



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.

Less Than 1 Month Away! Gray, Gray & Gray's 2025 Year End Planning Seminar is on November 13th

Our Year End Planning Seminar is Less Than One Month Away!

STRAIGHT TALK

on Taxes, Trades & Trends

Objective Guidance for the Year Ahead



Thursday, November 13th, 2025

In Person: Gray, Gray & Gray's Canton Office

Registration, Breakfast & Networking: 8:00 am - 9:00 am

Seminar Sessions: 9:00 am - 12:00 pm

Join us at our Canton, MA office on Thursday, November 13th for Straight Talk on Taxes, Trade & Trends: Objective Guidance for the Year Ahead. This year's seminar theme celebrates 80 years of clarity, relevance, and informed action— values that have shaped our firm since its founding and will help us pave the way forward for you. Gain insights from [Joshua Stillwagon](#) of Babson College on the economy and interest rates and learn from Gray, Gray & Gray Tax Partners [Kelly Berardi](#), [Brad Carlson](#), and [Derek Rawls](#) as they break down the latest legislative changes, including the One Big Beautiful Bill Act, with practical guidance for your business and personal finances. Plus, you'll hear firsthand from clients who have successfully navigated complex transitions and market shifts, highlighting the power of sound advice and strategic planning. Reflect, learn, and prepare for the future with us!

REGISTER NOW

Gray, Gray & Gray Named to INSIDE Public Accounting's "Best of the Best" for 2025



We are pleased to announce that Gray, Gray, & Gray has been named to “Best of the Best” as one of the nation’s best-managed firms by INSIDE Public Accounting magazine. Gray, Gray & Gray is one of only three firms in New England to be selected.

“We are honored to be recognized for the third time among the ‘Best of the Best’ accounting firms in the country,” said James DeLeo, MBA, CPA/MST, Leading Partner at Gray, Gray, & Gray. “This continued recognition reinforces that our innovative ‘Power of More’ approach is making a real difference for our clients, our firm, and the outstanding team members who drive our success.”

[READ THE FULL PRESS RELEASE](#)

This Month's Feature Spotlight: Enhanced Lists Rollout

We are excited to announce that Enhanced Lists are being rolled out in phases to all Sage Intacct customers. Soon, you will notice that Enhanced Lists will become the default experience for your company. If Enhanced Lists are not yet your company’s default, you can still try them on a list-by-list basis. Sage Intacct will remember your preference the next time you open that list. Most lists are already available in the enhanced format, with a few more coming in upcoming releases.

Why is this Important?

- **Personalized Experience:** Enhanced Lists allow you to customize your list views, making it easier to access and analyze the data that matters most to you.
- **Increased Efficiency:** Features like bulk operations, advanced filtering, and split view navigation streamline your workflow and save time.
- **Greater Flexibility:** Add, move, resize, and freeze columns, sort by key data, and save your custom views for future use.
- **Seamless Transition:** All your current public and private views for that list are automatically migrated to the enhanced format when you enable Enhanced Lists.

Action Required

To take advantage of Enhanced Lists:

- **Turn On Enhanced Lists:** Select “Turn on enhanced list” at the top of any list page. This change will only affect the current list.

★ 🏠 Accounts Payable ▾ 🔍 Search 📌

Vendors

Turn on enhanced list [Add](#) [Delete](#) [Import](#) [Export ▾](#)

All ▾ Manage views ▾ Group filters Nothing selected ▾ ☐ Include one-time use ☐ Include inactive ☒ Dis

[Clear all filters](#)

Select	Vendor ID ▾	Vendor name	City	State or territory	ZIP or postal
☐					
☐ Edit View	■ V0001	Express Bank	Salt Lake City	UT	84050
☐ Edit View	■ V0002	The Post Company	San Jose	CA	95110
☐ Edit View	■ V0003	Coast Tele	San Jose	CA	95110

- **Turn Off Enhanced Lists:** If you wish to revert, select “More actions” at the upper right and choose “Turn off enhanced list.” This only affects the current list.

