Sage Intacct 2025 R3 Product Release Notes

Sage Intacct 2025 R3 will be live on Friday, August 8th

We're excited to introduce the **Sage Intacct 2025 R3 Guide**! This comprehensive guide is your go-to resource for the latest features, enhancements, and updates in Sage Intacct's 2025 third 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, August 8th, 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 3 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

Save Time

Enhanced lists are now the default experience

Quickly find what you need using advanced filters and smart column search, bringing greater power, flexibility, and ease to every list you use. Learn More

Vendor Payments powered by MineralTree—General availability

Sage has partnered with MineralTree to offer a more seamless way to pay vendor bills directly. Vendor Payments is directly embedded within Sage Intacct and works with your existing AP process. Learn More

A new way to combine multiple documents into a single transaction—General availability

When you create a Purchasing transaction, you can streamline your workflow by converting multiple documents, including lines of documents, into a single transaction. Learn More

Line-level matching for smarter Purchasing automation—Early Adopter

AP Automation with Purchasing now supports line-level document matching for more accurate and robust automation. Learn More

Sage Intacct eProcurement streamlines purchasing

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

Use the equity method with Advanced Ownership Consolidation—Early Adopter

Use the equity consolidation method to record subsidiary ownership income, automate general equity entries, ensure ownership transparency, and more. Learn More

Delegate bill approvals

Maintain a seamless bill approval workflow when approvers are out-of-office. Learn More

Authenticate and validate your email domain today

Action is required to ensure smooth email delivery to your customers and partner; authenticate and validate your domain today. Learn More

Accelerate Decision-Making

Greater visibility into match tolerance exceptions

Now you can easily identify the transaction lines that fall outside of price or quantity match tolerance ranges, and choose to accept, adjust or override the exceptions. Learn More

New and updated custom reports for standard tax solutions

We added custom reports for France, Germany, New Zealand (Early Adopter), and Singapore (Early Adopter). We also updated the custom reports for France and the United Kingdom to support group VAT filing. Learn More

Built For Your Business

Sage Intelligent Time enhancements

- **Timesheet entry grid is now customizable—Sage Intelligent Time**: Customize the timesheet entry grid to control how time is entered and displayed. Learn More
- **Calculate overtime in timesheets automatically—Sage Intelligent Time:** New ability to apply overtime rules for payroll and project billing.(US-only). Learn More
- **Manage employee leave within timesheets—Sage Intelligent Time—Early Adopter:** You can now track leave requests, approval workflows, and time balances. This allows you to manage employee leave, ensuring precise payroll processing and legal compliance. (US-only) Learn More

Improved revenue recognition based on budgeted project cost

You can now calculate revenue based on the date of the actual transactions for a given period. Learn More

Comprehensive List of Changes Made in 2025 R3

AI-powered automation

- **Line-level matching for smarter Purchasing automation—Early Adopter**: AP Automation with Purchasing now supports line-level document matching for more accurate and robust automation.
- **Calculate overtime in timesheets automatically—Sage Intelligent Time**: New ability to apply overtime rules for payroll and project billing.
- **Smarter email capabilities for AP Automation**: Leverage auto-forwarding rules and process inline attachments and transaction data from the email body.
- **Automated transactions without matching—General availability:** You can now automate Purchasing transactions that do not have a source match defined, for example, vendor invoices that do not match to purchase orders or requisitions.

Company and Administration

- **Authenticate and validate your email domain today:** Action is required to ensure smooth email delivery to your customers and partners; authenticate and validate your domain today.
- **New import service—updates:** New imports are available for the Sage Intacct import service. Simplify data imports with AI-powered tools that handle the complexity for you.

Accounts Payable

- **Delegate bill approvals**: Maintain a seamless bill approval workflow when approvers are out-of-office.
- **Vendor Payments powered by MineralTree—General availability**: Sage has partnered with MineralTree to offer a more seamless way to pay vendorbills directly. Vendor Payments is directly embedded within Sage Intacct and works with your existing AP process.
- **Smarter email capabilities for AP Automation:** Leverage auto-forwarding rules and process inline attachments and transaction data from the email body.
- **Pay bills in more ways:** Pay bills for a vendor directly from the Vendors list.
- **You can now deactivate alternate accounts:** Prevent accidental postings by deactivating alternate accounts that you no longer use.
- **New custom report object:** Create custom reports based on payment approval history.

