

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.

Celebrating Women's History Month - Kelly Berardi Featured in Boston Business Journal

Celebrating
 Women's History
 Month

BOSTON
 BUSINESS JOURNAL



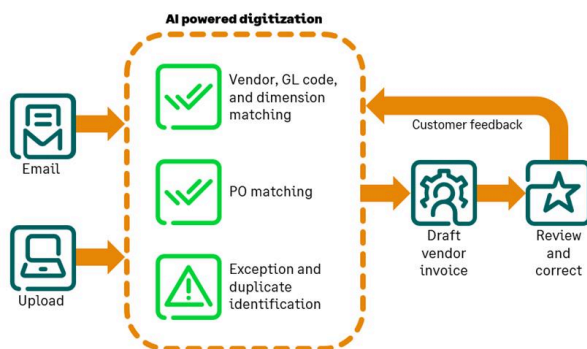
We are honored to have our very own Kelly Berardi, Partner at Gray, Gray & Gray, featured in Boston Business Journal's People on the Move in celebration of Women's History Month. As an advocate and champion for women in the industry, Kelly helps up and coming women in accounting to navigate challenges and create rewarding careers.

[LEARN MORE HERE](#)

This Month's Feature Spotlight: New Release Feature - Automated Transaction Matching for Purchasing Workflows - Expanded Early Adopter Program

Let Sage Intacct create draft vendor invoices for you and match them to existing purchasing transactions, with **Automated Transaction Matching for Purchasing Workflows**.

With automated transaction matching, 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.
4. You review the draft transaction, validating it against the vendor invoice 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.

Learn more about the Setup and Requirements plus ways to build efficiencies with Sage Intacct Automated Transaction Matching for Purchasing Workflows by contacting our [Sage Intacct Help Desk](#).

Sage Intacct Boston Customer Meetup



Join [Gray, Gray & Gray](#) team members and your fellow Boston peers to network, advance your knowledge, and hear the latest product updates from Sage Intacct experts. This is a free event. Lunch will be provided. We look forward to seeing you in person!

WHEN:

Tuesday, April 23, 2024
11:00 am - 2:30 pm

WHERE:

Hilton Back Bay
40 Dalton Street
Boston, MA 02115

[RSVP HERE](#)

Sage Transform 2024



Gray, Gray & Gray Team Members Pictured (left to right): James Cotter, Jacob Barrett, Caroline Beatty, and Xiaoyi Peng

Our team had a great time at **Sage Transform** last month, and we are excited about the updates shared during the event. [Click here](#) to discover the **top generative AI takeaways** and learn how you can incorporate AI to elevate your business.

Recognizing When Your Business Has Outgrown Its Financial Software



As businesses evolve, the financial software that once seemed perfectly adequate can become a bottleneck, hindering growth rather than facilitating it. Recognizing the signs that your company has outgrown its basic bookkeeping and financial management software is crucial for maintaining efficiency, accuracy, and competitive edge. Upgrading to a more robust platform like Sage Intacct can offer the scalability, flexibility, and comprehensive insights necessary for your expanding business needs.

[READ THE ARTICLE 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](#)

Additional Upcoming Sage Webinars

Top Tech Tips to Navigate the Digital Ledger

April 2 at 2:00 PM EST

[REGISTER HERE](#)

Breaking Free From QuickBooks

April 9 at 2:00 PM EST

[REGISTER HERE](#)

Real World Accounting with AI: ROI, Benefits, & Pitfalls

April 16 at 2:00 PM EST

[REGISTER HERE](#)

7 Signs your Business has Outgrown QuickBooks

May 7 at 2:00 PM EST

[REGISTER HERE](#)

Making Paperless Finance a Reality

June 11 at 2:00 PM EST

[REGISTER HERE](#)

7 Signs your Business had Outgrown QuickBooks

July 2 at 2:00 PM EST

[REGISTER HERE](#)

Team Member Spotlight: Sydney Cohen

The array of powerful tools available with Sage Intacct an ERP software, can be overwhelming. Selecting the right programs and modules for an organization's current (and future) needs, and then aligning them across multiple divisions, companies or locations requires an in-depth knowledge of both the client and the software. That's where Sydney Cohen shines.

Sydney's strength lies in maximizing the value of the Sage Intacct platform by ensuring the tools being utilized are appropriate for the job and best address the client's requirements and objectives. Through careful preparation and planning, Sydney is then able to guide clients through a smooth, seamless implementation and transition process.

Her background and experience are impeccably suited to the task. Prior to joining the Gray, Gray & Gray team in 2024, Sydney was a Senior Technology Consultant with RSM, and she is a Certified Sage Intacct Implementation Consultant.

Sydney is a graduate of Indiana University, where she earned a B.S. degree in Informatics. When not busy enhancing financial management technology for her clients, she enjoys walking, shopping and traveling.



scohen@gggllp.com

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](#)

Do you have a colleague that would like to receive our news?

[Subscribe Here](#)

Follow Us on LinkedIn:



Gray, Gray & Gray, LLP | The Power of More
150 Royall Street, Suite 102 | Canton, MA 02021

Web: www.gggllp.com | Phone: 781.407.0300 | Email: thepowerofmore@gggllp.com

This is a marketing email from Gray, Gray & Gray, LLP

If you no longer wish to receive these emails, click on the following link: [Unsubscribe](#).

To view this message in a browser, [click here](#).

The information contained in this communication (including any attachments and/or re-directs to other online sources) is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

Copyright © 2024. All Rights Reserved.