Sage Intacct 2026 R3 Product Release Notes

Sage Intacct 2026 R3 will be live on Friday, August 7th

We're excited to introduce the **Sage Intacct 2026 R3 Guide**! This comprehensive guide is your go-to resource for the latest features, enhancements, and updates in Sage Intacct's 2026 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 7th, 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 2026 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

Sage AI and Automation

Identify high-risk transactions using AI-driven anomaly detection for AP Automation

AP Automation uses AI-driven anomaly detection to identify potentially risky transactions before payment. Sage Intacct analyzes vendor billing patterns and submission details to flag unusual transaction amounts and unrecognized vendor email addresses. This helps AP teams focus on higher-risk transactions, reduce manual review, and strengthen fraud controls. Learn More

Discover and use AI agents in Sage Intacct

Extend Sage Copilot with AI agents from certified Sage partners. Discover, purchase, and manage agents from a centralized marketplace while controlling access through Sage Intacct roles. Sage reviews and certifies all marketplace agents through a technical, security, and legal process. Learn More

Block email addresses from automated document processing

Prevent unwanted or suspicious email addresses from generating transactions in Sage Intacct through AP Automation, Sage Expense Management, and E-Invoicing. By blocking specific email addresses before documents enter Intacct, you can help reduce fraud and maintain greater control over automated transaction processing. Learn More

APIs and Developer Updates

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

The REST API offers developer-friendly solutions for integrating with Sage Intacct. 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

Company Administration

Updated global navigation brings Sage products and tools together

We've updated the global navigation experience to help you move between Sage applications, access shared Sage tools, and quickly identify your product and company from a single, consistent location. The navigation supports both light and dark themes and is fully accessible using a keyboard. Learn More

Email verification for user accounts

Keep Sage Intacct user accounts and email addresses secure and up-to-date. Intacct now verifies new or updated email addresses and periodically asks users to confirm that their email address is still valid. Learn More

Validate email sender domains one time for your entire console hierarchy

Validate email sender domains one time for your entire console hierarchy. Learn More

Comprehensive List of Changes Made in 2026 R3

Accounts Payable

- **Post multiple bills at the same time:** Save time and reduce manual effort by posting up to 20 bills at the same time when you turn on enhanced lists. Previously, you could only post these transactions one at a time.
- **Streamline customer refund processing in Accounts Payable:** Vendors and bills created from customer refunds can now follow standard Accounts Payable vendor and bill approval workflows. You can also more easily identify and process customer refund payments using new filtering and visibility options in Pay bills. If approval review is not required, you can configure customer refund vendors and bills to skip approvals.
- **Automate prepaid expense amortization—Early Adopter:** Eliminate manual tracking of prepaid expenses and automate expense recognition over time. You can now apply amortization details to bills and purchasing transactions, and Sage Intacct automatically creates an amortization schedule using the Straight-line method. This improves accuracy and helps ensure that prepaid expenses are recognized in the appropriate accounting periods.
- **Vendor Payments powered by CSI has been retired:** Vendor payments powered by CSI was retired with this release. To explore alternative solutions, contact your account manager or partner.

Accounts Receivable

- **Post multiple invoices and adjustments at the same time:** Save time and reduce manual effort by posting invoices in bulk when you turn on enhanced lists. Previously, you could only post these transactions one at a time.
- **Enhancements to embedded Customer Payment Services—Early Adopter:** Accelerate cash flow by offering a self-service payment option to your customers directly from their invoices. This embedded payment experience is designed to streamline your receivables process with services powered by Fortis and other payment providers. In this release, we've introduced additional capabilities to make your receivables processing even more efficient:
- Invoices you import through CSV file can now be enabled for electronic payment processing, allowing invoice creation at scale.
- Customer refunds and partial payments are now supported through the Fortis payment service, eliminating the need for outside processing and preventing duplicate payments.
- **Customize sender and reply-to email addresses for Accounts Receivable invoices and statements**: Improve security and consistency by preventing the use of unauthorized or incorrect sender email addresses and supporting internal email authentication and sender-identity policies.

