

# SAGE INTACCT NEWSLETTER

## ISSUE 1 (2025)

### PAGE 1

- What's New
- Sage Copilot

### PAGE 2

- Sage Copilot
- Sage Fixed Asset Management Enhancements
- Sage Intacct Supplies Inventory

### PAGE 3

- Sage Intacct Supplies Inventory
- Industry Enhancements

### PAGE 4

- Industry Enhancements
- Other Notable Enhancements
- About Us

## INTRODUCING SAGE INTACCT 2025

### HERE'S A LOOK AT WHAT'S NEW

The first release of **Sage Intacct 2025** is now available. The theme of this release is "elevating the work of humans using AI and automation." In plain English, it means leveraging technology to free time from mundane and repetitive tasks, reduce errors, and allow your finance team to focus more on business growth and strategic initiatives.

Here's a look at what's new in the latest Sage Intacct 2025 Release 1 (R1).

### Sage Copilot (AI Productivity Assistant)

As we've highlighted in other recent releases, the new **Sage Copilot** is an AI-powered productivity assistant that can automate tasks, tackle your to-do list, and recommend operational improvements as you work.

With Sage Intacct 2025 R1, this AI-powered productivity assistant is even more intuitive and capable of handling complex tasks with greater efficiency. It can anticipate your needs by learning from past interactions, making proactive suggestions that save time and optimize workflow.

Let's take a look at two areas in particular where Sage Copilot has been enhanced:

### Search Help

This revolutionizes the way you find help and answers in Sage Intacct. Using natural language processing, Sage Copilot understands and responds to queries more humanly and understands the nuances of Sage Intacct terminology.

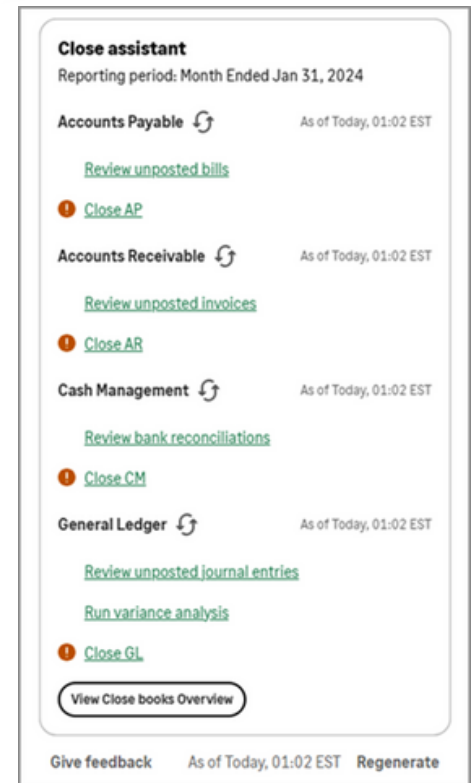
In short, this means you can ask Sage Copilot to generate reports, analyze trends, or even draft communications without navigating multiple menus or manually input data.

## Variance Analysis and Closing the Books

Sage Copilot can help you with the review process and variance analysis, which is often a bottleneck when it comes to closing the books and publishing financials.

For instance, Sage Copilot can compare budget and actuals while analyzing patterns in your financial data to highlight anomalies and potential issues. This helps improve accuracy, detect and resolve variances before the close, and enable faster and more informed decisions.

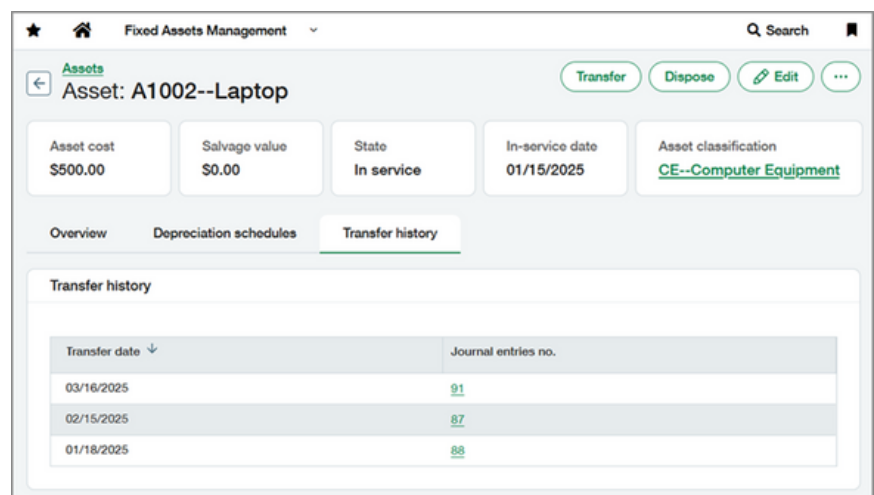
In addition, the Early Adopter program is rolling out a new **Close Assistant**. Designed to streamline your closing process, this AI-driven tool delivers proactive monitoring and at-a-glance visibility of month-end closing tasks such as unposted transactions in your GL, bank reconciliations in cash management, subledger and GL close status, and more.



