



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.

This Month's Feature Spotlight: Introducing Vendor-Based Approval for Bill Routing

Managing bill approvals by vendor just got easier! With Sage Intacct's new vendor-based approval rule, you can assign specific approvers to vendors directly within their records. When a bill is submitted, it's automatically routed to the right approver's queue—streamlining your workflow and ensuring a smoother approval process.

Important Note: If your bill approval policy includes both a Vendor-Based Approval rule and a Value Approval - Transaction Department rule, vendor-based approval takes priority. This means that for vendors with assigned bill approvers, departmental approval is overridden.

Details:

Accounts Payable bill approval policy

Save Cancel More actions

Process

	Rule type *	Rule set	Manage rule	
1	Rule type	Rule set		+
2	Find		Edit	+

Vendor-based Approval
Value Approval
Value Approval - Transaction Department

- Add the **Vendor-Based Approval** rule type to your bill approval policy in **Accounts Payable Configuration**.
- Once enabled, a **Bill Approver** field will appear in vendor records.

The screenshot shows the 'Billing details' section of the Sage Intacct Accounts Payable interface. At the top, there is a navigation bar with 'Accounts Payable' and a search icon. Below that, the vendor name 'V0008 -- Star Guard Insurance' is displayed, along with action buttons: 'Save', 'Duplicate', 'Print to...', 'Cancel', and 'More actions'. The 'Billing details' section contains several fields: 'AP account' (empty dropdown), 'Default expense account' (6270--Insurance - General Insurance), 'Credit limit' (empty text field), 'Bill approver' (Electra--Electra Ramirez, highlighted with a purple box), 'On hold' (checkbox), 'Do not pay' (checkbox), 'Comments' (empty text field), and 'Default currency' (empty dropdown).

- Assign bill approvers by **editing vendor records manually or importing updates via CSV.**
- Any **unrestricted business or employee user** with “**Approve Bills: List**” permissions can be selected as a bill approver.
- You can assign **user groups** as approvers, provided all members of the group are unrestricted and have the appropriate permissions. Only one group member needs to approve the bill.

When multiple rule types are present in your bill approval policy, they execute as follows:

- If your bill approval policy includes multiple rules, rules are executed in the order you list them.
- If a bill is submitted for a vendor that does not have an assigned approver, the bill is automatically approved for that rule and Sage Intacct proceeds to the next approval rule.
- If you have both a **Value Approval - Transaction Department** rule set and a **Vendor-Based Approval** rule type present in your bill approval policy, Sage Intacct executes the rules as follows:
 - For bills from vendors with assigned bill approvers, **Vendor-Based Approval** executes and **Value Approval - Transaction Department** is bypassed. This allows you to create bills for **Vendor-Based Approval** that are allocated across multiple departments.
 - For bills from vendors that do not have assigned bill approvers, **Value Approval - Transaction Department** executes and **Vendor-Based Approval** is bypassed.

How It Works:

Step 1: Setup

1. If you’re already using bill approvals, add the **Vendor-Based Approval** rule type to your existing configuration.
2. Grant “**Approve Bills: List**” permission to the users who need approval access.

Step 2: Assign Bill Approvers

1. Go to **Accounts Payable > All tab > Vendors.**
2. Select **Edit** next to the vendor you want to update.
3. Go to the **Additional information** tab.
4. In the **Bill Details** section, select a **user or user group** from the **Bill approver** list.
5. Select **Save** or **Submit.**

Note: If you have vendor approval enabled, this change takes effect after the vendor update is approved.

Step 3: Approve Bills

1. A user submits a bill.
2. Sage Intacct runs the bill approval rules based on your policy configuration.
3. When the approval workflow reaches the **Vendor-Based Approval** rule, Sage Intacct checks to see whether a bill approver is assigned to the vendor.
 1. If an approver is assigned, the bill is added to their approval queue.
 2. If no approver is assigned, the bill is automatically approved, and the next rule executes.
4. The assigned approved reviews the bill and either:
 1. **Approves it** → The bill status changes to **Posted** or **Partially Approved** (if additional rules apply).
 2. **Declines it** → The bill status changes to **Declined**.
5. Submitters with bill approval notifications enabled will receive an update once approval is complete.

To learn more about the Setup and Requirements for **Vendor-Based Approval for Bill Routing**, contact our [Sage Intacct Help Desk](#).

