Sage Intacct 2025 R2 Product Release Notes

Sage Intacct 2025 R2 will be live on Friday, May 9th

We're excited to introduce the **Sage Intacct 2025 R2 Guide**! This comprehensive guide is your go-to resource for the latest features, enhancements, and updates in Sage Intacct's 2025 second release. Designed to drive efficiency and elevate business performance, this release focuses on optimizing workflows, improving usability, and empowering data-driven decision-making. ***Please note: this update will take place on the night of Friday, May 9th, 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 2 Highlight video, please click here or the image on the right.

If you have questions, please reach out to your DSD Account Manager **Andre' Maund: 800-627-9032 x 255 AndreM@dsdinc.com** .
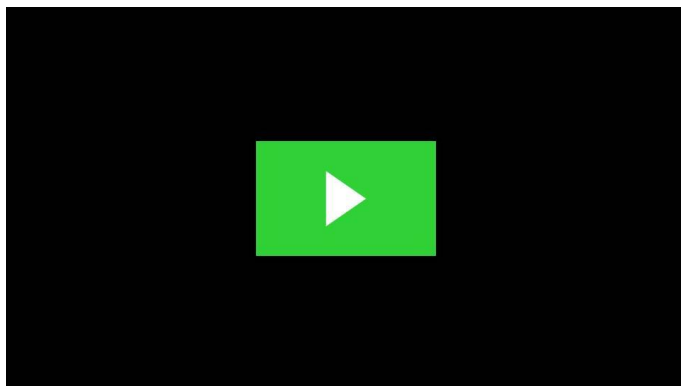
Features

Strength in Financials

Transfer assets between entities

Easily transfer an asset from one entity to another with accurate accounting treatment in Sage Fixed Assets Management. Learn More

Affiliate entity dimension—General availability

Automatically tag, track, and report on inter-entity activity with the new affiliate entity standard dimension for more granular eliminations in your consolidations. Learn More

Financial reporting guidance

Optimize your reports in Financial Report Writer with tailored recommendations. Learn More

Record customer refunds—Coming soon!

Record refunds issued to customers for improved tracking and reporting. Learn More

Industry Insights

Sage Intacct Fundraising powered by DonorPerfect

Increase the effectiveness of fundraising campaigns and regular giving programs while improving decision-making with superior business insights. Learn More

Introducing the Contracts summary tab

Achieve high-level visibility into contract activity to track details like Order Entry and AR transactions, Purchasing and AP transactions, and project insights. Learn More

Sage Intacct EMRConnect Dashboards

Gain actionable insights to improve healthcare efficiency with new dashboards in Sage Intacct that offer healthcare-focused financial and operational highlights for EMRConnect users. Learn More

Timesheet allocations in Sage Intelligent Time

Quickly distribute timesheet entries while ensuring consistent cost allocation. Learn More

Sage Intacct Data Flow now supports Tessitura

Leverage Sage Intacct data flow to seamlessly move financial data from Tessitura to Sage Intacct. Learn More

Automation Capabilities

Employee expense automation mobile app—Early Adopter

Submit and manage expenses with AI-powered receipt capture, faster reimbursements, and better compliance and visibility. Learn More

AP Automation streamlined in Purchasing—Early Adopter

Boost efficiency with AI-powered automatic transaction creation. Generate standalone transactions, reduce manual tasks, and get intelligent prediction that continuously improves. Learn More

Sage Intacct Supplies Inventory enhancements

- **Supplies Link PO**: Reduce manual data entry and link supplies requisition lines to existing POs when goods have already been ordered but not yet stocked. Learn More
- **Customizable supplies pick list and pick report:** Use merge field capabilities to tailor pick tickets and pick reports to meet specific business requirements. Learn More

Platform Scalability

Enhanced lists

Increase your personalization and efficiency with over 300 new lists available now. Learn More

New import service

Simplify data imports with AI-powered tools that handle all the complexity behind the scenes. Learn More

Authenticate and validate your custom domain before May 2025

Ensure secure and reliable email communications by authenticating your custom domain. Learn More

Event queue trigger

Flexible event management retrieval lets you get notifications on your schedule. Learn More

Improved Platform trigger creation for POST requests—General availability

You can now use the webhook delivery option to simplify your HTTP post requests in Triggers. Learn More

Comprehensive List of Changes Made in 2025 R2

AI-powered automation

- **AP Automation streamlined in Purchasing—Early Adopter:** This release continues the Early Adopter program to automate Purchasing transactions that do not have a source match defined, for example vendor invoices that do not match to purchase orders or requisitions.
- **Mobile app now supports employee expense automation—Early Adopter:** The Sage Intelligent Time mobile app now supports employee expense automation so that you can capture receipts, submit expense reports, and approve or decline them from a mobile device quickly.
- **Streamline your supplies workflow:** Ensure your team gets the supplies they need, when they are needed, by linking a new supplies request to an existing PO.
- **Customize supplies pick lists and pick reports:** Provide your team with detailed pick lists, and create more comprehensive pick reports.

