

Sage Intacct 2026 Release 2

LATEST UPDATES





WELCOME

Today's Presenters



Jenn Bowman

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Sage Intacct
Solution Architect



Jeremy Anderson & Clare Hollman

Will be on today's presentation
to answer any questions



Learning Objectives

After this course, you will be able to:



Identify key features introduced in Sage Intacct 2026 Release 2 and describe their impact on accounting workflows.



Summarize enhancements to user experience, navigation, and system functionality that improve operational efficiency.



Describe practical use cases for applying new Sage Intacct features to improve financial processes, operational efficiency, and reporting.



Agenda

Sage AI and
Automation

Company and
Administration

Platform Services,
Customization,
and Extensions

Purchasing

Accounts
Payable

Expenses

Time

Order Entry

Accounts
Receivable

Taxes

Projects &
Grants

Inventory &
Supplies

Sage Fixed
Assets
Management



Sage AI and Automation

Finance Intelligence Agent – Phased Early Adopter



The Finance Intelligence agent is your Sage **Ai-powered partner** that helps you find answers about your financial data and drive better decision-making.

Using Sage Copilot, you can ask questions, get insights and explore your information **all by using natural language**.

Sage will enable companies during the course of the next few months. When enabled, your Admin will receive a welcome emails with further enablement instructions.

Key benefits

The Finance Intelligence agent enables you to:

- Retrieve and aggregate data across Sage Intacct.
- Identify potential trends to support your decision-making process.
- Understand the “why” behind every answer with clear, transparent reasoning.

Finance Intelligence Agent – Phased Early Adopter



Keyword FIA-Keyword Top level

 Copilot Kara Grace Help & Support

★ Applications
🔍 Search

Intacct product updates

2026 Release 1 is here

Our latest release offers features that save time, accelerate decision-making, and are optimized for your business. And so much more. [Read the release notes](#)

Simplify bank reconciliation and close

Bank feeds improve cash visibility, catch issues faster, and streamline the close. [Get an overview on bank feeds](#)

Help & Support

- [Help Center](#)
- [Release notes](#)
- [Customer support](#)

Learning

- [New user help](#)
- [On-demand Fundra](#)
- [Video library](#)

Love Sage Intacct?

Leave a review and receive an e-gift card!

Analysis

How Copilot worked this out
✕ Close panel

Top 5 vendors by bill amount

Based on total bill amount (base currency: USD) for the top 5 vendors in the current results set.

🏆 Top vendor (RWS Commercial)	📄 Total (top 5)	📊 Average per vendor (top 5)
\$12,717,000.00	\$42,751,621.77	\$8,550,324.35

Top 5 vendors by bill amount (USD)

Total bill amount by vendor

Vendor	Bill Amount (USD)
RWS Commercial	\$12,717,000.00
JournalGram	\$11,975,893.56
SupplyPipe	\$11,953,913.76
The Post Company	\$3,675,358.57
PaperClips	\$2,429,456.08

Share of total (Top 5)

Contribution of each vendor to the top-5 total

Copilot

✕

🗨️ Chat history

Who are the top 5 vendors by bill amount?

Below are the top five vendors ranked by total bill amount based on the Accounts Payable bills retrieved. This is a preview of the full result set.

Top Vendors by Bill Amount (5 of 10 records)

Vendor	Total Bill Amount	Currency
RWS Commercial	\$12,717,000.00	USD
JournalGram	\$11,975,893.56	USD
SupplyPipe	\$11,953,913.76	USD
The Post Company	\$3,675,358.57	USD
PaperClips	\$2,429,456.08	USD

Ask Copilot a question

Check AI content for inaccuracies. This content is for informational purposes and is not professional advice. [Privacy notice](#)

New chat

Link to Custom Views From Tasks in Close Workspace



Users of Close Workspace may now link to a custom view in custom task templates.

Key benefits

As employees work through tasks to complete the close process, they gain the following benefits from this enhancement:

- **Faster access to relevant data:** Go directly to a custom view that's already filtered and organized to fit the current task.
- **Reduced navigation:** Eliminate extra filtering steps and uncertainty regarding which view is best for the current task.
- **More consistent workflows:** Work from the same set of focused, task-specific information that everyone else uses.

Link to Custom Views From Tasks in Close Workspace



Navigation link

You can create a custom link to this task that appears in the Copilot panel and email notifications

Link type

Menu link

Custom view

Custom link

List: AP bills

Custom view: Draft bills



Company and Administration

Roles Permissions Report



Key benefits

- **Unified role permissions view:** View standard and custom permissions together in a single report.
- **Point-in-time access snapshot:** See the permissions assigned to a role as they exist when the report is run.
- **Simplified role validation:** Quickly review and confirm role configurations without manual cross-checks.
- **Flexible review filters:** Filter by role or date range to support common access and setup reviews.

