



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.

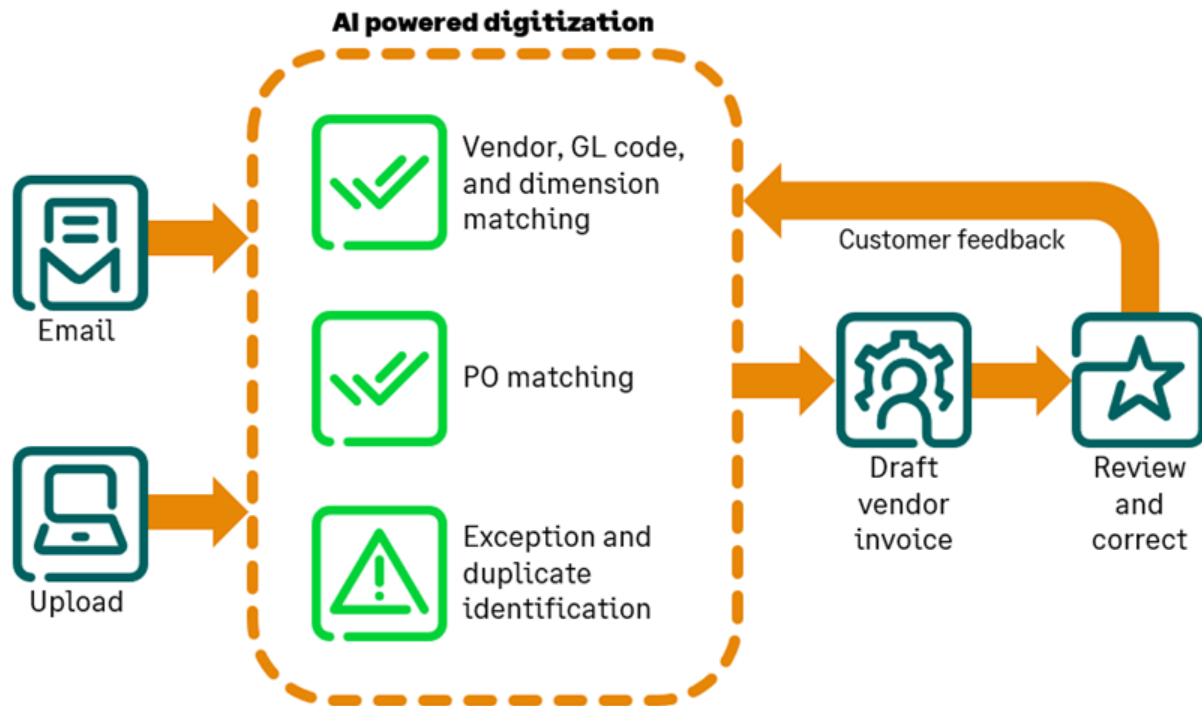
This Month's Feature Spotlight: AP Automation with Purchasing

Transform your purchasing process with our innovative Purchasing Automation, an exciting add-on to AP Automation. This powerful add-on simplifies the drafting and matching of incoming purchasing transactions, ensuring that vendor invoices are seamlessly drafted and aligned with existing documents like purchase orders or receivers. Embrace the efficiency and accuracy that Purchasing Automation brings to your financial operations, making your workflow smoother and more effective than ever before.

Details:

You define how incoming Purchasing documents map to existing source transactions in a one-time setup. Then, instead of converting Purchasing transactions to vendor invoices, you let Sage Intacct match incoming vendor invoices, using the following flow:

1. You email or upload vendor invoice documents for automated processing.
2. Sage Intacct uses artificial intelligence (AI) to detect the vendor and match the vendor invoice to a Purchasing transaction.
3. The system creates a draft vendor invoice for you, with the source document attached. Line items populate based on the matched source transaction.
4. You review the draft vendor invoice, validating it against the source document and making corrections as necessary, and then post.
5. Your corrections are fed back to the AI engine, where it updates the machine learning model to improve future matches.



As you review drafts, you have the option to change the match to a different Purchasing transaction or change the draft transaction to an AP bill or another transaction type.

How It Works:

- Automated transactions appear in a new Automated transactions list, which is available in the Accounts Payable and Purchasing menus.
- Incoming transactions are created as vendor invoices by default, and you can change the transaction type as needed before posting.
- You can change the transaction match for a draft transaction at any time before you post it.
- For transactions that do not belong in the Purchasing workflow, such as rent or utility bills, you can select Change to AP bill to move the transaction to Accounts Payable.
- If you want Sage Intacct to create all future transactions for a vendor as AP bills, you can set Change to AP bill as a preference on the vendor record.
- Sage Intacct automatically detects files that were previously uploaded and flags them as duplicates, bringing them to your attention.