Company and Administration

- **New import service—General availability**: The Sage Intacct import service simplifies data imports with AI-powered tools that handle all the complexity behind the scenes.
- **Authenticate and validate your email domain today**: To ensure smooth email delivery to your customers and partners, authenticate and validate your domain during May 2025.
- Updates to Accountant consoles:
  - **Monitor the creation process of an instance or console template**: After you create instances or console templates, the **State** column displays the following options: Ready, In progress, or Failed.
  - **Changes during instance creation**: The **Production type** field and the **Demo** option are no longer available when creating company instances from the Accountant console.
- **Spanish and Canadian French language preferences—General availability**: You can now set your preferred Company and User languages to Canadian French or Spanish.
- **Permission changes**: We changed permissions for Accounts Payable, Accounts Receivable, Expenses, Projects, and Time.

Accounts Payable

- **Issue checks to joint payees**: The joint check payment method is now available in Accounts Payable without a Construction subscription.
- **Before you void a payment**: A new message alerts you when an Accounts Payable transaction has already been reconciled.
- **Import permission update**: Post permissions required when importing non-draft adjustments.
- **New rule type for named approvers**: Select the User Level rule type to add bill approvers by name.
- **Field change**: Special characters are now restricted in certain Accounts Payable fields.

Accounts Receivable

- **Customer refunds—Coming soon!:** Record refunds that you make to customers against existing credits.
- **Inter-entity bill back improvements:** Locations and sublocations use bill back mapping from the parent entity.
- **Receive a payment**: We've postponed the retirement of Receive a payment.
- **AR statement improvements**: Applied external credits now appear in entity-level statements.

- **Import permission update**: Post permissions required when importing non-draft invoices and adjustments.
- **Before you reverse an advance**: A new message alerts you when a customer advance has already been reconciled.
- **Customer payment services retiring**: Our Authorize.net and PayPal integrations are going away on November 7, 2025. Check out Versapay, a Sage recommended solution, to continue accepting customer payments in Sage Intacct.
- **Field change**: Special characters are now restricted in certain Accounts Receivable fields.

APIs and Web Services

- **The REST API offers a developer-friendly solution for integrating with Sage Intacct:** Learn what's new in our latest release notes.
- **Stay up-to-date on great new Web Services features:** Read the Sage Intacct Developer portal blog.

Cash Management

- **Import credit card bank transactions for reconciliation**: Use Bank transaction assistant file import for an improved experience.
- **Classic import experience for reconciliation is retiring**: Instead, use Bank transaction assistant file import to import bank and credit card transactions.
- **Reclassify GL account for credit card transactions**: Update the GL account of paid, partially paid, and reconciled credit card transactions.

Consolidation

- **Affiliate entity dimension—General availability**: Use the new affiliate entity standard dimension to track inter-entity activity, enabling enhanced reporting and automated, more granular inter-entity eliminations for companies with Consolidation subscriptions.

Contracts

- **Introducing the Contract summary tab**: Quickly get a high-level view of contract activity. Track key details like transactions for OE, AR, Purchasing, and AP, along with project insights, all in one place.
- **Edit custom fields on canceled contract lines**: You can now edit custom fields on canceled contract lines, allowing you to update information for reporting, compliance, or adjustment purposes without reactivating the contract.
- **Other updates to Contracts**: We added quick shortcuts to pay contract invoices and generate invoices, as well as a new setting to improve evergreen contracts renewals.

Expenses

- **Time and Expenses split into two applications:** Previously, Time and Expenses were combined into a single application. Now, they are split into two individual applications.
- **Mobile app now supports employee expense automation—Early Adopter**: The Sage Intelligent Time mobile app now supports employee expense automation so that you can capture receipts, submit expense reports, and approve or decline them from a mobile device quickly.

Fixed Asset Management

- **Transfer asset enhancements:** You can now transfer assets between entities, revert transfers, and more.
- **Custom declining balance depreciation methods**: We added two new depreciation methods that allow you to customize the rate at which assets depreciate.
- **Depreciation Roll Forward report**: Use this new report to track and audit depreciation balances over a specific period.
- **List and page enhancements for SFAM**: We added new features to Fixed Assets Management lists and pages, making it easier to export data, manage depreciation rules, and more.
- **Other updates to Fixed Assets Management**: We added an Intangible type to assets, improved asset allocations, and made several other user interface and functionality enhancements.