How it works

- Go to **Company > Admin > History and reports** section > **Roles permissions report**.
- Set a start and end date.
- Enter a role name.
- Set other report options as needed and select **View**.



New Imports Now Available

Accounts Receivable

Import	Create	Update	Status
AR Advances	Yes	Yes	NEW: Beta

Consolidation

Import	Create	Update	Status
Ownership structure	Yes	Yes	NEW: Beta
Ownership structure periods	Yes	Yes	NEW: Beta

Use the Beta signup link in the Release Notes section within the home screen to sign up!



Restricted file types for attachments

The following file types are no longer supported for attachment uploads due to risk of accidental or malicious file uploads: Existing attachments are not affected.

.bat

.jar

.cmd

.msi

.com

.ps1

.dll

.sh

.dmg

.sys

.exe

.vbs

.iso

.vhd



New Entity-Level Logo for AP Bank Remittance

Key Benefits

- **Clear identification:** Logos help identify the entity (a subsidiary, business unit, or region) that issued a document.
- **Compliance support:** Comply with regional requirements in areas where invoices must clearly identify the issuing entity.

How it works

Entity-level logo will appear on bank remittance documents when the applicable template is used. If no entity-level logo is uploaded, company logo will appear instead.

Upload a logo at the entity level

- Go to **Company > Setup > Entities**.
- Find the entity that you want to upload a logo for.
- Select Edit (pencil icon) at the end of the row.
- Select **Upload logo**.
- In the pop-up window, select **Choose Files**.
- Select a GIF, JPEG, or PNG image of your logo, then select **Open**.
- Select **Save**.

New Permissions



Off by default, these new permissions are available:

- Order Entry
 - Invoice runs: List, View
 - Allows you to view invoice runs for billing groups
 - Individual charges: List, View, Add, Edit, Delete
 - Allows you to create and manage individual charges for billing groups



Sage





Platform Services, Customization and Extensions



Define Application Configuration Values With Configuration Objects Now Generally Available

The configuration object for platform applications is now generally available. If you have not yet tried using configuration objects, consider doing so now to reduce work and minimize the risk of misconfiguration.

Key benefits

- **Define key-value pairs in a structured file:** Reference the key-value pairs in any place where you support merge fields in your application, such as triggers or templates. For example, you can use merge fields with an HTTP Post trigger. The trigger can then reference the merge fields in a URL to deploy applications to different environments.
- **Spend less time maintaining and updating your application:** Referencing key-value pairs makes maintenance and updates easier. In addition, you reduce the opportunity for misconfiguration. Each application can include 1 configuration object and up to 1,000 configuration records.
- **Specify override behavior:** Application owners can specify whether a client can override a configuration key.



Application Management Updates - Beta

Application management helps publishers streamline the way they publish, update and manage application versions across multiple companies.

Built for scale, it supports push updates, version-specific records, and clear visibility into installation status. In 2026 R2, a new history list view makes it even easier to track changes over time.

What's changed

The Application management menu now includes an **Installation history** option list view -->>

Created on	Package name	Version	Installation status	Package key	Subscriber name
03/18/2025 16:54:50	subscriber_app	1.2	Success	31001000000123	FB02_APP_MANAGE_p010

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[Log a support ticket to join the Beta Program.](#)



Purchasing

Custom Purchasing Approvals – Early Adopter



Reduce manual effort while strengthening control over purchasing approvals and helping to support compliance.

Configure custom approval workflows for Purchasing transactions using flexible, rule-based logic. With custom Purchasing approvals, administrators can define approval rules based on vendor attributes, payment priority and transaction amounts to automatically route Purchasing transactions to the appropriate approvers.

Key benefits

- **Flexible approval criteria:** Create custom approval rule sets using vendor details, such as vendor type or payment method, currency and transaction totals.
- **Precise approval routing:** Combine multiple conditions using AND/OR logic to route Purchasing transactions to the right approvers based on your business rules.
- **Consistent approval behavior:** Route Purchasing transactions for approval to a specific user or user group while maintaining the same approval experience used across Purchasing.
- **Audit-ready visibility:** Maintain transparency with a built-in audit trail in your transactions and approval history to help support compliance.

Custom approval rule set

Save draft Create Save Cancel More actions

Application * Purchasing

Description * Subcontractor vendor type

User * Noah Smith

User group * Noah Smith

Approval object * Purchase transaction

Transaction definition * Purchase order

Status * Purchase Order

Process

Condition type All (AND)

Condition

Approval routing and limits

	Data source	Field ID	Operator	Value	
1	Vendor	VENDTYPE	Equals	Subcontractor	+ -
2	Vendor	VENDORNAME	Equals	Vista Garden	+ -
3	Purchasing transaction	TRXTOTAL	Is less than	500.00	+ -
4					+ -



Intelligent 3-Way Matching With AP Automation



Intelligent 3-way matching strengthens AP Automation by introducing AI-driven, line-level document matching across purchase orders, receivers and vendor invoices. This enhancement increases accuracy, reduces manual intervention, and helps teams resolve discrepancies faster and with greater confidence.

