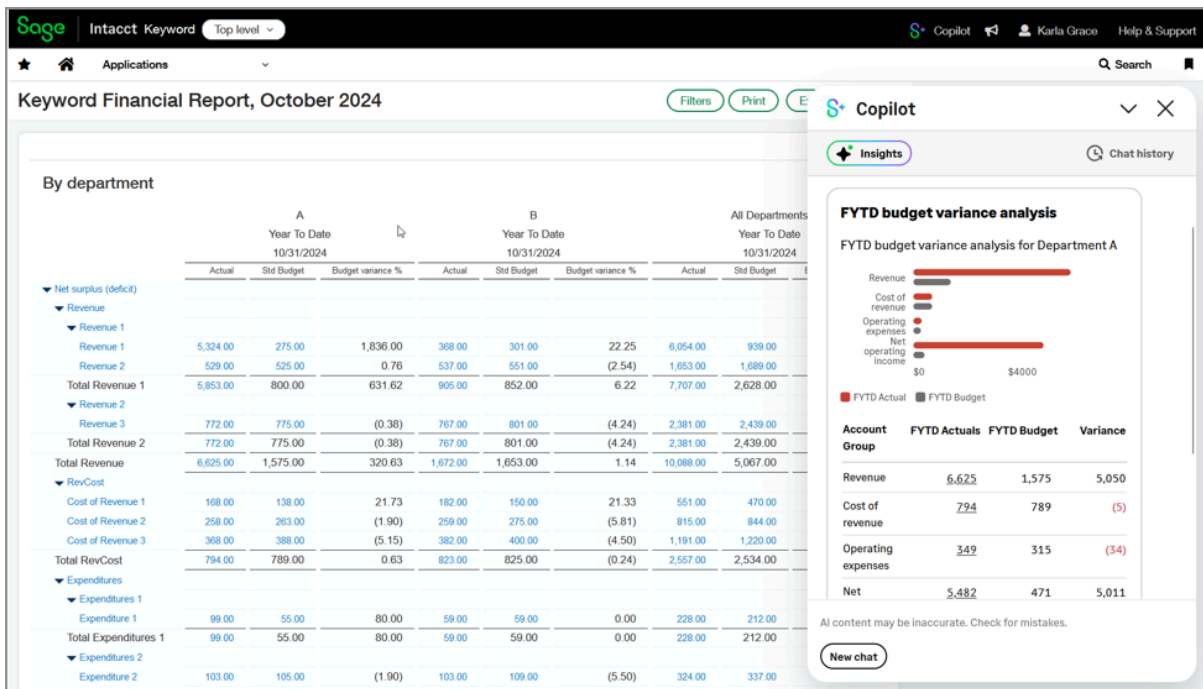


Happy Holidays! On behalf of the entire Gray, Gray & Gray team, we hope this holiday season brings you happiness, peace, and quality time with loved ones. Please note Gray, Gray & Gray will be closed Tuesday, December 24th and Wednesday, December 25th, in celebration of the holiday. We will resume normal business hours on Thursday, December 26th.

This Month's Feature Spotlights: Sage Copilot Variance Analysis and Search Help for Early Adopter

Introducing Copilot Variance Analysis – Early Adopter

Sage is excited to unveil Copilot Variance Analysis, a cutting-edge tool designed to help business leaders proactively manage budgets and spending. This innovative feature provides AI-driven insights into budget variances, empowering users to investigate discrepancies and address financial concerns efficiently.



Key Features:

- **Automated Alerts:** Receive notifications when actual expenses exceed budget, allowing for immediate action.
- **Real-Time Variance Tracking:** Monitor budget vs. actual variances in real-time, ensuring you're always aware of your financial health.
- **Data Visualization:** Visualize your financial data through intuitive charts and graphs for easy understanding.
- **Drill-Down Analysis:** Easily drill down into reports to identify the root causes of variances for specific GL accounts.
- **Detailed Variance Insights:** Get AI-generated variance descriptions that identify potential causes and implications of the variances.
- **Targeted Data Visibility:** Get visibility into data relevant to your respective budget areas. For example, a department manager will be able to see variance analysis for a specific department while a controller will be able to see variance analysis for the entire organization.

Introducing Search Help with Copilot – Early Adopter

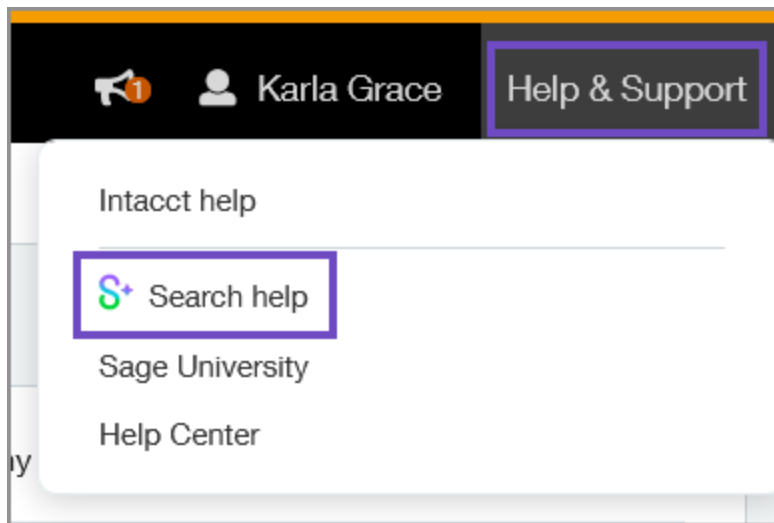
Sage is thrilled to introduce the Early Adopter release of **Search Help with Copilot**, an AI-powered semantic search engine designed to transform how you find answers within Sage Intacct. This innovative tool understands the context and intent behind your queries, delivering more accurate and relevant results to save you time and effort.