## Sage Fixed Asset Management Enhancements

The Sage Fixed Asset Management (SFAM) component of Sage Intacct now extends features to accurately record asset movement so you can transfer assets between departments or projects while ensuring the transactions receive proper accounting treatment.

Each transfer automatically generates journal entries to update the asset's dimensions in the General Ledger, removing the need for manual updates. Transfers are also recorded on the new Transfer History tab for complete transparency and tracking.



## Sage Intacct Supplies Inventory

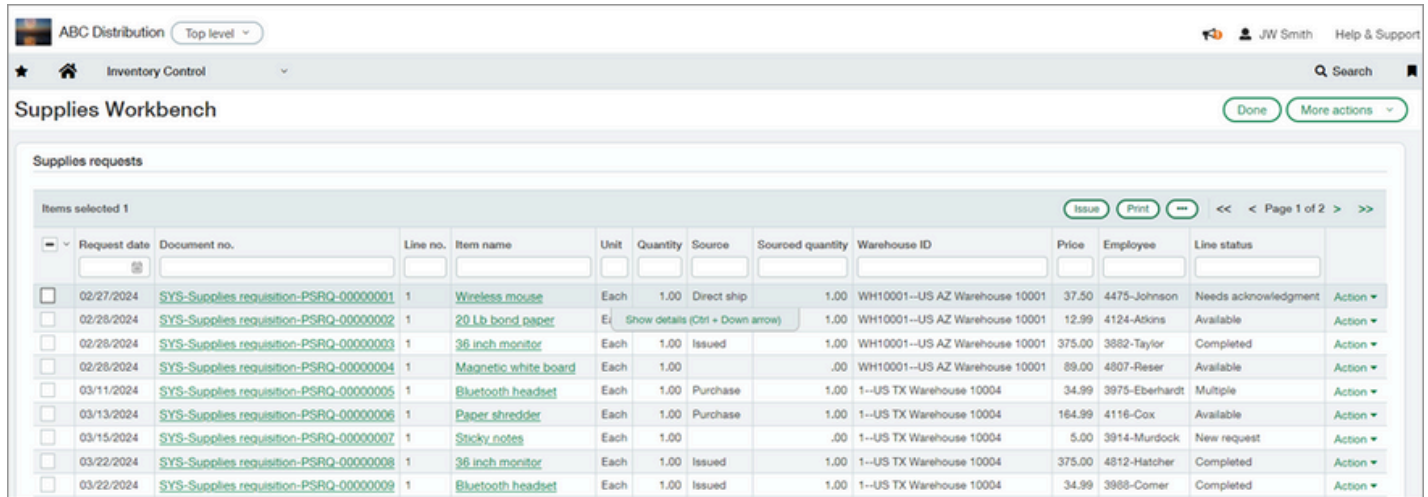
Sage Intacct 2025 introduces a new way to manage your internal supplies from request to fulfillment.

Supplies Inventory provides a convenient way to manage employee requests for items needed to run your business (i.e. paper, pens, keyboards, cables, etc.). Your supplies manager can review and fulfill incoming requests and ensure accurate accounting as supplies are consumed. It provides valuable insight into purchasing and usage trends across locations and periods.

# WHAT'S NEW WITH SAGE INTACCT

Your employees create requests when they need supplies, and the supplies manager uses the **Supplies Workbench** to complete the following workflow activities:

- Review incoming supplies requests and evaluate reorder levels based on most-needed items.
- Create new purchase orders or transfer in-stock items between warehouses.
- Replenish the in-house availability of most-requested items.



The screenshot displays the 'Supplies Workbench' interface. At the top, there's a header with 'ABC Distribution', a 'Top level' dropdown, and user information 'JW Smith' with a 'Help & Support' link. Below the header, the 'Inventory Control' section is active. The main area is titled 'Supplies requests' and shows a table of items selected (1 item). The table has columns for Request date, Document no., Line no., Item name, Unit, Quantity, Source, Sourced quantity, Warehouse ID, Price, Employee, and Line status. The table lists several requests, including 'Wireless mouse', '20 lb bond paper', '36 inch monitor', 'Magnetic white board', 'Bluetooth headset', 'Paper shredder', 'Sticky notes', and '36 inch monitor'. Each row has an 'Action' button.