Healthcare

- **Introducing Sage Intacct EMRConnect dashboards**: Identify operational efficiency gains and monitor key financial metrics with new healthcare-focused dashboards.
- **Enhanced connections and value transformations in EMRConnect**: Refine the data set for a value transformation using a new Not Equals condition, and set up more secure SFTP connections.

Inventory & Supplies

- **Customize supplies pick lists and pick reports**: Provide your team with detailed pick lists, and create more comprehensive pick reports.
- **Streamline your supplies workflow**: Ensure your team gets the supplies they need, when they are needed, by linking a new supplies request to an existing PO.
- **Increase transaction workflow efficiency**: Now save draft inventory transactions without a document number.
- **Autofill request delivery method**: We're making it easier for you to process new supplies requests with a new default delivery setting.

Order Entry

- **Increase your transaction workflow efficiency**: Now save draft sales transactions without a document number.

Nonprofit

- **Sage Intacct Data Flow now supports Tessitura:** Reduce errors and improve efficiency with automatic transfer of data from Tessitura to Sage Intacct.
- **Sage Intacct Fundraising powered by DonorPerfect—General availability**: Manage donors and execute successful fundraising campaigns. Rely on dashboards and reports for sound decision making.

Platform services

- **Platform event queue trigger—Early Adopter**: Event management retrieval that lets you get notifications on your schedule.
- **Improved Platform trigger creation for POST requests—General availability**: Now generally available, you can use the webhook delivery option to simplify your HTTP post requests in Triggers.
- **Platform installed components update**: We simplified the Platform Services menus so that you can more easily focus on what you use.

Projects and Grants

- **New time and material summary totals workflow**: This new workflow enables you to manually refresh summary totals and increases the number of expenses in each transaction type to 4000.

Purchasing

- **AP Automation streamlined in Purchasing—Early Adopter**: This release continues the Early Adopter program to automate Purchasing transactions that do not have a source match defined, for example vendor invoices that do not match to purchase orders or requisitions.
- **Hide price on Purchasing documents**: You can now hide the price on transactions like receiver documents.
- **Match tolerance exceptions**: Transaction lines that fall outside of your match tolerance range now flag exceptions for draft transactions.
- **Increase your transaction workflow efficiency**: Now save draft purchase transactions without a document number.

Reporting—Financial

- **Financial reporting guidance for optimized performance**: See tailored recommendations for optimizing your reports in Financial Report Writer.

Tax

- **Support for Canadian Sales Tax in French**: We added French versions of the tax details and schedules that you can import to use with the standard tax solution for Canada.
- **Use custom discounts for Canadian Sales Tax**: If your company uses the standard tax solution for Canada, you can now use custom discounts in certain Accounts Receivable transactions.

Time

- **Mobile app now supports employee expense automation—Early Adopter**: The Sage Intelligent Time mobile app now supports employee expense automation so that you can capture receipts, submit expense reports, and approve or decline them from a mobile device quickly.
- **Distribute timesheet entries—Sage Intelligent Time**: Transaction allocations determine how Intacct calculates the time to distribute between dimensions.
- **Time and Expenses split into two applications**: Previously, Time and Expenses were combined into a single application. Now, they are split into two individual applications.
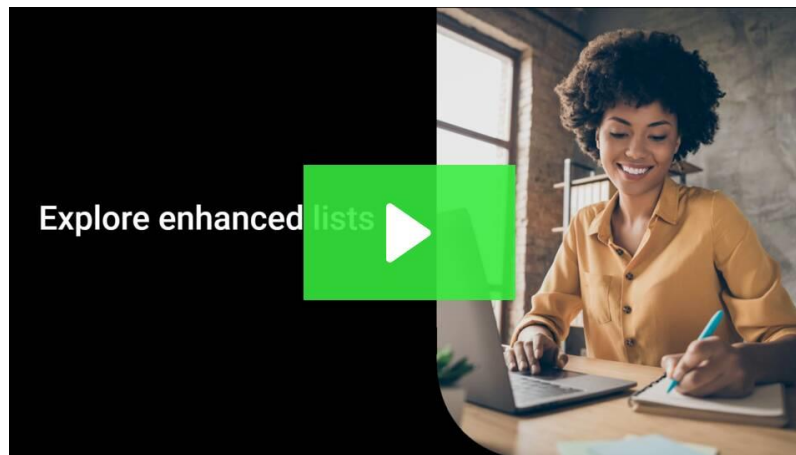
Training & Videos

- **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**: 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!

Lists enhancements

- **User interface changes**: We updated labels in Accounts Payable, Company, Contracts, Fixed Assets Management, Platform Services, Projects, Supplies Inventory, Time, and WIP Management.

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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