Key Features:

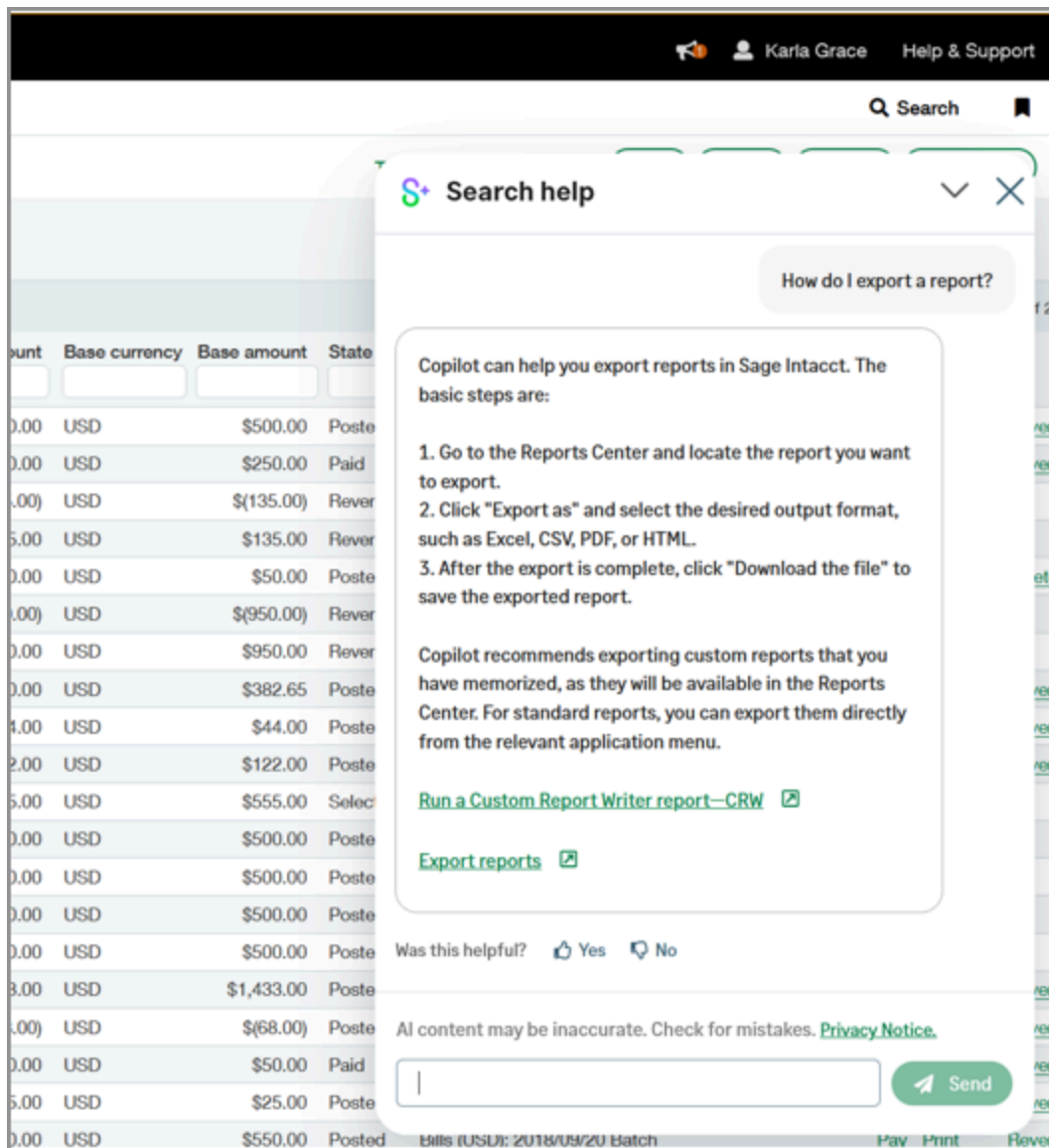
- **Natural Language Understanding:** Copilot understands the nuances of Sage Intacct terminology and can interpret complex queries.
- **Increased Efficiency:** Significantly reduces search time and the need for multiple searches by delivering more relevant results.
- **Intelligent Recommendations:** Provides suggestions for related topics and articles to expand your knowledge.

How It Works:

When your company is enabled to use Search help with Copilot, you'll see a new Search help option in the Help & Support menu.



