



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.

## The Power of More...Giving! Gray, Gray & Gray Offices Closed Thanksgiving Week

*the power of  
more...giving!*



The holiday season is quickly approaching! Thanksgiving is a time for giving back and reflecting on what we are thankful for. As a firm, we have much gratitude, admiration and appreciation for our valuable client relationships, and our world-class team members who have directly contributed to our prosperity and success in 2023.

We are pleased to announce another year of giving MORE to our team during the Thanksgiving holiday. **Gray, Gray & Gray's offices will be closed for the entire week of Thanksgiving, from Monday, November 20th through Friday, November 24th.** Whether it's spending quality time with family and friends, focusing on relaxation, or enjoying hobbies and interests outside of work, our team will have the opportunity to take a well-deserved break to enjoy the holiday.

## Power Up! Register Now for Gray, Gray & Gray's 2023 Year End Planning Seminar



What challenges will business leaders face in 2024, and how can they prepare to meet them? Find out at Gray, Gray & Gray's annual in-person Year End Planning Seminar on Tuesday, December 5th at our Canton office. Take part in our seminar sessions, which highlight a variety of important topics for 2024, including an economic outlook, the impact of the latest tax changes on your business and personal financial planning, and trends in the M&A and equity markets. Plus, during our client panel, you'll hear directly from successful business owners what strategies they are using to navigate their companies through tumultuous times. And don't miss out on our Sage Intacct Demos.

LEARN MORE & REGISTER

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## This Month's Feature Spotlight: Sage Intacct Advanced CRM Integration Updates



The below updates have been made to the Sage Intacct Advanced CRM Integration.

### Support for Evergreen contracts

The Advanced CRM Integration now supports evergreen contracts. A field named **Term type** was added to the Salesforce Contract object to allow you to select Termed, Evergreen, or Both as options on contracts in Salesforce, as well as updated the field mapping for the term. Add the Contract Type field to your contracts to take advantage of this update.

You can create an Evergreen contract in Salesforce, and add new lines to the contract, but you cannot manage the contract in Salesforce. For example, if you want to terminate the contract or update the price of an existing line, you must manage this through Intacct.

If you previously created your own custom field mappings to indicate an evergreen contract, you can continue to use your customizations, or you can update your Salesforce instance with the new standard fields included in the Salesforce package.

### Project sync updates

#### *Project field mapping updates*

On the Intacct side, the Project sync directions for standard field mappings have been expanded. You can now update the sync direction for most Project fields to be **bidirectional** or select **To Intacct** or **From Intacct** as needed. You can also deactivate any Project field mappings you do not use in your company.

#### *Create Project button updates*

On the Salesforce side, the Create Project button on an opportunity has been updated. Previously when this button was clicked, a pop-up opened the Intacct Project Information page. Now you can choose which information page you want the button to open: the Salesforce Project Detail page or the Intacct Project Information page.

Learn more about the Setup and Requirements plus ways to build efficiencies with these updates by contacting our [Sage Intacct Help Desk](#).

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Congratulations to our Gray, Gray & Gray Sage Intacct Team on Being Named a "Partner of the Quarter"!



GRAY, GRAY & GRAY NAMED A  
**PARTNER OF THE QUARTER**  
NOVEMBER 2023

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**Sage** Business Partner

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**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**

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**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](#)

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### Additional Upcoming Sage Webinars

#### Real world accounting with AI: ROI, benefits, and pitfalls

November 17 at 2:00 PM EST

[REGISTER HERE](#)

#### How to evolve your financial reports to get back in the driver's seat

November 21 at 2:00 PM EST

[REGISTER HERE](#)

#### Why QuickBooks isn't rising to meet CFO needs

November 28 at 2:00 PM EST

[REGISTER HERE](#)

#### Find freedom from your financial close with automation

December 5 at 2:00 PM EST

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#### Use your subscription billing to scale during market uncertainty

December 12 at 2:00 PM EST

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#### Leveraging digital transformation for greater mission impact in 2024

December 19 at 2:00 PM EST

[REGISTER HERE](#)

#### Simplify your year-end with 1099 E-Filing

December 26 at 2:00 PM EST

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### Team Member Spotlight: Todd Donatello

Todd Donatello joined our Sage Intacct implementation team in 2021 as a Manager, bringing more than 20 years of experience that blends accounting, financial management and accounting system design.

This in-depth knowledge gives Todd the ability to create a customized solution that is perfectly adapted to a client's specific needs. Just as critical, Todd has conducted multiple implementations for businesses in a variety of industries, learning that a smooth and seamless transition from a legacy accounting system to the more powerful and comprehensive Sage Intacct platform is an essential part of giving clients the Power of More.



[tdonatello@gggllp.com](mailto:tdonatello@gggllp.com)

"Clients are delighted with Sage Intacct," says Todd. "They love what the software allows them to do, how it organizes and streamlines so many functions. It is very gratifying when we help an organization move from having to deal with cumbersome and time-consuming processes to having complete control through the very complete, very potent Sage Intacct system."

Todd and our Sage Intacct team also work to keep clients on track with the latest updates, additions and, when necessary, expansion of installed systems. "Our job continues once Sage Intacct is up and running, helping clients to discover even more ways to use the software to improve processes and streamline operations."

It helps that Todd has practical experience on both the accounting firm and client side. After graduating from Stonehill College, where he earned a degree in business administration, Todd was in the restaurant business. He then joined what is now TD Bank, which led to senior audit positions for two of the leading accounting firms in his native state of Maine.

When he is not creating customized solutions for our clients' accounting and financial management needs, you might find Todd spending time with his twins, or on the golf course. He is an avid golfer who finally reached the elusive goal of breaking par for a round a few years ago. He also enjoys cooking and spending time with his fiancée, Nicole.

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

[Schedule a Consultation](#)

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

[Submit a Referral](#)

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