Sage Intacct 2025 R1 Product Release Notes

Sage Intacct 2025 R1 will be live on Friday, February 7th

We're excited to unveil the **Sage Intacct 2025 R1** Guide! This guide is your essential resource for all new features, enhancements, and updates in Sage Intacct's 2025 first release, aimed at providing insights and streamlining business processes. Committed to delivering superior solutions, this update focuses on enhancing efficiency, usability, and data-driven decision-making. ***Please note: this update will take place on the night of Friday, February 7th, 2025.***

For full descriptions, screenshots, videos, links, and more, please visit the Sage Intacct technical release webpage here: **FULL RELEASE NOTES**

To watch the Sage Intacct 2025 Release 1 Highlight video, please click here or the image on the right.

If you have questions, please reach out to your DSD Account Manager **Gregg Lukoskie: 800-627-9032 x255** **GreggL@dsdinc.com** & Consulting Manager **Jennifer Kinzel: 800-627-9032 x 141** **jenniferk@dsdinc.com**
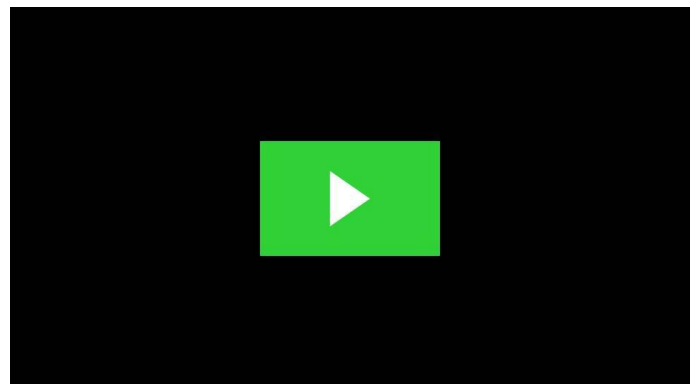
Features

Sage Copilot

Copilot Close Assistant—Early adopter

Gain clarity, save valuable hours, and ensure timely end-of-period reporting. Our central hub lets you monitor close activities efficiently.

Release note coming soon!

Automation capabilities

AP Automation with Purchasing—General availability

Streamline your Purchasing process with AI to match incoming documents to existing purchase orders or receivers, and more! Learn More

Get end-to-end supplies item management with Sage Intacct Supplies Inventory

Efficiently manage employee supplies requests and approval flows with Sage Intacct Supplies Inventory. Learn More

Purchase order approval delegation improvements

Enhance your purchase order approval process with improved delegation. Allow restricted users to be assigned as delegates and enable user groups to be selected as approvers. Learn More

Strength in Financials

Automate revenue management even when billing through other applications

Process, defer, and recognize revenue from 3rd-party billing applications in bulk and with enhanced accuracy and compliance. Learn More

Enhanced currency support for funds transfers—Early adopter

Perform funds transfers with up to 3 unique currencies without having to create a manual journal entry. Learn More

Generate NACHA ACH payment files

Improve the efficiency and security of your payment process by generating NACHA compliant ACH payment files. Learn More

Transfer assets within an entity

Easily transfer assets between dimensions such as departments and projects, with accurate accounting and full visibility on the Transfer history tab. Learn More

Introducing vendor-based approval for bill routing

Simplify your approval process with role-based approval rules for approval policies. Ensure that submissions are automatically routed to the right approver for review. Learn More

New affiliate entity dimension for easier tracking and reporting—Early adopter

Optimize your consolidation process with the affiliate entity dimension to experience seamless auto-elimination of inter-entity activities. Learn More

Industry insights

Sage Intacct Clinical eProcurement—Coming soon!

Save time using vendor punchout catalogs seamlessly connected to Sage Intacct Purchasing. Learn More

Lending Management—Early adopter

Lenders can now manage loans from origination to payoff including client billing, statements, and more. Includes full subledger tracking and reporting to ensure real-time portfolio insight and audit readiness. Learn More

Projects and grants

- **A new look for projects and grants:** Streamlined project and grant records now provide faster, focused insight on billings and resource price information. Learn More

- **Simplify cost and grant reporting with one-click downloads:** Easily assemble project and grant attachments to share with customers or grant funding sources. Learn More

Comprehensive List of Changes Made in 2025 R1

Sage Copilot

- Announcing Copilot Close Assistant—Early adopter: Reduce uncertainty related to the close process, wasted time, and unnecessary delays to end of-period reports and insights. Release note coming soon!
- **Search help with Copilot—Phased General Availability:** Our AI-powered semantic search engine understands the context and intent behind your help queries, providing more accurate and relevant results.

