



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: Intelligent 3-Way Matching with AP Automation

Sage Intacct enhances AP Automation with **Intelligent 3-Way Matching**, an AI-driven feature that performs line-level matching across purchase orders, receivers, and vendor invoices. This improvement increases accuracy, reduces manual review, and helps teams resolve discrepancies faster.

Entries									
Item ID	Warehouse	Conversion type	Quantity	Unit	Price	Extended price	Exception		
1	2-Mobile Phones	1-US, TX Warehouse 10004	5.00	Each	750.00	3,750.00			
Total						3,750.00			

Exception summary																	
Line no.	Item ID	Preceding bn	Quantity	Unit	Price	Previous bn	Quantity	Unit	Price	Current bn	Quantity	Unit	Price	Quantity variance	Price variance	Quantity variance %	Price variance %
1	2-Mobile Phones	MT_REQ-PR#0308#doc	6.00	Each	700.00	MT_Order-PO#0165#doc	6.00	Each	700.00	MT_Receiver-Po-0228-Rec	5.00	Each	750.00	-1.00	--	-16.67%	--

Why this matters:
Line-level matching allows invoices to link directly to source purchasing transactions,

minimizing unnecessary review and surfacing true exceptions—so AP teams can work more efficiently.

Key benefits:

1. Faster exception handling with AI-flagged quantity and price variances
2. More accurate invoice matching at the line level
3. Reduced review effort with configurable match tolerances

How it works:

Documents are uploaded or emailed as usual. Sage Intacct applies AI to match invoice lines, highlight discrepancies, and enable users to review exceptions or post transactions as needed.

Action required:

Enable line-level matching in **Purchasing > Setup > Configuration** to take advantage of this feature.

For more details or setup assistance, contact our [Sage Intacct Help Desk](#).

Sage Intacct AI Gateway (1.0)

Sage Intacct introduces the AI Gateway (1.0), enabling AI applications to securely connect to Sage Intacct using REST APIs or the Sage Intacct MCP Server.

This new gateway provides governed, read-only access to financial data and supports natural-language queries—making it easier for developers to build AI-powered insights without direct system integration.

Key highlights:

- Secure, read-only access to core financial data
- Natural-language queries translated into structured requests
- OAuth 2.0 authentication with centralized governance
- Coverage across key modules including GL, AP, AR, and Purchasing

To learn more, see the [Sage Intacct AI Gateway Guide](#).

Now Available: Sage Intacct R2 Release Notes



Sage Intacct's latest release notes are now live, delivering new features and product enhancements automatically—no action required. Be sure to review the release highlights to see what's new and how these updates can support your workflows.

[Access the release notes here.](#)

Upcoming Sage Intacct Webinar



Designing Dashboards That Guide Action: KPIs, Forecasting, and Cross-Functional Planning

May 28, 2026

1:00 PM ET

When teams work from different versions of the numbers, key performance indicators (KPIs) drift, forecasts become outdated, and dashboards become noise instead of clarity.

On Thursday, May 28th, at 1 pm ET, join Pooja Pewekar, Growth Strategy Lead for Sage Intacct, and Linda Pinion, Principal Solutions Consultant, as they show how shared dashboards keep every department aligned, even when business conditions shift quickly.

[REGISTER NOW](#)

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



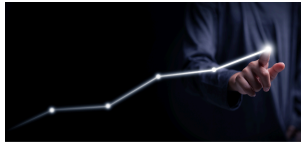
Coffee Break Demo

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.

Find out more about the expansion of Sage construction cloud suite with the launch of Sage Construction Management. Read the [full press release here](#) and register below for the virtual demo.

REGISTER HERE

Managing the Financial Aspects of Expansion and Diversification



For fuel dealers who have spent years building a solid delivery operation, the move into new territories, additional product lines, or acquired businesses is exciting, but it introduces a layer of financial complexity that most back-office systems were simply never designed to handle. If you're running your financials on QuickBooks or relying on the reporting tools built into your dispatch and delivery platform, you may be managing a mid-sized energy company with the financial infrastructure of a small retail shop. That gap matters.

READ THE FULL ARTICLE

Gray, Gray & Gray Named to Boston Business Journal Fast50 List for Second Consecutive Year



We are elated to announce that Gray, Gray & Gray has been named to the *Boston Business Journal's* 2026 “Fast50” list, which recognizes the 50 fastest-growing private companies in Massachusetts. This is the second consecutive year the firm has been named among the region’s fastest-growing companies, ranking #40 with a four-year growth rate of more than 46%. The BBJ Fast50 list was selected and ranked based on total revenue growth from 2022 to 2025 as analyzed by the *Boston Business Journal's* research department.

[READ THE FULL PRESS RELEASE](#)

Team Member Spotlight: Sarah Hayes

Sarah brings comprehensive expertise to her role in our Customer Accounting & Advisory (CAAS) practice group. Her credentials include multiple Sage certifications: Implementation Consultant, Construction Certified Implementation Consultant, Construction Industry Specialist and Construction Sales Professional. These certifications demonstrate her deep expertise in both general ERP implementation and industry-specific applications.

Sarah’s professional background spans diverse industries, including aviation, technology, construction, publishing, and logistics. She also contributes significantly to the non-profit sector, working with organizations focused on social services, publishing, and the arts. This varied experience enables her to understand and address the unique financial management needs across different organizational structures and industries.

Sarah leverages her extensive background in finance and HR to provide strategic solutions for clients transitioning to Sage Intacct’s cloud-based financial management platform. Her comprehensive understanding of both operational and technical aspects makes her particularly effective in guiding organizations through complex system implementations.

Sarah joined Gray, Gray & Gray in 2024. She is a graduate of Hamline University.



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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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