Item ID	Warehouse	Conversion type	Quantity	Unit	Price	Extended price	Exception
1 2--Mobile Phones	1--US-TX Warehouse 10004	Quantity	5.00	Each	750.00	3,750.00	
Total						3,750.00	

Line no.	Item ID	Preceding bn	Quantity	Unit	Price	Previous bn	Quantity	Unit	Price	Current bn	Quantity	Unit	Price	Quantity variance	Price variance	Quantity variance %	Price variance %
1	2--Mobile Phones	MT REQ-PR#0308#doc	6.00	Each	700.00	MT Order-PO#0195#doc	6.00	Each	700.00	MT Receiver-Pc-0228-Rec	5.00	Each	750.00	-1.00	--	-16.67%	--

Key benefits

- **Faster exception handling:** AI automatically flags quantity and price differences so reviewers can identify and address line discrepancies in the Exception summary.
- **More precise automation:** Vendor invoices are matched directly to the source purchasing transaction at the line level, rather than relying on header-level matching.
- **Reduced review effort:** Match tolerance thresholds help minimize unnecessary review of minor differences, allowing teams to focus on true exceptions.



Accounts Payable

Enhancements to AP Automation



These updates focus on making it easier to upload and review bills while improving how automation adapts to real-world variations.

Flexible line entry method on bills

AP Automation now supports changing the line entry format directly within draft bills. This gives you the flexibility to choose how line item data is structured after upload, instead of locking that decision in advance.

Entries Show defaults						
Entry method: Single-line summary All line items						
		Account *	1099	Transaction amount *	Department	Location ID
☰	1	6251--Travel and Enter	<input type="checkbox"/>	9,495.00		3--United Kingdom
☰	2	6251--Travel and Enter	<input type="checkbox"/>	3,596.00		3--United Kingdom
☰	3	6251--Travel and Enter	<input type="checkbox"/>	3,894.00		3--United Kingdom
☰	4		<input type="checkbox"/>			
Total				16,985.00		

Improved Remittance Support for Bank Files



Get more control over how remittance information is generated and delivered to vendors. This enhancement is designed for companies, in particular international ones, who do not use check payments and need clearer remittance communication for bank file payments.

Key benefits

- **Clear remittance communication:** Send remittance details for bank file payments using dedicated Accounts Payable remittance emails and PDF attachments.
- **Flexible remittance configuration:** Control remittance email templates and PDF stubs separately for bank file payments, without affecting check remittance.
- **Company and entity logos:** Include company- or entity-specific logos in remittance emails and PDFs where applicable.

The screenshot displays the 'Configure Accounts Payable' settings page. At the top, there is a navigation bar with a star icon, a home icon, and the text 'Accounts Payable'. Below this is the main title 'Configure Accounts Payable'. A section titled 'Remittance' is expanded, showing three unchecked checkboxes:

- Do not include payment copy PDF in payment notification email
- Include payment details in payment notification email
- Include secondary email contacts in automatic payment notifications

Below the checkboxes, there are two dropdown menus:

- AP remittance email template** (dropdown menu)
- Bank file remittance** (dropdown menu)

Updates to Currency in Payment Posting



This release, we're laying the groundwork for future multi-currency enhancements. The updates made in this release improve the distinction between currencies and amounts when multiple currencies are involved.

What's Changed

You'll notice field name enhancements in the following payment-related UI pages:

- [Posted payments](#)
- [Payment requests](#)
- [AP Advances](#)
- [Manual payments](#)

These changes also impact the fields that are displayed in ledgers, registers and custom reports when you support foreign currency payments.

Updated Rules for Editing Bills With Deferred Adjustments



Now there are defined rules when editing bills after a deferred adjustment for charges constatées d'avance (CCA) has been posted. These rules clarify which fields remain editable so you can make appropriate updates without affecting posted accounting data.

Key Benefits

- **Clear editing boundaries:** Understand which bill fields are editable after deferred adjustments are posted, reducing uncertainty during updates.
- **Preserved accounting accuracy:** Prevent changes to dates, vendor, currency and deferred adjustment details after deferred adjustments are posted.
- **Flexible nonfinancial updates:** Continue to update memos, attachments and custom fields without impacting posted accounting data.

