

# Sage Intacct 2026 R2 Product Release Notes



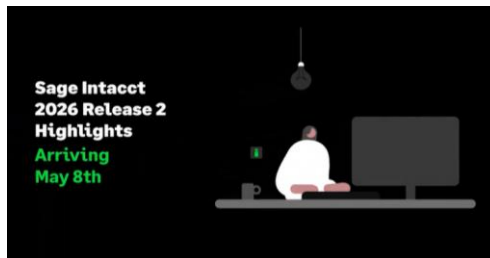
## Sage Intacct 2026 R2 will be live on Friday, May 8<sup>th</sup>

We're excited to introduce the **Sage Intacct 2026 R2 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, May 8th, 2026.**

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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## Features

### AI and Automation

#### Intelligent 3-way matching with AP Automation

Intelligent 3-way matching with AP Automation-Intelligent 3-way matching strengthens AP Automation by introducing AI-driven, line-level document matching across purchase orders, receivers, and vendor invoices. This enhancement increases accuracy, reduces manual intervention, and helps teams resolve discrepancies faster and with greater confidence. [Learn More](#)

#### Sage Intacct AI Gateway (1.0)

Introducing the Sage Intacct AI Gateway. Secure, scalable connectivity for AI applications through Sage Intacct REST API and MCP Server. [Learn More](#)

#### Finance Intelligence agent—Phased Early Adopter

Finance Intelligence agent—Phased Early Adopter-The Finance Intelligence agent is your Sage Ai-powered partner that helps you find answers about your financial data and drive better decision-making. Using Sage Copilot, you can ask questions, get insights, and explore your information all by using natural language. Customers and partners have already been selected for the first phase of the Early Adopter rollout occurring during R2. We look forward to welcoming more customers as we expand the rollout further in 2026. [Learn More](#)

#### Enhancements to AP Automation

Enhancements to AP Automation-We've made several improvements to AP Automation to give AP teams more flexibility and streamline transaction processing. These updates focus on making it easier to upload and review bills while improving how automation adapts to real-world variations. [Learn More](#)

#### Link to custom views from tasks in Close Workspace

Link to custom views from tasks in Close Workspace-Improve the efficiency of your close process by including a link to a custom view in custom task templates. When employees are working on their tasks, they can select the link to go directly to that view. [Learn More](#)

### APIs and Developer Updates

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

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#### 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](#)

## Company Administration

### Introducing the Roles permissions report

Introducing the Roles permissions report-Administrators can now view a consolidated snapshot of all permissions assigned to a role in a single, standard report. The new report includes both standard and custom permissions. The Roles permissions report aggregates all permissions associated with a role at a specific point in time. Administrators can quickly review role access without cross-referencing multiple sources. [Learn More](#)

### Simplified external user management—Consoles

Simplified external user management—Consoles-You can now manage each external user from a single record tied to the parent console. This update removes duplicate user records and centralizes permission management across linked consoles, making administration simpler and more consistent. [Learn More](#)

### Email domain validation at the console level

Email domain validation at the console level-Email domain validation has just gotten easier for partners who send email on behalf of multiple client companies. Partners who manage multiple client companies can now validate an email domain once at the console level. That validation then automatically applies to all companies linked to the console. [Learn More](#)

### Restricted file types for attachments

Restricted file types for attachments - To improve security, certain file types can no longer be uploaded as attachments. This change helps prevent potentially harmful files from being added. The following file types are no longer supported for attachment uploads: .bat; .cmd; .com; .dll; .dmg; .exe; .iso; .jar; .msi; .ps1; .sh; .sys; .vbs; .vhd. [Learn More](#)

### New entity-level logo for AP bank remittance

New entity-level logo for AP bank remittance-You can now upload entity-level logos for AP bank remittance documents to clearly identify the issuing entity and meet regional compliance requirements where documents must reflect the correct entity. [Learn More](#)