Selecting **Search help** opens the Copilot panel on the right side of your Intacct page.



Enter a query using natural language in the search box located at the bottom of the **Search help** panel. The more specific you are, the more accurate the results will be.

Copilot responds with an answer and provides links to additional information.

What's the Early Adopter program?

The Early Adopter program allows a select group of customers to test and provide feedback on new features. Their input will help us refine and improve these features before the general release.

The Early Adopter program is actively monitored. We work closely with the early adopters to ensure that we focus our time and attention on what matters most to you.

If you would like to be considered to be an early adopter of Copilot Variance Analysis, take this short [survey](#). Alternatively, if you're interested in being an early adopter of Search help with Copilot, take this short [survey](#).

To learn more about the Setup and Requirements for Sage Copilot Variance Analysis and Search Help for Early Adopter, contact our [Sage Intacct Help Desk](#).

Transform Your Financial Planning & Analysis with Martus



MARTUS

Gray, Gray & Gray is excited to announce our partnership with Martus, a cutting-edge Financial Planning & Analysis platform that seamlessly integrates with and leverages your existing Sage Intacct ERP system. This powerful combination allows us to offer a comprehensive financial management solution that streamlines planning, budgeting and forecasting processes.

[LEARN MORE HERE](#)

Recording Available! Gray, Gray & Gray's 2024 Year End Planning Seminar



We appreciate everyone who attended our Annual Year End Planning Seminar, taking away valuable insights to help them strive for success in 2025. Special thanks to all of our presenters, moderator and panelists - including our keynote speaker, [Eric Mason](#) of the City of Quincy, [Brad Carlson](#), [Derek Rawls](#), [Bryan Pearce](#), and our client panelists, [Jim Finn](#) of Universal Window and Door, [Jonathan Kasen](#) of Shaker Valley Capital Partners, Hilliard's Chocolates and Harbor Sweets, and [Bob Winneg](#) of Winwood Capital Partners - for sharing their knowledge.

We'd also like to extend our gratitude to [Bill Constantopoulos](#) for conducting the [Sage Intacct](#) demos during networking and breaks, giving attendees a closer look at how this powerful tool can help streamline financial management and support business growth.

In case you missed our recent seminar or would like a refresher on the information shared, you can now access the recording and copy of the presentation online. Check out the recording and get fired up for 2025 with information and inspiration designed to give you a head start on developing the strategies and tactics to grow and prosper in the New Year.

[ACCESS RECORDING HERE](#)

Massachusetts Raises Financial Reporting Thresholds for Nonprofits



The Commonwealth of Massachusetts has recently implemented significant changes to its financial reporting requirements for nonprofit organizations, marking an important shift that affects hundreds of organizations across the state. These changes reflect a more nuanced approach to financial oversight that better aligns with today's economic realities.

[READ THE ARTICLE HERE](#)

Sage Intacct Demo with Q&A



Coffee Break Demo

Learn how Sage Intacct helps you drive business performance from multi-entity consolidation in minutes to powerful, yet easy-to-use cloud budgeting and planning software.

REGISTER NOW

Sage Intacct Construction Demo Plus Live Q&A



Coffee Break Demo

Learn how Sage Intacct Construction, the only native-cloud construction financial management solution, helps manage multiple entities with ease, gain real-time insights into business drivers, and distribute environments/scalability.

Learn more about the expansion of Sage construction cloud suite with the launch of Sage Construction Management. Read the full [press release here](#).

REGISTER HERE

Additional Upcoming Sage Webinars

Chief Cloud Officer: Helping SMB Finance Leaders Evolve

December 17 at 2:00 PM EST

[REGISTER HERE](#)

Navigating 2025: Healthcare finance leaders' top priorities, predictions, and strategic plans

January 7 at 2:00 PM EST

[REGISTER HERE](#)

The Rise of AI in Modern Finance

January 14 at 2:00 PM EST

[REGISTER HERE](#)

Team Member Spotlight: Sarah Hayes, MFA

Sarah brings comprehensive expertise to her role as Sage Intacct Consultant specializing in ERP implementations. Her credentials include multiple Sage certifications: Implementation Consultant, Construction Certified Implementation Consultant, Construction Industry Specialist and Construction Sales Professional. These certifications demonstrate her deep expertise in both general ERP implementation and industry-specific applications.

Sarah's professional background spans diverse industries, including aviation, technology, construction, publishing, and logistics. She also contributes significantly to the non-profit sector, working with organizations focused on social services, publishing, and the arts. This varied experience enables her to understand and address the unique financial management needs across different organizational structures and industries.



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As an ERP Implementer, Sarah leverages her extensive background in finance and HR to provide strategic solutions for clients transitioning to Sage Intacct's cloud-based financial management

platform. Her comprehensive understanding of both operational and technical aspects makes her particularly effective in guiding organizations through complex system implementations.

Sarah joined Gray, Gray & Gray in 2024. She is a graduate of Hamline University.

Interested in learning more about the Sage Intacct Solution from Gray, Gray & Gray?

[Schedule a Consultation](#)

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