Updated Rules for Editing Bills With Deferred Adjustments



What's Changed

If any line on a bill has a posted deferred adjustment, the following fields are not editable:

- Date
- Vendor and contact fields
- Currency and exchange rate fields
- Deferred adjustment fields (template, start date, and end date)
- All bill line fields (excluding memo and custom fields)

Nonfinancial fields, such as memo, attachment and custom fields, remain editable on bills with posted deferred adjustments.

Process all Vendor payments powered by CSI by **July 24, 2026**.



Expenses – Sage Expense Management (powered by Fyle)

SEM Enhancements



Automatic Approvals for Expense Reports

Reduce approval bottlenecks and get employees paid faster.

SEM now supports automatic approvals for eligible expense reports that help accelerate reimbursements and allow approvers to focus on exceptions.

Admins can enable automatic approvals and define a report amount threshold. Reports are approved automatically when they meet the configured eligibility criteria, such as policy compliance, no duplicate expenses, a single approval level, and staying within the defined threshold.

When a report qualifies as automatically approved, Sage Expense Management:

- Approves the report
- Notifies the employee by email
- Records the approval in report and expense history
- Bypasses the assigned approver

SEM Enhancements



Project-Level Billable Defaults

Admins can now configure the default Billable value at the project level instead of the organization level, making it easier to categorize project-related expenses consistently.

Each project can have its own default billable setting. When an employee selects a project while creating an expense, the Billable field is automatically populated based on that project's configuration.

Employees can still override the value on the expense form if needed.

SEM Enhancements



Express ACH

For organizations using ACH, you can now accelerate payments for smaller expenses using 'Express ACH'.

When enabled in Admin settings, expense reports up to \$1,000 are processed using Express ACH, typically within 1 to 2 business days.

Expense reports over \$1,000 continue to be processed using Standard ACH, typically within 3 to 5 business days.

This provides finance teams a faster reimbursement option for the majority of lower-value expense reports.

SEM Enhancements



Group Expenses During Automatic Report Submission

SEM now provides admins more flexibility in how expenses are grouped when reports are created through automatic report submission. This helps better match organizational review and reporting needs.

Admins now have the following options to select from:

- **No grouping:** All complete expenses are submitted in one report.
- **Group by payment mode:** Expenses are grouped into separate reports by payment mode.
- **Advanced grouping:** Expenses can be grouped by Project or Cost Center, with an optional second-level grouping by payment mode.

SEM Enhancements



Mobile App Push Notifications

Mobile app push notifications are now available in SEM, providing updates on expense activity, reports, approvals and reminders in real time.

- Admins control which notification triggers are available for their organization.
- Employees and approvers can then select their own preferences from the approved set. They decide whether they want to receive updates by email, mobile push notifications, or both.
- Notification preferences can be configured from both the web app and mobile app.

SEM Enhancements



Budget Improvements

This release includes several improvements to budgets, making them easier to set up, monitor and use.

Admins can now select how budget visibility works during setup. You determine if budgets are visible to only admins, all contributing employees, or specific employees. When visibility is enabled, employees can view relevant budgets in their dashboard, including overall budget amount, amount used, and amount remaining.

Additional budget enhancements include the following:

- [Historical budget usage view from the Spend Overview page](#)
- [Budget export capability from Spend Overview](#)
- [Greater flexibility to edit budget details after setup](#)



Time

Sage Intelligent Time Enhancement to Assign Delegates to Approve Timesheets



You can now assign delegates to approve timesheets while you're out of office using Sage Intelligent Time. When employees submit timesheets while an approver is absent, delegates can approve or decline them to ensure that payroll processing continues smoothly.

Key Benefits

- **Continuous workflow:** Timesheet approvals continue uninterrupted when approvers are out of the office.
- **Operational efficiency:** Eliminates manual reassignment of approvers, reducing administrative overhead.
- **Enhanced user experience:** Provides a reliable and transparent approval process for employees and managers.
- **Audit and accountability:** Maintains a clear audit trail of delegated actions for governance and reporting.

Good to Know

- The default delegate can only approve timesheets when acting as the approver delegate.
- When out-of-office approvals are enabled, approval requests are directed to the assigned delegate and remain visible until the out-of-office expires.



Order Entry



Customize Sender and Reply-To Email Addresses for Order Entry Communications

What's Changed

Sales email workflows now use dropdowns for "Sender" and "Reply to" fields that are populated only with allow-listed email addresses. Your admin can set up the [allowed email list](#).

By replacing free-text entry with selections from the approved allow list, this update ensures that only authorized, validated email addresses can be used in your customer-facing communications.

Key Benefits

- **Improved email security:** Uses approved, allow-listed sender and reply-to addresses to support authentication and sender-identity policies.
- **Consistent customer-facing communication:** Ensures Order Entry emails are sent from validated, standardized addresses across users and documents.
- **Reduced configuration errors:** Replaces free-text entry with dropdowns, preventing typos and unauthorized or incorrect email addresses.