AI-powered Automation

- **AP Automation with Purchasing—General availability**: This release, purchasing automation is available to all companies. An add-on to AP Automation, this feature automates draft transactions for incoming vendor invoices and matches them to purchase orders or receiving documents.
- **Automated matching for inbound vendor invoices to existing purchase documents—Early adopter**: AP Automation with Purchasing is opening an early adopter program to support standalone vendor invoices.
- **Automated receipt submission for multi-currency companies**: Streamline your expense reporting process by emailing your receipts directly to Sage Intacct from any device. This feature leverages artificial intelligence (AI) to assist in coding your receipts, making the entire process more efficient and accurate.

Company and Administration

- **Authenticate and validate your custom email domain**: Your email communications are secure and reliable when you authenticate and validate your custom email domain.
- **Instance Setup Wizard enhancements**: We updated the setup wizard to allow for smoother experience creating companies.
- **Permission changes**: Review changes in permission menus.

Accounts Payable

- **AP Automation with Purchasing—General availability**: This release, purchasing automation is available to all companies. An add-on to AP Automation, this feature automates draft transactions for incoming vendor invoices and matches them to purchase orders or receiving documents.
- **New bill approval rule**: Assign a specific approver to each vendor with vendor-based approval.
- **Vendor visibility user interface changes**: Learn about small changes to the user interface and workflow around vendor restrictions.

Accounts Receivable

- **AR statement enhancements**: Include custom field data in statements and process larger statements runs with more ease.
- **Receive a payment is retiring soon**: Get ready to transition to Receive payments in 2025 Release 2.
- **Customer visibility user interface changes**: Learn about small changes to the user interface and workflow around customer restrictions.

Cash Management

- **Funds transfer—Early adopter**: Make 3-way currency funds transfers when you join the Early adopter program.
- **NACHA payment files**: You can now generate NACHA-compliant ACH payment files in Sage Intacct.
- **Bank transaction assistant**: Draft payments that you receive but are not ready to post.
- **Print Canadian checks in French**: Print on blank or preprinted check stock.
- **Canadian bank file payments**: You can now pay vendors and employees electronically with new Canadian bank file formats.

Consolidation

- **Affiliate entity dimension—Early adopter**: Use the new affiliate entity dimension to track inter-entity activity, enabling enhanced reporting and automated inter-entity eliminations for Consolidation subscriptions. Now available to early adopters with a Consolidation subscription.

Fixed Asset Management

- **Transfer assets within an entity**: Easily move assets between departments, projects, or other dimensions. Each transfer automatically generates GL journal entries to ensure accurate records and is logged in the asset's Transfer History.

General Ledger

- **Prevent direct posts to specified journals**: Eliminate a primary cause of discrepancies between subledgers and the Trial balance report. You can prevent direct posts on a journal-by-journal basis.
- **Regularization account reclassification for regional reporting compliance**: Ensure regional reporting compliance by configuring balance sheet accounts to be automatically classified as assets or liabilities depending on their balance.

Industry

- **Enhancements in Sage Intacct Forms and Operational Workflows**: Simplify onboarding your clients and streamline interactions with new onboarding workflows and client portals.

Healthcare

- **Clinical eProcurement streamlines purchasing for healthcare organizations**: Save time using vendor punchout catalogs seamlessly connected to Sage Intacct Purchasing.
- **Enhancements in EMRConnect**: Learn about the updates that make EMRConnect even better!

Industry solutions

- **Enhancements in Sage Intacct Data Flow**: We've improved the flow of data from HubSpot to Intacct, and you can now use the Data Table tool to update data without removing existing data in the data table.
- **Enhancements in Sage Intacct Forms and Operational Workflows**: The audit log is easier to query, and we've added many new forms and workflows for construction and church/ministry.
- **Consolidated dashboards in Sage Intacct Project Intelligence**: For multi-entity organizations operating in different base currencies, new dashboards let you see consolidated data across all entities in a single base currency.

Inventory Control & Supplies Inventory

- **Automatic updates ensure inventory valuation accuracy**: Easier configuration for new subscribers keeps inventory costs up-to-date.
- **Get end-to-end supplies item management with Sage Intacct Supplies Inventory**: Conveniently manage your supplies inventory workflow requests, approvals, and purchases.
- **More flexibility during transaction processing**: New security settings offer restricted users added control of their draft inventory transactions.

Lending Management

- **Lending Management—Early adopter**: Lenders can now manage loans from origination to payoff including client billing, statements, and more. Includes full subledger tracking and reporting to ensure real time portfolio insight and audit readiness.