Align Your Technology with Your Mission



We are excited to announce the launch of our [Technology Integrations Consulting practice](#) at Gray, Gray & Gray. This new service helps businesses connect and optimize their digital systems to drive efficiency and growth.

Our expert team will help you:

- Streamline operations by eliminating data silos
- Automate manual processes
- Enable real-time business insights
- Scale your technology infrastructure

Through partnerships with industry leaders like Workato, DataBlend and Microsoft we deliver customized integration solutions that maximize your existing technology investments.

[LEARN MORE HERE](#)

New Webinar Series! The Power of Connection: Technology Integrations Strategies for Business



Gray, Gray & Gray is excited to announce our new [Technology Integrations Consulting](#) services bi-monthly webinar series: "The Power of Connection". In these 30-minute sessions, we'll tackle

all the burning questions about how to best deploy and utilize the incredible array of tools available to streamline operations and build a more efficient business.

Join us for our first webinar of the series, **Demystifying Integrations and Automations**, on February 18 at 1:00pm, where we'll take a "big picture" approach to introduce you to software integrations as well as API basics which are the building blocks of integration. Click [HERE](#) to register.

LEARN MORE & REGISTER HERE

We are pleased to welcome the following new Gray, Gray & Gray team members.

We look forward to bringing your unique skills and experience to our firm, helping to deliver the power of more!



Juliana Agnitti
Tax Intern



Paul Alfonso
Tax Intern



Anastasios Aslanidis
Tax Intern



Thomas Feinsmith
Tax Supervisor



Sairy Gonzalez-Amador
Tax Intern



Sarah Hayes
Sage Intacct & Advisory Consultant



Richard Wilz
Tax Intern



Mark Zhukov
Tax Intern

Transform Your Financial Planning & Analysis with Martus



Gray, Gray & Gray now offers a powerful financial management solution through our partnership with Martus, a cutting-edge Financial Planning & Analysis platform. Martus 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

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](#).

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Additional Upcoming Sage Webinars

From Chaos to Clarity: Simplifying Finance for SaaS Success

February 19 at 1:00 PM EST

[REGISTER HERE](#)

Mission Synergy: Aligning Finance and Fundraising for Greater Impact

February 19 at 2:00 PM EST

[REGISTER HERE](#)

The Rise of AI in Modern Finance

February 25 at 2:00 PM EST

[REGISTER HERE](#)

Forecasting Your Mission with Automated Nonprofit Budgeting and Planning

March 4 at 2:00 PM EST

[REGISTER HERE](#)

The Intersection of AI and Finance

March 11 at 2:00 PM EST

[REGISTER HERE](#)

CFO Masterclass: Key Strategies for Success

March 25 at 2:00 PM EST

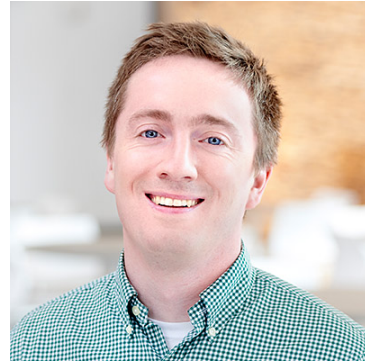
[REGISTER HERE](#)

Team Member Spotlight: James Cotter

When James Cotter joined the Sage Intacct team here at Gray, Gray & Gray in 2021, it was an eye-opening experience.

“I was amazed by the support and collaboration that goes on internally,” says James. “This is just a great place to do great work.”

James had extensive experience with Sage Intacct before he arrived. After graduating from the College of William & Mary, the Virginia native worked with a variety of clients at high level technology consulting firms. But he was ready to dive deeper and do more for clients who were adopting the Sage Intacct platform.



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“The depth of talent and dedicated resources we bring to the table allows us to deliver a more complete experience for our clients. That starts with planning and set-up, and extends right through implementation and rollout. But I think the real reason our clients have such success with Sage Intacct is the support and guidance we provide once they begin using the system.”

“I know everybody claims they support the product. But I have never seen such a total commitment to making sure things are done right so that every client can maximize the value of their Sage Intacct platform. It’s fun to be a part of that!”

Working as part of a close-knit team is nothing new to James, a lifelong soccer player. “Knowing your teammates will be in the right spot at the right time is critical on the soccer pitch, just as it is when building out the right software solution for a client. In both cases, the sense of accomplishment and success is worth the effort.”

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

[Schedule a Consultation](#)

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