Individual Charges and Invoice Runs For Billing Groups

This idea came from you

Manage customer-specific charges more efficiently and gain clear visibility into billing group activity.

This update introduces individual charges and a centralized invoice runs list, making it easier to handle customer-level adjustments, reduce manual work and review billing outcomes without disrupting existing billing schedules.

Key Benefits

- **Greater billing flexibility:** Handle customer-specific adjustments, exceptions, and contract complexity within a billing group.
- **Reduced manual effort:** Replace one-off invoices and offline tracking with a consistent, repeatable billing process.
- **Improved billing accuracy:** Ensure that charges apply only to customer-specific invoices during billing group invoice generation.
- **Clear operational visibility:** Review billing activity and outcomes across billing groups to better support reconciliation, troubleshooting and audit needs.



Individual Charges and Invoice Runs For Billing Groups

Order Entry Search

Billing group -- Monthly customers Save Cancel More actions

Total group charges	Next run date
1750.00	04/01/2026

Overview Group charges Individual charges Billing periods Billing history

Frequency *	Customer *	Item *	Item description	Quantity *	Price *	Extended price *	Start date *	Status	State *	
Recurring	1--Power Aerospace &	02--File downloads		1.00	50.00	50.00	01/01/2026	Active	In progress	+ 🗑️
One-time	2--Logic Solutions	14--Maintenance		1.00	100.00	100.00	04/01/2026	Active	In progress	+ 🗑️
One-time	CG--Catalyst Gaming	17--Basic training		1.00	200.00	200.00	05/01/2026	Active	In progress	+ 🗑️
Recurring						--		Active	In progress	+ <small>Show details (Ctrl + Down arrow)</small>

Individual Charges and Invoice Runs For Billing Groups



This release includes the following billing group enhancements:

- **Individual charges:** Billing groups now support charges associated with a specific customer. Individual charges are included only on that customer's invoices during billing group invoice generation. You can add and manage individual charges from the billing group, customer record, or Individual Charges list.
- **Invoice Runs list:** The Invoice Runs list displays invoice runs across all billing groups, with drill-down access to run-level and invoice-level details.
- **Customer billing groups tab:** Customer records now include a Billing groups tab, which shows the billing groups and individual charges associated with that customer.
- **Inline charge entry:** Charges are now entered inline in a grid, instead of through a separate entry page.
- **Billing group schedule frequencies:** Billing groups now support Semi-monthly and End of month schedules. The Days frequency has been removed to align with common billing practices.
- **Navigation update:** Billing groups are now found on the All tab in Order Entry instead of the Setup tab.



★ Home Accounts Receivable Search

2 -- Logic Solutions

Save Duplicate Print to... Cancel More actions

Customer Additional information Contact list Restrictions Item cross references Billing groups

▼ Billing groups

	Billing group	Transaction definition	Frequency	State	Interval	Action
1	Monthly customers	Sales Invoice	Months	In progress	1	Add individual charges

▼ Individual charges

	Billing group	Frequency	Item	Quantity	Price	Extended price	Start date	Status	State
1	Monthly customers	One-time	17	1.00	99.00	99.00	01/01/2026	Active	In progress
2	Monthly customers	Recurring	13	1.00	55.00	55.00	01/01/2026	Active	In progress



Accounts Receivable



Process Customer Refund Payments Through Accounts Payable

What's Changed

- You can now process customer refunds in Accounts Payable, in addition to recording refunds that have been paid outside of Sage Intacct.
- We've added a **Customer refunds** section in the Configure Accounts Receivable page and amended customer and vendor records to support refund payment processing.
- When you process a refund through Accounts Receivable, Intacct automatically creates a linked Accounts Payable bill that mirrors the refund.
- Accounts Receivable users continue to control refund creation, while Accounts Payable users manage the disbursement of funds using existing pay bills workflows. You can view and track refunds from both Accounts Receivable and Accounts Payable, with links between refunds, bills and payments.

Key Benefits

- Separate refund creation from payment processing by allowing Accounts Receivable users to create refunds and Accounts Payable users to issue payments.
- Refunds processed through Accounts Payable are fully linked, making it easier to track refund status, related bills and payments across applications.

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Enhancements to Embedded Customer Payment Services—Early Adopter

Key Benefits

This integration delivers several advantages for your accounts receivable team:

- **Faster payments:** Customers can pay multiple invoices directly from invoice emails, helping you collect payments faster.
- **Improved accuracy:** Automated payment tracking and reconciliation reduce manual errors and administrative overhead.
- **Enhanced visibility:** Real-time payment status updates and audit trails provide better control and transparency.
- **Customer and self-service convenience:** A secure payment experience improves customer satisfaction and reduces friction.
- **Easier setup:** Default email templates are provided, but you can create different templates based on the defaults if you wish.
- **More payment providers added:** Customers can now use Bridge for companies in France and Germany to make electronic payments.