Step 1. Email or upload vendor invoice documents

Email a vendor invoice

Forward one or many documents to the Sage-provisioned email address for the entity where you want it to be created. Purchasing automation uses the same mailboxes that were set up for you when you enabled AP Automation, so you do not have to learn new email addresses.

Sage Intacct analyzes the emailed document, creates a draft vendor invoice for the vendor in Purchasing, and adds the new transaction to the Automated transactions list.

Upload a vendor invoice

Upload new Purchasing transactions in the Automated transactions list, instead of the Bills list.

1. Go to **Accounts Payable** or **Purchasing > All > Automated transactions**.
2. Select **Upload** on the Automated transactions list to upload up to 30 vendor invoices at one time.
 1. Uploaded vendor invoices appear in the list immediately while Sage Intacct analyzes the data.

3. Select **Refresh** to update the list and see when the draft transaction is complete and ready for review.

Step 2. Review automated transaction drafts

1. Go to **Accounts Payable** or **Purchasing > All > Automated transactions**.
2. Select **Edit** next to the draft vendor invoice on the Automated transactions list.
 1. If you have split view enabled in your personal preferences, you can view the original vendor invoice alongside the draft transaction for easy comparison.
3. Review the draft details.
 1. To change the transaction match, select **Change**, then select a different source transaction from this vendor in the popup.
 2. To move the transaction to the Accounts Payable workflow, select **Change to AP bill**.
 3. Edit header information and adjust line items as needed.
4. **Post** the transaction.

To learn more about the Setup and Requirements for **AP Automation with Purchasing**, contact our [Sage Intacct Help Desk](#).

Webinar Recording Now Available! "The Power of Connection" Demystifying Integrations and Automations



We officially kicked off The Power of Connection webinar series! Thank you to everyone who joined in our session on Demystifying Integrations and Automations. In case you missed this webinar or would like a refresher on the information shared, you can now access the recording online. During Demystifying Integrations and Automations, we 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 access the recording now.

Looking for more? Gray, Gray & Gray's Technology Integrations Consulting services bi-monthly webinar series: “The Power of Connection” continues on April 22 with our next session, Integration Methods and Data Approaches!

[LEARN MORE & REGISTER HERE](#)

Gray, Gray, & Gray Ranked Among Top Massachusetts Accounting Firms by Boston Business Journal

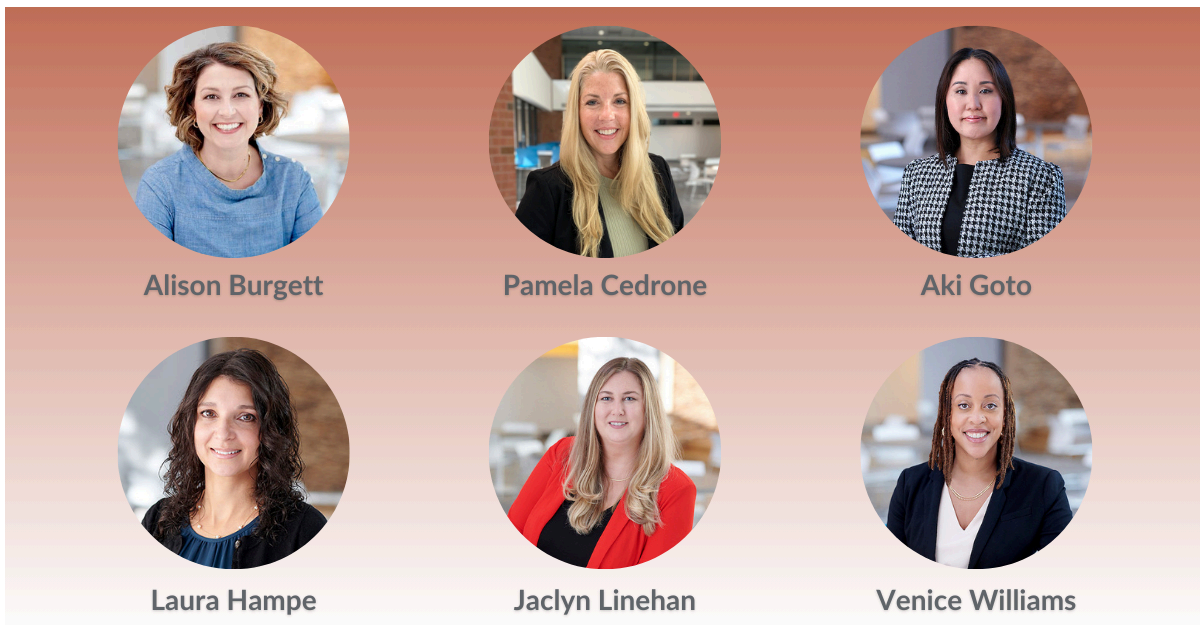


We are elated to announce that Gray, Gray & Gray has been ranked as the 18th largest accounting firm in Massachusetts by the Boston Business Journal! The publication's annual rankings are based on the size of the firm's professional staff in the state and include both independent firms and regional offices of large national accounting firms.