★ 🏠 Accounts Payable ▾ 🔍 Search 📌

Vendors Enhanced list

[+ Create](#) [Import](#) [Export ▾](#) [...](#)

All ▾ Manage view ▾ ☒ Display hierarchy [Table](#) [Card](#) [Filters 2](#) [Settings ▾](#)

Items selected: 0 [Delete](#)

	Vendor ID ↑	Vendor name	Ledger	Address line 1...	City [contacts....	State [contact
☐	Contains ▾	Contains ▾		Contains ▾	Contains ▾	Contains ▾
☐	V0001	Express Bank	Ledger	PO Box 2000	Salt Lake City	UT
☐	V0002	The Post Com...	Ledger	333 N 7th Avenue	San Jose	CA
☐	V0003	Coast Tele	Ledger	200 1st Street	San Jose	CA

- **Send Us Feedback:** Use “More actions > Send us feedback” to let us know what you like or what could be improved.

How It Works

- **Personalize Your List Views:** Add, move, and resize columns. Freeze columns for easier scrolling. Sort by your preferred data and save your customized views.
- **Advanced Filtering:** Easily narrow down your data with advanced filters, including date and amount ranges, and combine multiple criteria using AND/OR operators. Save filtered views for repeated use.
- **Split View Navigation:** View record details side by side with your list for easier navigation and review.
- **Bulk Operations and More:** Perform actions on multiple records at once, manage your list views centrally, and enjoy improved color options for displaying hierarchies.

For more details about Enhanced Lists and how to make the most of these new features, please contact our [Sage Intacct Help Desk](#).

Additional Upcoming Sage Webinar

A High Performance Framework for Senior Living Finance Leaders

November 4th at 3:00 PM EST

[REGISTER 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.

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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](#).

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Team Member Spotlight: Bill Constantopoulos

Bill Constantopoulos is on a mission. He truly believes that Sage Intacct is “the best reporting system for mid-market companies available today.” And he is determined to win over doubters and disbelievers.

Bill’s confidence in Sage Intacct is based in real-life experience - he has completed more than 300 implementations for organizations in a wide array of industries and range of sizes. All had a common need for an accounting and financial reporting software platform that was powerful enough to compile and deliver the diverse scope of information necessary to support and drive the decisions that lead to growth and profitability.



bconstantopoulos@gggllp.com

“I think the ‘sweet spot’ for Sage Intacct is an organization with revenues in the \$20 million and more window,” says Bill. “That’s the range where real-time access to accurate and detailed information and data analysis is critical. No other system delivers that like Sage Intacct.” Bill’s implementations have run the gamut from non-profit organizations, healthcare companies, private equity firms, energy businesses, to collegiate athletic conferences. “Anyone who will

benefit from having the right information at the right time should learn more about Sage Intacct.”

Bill also cites Sage Intacct’s open API architecture as a huge advantage over legacy systems and even other accounting software platforms. “Because the architecture is designed from the ground up to be cloud based, Sage Intacct can be fully integrated with virtually any other business operations software system to build a holistic back office technology stack.”

An early start in technology was perhaps a harbinger of Bill’s future. He helped set up the computer system for his father’s construction business before heading off to the University of Massachusetts-Boston to earn an accounting degree. His first full-time job after graduation was with the Federal Reserve Bank of Boston where Bill worked with multiple proprietary accounting and financial reporting systems and learned valuable lessons in “how the monetary system in this country runs.”

Bill then joined RSM’s Sage Intacct team, working on client assessments, system design and implementation on a variety of businesses. He brought his deep appreciation for – and experience with – Sage Intacct to Gray, Gray & Gray in 2020 and immediately made a big impact for our clients, leading successful implementations that overcame the difficult challenges posed by the global pandemic.

When he is not equipping clients with the powerful tools of Sage Intacct, Bill will most likely be found deep in the woods or on a mountain trail on an immersive hike over the most challenging terrain. He is also a diehard NFL football fan, and is at home in the weight room or basketball court at the local Y.

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

[Schedule a Consultation](#)

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