Cash Management

- **Enhancements to Cash intelligence—Early Adopter:** In our previous release, we added the ability to send automatic payment reminders directly from the Cash intelligence page. Now, if you are participating in the Customer Payment Services EA program and subscribed to a payment provider, these reminders include a secure Pay Now link for customers to submit payments instantly—easing the payment process for your customers and accelerating collections for you.
- **Increased precision in display of reconciliation information:** Last reconciliation type—new statuses
    - The new possible statuses for the **Last reconciliation type field** are as follows:
        - **Banking cloud:** Bank feed or Bank transaction assistant (BTA) file import
        - **Classic import:** Classic import experience
        - **Manual:** Manual transaction matching
    - These are all the possible statuses and replace all previous statuses."

Construction

- **Enhanced project contract billing workflow—Early Adopter:** Bill project expenses with greater flexibility across periods and invoices using the enhanced project contract billing workflow.
- **Subcontractor payment application workflow—Early Adopter:** Streamline subcontractor billing and meet regional regulatory requirements with the new subcontractor payment application workflow.
- **Automated retainage holding on primary documents:** Define and assign automated retainage withholding rules on primary documents with the new advanced retainage feature.
- **View history of cost forecast details in work in progress (WIP) management—Early Adopter**

Contracts

- **Improve transparency for usage-based invoices:** New quantity and price fields provide greater visibility into how usage-based charges are calculated and billed, helping reduce customer confusion and invoice disputes. This enhancement makes usage and pricing information available throughout the billing workflow and in printed invoices.

Fixed Assets Management

- **Reverse asset disposals:** You can now reverse full and partial asset disposals in Fixed Assets Management. Reversing a disposal creates offsetting journal entries and restores the asset and related depreciation information to its state before the disposal. This helps you correct disposal errors while preserving posted accounting activity. Previously, you could only revert disposals, which deleted the original journal entries. In some regions, accounting standards require posted transactions to be reversed rather than deleted."
- **Revert summarized depreciation postings:** You can now summarize depreciation postings when the correction treatment for Fixed Assets Management is set to Revert. Previously, summarized depreciation postings were available only when correction treatment was set to Reverse. This enhancement helps reduce General Ledger volume and gives you the flexibility to revert individual depreciation entries that are included in a summarized posting.
- **Add dimensions and additional fields to the Roll Forward report**: You can now include dimensions and additional asset fields directly in the Roll Forward report. This enhancement lets you view financial amounts alongside asset attributes in a single report, eliminating the need to run and reconcile multiple reports.
- **Other updates to Fixed Assets Management:** You can now switch between the Revert and Reverse correction treatment options at any time. Changes apply only to future transactions. Existing transactions continue to follow the correction treatment that was in effect when they were processed. Previously, selecting Reverse was permanent and you couldn't switch back to Revert.

General Ledger

- **Simplified General Ledger set up and easier access to journal entry approvals:** We've moved the setup for journal entry approvals to the General Ledger (GL) Setup menu.
- **Fast access to journal entry templates**: You can access all types of journal entry templates, which can be used to memorize, schedule, and standardize entries, directly from the General Ledger > All menu.