Updated Rules for Editing Invoices With Deferred Adjustments

Now there are defined rules when editing invoices after a deferred adjustment has been posted. These rules clarify which fields remain editable so you can make appropriate updates without affecting posted accounting data.

Key Benefits

- **Clear editing boundaries:** Understand which invoice fields are editable after deferred adjustments are posted, reducing uncertainty during updates.
- **Preserved accounting accuracy:** Prevent changes to dates, customer, currency and deferred adjustment details after deferred adjustments are posted.
- **Flexible nonfinancial updates:** Continue to update memos, attachments and custom fields without impacting posted accounting data.

What's Changed

If any line on an invoice has a posted deferred adjustment, the following fields are not editable:

- Date
- Customer and contact fields
- Currency and exchange rate fields
- Deferred adjustment fields (template, start date and end date)
- All invoice line fields (excluding memo and custom fields)

Nonfinancial fields, such as memo, attachment and custom fields, remain editable on invoices with posted deferred adjustments.



Updates to Currency in Payment Posting

This release, we're laying the groundwork for future multi-currency enhancements. The updates made in this release improve the distinction between currencies and amounts when multiple currencies are involved.

What's Changed

You'll notice field name enhancements in the following payment-related UI pages:

- Posted payments
- AR Advances

These changes also impact the fields that are displayed in ledgers, registers, statements and custom reports when you support foreign currency payments.

Field changes on payment-related pages

When using multi-currency, pages related to payments now show multi-currency related fields as follows:

Field or column	Description
Bank currency	The bank account currency.
Bank amount	The payment amount in the bank currency.
Txn currency (Transaction currency)	The currency in which the payment was received and recorded.
Txn amount (Transaction amount)	The payment amount in the currency that the payment was received and recorded.
Base currency	The operating currency of the entity.
Base amount	The payment amount in the operating currency of the entity.



New Payment Service Provider: Bridge – Early Adopter

Accelerate cash flow by offering a self-service payment option to your customers with the new embedded Customer Payment Services feature. If you've subscribed to an inbound payment service provider, you can allow your customers to pay invoices electronically through a secure link in invoices that you send electronically. In this release we've added Bridge to the list of available payment providers that your customers can use to pay invoices electronically.

What's the Early Adopter program?

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

If you want to be considered for the Early Adopter program, [complete this form](#) today.



Taxes



Updates and Enhancements for Taxes

This idea came from you

Thanks to your feedback, we made several updates and enhancements to our existing tax features.

Enter partial exemption at the top level

You can now enter partial exemption directly at the top level for your Accounts Payable transactions. This makes it easier to apply partial exemption to supported transactions.

How it works

- Enable and configure partial exemption on your entity configuration page. Depending on where your entity operates, it might have a different name.
 - Australia - Reduced input tax credit (RITC)
 - Canada - Input tax credit (ITC)
 - All other locations - Partial exemption
- Open an Accounts Payable transaction at the top level.
- If partial exemption is enabled for the selected entity or location, a Partly exempt column displays with a checkbox for each line.
- Select the checkbox to apply partial exemption to the transaction line.
- If the line applies to an entity that does not have partial exemption, you cannot select the checkbox for partial exemption.

Exemption Certificate Management Integration with Avalara—Early Adopter



Sage Intacct's integration with Avalara's Exemption Certificate Management (ECM) brings ECM visibility into Sage Intacct. You can confirm customer exemption status, request missing certificates and stay audit-ready without switching between systems.

This integration helps reduce billing delays, improves accuracy and simplifies exemption workflows.

Key benefits

- **Integration with Avalara ECM** reduces the need to toggle between applications to manage certificates or update customer records.
- **Automatic bulk sync** of customer records when you enable ECM in Intacct, reducing manual setup and maintenance.
- **Automatic update** of customer records in Avalara ECM when you create or update Intacct customer records after the initial enablement bulk sync.
- **Exemption visibility** directly from the Intacct customer record, including jurisdiction, exemption reason, effective dates and certificate status.
- **Certificate request workflow** that lets users send exemption certificate invitation emails to customers who have expired or soon-to-be expired certificates in Intacct.



Projects and Grants



Project & Grant Financial Summary Enhancements

You can now switch between currencies and view the results in the project Financial summary on the Project summary tab located on the Project information page.

By default, the values in the Financial summary section of the Project summary are displayed in the base currency.