"We do not answer to a corporate office in New York or Chicago. Our leadership, our guidance, and our decision-making are made right here where our clients need us," says DeLeo.

[READ THE FULL PRESS RELEASE HERE](#)

Celebrating Women's History Month at G3

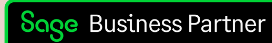


As a firm with a rich history spanning over 80 years, we deeply value the contributions of the women at g3. We take this time to honor and appreciate their unique stories, which have made a significant mark on our firm. We are proud to announce that the following team members have been featured in Boston Business Journal's People on the Move in celebration of Women's History Month. Please join us in recognizing them for these well-deserved features, serving as inspirational examples of women in the industry!

- [Alison Burgett, Chief People Officer](#)
 - [Pamela Cedrone, CAAS Director](#)
 - [Aki Goto, Audit Senior Manager](#)
 - [Laura Hampe, Marketing Director](#)
 - [Jaclyn Linehan, Tax Senior Manager](#)
 - [Venice Williams, Tax Director](#)
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Visit Our Booth for a Sage Intacct Demo & Earn Some Swag!

Participants will receive a Nike Hat (available on a first-come, first-served basis).



April 4 - 6, 2025

Charlotte Convention Center, Charlotte, NC

Be sure to visit Gray, Gray & Gray's booth (#526) at this year's expo. Gray, Gray & Gray Manager, [Jacob Barrett](#), will be at our booth (#526) hosting live demos of Sage Intacct during the upcoming NPGA Expo in Charlotte, NC! This powerful cloud-based ERP solution that allows you complete access to mission critical financial information - with real time data available anywhere at any time. Don't miss out! Plus, each person who attends a demo will receive a Gray, Gray & Gray branded hat (limit one per person, available on a first-come, first-served basis). We will also be co-presenting the following session:

National Propane Survey Panel Discussion: What the Experts Say

Friday, April 4, 2025, 12:30 pm - 1:45 pm

Presenters: Marty Kirshner, CPA, MSA, Partner, Gray, Gray & Gray, LLP; Philip Baratz, CEO & Co-Founder, Angus Energy; Barrett Conway, Managing Director, Cetane Associates; David O'Connell, President, Wilson Oil & Propane; Richard Goldberg, President, Warm Thoughts Communications

[LEARN MORE ABOUT THE CONFERENCE](#)

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

CFO Masterclass: Key Strategies for Success

March 25 at 2:00 PM EST

[REGISTER HERE](#)

Unlocking Donor Engagement with Data-Driven Storytelling

April 1 at 2:00 PM EST

[REGISTER HERE](#)

Embracing AI in Finance: Transparency and Innovation

April 8 at 2:00 PM EST

[REGISTER HERE](#)

Challenges and Best Practices for Specialty Contractors

April 15 at 2:00 PM EST

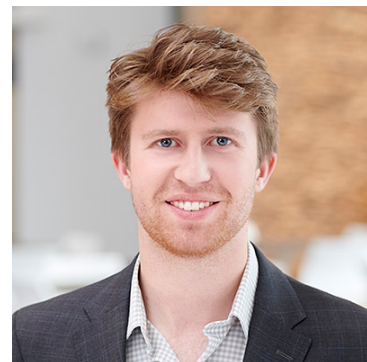
[REGISTER HERE](#)

Team Member Spotlight: Jacob Barrett

Jacob Barrett knows that a robust and versatile accounting software system is essential for providing the accurate and timely data and information needed to manage a modern organization. In his role as a Manager, Jacob manages the design, transition and implementation process for clients who choose to take advantage of the world's most powerful enterprise software systems.

Jacob works with clients to help ensure that the transition from their legacy accounting software to Sage Intacct is seamless. This starts with an in-depth assessment of current and anticipated accounting needs, leading to an implementation plan that maximizes efficiencies in workflow and ensures a successful deployment of the Sage Intacct system.

Prior to joining Gray, Gray & Gray, Jacob was an Accountant and Sage Intacct Administrator with Opportunity Communities, LLC. He is a graduate of Northeastern University, where he earned a Bachelor's Degree in Mathematics and Business Administration. Outside of work you might find Jacob hiking, playing his guitar, or playing volleyball.



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

Schedule a Consultation

Do you know anyone that could use Gray,
Gray & Gray's assistance?

Submit a Referral

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