



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: New Release Features - Sage Intacct Data Flow and Forms and Operational Workflows

Data Flow seamlessly integrates your other applications with Sage Intacct. It automates secure and reliable data transfer between your operational and finance systems on a schedule that works for you.



Benefits include:

- Scheduling of automated data flow
- API-level integrations
- Extract, transform, and load capabilities
- Handling of large data sets
- Support for multiple connection types

Forms and Operational Workflows streamline and digitize your data collection and organization workflows.

Benefits include:

- Fully digitized workflows tailored for your organizational needs.
- Flexible form builder for data collection and sharing information.
 - Collect any type of data required for tracking.
 - Drive entries into other Sage Intacct application areas from the data collected.
 - Deliver insights with enhanced form options.
- Easily customizable and manageable workflows with approvals.
- Portal capability to facilitate communication with constituents.

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



Sage Transform

February 26-29, 2024
MGM Grand | Las Vegas, NV



We are pleased to share that our team will be at **Sage Transform** from February 26-29, 2024, at the MGM Grand in Las Vegas, NV. Stay tuned for exciting updates in next month's newsletter. If you're attending, we'd love to connect with you during the event.



Bill Constantopoulos
Partner



Todd Donatello
Senior Manager



James Cotter
Manager



Xiaoyi Peng, CPA
Manager

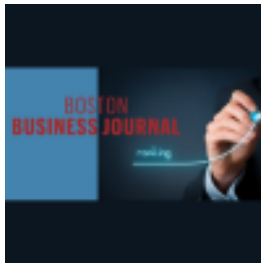


Jacob Barrett
Senior Sage Intacct
Consultant



Caroline Beatty
Sage Intacct
Consultant

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 17th largest accounting firm in Massachusetts by the Boston Business Journal, up two spots from the previous year's position. 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.

[READ THE PRESS RELEASE 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](#).

[REGISTER HERE](#)

U.S. House Passes Act to Extend R&D Tax Credits



On January 31st, the U.S. House of Representatives passed the Relief for American Families & Workers Act of 2024, which includes significant changes to Section 174 Research and Development (R&D) expensing rules, enhancements to the Child Tax Credit, and restoration of several other business friendly provisions. The bi-partisan agreement still needs to be finalized and passed by the Senate, then go to the White House for the President's signature

[READ THE ARTICLE HERE](#)

Sales and Use Tax Five Years After Wayfair



The landmark Supreme Court decision in *South Dakota v. Wayfair, Inc.* in 2018 fundamentally altered the landscape of sales and use tax compliance for businesses with multistate sales. By overturning the physical presence requirement, the Court paved the way for states to require remote sellers to collect and remit sales tax on transactions within their borders, regardless of whether they have a physical presence in the state.

[READ THE ARTICLE HERE](#)

Additional Upcoming Sage Webinars

Accounting and finance trends for 2024 and beyond

March 5 at 2:00 PM EST

[REGISTER HERE](#)

What are the signs your business has outgrown QuickBooks

March 12 at 2:00 PM EST

[REGISTER HERE](#)

Team Member Spotlight: Jonathan Dor

As a certified Sage Intacct Implementation Consultant, Jonathan Dor brings exceptional product and technical knowledge to our Sage Intacct clients. His expertise in creating a customized software solution is bolstered by his background in accounting and finance. This dual comprehension allows Jonathan to better craft a software solution that addresses current financial reporting needs, while anticipating and accommodating future expansion and growth.



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Jonathan's technical abilities are complemented by his great communications skills. From initial consultation, through planning and development, through implementation and deployment of a Sage Intacct system, he keeps clients informed on progress at all times.

Before joining Gray, Gray & Gray in 2023, Jonathan served as an Implementation Consultant for SunLife. He is a graduate of the University of Massachusetts-Boston, where he earned a degree in Accounting and Finance. Jonathan is a passionate "foodie" who loves experimenting in the kitchen. But he gladly trades his spatula for a golf club or basketball!

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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