Financial summary

Display currency

Entity ID	Entity name	Deferred Revenue Liabilities	All Payables	Sales	Cost of Goods Sold	Employee Expenses	Project Labor	Gross Profit	Net Income (Loss)
1 1	United States of America	0.00	81,071.36	674,202.95	37,783.43	55,526.89	-1,095.89	646,419.52	646,419.52
2 2	India	0.00	973.36	0.00	717.36	403.82	0.00	-717.36	-717.36
3 7	Canada	0.00	2,610.11	0.00	0.00	0.00	0.00	0.00	0.00
Total		0.00	84,654.83	674,202.95	38,500.79	55,930.71	-1,095.89	645,702.16	645,702.16



Inventory & Supplies



Centralized Inventory Item Attachments

This idea came from you

Increase operational efficiency with centralized item reference documentation. Now upload, store and view item-related attachments such as images, specification sheets, Material Safety Data Sheet (MSDS) files and installation guides.

These attachments are accessible directly from an item record or through APIs, improving item identification, operational accuracy, and cross-team communication.

Item ID	Unit of measure
Hardhat - STD-Y	Count
Name *	Base unit
Hardhat - STD Yellow	Each
Product line ID	Note
Extended description	Default conversion type
	Quantity
Attachment	
HH specsheet	

	Item Specifications
	Item: Hard Hat
	Color: Yellow
	Material: ABS Plastic
	Adjustment: 4-Point Suspension
	Size: Adjustable (52-64 cm)
	Weight: 12 oz (0.34 kg)
	Features: Impact Resistant, Ventilated, Chin Strap
	12345 67890
QTY: 50 PCS	
	BIN: C4-07

More Control of Transaction Cost Precision



This improvement gives you greater transaction handling confidence with consistently accurate item costs to reduce rounding discrepancies.

By default, Inventory Control accepts 10 decimal places when items are added to transactions. After posting, 2 decimal places display when a transaction is opened in View or Edit mode.

With this update, you can configure the number of decimal places that you want to display by default in your Inventory Control transactions.

What's Changed

With more configuration control of decimal precision in Inventory Control, items retain greater decimal precision accuracy when transactions are edited or posted. Additionally, an item's unit cost precision setting takes priority over the application setting, ensuring consistent cost handling across application workflows.

Why the Change

For organizations, calculating item unit costs with more than two decimal places, rounding discrepancies could occur when editing a draft inventory transaction or posting an adjustment. This could lead to unexpected cost differences.



Track Inventory Transfers More Securely

Warehouse transfer transaction definitions provide more comprehensive inventory activity tracking compared to Inventory Transfer transaction definitions.

If you're currently using Inventory Transfer transaction definitions, you'll need to transition to use Warehouse Transfer transaction definitions.

Set up the corresponding Warehouse Transfer In/Out transaction definitions before support ends for Inventory Transfer In/Out transaction definitions later this year.

Action Required

Switch your existing inventory transfer transaction definitions to the following system-generated warehouse transaction definitions as follows:

- Instead of using **Inventory Transfer In**, use **SYS-Warehouse Transfer In**
- Instead of using **Inventory Transfer Out** use **SYS-Warehouse Transfer Out**

You can also use the additional system-provided transaction definition to track the movement of inventory between warehouses:

- Inventory Control: **SYS-Warehouse In Transit**



Sage Fixed Assets Management



New Functionality Reviewed

- Split Assets into multiple assets
- Reverse depreciation postings
- Demo to show
- Revert partial disposals
- Enhancements to CIP asset capitalization
- Other updates to Fixed Assets Management



Split an Asset Into Multiple Assets

Easily manage assets that need to be tracked separately. You can now split an existing asset into **up to 20 independent assets** while preserving depreciation accuracy and history.

This enhancement gives you more flexibility to manage depreciation, transfers, and disposals without manual workarounds.

Fixed Assets Management automatically allocates values and maintains a clear link between the original asset and the assets created by the split.

Key Benefits

- **Greater asset flexibility:** Split an asset directly from the asset record and manage the resulting assets separately.
- **Accurate depreciation:** Automatically allocate depreciation while keeping totals aligned with the original asset.
- **Preserved audit trail:** Maintain a clear history that links the original asset to all assets created by the split.
- **Reduced manual effort:** Eliminate workarounds and manual adjustments when assets need to be tracked, transferred or disposed separately.

SAGE FIXED ASSET MANAGEMENT



Good to Know

- You can use it to split an asset into a **maximum of 20 assets**.
- Assets with partial disposals cannot be split at this time.
- An asset that has been split cannot be edited, deleted or split again.
- Assets created by a split cannot be deleted or reverted to the Ready for review state. Each can be split one additional time.
- You can only edit the following fields on assets created by a split: Asset name, Status, Serial number, Quantity, Parent asset, Description, Notes, Attachment, Asset tag, Dimensions and custom fields.

