

Sage Intacct 2025 R4 Product Release Notes



Sage Intacct 2025 R4 will be live on Friday, November 7th

We're excited to introduce the **Sage Intacct 2025 R4 Guide!** This comprehensive guide is your go-to resource for the latest features, enhancements, and updates in Sage Intacct's 2025 fourth 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, November 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 4 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
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**Sage Intacct
2025 Release 4
Highlights**
Arriving
November 7th



Features

APIs and Developer Updates

The REST API offers a developer-friendly solution for integrating with Sage Intacct:

With 2025 release 4, we're introducing a new Sage Intacct developer experience. Check out the updated look and feel. [Learn More](#)

Stay up-to-date with XML API changes

While Sage Intacct continues to support the XML API, going forward, all new objects and features will be released in the REST API. [Learn More](#)

Sage AI—Close Automation

Close Workspace—General availability

With 2025 release 4, we're introducing a new Sage Intacct developer experience. Check out the updated look and feel.

Draft emails with Copilot

Save time by letting Sage Copilot write your email notifications for Close Workspace and Variance Analysis.

AI and Automation

Search help with Copilot—Available in all supported languages

Our AI-powered semantic search engine understands the context and intent behind your help queries, providing more accurate and relevant results. [Learn More](#)

The Sage Intelligent Time and Expense mobile app supports employee expense automation—General availability

Boost efficiency and quicken reimbursements for employee expenses. [Learn More](#)

Smarter email capabilities for AP Automation

Leverage auto-forwarding rules, support more file formats, and get notified when documents do not process. [Learn More](#)

Smarter email capabilities for AP Automation with Purchasing

Leverage auto-forwarding rules, support more file formats, and get notified when documents do not process. [Learn More](#)

Budgeting & Planning

Draft emails with Copilot

Save time by letting Sage Copilot write your email notifications for Variance Analysis insights.

Company Administration

New sandbox naming convention

We updated our sandbox naming convention to improve consistency and make sandbox instances easier to identify.

[Learn More](#)

Sage Intacct import service updates

New imports are now available, including General Ledger journal entries and Contacts! Simplify your imports with AI-powered tools. [Learn More](#)

Anonymous users can no longer slide into a company

This allows for a clear audit trail in a Sage Intacct instance. [Learn More](#)

Comprehensive List of Changes Made in 2025 R4

Accounts Payable

- [Smarter email capabilities for AP Automation:](#) Leverage auto-forwarding rules, support more file formats, and get notified when documents do not process.
- [AP Ledger report:](#) Enjoy more filtering flexibility with the ability to select multiple vendors, filter by vendor group, and include child vendors.
- [Payment IDs for advances:](#) Automatically assign unique IDs to new AP advances.

Accounts Receivable

- [New transaction options when running customer statements:](#) Now when you run open item customer statements, you'll see new transaction options to select from. This change makes it easier to decide what transactions and states you want to include in the statement.
- **Customer payment services retired:** Our Authorize.net and PayPal integrations went away on November 7, 2025. Check out Versapay, a Sage recommended solution, to continue accepting customer payments in Sage Intacct.

Cash Management

- [Combine bank fees with debit or credit transactions for easier matching:](#) A new match condition helps save you time by combining bank fees with the associated transaction fees when reconciling a bank account.
- [Item mapping and bundling in SaaS Intelligence—Early Adopter: Stop](#) product churn on old items by substituting new items for them.

Consoles

- [Anonymous users can no longer slide into a company:](#) This allows for a clear audit trail in a Sage Intacct instance.

Consolidation

- [Automate equity consolidation method—General availability:](#) You can now use the equity consolidation method to record subsidiary ownership income. Sage Intacct automatically generates equity entries, ensures ownership transparency by recording and tracking changes by period, and supports single subsidiary rollup to multiple parents with multiple rollup levels.

Contracts

- [Introducing historical contracts:](#) Onboard to Contracts faster with a new way to import and manage historical contract lines and their balances.
- [Contract renewal enhancements:](#) We've updated the automatic renewal process, added new configuration settings, and simplified template management.
- [Faster page loading and navigation in Contracts:](#) We enhanced pagination across multiple key areas of contracts and redesigned the Journal balances tab.