Order Entry

- **View dimensions in subtotals**: Dimension distributions can now display across subtotal line items in entity-level sales transactions.
- **More flexibility during transaction processing**: Modified security settings offer restricted users added control of their draft sales transactions.
- **Automate revenue management even when billing using a different application**: Integrate your third-party billing with Sage Intacct's Revenue Management. Accurately process, defer, and recognize revenue from external invoices while ensuring compliance and streamlined reporting.

Platform services

- **Enable the Platform translation tool**: Use Company settings to enable a tool that provides simple translation options for your applications.
- **Improved Platform Trigger Creation for POST Requests—Early adopter**: Use the webhook delivery option to simplify HTTP post requests in Triggers.

Projects and Grants

- **A new look for projects and grants**: Streamlined project and grant records now provide faster, focused insight on billings and resource price information.
- **Simplify cost and grant reporting with one-click downloads**: Easily assemble project and grant attachments to share with customers or grant funding sources.

Purchasing

- **AP Automation with Purchasing—General availability**: This release, purchasing automation is available to all companies. An add-on to AP Automation, this feature automates draft transactions for incoming vendor invoices and matches them to purchase orders or receiving documents.
- **More flexibility for approvals**: Share the workload with the ability to extend who can act as a delegate for approval requests when you're away from the office.
- **View dimensions in subtotals**: Dimension distributions can now display across subtotal line items in entity-level purchase transactions.
- **Edit tax information in Purchasing draft transactions**: To support Purchasing automation, you can now create draft Purchasing transactions without entering tax solution information. You can update the draft later to enter a tax solution, tax schedules, and tax details.
- **More flexibility during transaction processing**: Modified security settings offer restricted users added control of their draft purchase transactions.

Reporting—Financial

- **Variance analysis reports added to all QuickStart templates**: For companies created using a QuickStart template, the Variance analysis reports help you analyze your budget performance by department or location.

Revenue Management

- **Automate revenue management even when billing through other applications**: Integrate your third-party billing with Sage Intacct's Revenue Management. Accurately process, defer, and recognize revenue from those invoices while ensuring compliance and streamlined reporting.

Taxes

- **Tax submission for custom tax solutions—Generally available**: Our new tax submission workflow streamlines the tax filing process for any company using a custom tax solution.
- **Support for term discounts for taxes—Early adopter**: Customers using a standard or custom tax solution in the Taxes application can capture taxes on term discounts in their Accounts Receivable and Order Entry transactions.
- **Create customized tax reports—Early adopter**: Define tax report boxes, add those defined boxes to a tax report template, and run a tax report from that template to calculate your tax burden for a defined period.

Time and Expenses

- **Create and apply clear pricing structures—Sage Intelligent Time**: Use rate cards to apply standard billing rates for employees, items, projects, and tasks.
- **Automated receipt submission for multi-currency companies**: Streamline your expense reporting process by emailing your receipts directly to Sage Intacct from any device. This feature leverages artificial intelligence (AI) to assist in coding your receipts, making the entire process more efficient and accurate.

Training & Videos

- **New training and videos:** We added new training courses and videos to help you get the most out of Sage Intacct.

User interface

- **Lists enhancements—General availability**: Manage list and record details side by side, leverage advanced filters, customize your list view for the way you work, and so much more. Try it!

- **Updated user interface changes**: We updated labels in Accounts Payable, Accounts Receivable, Cash Management, Company, Consoles, Fixed Assets Management, Inventory Control, Order Entry, Projects, Purchasing, and WIP Management.

Lists enhancements—General availability
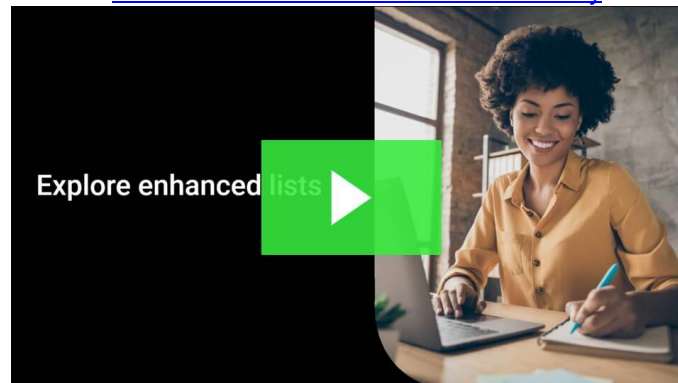
Closing Thoughts

We're thrilled to bring you a suite of updates focused on improving your efficiency and effectiveness.
For any questions or further assistance, don't hesitate to reach out to your DSD Account Manager or DSD Sage Intacct Support team. Let's enhance your financial management journey together!

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