Accounts Receivable

- **Customer refunds—General availability:** Record refunds that you make to customers against existing credits.
- **Receive payments in more ways:** Apply payments directly from the Customers list.
- **More flexibility when applying credits:** Apply credits in more ways and distribute them across multiple invoices with ease.
- **Enhancements to customer advances:** Create draft customer advances and assign unique payment IDs when they post.
- **AR Ledger report:** Enjoy more filtering flexibility with the ability to select multiple customers, filter by customer group, and include child customers.
- **Add bill back transactions in bulk:** Specify the bill back template to use for an invoice when importing it using CSV.
- **New custom report object:** Create custom reports based on customer refunds.
- **You can now deactivate alternative accounts:** Prevent accidental postings by deactivating alternate accounts that you no longer use.
- **Customer Payments powered by Stripe—Early Adopter:** Introducing a new way to accept customer payments directly within Sage Intacct through our integration with Stripe.
- **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.

Cash Management

- **Improve bank transaction matching with more precise rules:** Use more data fields to improve matching accuracy in reconciliations and to filter or view bank transactions more effectively.
- **New NACHA file formats:** This release we added new bank file formats to support ACH payments and include the ID numbers for vendors and employees.
- **Funds transfers at entity level now require at least one bank account from that entity:** When you add a funds transfer at the entity level, Intacct now checks that at least one of the accounts is owned by the entity.
- **Upload digital signatures in PNG file format for use on checks:** You can now upload a digital signature in PNG file format, as well as GIF and JPG file formats, to use when printing checks with a signature.

Consolidation

- **Use the equity method with Advanced Ownership Consolidation—Early Adopter:** Use the equity consolidation method to record subsidiary ownership income, automate general equity entries, ensure ownership transparency, and more.

Contracts

- **Reassign dimensions on contract lines:** Update dimensions on in-progress contract lines to ensure accurate reporting for future transactions.
- **Edit reversal dates on AR payments:** Contracts now supports editing the reversal date on AR payments, improving accuracy and consistency across the AR workflow.
- **Update contract states:** We added new actions to help you update contracts that need to be transitioned to Renewed or Not renewed

Dashboard

- **Formatting changes for charts and graphs:** Due to a behind-the-scenes update for charts and graphs, you might notice some minor formatting changes.
- **Item mapping and bundling in SaaS Intelligence—Early Adopter: Stop** product churn on old items by substituting new items for them.

Expenses

- **Link credit card transactions and electronic receipts to employee expense reports:** Use credit card transactions with electronic receipts to help automate your employee expense creation process, saving time and reducing manual effort.

Fixed Asset Management

- **Provide accumulated depreciation for historical assets:** You can now choose to manually enter accumulated depreciation for historical assets or let Intacct calculate it for you.
- **Update assets in bulk using the import service:** Use the import service to update asset details and change asset states in bulk.
- **Revert posted depreciation entries in bulk:** Revert multiple depreciation postings at once from the Post Depreciation page, saving time and effort.
- **Depreciation enhancements:** We added the ability to view cumulative depreciation and updated the daily depreciation method.
- **List and page enhancements:** We added new features to Fixed Assets Management lists and pages, making it easier to manage journal posting rules, navigate to depreciation schedules, and more.

General Ledger

- **View top-level transactions at the entity level:** To speed up the Journal transactions list loading, top-level entries are hidden by default.
- **Lettrage enhancements:** Match transactions with improved efficiency and visibility.
- **You can now deactivate alternate accounts:** Prevent accidental postings by deactivating alternate accounts that you no longer use.

Inventory & Supplies

- **Add flexibility to your order fulfillment workflow:** New Fulfillment features empower your team to deliver requested items at the right time—boosting order processing efficiency and customer satisfaction.
- **Enhanced inventory reporting insights.** Additional options are now available on the Inventory valuation report, providing you with greater visibility into the transactions that might affect your item costing.
- **Track inventory transfers more securely:** Warehouse transfer transaction definitions are replacing Inventory transfer transaction definitions.

Order Entry

- **Summarize OE revenue recognition entries:** Reduce GL transaction volume by summarizing revenue recognition postings daily, weekly, or monthly to improve performance, reconciliation, and audit efficiency.

Platform services

- **Define application configuration values with configuration objects—Early Adopter:** Define key-value pairs in a structured file to reference anywhere merge fields are supported.

Projects and Grants

- **Improved revenue recognition based on budgeted project cost:** You can now calculate revenue based on the date of the actual transactions for a given period.
- **Add standard tasks to a project quickly:** We added a new Add to Project bulk action option that is now available on the Standard task catalog page.
- **Specify a primary project estimate forecast for quick access:** Mark an estimate as a primary forecast to quickly identify the estimate as the forecast estimate.

