



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: Custom Purchasing Approvals (Early Adopter Program)

Streamline your Purchasing approval process with **Custom Purchasing Approvals**, a new Early Adopter feature in Sage Intacct. Using flexible, rule-based logic, organizations can automatically route Purchasing transactions to the appropriate approvers based on vendor attributes, transaction amounts, payment priorities, and more.

Sage | Intacct Skyline | Top level

Company | Search

Custom approval rule set | Save draft | Create | Save | Cancel | More actions

Application * | Description * | User * | User group *

Purchasing | Subcontractor vendor type | Noah Smith | Noah Smith

Approval object * | Transaction definition * | Status *

Purchase transaction | Purchase order | Purchase Order

Process

Condition type

All (AND)

Condition

Approval routing and limits

	Data source	Field ID	Operator	Value	
1	Vendor	VENDTYPE	Equals	Subcontractor	+ -
2	Vendor	VENDORNAME	Equals	Vista Garden	+ -
3	Purchasing transaction	TRXTOTAL	Is less than	500.00	+ -
4					+ -

Copilot ^ X

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Why this matters:

Custom Purchasing Approvals help reduce manual effort, improve consistency, and strengthen internal controls by ensuring transactions are routed according to your organization's specific business rules.

Key benefits:

1. **Flexible approval criteria** based on vendor details, payment methods, currency, and transaction totals.
2. **Precise approval routing** using configurable AND/OR logic.
3. **Improved compliance and visibility** with built-in audit trails and approval history.

How it works:

Administrators create custom approval rule sets, assign approvers, and define conditions for routing transactions. Once activated, Sage Intacct automatically directs Purchasing transactions to the appropriate approvers and records each approval decision.

Good to know:

Approval rules run sequentially based on the order established within your approval policy.

Interested in participating?

This feature is currently available through Sage Intacct's **Early Adopter Program**. Complete the [Early Adopter application form](#) to be considered and help shape future enhancements.

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

Roles Permissions Report

Managing role-based access just got easier with Sage Intacct's new Roles Permissions Report. This report provides administrators with a consolidated view of all permissions assigned to a role—including both standard and custom permissions—in a single, easy-to-review report.

Why this matters:

The Roles Permissions Report simplifies access reviews by providing a point-in-time snapshot of role permissions, eliminating the need to cross-reference multiple settings and screens.

Key benefits:

1. Unified permissions view for both standard and custom role permissions.
2. Simplified role validation to quickly review and confirm access settings.
3. Flexible reporting options with filters for role names and date ranges.

How it works:

Navigate to Company > Admin > History and Reports > Roles Permissions Report, select your desired date range and role, then generate the report to review assigned permissions.

Good to know:

If no date range is selected, the report displays all permissions for the chosen role. While useful for access reviews, this report is not intended to serve as an audit trail of historical permission changes.

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

Customer Refunds Through Accounts Payable

Sage Intacct now allows customer refunds created in **Accounts Receivable** to automatically generate linked **Accounts Payable** bills for payment processing. This enhancement helps strengthen internal controls while simplifying refund management.

Why this matters:

By separating refund creation from payment processing, organizations can maintain proper segregation of duties and improve visibility into the refund lifecycle.

Key benefits:

1. **Stronger controls** by separating AR and AP responsibilities.
2. **Improved tracking** with linked refunds, bills, and payments.
3. **Simplified processing** using existing AP payment workflows.

How it works:

When a refund is created in Accounts Receivable, Sage Intacct automatically creates a matching Accounts Payable bill. AP users then process the payment through their standard pay bills workflow.

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

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

Gray, Gray, & Gray Participates in “Day of Service” at Three Local Organizations



Gray, Gray & Gray was proud to participate in a “Day of Service” on Tuesday, June 23, as part of a statewide community initiative sponsored by MassCPAs.

“At Gray, Gray & Gray, we believe service goes beyond the workplace. The Day of Service underscores our core values: meaningful impact happens when businesses invest in their employees and communities, not just financially, but through hands-on engagement and compassion,” said Rita Senier-Coletti, the firm’s Talent Acquisition & Culture Specialist.

Click [HERE](#) to read the full press release, and click [HERE](#) for even more highlights and memorable moments from this incredible day

Gray, Gray, & Gray Elevates Seven to New Roles



Gray, Gray & Gray is pleased to announce the promotion of seven team members to new positions.

“For more than 80 years, our people have been the foundation of Gray, Gray & Gray’s success. These promotions recognize the talent, dedication, and purpose-driven approach that enable our team members to grow in their careers, support one another, and succeed together,” said James A. DeLeo, MBA, CPA/MST, Leading Partner of Gray, Gray & Gray.

READ THE FULL PRESS RELEASE

Welcoming New Team Members

We are pleased to welcome the following new Gray, Gray & Gray team members, and welcome back several returning team members! We look forward to seeing them deliver more for our Audit, Tax, Support, and Investment Banking teams.

W
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3



Colin Botelho
Audit
Staff Accountant



Rusbel Castillo Perello
Tax
Staff Accountant



Caroline Connell
Marketing
Coordinator



Luca Ferrara
Investment Banking
Analyst



Joseph Gatto
Tax
Staff Accountant



Nico Georgakopoulos
Audit
Intern



Michael Marchese
Investment Banking
Intern



Taylor McLaughlin
Audit
Staff Accountant



Joseph O'Connell
Audit
Staff Accountant



William O'Malley
Tax
Staff Accountant



Amanda Pagel
Audit
Intern



Sean Remillard
Investment Banking
Intern



Elisabeth Stapelfeld
Audit
Staff Accountant



Meghan Stravin
Tax
Staff Accountant



Benjamin Tyler
Audit
Intern

Team Member Spotlight: Patrick Mullenger

With a background in accounting, insurance and law, Patrick Mullenger, a key member of Gray, Gray & Gray's Client Accounting & Advisory Services (CAAS) team and a Certified Sage Intacct Implementation consultant, is well prepared to help a business become more efficient and effective.

Having worked with a wide range of clients across multiple industries, Patrick possesses a deep understanding of the unique challenges facing business managers in companies of different types and sizes. Which is why he appreciates the depth and flexibility offered by the Sage Intacct enterprise accounting systems he helps to design and implement.

"No matter the size of your business or the customers you serve, the world moves on data and information that has to be accurate and available on demand," says Patrick. "Sage Intacct and our workflow systems like Workato have the advantage



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of being adaptable and customizable to solve the specific problems our clients are dealing with in their organizations.”These powerful tools, in combination with the financial, strategic planning, and accounting knowledge embedded at Gray, Gray & Gray, allow Patrick and our CAAS team to deliver the Power of More® in support of growth and profitability for clients in all fields.

Prior to joining Gray, Gray & Gray, Patrick was an accountant and Certified Intacct Implementation Specialist with Brixey & Meyer, and a Director of Operations for the law firm of Taft, Stettinus & Hollister, LLP. He is a graduate of the University of Cincinnati Carl H. Lindner College of Business and UC Blue Ash College, with degrees in Accounting and Business Administration & Management.

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

[Schedule a Consultation](#)

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