



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.

Platform Spotlight: Expanding Your Sage Intacct Ecosystem

In addition to Sage Intacct, we partner with a select group of integrated platforms designed to expand functionality and drive greater efficiency. This month, we're highlighting a few of these solutions and the value they can bring to your organization.

We take a thoughtful approach to the platforms we recommend—working only with solutions we trust to deliver meaningful results. Each tool is purpose-built to integrate with Sage Intacct, helping streamline processes, enhance system capabilities, and improve overall operational efficiency.



Collaborative Budgeting & Financial Planning

Martus is a powerful financial planning and analysis (FP&A) platform that enhances your Sage Intacct environment—streamlining budgeting, forecasting, and reporting in one connected solution. With real-time data integration, your financial information flows seamlessly, eliminating manual entry and ensuring accuracy across your planning process.

From rolling forecasts and scenario modeling to collaborative budgeting and automated variance reporting, Martus helps teams make faster, more informed decisions. Built for flexibility, it enables cross-departmental input, maintains version control, and simplifies the creation of board-ready reports.

Gray, Gray & Gray supports the full implementation, configuring Martus to align with your workflows and providing training and ongoing guidance to maximize long-term value.

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Smarter Spend Management Starts Here

Ramp is an AI-powered financial operations platform that simplifies how your team manages spending—from expenses and accounts payable to corporate cards and procurement. When integrated with Sage Intacct, Ramp automates coding, categorization, and syncing of transactions in real time, reducing manual effort and speeding up month-end close.

With intelligent automation handling receipt capture, approvals, and invoice processing, your team gains clean, accurate data and full visibility into spending—without the usual administrative burden.

Gray, Gray & Gray supports the full implementation, ensuring Ramp is configured to align with your workflows, approval processes, and reporting needs, so you can maximize efficiency from day one.

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Velixo

Real-Time Reporting, Right in Excel

Velixo connects your cloud ERP directly to Excel, giving your finance team access to live, real-time data—right where they already work. No more exporting files or reformatting spreadsheets—your reports update instantly with the latest numbers from your system.

With Velixo, you can build dynamic financial statements, manage multi-entity consolidations, and even push budgets and entries back into your ERP—all within Excel. The result is faster reporting, greater accuracy, and more time spent on analysis instead of manual work.

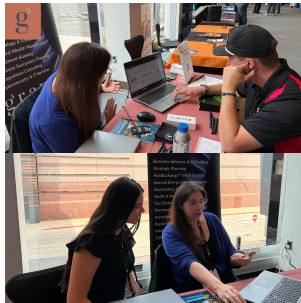
Gray, Gray & Gray handles the implementation and configuration, ensuring Velixo is tailored to your ERP, reporting needs, and workflows.

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Together, these integrated solutions are designed to help you get more out of your ERP—streamlining processes, improving visibility, and enabling your team to work more efficiently.

Whether you're enhancing reporting, automating financial operations, or strengthening planning and analysis, Gray, Gray & Gray can help you build the right solution.

Recent Events



Our team has been actively attending industry events throughout the year, most recently the **Midwest Regional DFMC Conference** and the **Rural Computer Consultants Summer Camp**. At both events, we shared insights on the power of Sage Intacct while connecting with clients and prospects, learning more about their needs, and building meaningful relationships. We look forward to continuing to engage with the industries we serve and expanding these connections!

Team Member Spotlight: Xiaoyi Peng, CPA

As Director of Implementation Services with Gray, Gray & Gray's Sage Intacct & Advisory practice group, Xiaoyi leads a growing implementation team and partners with clients to design, build, and deploy scalable accounting and process automation solutions. Her work focuses on developing people, strengthening delivery capabilities, and helping organizations streamline operations and realize value through systems such as the Sage Intacct enterprise accounting platform.

Xiaoyi provides advisory services focused on accounting systems strategy, process improvement, and implementation leadership, helping organizations modernize finance operations and achieve measurable business outcomes through technology-enabled



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transformation.

"Sage Intacct is a powerful platform, but its value depends on how thoughtfully it's designed," Xiaoyi says. "When systems are built around real workflows and decision-making needs, they become tools that enable people and drive meaningful outcomes."

Prior to joining Gray, Gray & Gray in 2022, Xiaoyi served as a senior accountant with Brixey & Meyer. She is a graduate of Shanghai Financial University and Lakeland College. When not solving problems for clients, Xiaoyi enjoys spending time with her daughter, tending to her ever-growing collection of plants, and trying to corral her three dogs, two Huskies and a Malamute.

**Interested in learning more about Sage Intacct and
the full suite of integrated solutions from Gray, Gray & Gray?**

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