Purchasing

- **A new way to combine multiple documents into a single transaction—General availability:** When you create a Purchasing transaction, you can streamline your workflow by converting multiple documents, including lines of documents, into a single transaction.
- **Line-level matching for smarter Purchasing automation—Early Adopter:** AP Automation with Purchasing now supports line-level document matching for more accurate and robust automation.
- **eProcurement streamlines purchasing:** Save time using vendor punchout catalogs seamlessly connected to Sage Intacct Purchasing.
- **Greater visibility into match tolerance exceptions:** Now you can easily identify the transaction lines that fall outside of price or quantity match tolerance ranges, and choose to accept, adjust or override the exceptions.
- **Automated transactions without matching—General availability:** You can now automate Purchasing transactions that do not have a source match defined, for example, vendor invoices that do not match to purchase orders or requisitions.
- **Smarter email capabilities for AP Automation with Purchasing:** Leverage auto-forwarding rules, process inline attachments, and transaction data from the email body with smarter email capabilities for AP Automation with Purchasing.

Revenue Management

- **Summarize OE revenue recognition entries:** Reduce GL transaction volume by summarizing revenue recognition postings daily, weekly, or monthly, to accelerate performance and reconciliation, and improve audit efficiency.

Reporting—Advanced

- **New AP Payment Approval History report object—CRW:** Create custom reports on AP payment approvals.
- **New AR Customer Refund report object—CRW:** Create custom reports on AR customer refunds.

Sage Construction Payroll

- Enhancements in Sage Intacct Construction Payroll: Learn about the latest changes in Construction Payroll.

Sage Field Operations

- **Enhancements in Sage Field Operations:** We've increased automation for agreements, and added more data to reports and metrics in the Business Intelligence Solution.

Tax

- **New and updated custom reports for standard tax solutions:** We added custom reports for France, Germany, New Zealand (Early Adopter), and Singapore (Early Adopter). We also updated the custom reports for France and the United Kingdom to support group VAT filing.
- **Reporting account filter for Accounting Entries File (FEC) report:** Multinational companies operating in France can now filter and run their FEC report on General Ledger reporting accounts.

Time

- **Timesheet entry grid is now customizable—Sage Intelligent Time:** Customize the timesheet entry grid to control how time is entered and displayed.
- **Calculate overtime in timesheets automatically—Sage Intelligent Time:** New ability to apply overtime rules for payroll and project billing.
- **Manage employee leave within timesheets—Sage Intelligent Time—Early Adopter:** You can now track leave requests, approval workflows, and time balances. This allows you to manage employee leave, ensuring precise payroll processing and legal compliance.
- **Sage Intelligent Time no longer requires the Projects subscription:** We removed the Projects subscription requirement so that time tracking is easily accessible, ensuring a smoother experience using Sage Intelligent Time.

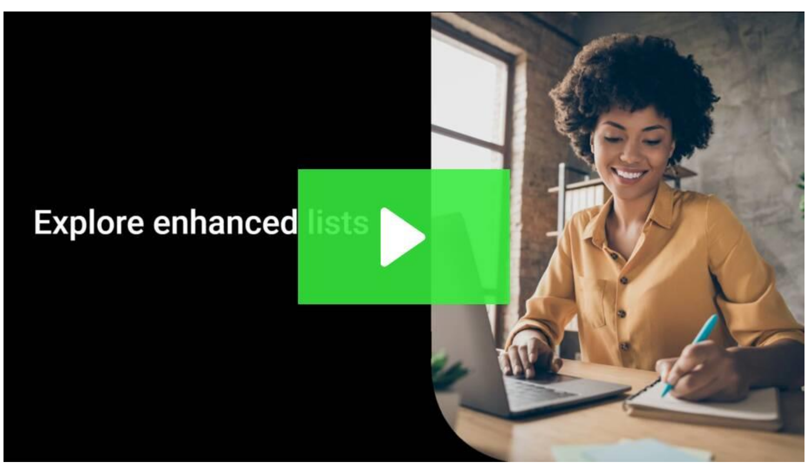
Training & Videos

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

User interface

- **Enhanced lists are now the default experience:** Quickly find what you need using advanced filters and smart column search, bringing greater power, flexibility, and ease to every list you use.

Lists enhancements



- **Two new help content enhancements:** We added a toggle to view instructions for either the enhanced or existing user interface and a language switcher to view content in your preferred language.

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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