Fixed Assets Management

Split asset: A0144--Laptop

Split to

Split date * 04/04/2026 Original asset cost \$5000.00 Original salvage value \$500.00

Split to assets

	Asset name *	Asset cost *	Salvage value *		
1	Laptop-1	\$1,000.00	\$100.00	⊖	⊕
2	Laptop-2	\$1,000.00	\$100.00	⊖	⊕
3	Laptop-3	\$1,000.00	\$100.00	⊖	⊕
4	Laptop-4	\$1,000.00	\$100.00	⊖	⊕
5	<input type="text" value="Laptop-5"/>	<input type="text" value="1,000.00"/>	<input type="text" value="100.00"/>	⊖	⊕

Reverse Depreciation Postings



Correct depreciation mistakes without deleting journal entries or relying on manual workarounds. You can now reverse posted depreciation directly within Fixed Assets Management. Reversing creates an offsetting journal entry and preserves the original posting.

Key Benefits

- **Improved traceability:** Preserve the original postings while clearly recording corrections.
- **Flexible recovery:** Reverse posted depreciation and repost the period again when you're ready.
- **Reduced manual effort:** Eliminate manual journal entry adjustments in the General Ledger.

What's Changed

- You can choose Reverse or Revert depreciation by setting the Correction treatment configuration.
- A **Reverse** action is available for posted depreciation entries on the Depreciation Schedule and Post Depreciation pages.
- When you reverse a depreciation entry, the entry is marked as Reversed and an offsetting journal entry is created automatically.
- Depreciation entries can now be linked to multiple journal entries. To support this, the **Journal entry no.** column is replaced with a **Journal entries** link. The link opens a list of all related depreciation expense and reversal journal entries.

SAGE FIXED ASSET MANAGEMENT



Good to Know

- Configuration is permanent at this time. After you set Correction treatment to Reverse, you cannot use revert actions, such as reverting transfers or disposals.
- Assets with reversed depreciation entries cannot be deleted.
- Reversal journal entries debit the Accumulated depreciation GL account and credit the Depreciation expense GL account.

Applications

Depreciation schedule: 65

Depreciation schedule entries

Period	Scheduled posting date ↑	Actual posting date	Depreciation amount	Cumulative de...	State	Journal entries
1	04/30/2026		\$4.86	\$0.00	Historically posted	...
2	05/31/2026		\$4.86	\$4.86	Historically posted	...
3	06/30/2026	06/30/2026	\$4.86	\$14.58	Posted	Journal entries ...
4	07/31/2026	07/31/2026	\$4.86	\$14.58	Posted	Journal entries ...
5	08/31/2026		\$4.86	\$19.44	Not posted	Reverse ...
6	09/30/2026		\$4.86	\$24.30	Not posted	...
7	10/31/2026		\$4.86	\$29.16	Not posted	...

SAGE FIXED ASSET MANAGEMENT



Fixed Assets Management

Post depreciation

Posted* Manage view Revert changes Filters 1

Items selected: 2 Post Revert **Reverse**

	Depreciation schedule entry ID	Actual posting date	State	Depreciation amount	Journal entries	
<input type="checkbox"/>	1494	11/30/2026	Posted	\$500.00	Journal entries	...
<input checked="" type="checkbox"/>	1500	05/31/2026	Posted	\$9.72	Journal entries	...
<input checked="" type="checkbox"/>	1499	04/30/2026	Posted	\$9.72	Journal entries	...
<input type="checkbox"/>	1490	02/28/2026	Posted	\$3,542.63	Journal entries	...

Show 20 Page 1 of 4 71 items

Armanino-Led Sage Intacct Recordings Library



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!](#)



Sage Intacct Health Check Optionality Overview



	Enhanced	Essential
Sage Intacct Health Check Services	TIMELINE: 4-6 WEEKS	TIMELINE: 3-4 WEEKS
Project Management Kickoff, Weekly Status Report / Calls	Included	Included
Prework Documentation Review	Included	Included
Client-Led Sage Intacct System Walkthrough <ul style="list-style-type: none"> • Client Sage Intacct and/or Sage Intacct Planning Environment • Users and Roles • Financial and Custom Reports 	Included	Included
Requirements and Business Scenarios Gathering Session	Included	Included
Pain Point and Gap Analysis Session	Included	Included
Sage Intacct Health Check Deliverables		
Review and Evaluation of Current State System Configuration and Settings	Included	Included
Review and Evaluation of Pain Points and System Gaps	Included	Included
Aggregated Recommendations and Estimates Evaluation Report*	Included	Included
<i>*Report is delivered as a spreadsheet for ease of filtering and review.</i>		
Post Health Check Consulting Services		
25 Hours of Sage Intacct Consulting Services to Address Tasks Arising from the Health Check	Included	N/A
ONE TIME FEE	\$18,000	\$9,500

Additional questions? Reach out to us!

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