## Comprehensive List of Changes Made in 2026 R2

### Accounts Payable

- [Enhancements to AP Automation](#): Enhancements to AP Automation-We've made several improvements to AP Automation to give AP teams more flexibility and streamline transaction processing. These updates focus on making it easier to upload and review bills while improving how automation adapts to real-world variations.
- [Improved remittance support for bank files](#): Improved remittance support for bank files-Get more control over how remittance information is generated and delivered to vendors. This enhancement is designed for companies, in particular international ones, who do not use check payments and need clearer remittance communication for bank file payments.
- [Accounts Payable](#): Accounts Payable advances now support different bank and transaction currencies-Create an Accounts Payable advance even when the bank currency is different from the transaction currency. This update expands support for multi-currency advance scenarios.
- [Apportioned PO](#): Apportioned PO subtotals display as separate lines on Accounts Payable bills-When you create an Accounts Payable bill from a purchase order that includes apportioned subtotals such as freight or

tax, those charges now appear as separate subtotal lines on the bill. Ensure greater accuracy when applying apportioned inventory purchase costs with term discounts, to prevent discounts from being applied to non-item costs. Separate item charges are clearly marked as separate from item line amounts.

- [Vendor Payments powered by CSI to end August 7, 2026](#): Vendor Payments powered by CSI to end August 7, 2026-Vendor Payments powered by CSI will no longer be supported after August 7, 2026 with our R3 release. To explore alternative solutions, contact your account manager or partner.

### Accounts Receivable

- [Process customer refund payments through Accounts Payable](#): Process customer refund payments through Accounts Payable-This release introduces a new way to process customer refunds by integrating Accounts Receivable and Accounts Payable workflows. You can now create refunds in Accounts Receivable that generate linked bills in Accounts Payable for payment processing. This approach helps enforce segregation of duties while making customer refunds easier to track and manage.
- [Enhancements to embedded Customer Payment Services—Early Adopter](#): Enhancements to embedded Customer Payment Services—Early Adopter-Accelerate cash flow by offering a self-service payment option to your customers with the new embedded Customer Payment Services feature. If you've subscribed to an inbound payment service provider, you can allow your customers to pay invoices electronically through a secure link in invoices that you email to them. This embedded payment experience is powered by Fortis and other payment providers, and is designed to streamline your receivables process.

### Cash Management

- [Cash requirements now includes one-touch customer payment reminders—Early Adopter](#): Cash requirements now includes automatic customer payment reminders—Early Adopter: Now you can send automatic payment reminders to selected customers at the touch of a button, accelerating collections and improving cash flow right when you need to most.
- [Other updates and enhancements to Cash Management](#): Other updates and enhancements to Cash Management-Now, when you select the option to enforce user entity restrictions for bank and credit card accounts, the restrictions also apply to transactions. This means that a top-level user viewing the Bank transactions page will see only transactions for their entities' accounts.

### Construction

- [Flexibly release retainage from a project contract](#): Flexibly release retainage from a project contract-Flexible retainage release is now supported for project contracts.
- [Enhancements in work in progress \(WIP\) management](#): Enhancements in work in progress (WIP) management-In this release we've made the following enhancements to work in progress (WIP) management. Base a project's PM forecasts on its primary forecast estimate. By default, duplicate projects are not included in WIP schedules.

### Fixed Assets Management

- [Summarize depreciation postings](#): Summarize depreciation postings: Automatically group depreciation entry postings by GL account and dimensions to improve report readability, speed up period close, and simplify audits.