Request date	Document no.	Line no.	Item name	Unit	Quantity	Source	Sourced quantity	Warehouse ID	Price	Employee	Line status	Action
02/27/2024	SYS-Supplies requisition-PSRQ-00000001	1	Wireless mouse	Each	1.00	Direct ship	1.00	WH10001--US AZ Warehouse 10001	37.50	4475-Johnson	Needs acknowledgment	Action
02/28/2024	SYS-Supplies requisition-PSRQ-00000002	1	20 lb bond paper	Each	1.00	Direct ship	1.00	WH10001--US AZ Warehouse 10001	12.99	4124-Adkins	Available	Action
02/28/2024	SYS-Supplies requisition-PSRQ-00000003	1	36 inch monitor	Each	1.00	Issued	1.00	WH10001--US AZ Warehouse 10001	375.00	3882-Taylor	Completed	Action
02/28/2024	SYS-Supplies requisition-PSRQ-00000004	1	Magnetic white board	Each	1.00	Direct ship	.00	WH10001--US AZ Warehouse 10001	89.00	4807-Reser	Available	Action
03/11/2024	SYS-Supplies requisition-PSRQ-00000005	1	Bluetooth headset	Each	1.00	Purchase	1.00	1--US TX Warehouse 10004	34.99	3975-Eberhardt	Multiple	Action
03/13/2024	SYS-Supplies requisition-PSRQ-00000006	1	Paper shredder	Each	1.00	Purchase	1.00	1--US TX Warehouse 10004	164.99	4116-Cox	Available	Action
03/15/2024	SYS-Supplies requisition-PSRQ-00000007	1	Sticky notes	Each	1.00	Direct ship	.00	1--US TX Warehouse 10004	5.00	3914-Murdock	New request	Action
03/22/2024	SYS-Supplies requisition-PSRQ-00000008	1	36 inch monitor	Each	1.00	Issued	1.00	1--US TX Warehouse 10004	375.00	4812-Hatcher	Completed	Action
03/22/2024	SYS-Supplies requisition-PSRQ-00000009	1	Bluetooth headset	Each	1.00	Issued	1.00	1--US TX Warehouse 10004	34.99	3988-Corner	Completed	Action

## Industry Enhancements

Various new or enhanced industry-specific features have been rolled out with the release of Sage Intacct 2025 R1. Here's a quick look at some of the key new capabilities:

### Clinical eProcurement

Designed for healthcare organizations, new **vendor punchout catalogs** allow you to create shopping carts directly from a vendor's website and then send the details to Sage Intacct, eliminating duplicate data entry. Buyers enjoy up-to-date product pricing and availability directly from the supplier while your procurement policy guidelines can be baked into the vendor's web portal.

### Lending Management

Coming in April 2025, lenders will now be able to manage loans from origination to payoff including client billing, statements, and more. Includes full subledger tracking and reporting to ensure real-time portfolio insight and audit readiness. And of course, with seamless integration, it connects directly to Sage Intacct GL, AP, and Cash Management.

### Construction Enhancements

New compliance features make vendor tracking easier than ever. You can now track and manage **secondary vendors** on a new tab that displays directly on primary document commitments. In addition, secondary vendors automatically populate as potential joint payees for commitment invoices.

# WHAT'S NEW WITH SAGE INTACCT

In addition, new features added in **Sage Intacct Construction Payroll** include:

- Easily access payroll setup information for employees and projects.
- Construction payroll setup tables are now available for advanced reporting in Custom Report Writer and Interactive Custom Report Writer.
- Approved timesheets can be sent directly to Construction Payroll, streamlining payroll processing.

Lastly, to help make time and materials billing seamless, you can now view and create reports with all dimensions from project and billed expenses. Plus, user-defined timesheet fields are now available for reporting.

## Other Notable Enhancements

Here's a collection of new features or enhancements in other areas of Sage Intacct that we think are noteworthy:

- Enhanced PO approvals with new delegation options and simplified approval workflow.
- Important platform and technological updates, including email domain validation to authenticate email for better security and reliability, and outbound web hooks enable developers to share data between systems.
- Support for US NACHA bank payment files.
- Expanded currency support for funds transfer across three unique currencies with automatic exchange rate calculations.
- Streamlined project and grant records now provide faster, focused insight on billings and resource price information.

## QUESTIONS?

We've only covered a selection of key new features in many improved functions throughout the software. Be sure to contact us with your questions about Sage Intacct 2025 R1 or to request a link to the complete and detailed release notes.

## ABOUT VRAKAS/BLUM COMPUTER CONSULTING

*Our team of ERP implementation experts is committed to ensuring that your business management systems enhance your productivity and profitability at every level of your organization.*

*You can count on our deep software and industry expertise to provide ongoing solutions and assistance throughout the years to come, because you will continue to work with the same expert team.*

**EMPOWER WITH SOFTWARE. PERFECT YOUR PROCESSES.**  
**OUR SOLUTIONS SUPPORT TEAM IS WITH YOU EVERY STEP OF THE WAY.**