Industry Solutions

- **Updates in Enhanced Sage Intacct Planning (eSIP)**
- **Announcing Sage Intacct daily sales report powered by Craftable:** Craftable supports the unique workflows of hospitality businesses. Integrating Craftable and Sage Intacct connects your operational and financial data, giving you continuous visibility into daily sales.
- **Announcing Lending Management:** We're excited to announce that Lending Management is generally available in the United States. Lending Management gives you the tools to manage loans through their full life cycle—from origination to payoff—for both revolving and non-revolving loan instruments.Lending Management transactions are posted in real time and data is synchronized seamlessly. Lending Management synchronizes with Order Entry to provide invoices. Order Entry transactions are posted automatically to Accounts Receivable and General Ledger. Lending Management interacts with Accounts Payable for Loan Disbursement.
- **Updates in Sage Intacct Paperless:** Improve and modernize your paper-heavy accounts payable document workflow. Sage Intacct Paperless is an intelligent, automated solution that lets you capture, index, route, and store documents in one secure place.
- **Updates in Sage Intacct Real Estate:** Sage Intacct Real Estate adds property management functionality to Sage Intacct. The solution features a unique data structure that puts the lease document at the center of your workflow, making it flexible enough to accommodate virtually any lease agreement. Real Estate also tracks other business-critical details related to your properties and offers multiple billing options.

Inventory & Supplies

- **Manage supplies without blocking negative inventory:** Previously, you couldn't configure and use Supplies Inventory if your company allowed negative inventory sales transactions. With this new configuration flexibility and an exception-based workflow, you can bridge timing gaps between physical inventory movement and system transactions.

Order Entry

- **Preview invoices for billing groups:** You can now preview invoice details before starting an invoice run for billing groups. Review billing information, invoice amounts, and charges to help catch issues early and bill with confidence. If you use Revenue Management, invoices can be generated in Draft state so you can assign revenue recognition information before posting.
- **A new way to combine multiple documents into a single transaction:** When you move a transaction through a sales workflow, you convert one document to the next step, as defined in the corresponding Order Entry transaction definition. However, the convert functionality only allows you to convert one full document at a time. Now you can choose to convert one or more sales orders at a time, including specific lines from different orders.

Purchasing

- **Updates to Custom Purchasing approvals—Early Adopter:** Custom Purchasing approvals now support additional header-level and line-level fields, helping you create more precise approval rules for Purchasing transactions.
- **Customize sender and reply-to email addresses for Purchasing communications:** Improve security and consistency by preventing the use of unauthorized or incorrect sender email addresses and supporting internal email authentication and sender-identity policies.

Reporting & Insights

- **Compare-to options for additional reporting periods in performance cards:** We've added more options for using dashboard performance cards to compare data across cumulative reporting periods.
- **Smart Excel reporting—Early Adopter:** We're excited to offer a new report writing option that lets you use Sage Intacct financial data to build reports directly in Microsoft Excel. The financial data remains linked to the Excel report so that you can refresh it with the latest information as needed. Sage Intacct security permissions are applied for the linked data through Excel.
- **Exclude blank pages from reports:** When you select the Individual report option to generate separate reports for certain dimensions, you can now streamline the report output by suppressing blank pages for dimension values with no data for the period.

Taxes

- **Override tax schedules in Order Entry and Purchasing:** Customers using our standard or custom tax solutions can make tax schedule maps inactive and override tax schedules at the line level in transactions, giving you control over tax calculations to fit your business needs.
- **Avalara use tax in Purchasing—Early Adopter:** Subscribers to Avalara AvaTax can now apply use taxes in Purchasing transactions. Use tax is applied when sales tax is not collected or differs from the tax owed in the jurisdiction where goods are used. When you enable Avalara use tax, you can apply use tax as a standalone tax, or to offset sales tax when partial taxes have been paid on out-of-state purchases.

Training & Videos

- **New training and videos:** At Sage Intacct, we get how vital it is to have in-depth and best practice learning available to make sure you get the most out of Intacct.
    - Access new and updated self-paced, on-demand courses that guide you through specific tasks and features.
    - View demo videos to help you get up and running on a variety of tasks.

User Experience

- **Migrate to Sage Collaborate to get more visibility and control:** Sage Collaborate is the next generation of Intacct Collaborate, helping your team communicate in real time directly on Sage Intacct records. With this release, eligible companies can migrate from Intacct Collaborate to Sage Collaborate and take advantage of new capabilities that improve visibility, administration, and access 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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