- [Split an asset into multiple assets](#): Split an asset directly from the asset record while maintaining accurate depreciation and auditability.
- [Reverse depreciation postings](#): Correct depreciation errors by reversing posted entries instead of deleting the original entry.
- [Revert partial disposals](#): Easily undo partial disposals while preserving accurate depreciation and audit trails.
- [Enhancements to CIP asset capitalization](#): Get more control over when and how you capitalize Construction in Progress (CIP) assets. You can now specify a capitalization date that aligns with your accounting timelines and revert a capitalization if you need to make changes. Previously, capitalization always used the current date and couldn't be undone.
- [Other updates to Fixed Assets Management](#): Disposals moved to a dedicated tab. FAM section repositioned for AP and Purchasing. Label improvements

## Inventory & Supplies

- [Centralized inventory item attachments](#): Store centralized item attachments to reduce fulfillment errors: Images, specifications and packaging guides are now easy to access on an item record, helping teams work faster and deliver with greater accuracy. Increase operational efficiency with centralized item reference documentation. Now upload, store, and view item-related attachments such as images, specification sheets, Material Safety Data Sheet (MSDS) files, and installation guides. These attachments are accessible directly from an item record or through APIs, improving item identification, operational accuracy, and cross-team communication.
- [More control of transaction cost precision](#): Customers working with high-precision costs need more predictable and consistent behavior. Sage Intacct now gives you more control of how many decimal places—up to 10—are used when posting and editing transactions. This improvement gives you greater transaction handling confidence with consistently accurate item costs to reduce rounding discrepancies.
- [Track inventory transfers more securely](#): Warehouse transfer transaction definitions provide more comprehensive inventory activity tracking compared to Inventory transfer transaction definitions. To ensure all customers are using warehouse transfer transaction definitions, later this year Inventory Transfer In/Out transaction definitions will stop being supported.

## Order Entry

- [Individual charges and invoice runs for billing groups](#): Individual charges and invoice runs for billing groups: Easily add one-off charges and view invoice runs for billing groups.
- [Customize sender and reply-to email addresses for Order Entry communications](#): Improve security and consistency by preventing the use of unauthorized or incorrect sender addresses and supporting internal email authentication and sender-identity policies.

## Platform Services

- [Define application configuration values with configuration objects—General Availability](#)

## Projects and Grants

- [Project & Grant financial summary enhancements](#): You can now select the currency in which to view the financial summary for a project and drill down to supporting transactions.

## Purchasing

- [Custom Purchasing approvals—Early Adopter](#): Automatically route purchase orders using flexible, multi-condition rules so the right people approve the right spend while reducing manual effort and enforcing consistent purchasing controls at scale. Configure custom approval workflows for Purchase transactions using flexible, rule-based logic. With custom Purchasing approvals, administrators can define approval rules based on vendor attributes, payment priority, and transaction amounts to automatically route Purchase transactions to the appropriate approvers.
- [Intelligent 3-way matching with AP Automation](#): Intelligent 3-way matching strengthens AP Automation by introducing AI-driven, line-level document matching across purchase orders, receivers, and vendor invoices. This enhancement increases accuracy, reduces manual intervention, and helps teams resolve discrepancies faster and with greater confidence.
- [Improved accuracy for apportioned item charges](#): We've improved how additional subtotal charges such as tax, freight, and other fees, are handled on inventory-related Accounts Payable bills. This update prevents discounts from being applied to non-inventory costs and ensures accuracy when apportioning inventory purchase costs with term discounts.

## SaaS Intelligence

- [SaaS Intelligence advanced analytics—Early Adopter](#): SaaS Intelligence now delivers next-generation analytics with more flexible dashboards, deeper SaaS metrics, and predictive insights.

## Taxes

- [Updates and enhancements for taxes](#): Enter partial exemption at the top level. Manually retrieve missing tax submission files.
- [Exemption Certificate Management \(ECM\) integration with Avalara—Early Adopter](#): Confirm customer exemption status, request missing certificates, and stay audit-ready without switching between systems.

## Training & Videos

- [New training and videos](#): At Sage Intacct, we get how vital it is to have in-depth and best practice learning that enhance your use of Intacct. To that end we recently: Provided access to new and updated self-paced, on-demand courses that guide you through specific tasks and features. Added new product demo videos to help you get up and running on a variety of tasks.

## 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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