Expenses

- [Set default values to appear on timesheets:](#) Admins can set default values on employee records so that those values appear on timesheets automatically using Sage Intelligent Time.
- [The Sage Intelligent Time and Expense mobile app supports employee expense automation—General availability:](#) Boost efficiency and quicken reimbursements for employee expenses.

Fixed Assets Management

- [Partially dispose of assets:](#) Dispose of part of an asset while continuing to depreciate the remaining value.
- [Create multiple assets from a bill or invoice line:](#) Ensure accurate asset tracking for bulk purchases by automatically generating multiple fixed assets from a single bill or purchasing transaction line.
- [Skip asset creation on bill and invoice lines:](#) Gain more flexibility by choosing not to create an asset for specific bill or invoice lines when using AP or Purchasing integrations.
- [Other updates to Fixed Assets Management:](#) Edit asset dimensions without a transfer, change the historical accumulated depreciation setting at any time, and more.

General Ledger

- [Include unposted transactions in General Ledger reports:](#) Gain a more transparent, real-time view of your financial data.

Insurance

- [Introducing Sage Intacct PolicyConnect:](#) PolicyConnect bridges the gap between insurance policy administration systems and general ledger, automating the flow of policy transactions into your financials.

Inventory & Supplies

- [Easier control of tracked supplies items:](#) Now you can enter supplies item tracking details directly within the Supplies workbench during a warehouse transfer.

Platform Services

- [Application management—Beta:](#) Publish, update, and manage application versions for subscribing companies in an easy-to-use interface.
- [Platform REST API trigger:](#) Supercharge workflows with REST automation in Sage Intacct.
- [Platform trigger simplicity:](#) Now when you create a trigger, fields that might result in corrupt data no longer appear as options for standard fields.

Projects and Grants

- [Create projects and tasks with default purchasing tax schedules:](#) You can now assign a default tax schedule for a project and task. The appropriate taxes for the project location are automatically filled for the purchasing line items.

Purchasing

- [Line-level matching enhancements for AP Automation with Purchasing—Early Adopter](#): Now you can view line entry exceptions in a summarized view when the price or quantity do not match and add unconverted lines from the source transaction.
- [Smarter email capabilities for AP Automation with Purchasing](#): Leverage auto-forwarding rules, support more file formats, and get notified when documents do not process.
- [Broader visibility into match tolerance exceptions](#): View specific details relating to purchase transaction quantities and prices, so you can take quicker action to resolve discrepancies.

Reporting & Insights

- [Formatting updates for charts and graphs](#): To support future enhancements, we've made some behind-the-scenes improvements to the charts and graphs used in General Ledger.

Revenue Management

- [View the cancellation date of a revenue schedule](#): Cancellation dates are now visible in both revenue schedules and reports to improve your workflow.

Sage Intacct Advanced CRM Integration

- Support for multicurrency and overpayments: Now you can pay invoices in any currency and track overpayments with the Advanced CRM.

Tax

- [Support for term discounts for taxes—General availability](#): 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.
- [Get ready for 1099 season](#): Stay a step ahead. We gathered the resources you need to help you get started now.
- [Assign an entity contact if issuing separate 1099s per entity](#): Make sure correct contact information prints on forms.
- [Use Form 1099-NEC, Box 3 for excessive golden parachute payments](#): Move data from 1099-MISC Box 14 to the 1099-NEC form.

Time

- [Set default values to appear on timesheets—Sage Intelligent Time](#): Admins can set default values on employee records so that those values appear on timesheets automatically using Sage Intelligent Time.
- [Enhanced validation for timesheets using Sage Intelligent Time](#): Enhanced validation ensures that all components are accurate before submission.
- [The Sage Intelligent Time and Expense mobile app supports employee expense automation—General availability](#): Boost efficiency and quicken reimbursements for employee expenses.

Training & Videos

- [New training and videos](#): We added new training courses and videos to help you get the most out of Sage Intacct.

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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