



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: Vendor-Based Approval for Bill Routing

We are excited to announce a new feature in Sage Intacct that will streamline your bill approval process: vendor-based approval for bill routing. This enhancement is perfect for organizations that assign approval responsibilities based on vendors. With this new vendor-based approval rule type, you can assign a bill approver directly to each vendor in the vendor record, ensuring bills are routed efficiently to the right approver's queue for review.

Details:

Accounts Payable bill approval policy Save Cancel More actions

Process

	Rule type *	Rule set	Manage rule	
1	<input type="text" value="Rule type"/>	<input type="text" value="Rule set"/>		+
2	Find		Edit	+

Vendor-based Approval

Value Approval

Value Approval - Transaction Department

- **Vendor-Based Approval Rule Type:** Add this rule type to your bill approval policy in accounts payable configuration. Once added, the bill approver field appears in the vendor record, allowing you to assign approvers directly.

Accounts Payable

V0008 -- Star Guard Insurance

Save Duplicate Print to... Cancel More actions

Billing details

AP account

Default expense account
6270--Insurance - General Insurance

Credit limit

Bill approver
Electra--Electra Ramirez

On hold

Do not pay

Comments

Default currency

- **Assigning Bill Approvers:** You can edit vendor records directly or update them using CSV import to assign bill approvers. Any unrestricted business or employee user with approve bills: List permissions can be selected as a bill approver. You can also assign a user group as a bill approver, provided all members have the appropriate permissions.
- **Approval Rule Execution:** If multiple rule types are present in your bill approval policy, they execute in the order listed. For vendors with assigned bill approvers, the vendor-based approval rule executes, bypassing the Value Approval - Transaction Department rule. For vendors without assigned approvers, the Value Approval - Transaction Department rule executes.

How It Works:

1. **Setup:** Add the vendor-based approval rule type to your existing bill approval configuration. Grant approve bills: List permission to users you want to assign as bill approvers.
2. **Assign Bill Approvers:** Navigate to Accounts Payable > All tab > Vendors. Edit the vendor you want to update, select the additional information tab, and choose a user or user group from the bill approver list. Save or submit the changes.
3. **Approve Bills:** When a bill is submitted, Sage Intacct executes the bill approval rules defined in your policy. If a vendor has an assigned approver, the bill is added to their queue. Approvers receive notifications if configured. If no approver is assigned, the bill is auto-approved, and the next rule is executed. The approver reviews the bill and either approves or declines it.

This new feature enhances the efficiency of your bill approval process, ensuring bills are reviewed by the appropriate approvers based on vendor assignments. To learn more about the Setup and Requirements for **Vendor-Based Approval for Bill Routing**, contact our [Sage Intacct Help Desk](#).

Gray, Gray, & Gray Celebrates 80th Anniversary



2025 marks the 80th anniversary of Gray, Gray & Gray! Since 1945, our firm has evolved into a leading independent accounting and advisory firm while maintaining our commitment to the industry and providing remarkable service to our clients. As we reflect on 80 years of delivering more, we are grateful to our clients and team members.

"From a three-person post-war start up, we have grown steadily and deliberately over the years with the intention of maintaining our identity as an independently operated, entrepreneurial firm. Whether it was through organic growth by adding new clients or expanding with our existing clients, our path has always been forward and upward. Throughout our history we have been fortunate to have team members of exceptional skill and dedication; and clients who placed their trust and confidence in our firm," says James DeLeo, MBA, CPA/MST, a 35-year veteran of Gray, Gray & Gray who serves as the firm's Leading Partner.

[READ THE FULL PRESS RELEASE HERE](#)

NPGA Expo Recap 2025



Our Energy team enjoyed participating in the 2025 NPGA Expo in Charlotte, NC earlier this month! We took part in some exciting and informative events, including the session "National

Propane Survey Panel Discussion: What the Experts Say", co-presented by Gray, Gray & Gray Partner, Marty Kirshner. Our team had a great time meeting and networking with attendees at our booth, including conducting demos of Sage Intacct! Plus, Gray, Gray & Gray, Cargas, Cetane, Ray Murray, and Warm Thoughts Communications co-hosted a clients & friends appreciation event at the Harvey B. Gantt Center, celebrating and connecting with many energy industry professionals! Thank you to all who attended and participated, and to those who visited our booth during the expo.

Announcing New Gray, Gray & Gray Team Members!



Olivia Atherton
Audit
Staff Accountant



Cole Canfield
Sage Intacct Consultant



Maya DeMello
Marketing & Communications
Intern



Meghan Stravin
Marketing & Communications
Intern



Nishita Redkar
Transaction Advisory Services
Intern

We are pleased to welcome new team members to our g3 family. We look forward to bringing your unique skills and experience to our firm, helping to deliver the power of more!

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 Webinar

The Rise of AI in Modern Finance

April 22 at 2:00 PM EST

[REGISTER HERE](#)

Team Member Spotlight: Cole Canfield

Cole is an experienced Sage Intacct Consultant with a strong background in helping organizations streamline their accounting processes, enhance reporting capabilities and optimize operational efficiency through Sage Intacct implementations.

Cole's expertise includes system configuration, workflow automation, integration support and financial reporting. He works closely with clients across various industries to understand their unique needs and deliver tailored solutions that drive growth and scalability. His deep knowledge of Sage Intacct's advanced features - such as multi-entity consolidation, revenue recognition and project accounting - enables businesses to make data-driven decisions with confidence.



ccanfield@gggllp.com

Prior to joining Gray, Gray & Gray, Cole gained hands-on experience in accounting and financial systems as a Sage Intacct Consultant with Pemeco Consulting Group, and as a Financial Systems Consultant with NewGen Business Solutions. This background allows him to bridge the gap between technical functionality and real-world business challenges.

Cole is a graduate of Arizona State University with a Bachelor of Science degree in Accounting.



Don't miss our upcoming webinar, "Integration Methods and Data Approaches," on April 22 at 1:00pm, where we'll delve into effective integration strategies and data transformation techniques to enhance your business operations—[learn more and register here!](#)

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

Schedule a Consultation

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Gray & Gray's assistance?

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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

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