

Sage Intacct 2026 R4 Product Release Notes



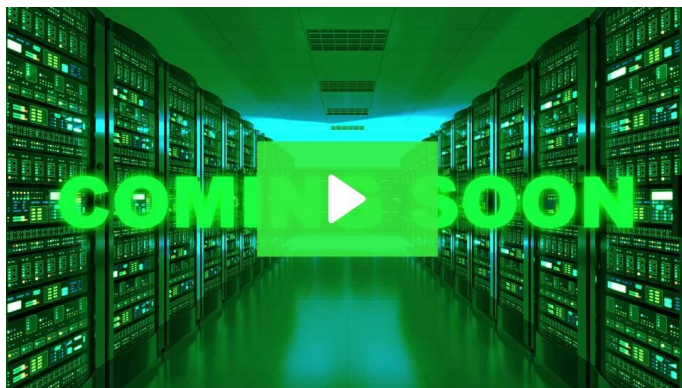
Sage Intacct 2026 R4 will be live on Friday, November 6th

We're excited to introduce the **Sage Intacct 2026 R4 Guide!** This comprehensive guide is your go-to resource for the latest features, enhancements, and updates in Sage Intacct's 2026 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 6th, 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 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
AndreM@dsdinc.com .



Features

Sage AI and Automation

Finance Intelligence Agent—General availability

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. [Learn More](#)

Split multi-page documents into individual transactions with AP Automation—Early Adopter

Upload a document containing multiple transactions and automatically split it into separate transactions for processing in AP Automation. [Learn More](#)

Other enhancements to AP Automation and Purchasing

Admins can now configure AP Automation with Purchasing to post entity-emailed transactions at the top level while controlling how line locations are assigned.

PO Automation now populates memo fields using descriptions extracted from uploaded documents, reducing manual entry while preserving document-specific information in Purchasing transactions.

When a transaction definition is configured to inherit the source document number, AP Automation with Purchasing now honors that setting. Generated transactions use the document number from the matched source transaction instead of being assigned the next available document number. [Learn More](#)

APIs and Developer Updates

Explore the redesigned Sage Intacct Developer Portal—a fresh new look and feel for REST API documentation.

This release introduces updates to existing REST API endpoints, along with improvements to the Sage Intacct Developer site. Review the sections below for details. [Learn More](#)

Legacy Sage Intacct developer documentation will move

Legacy Sage Intacct developer documentation is moving to the Sage Intacct Developer Portal with the 2027 R1 release. [Learn More](#)

Company Administration

Log in faster and more securely with passkeys

Passkey authentication provides eligible users with a faster, passwordless way to log in. Passkeys are resistant to phishing and credential theft because they use cryptographic credentials stored on a trusted device.

Passkeys are optional for users who do not use single sign-on (SSO). Existing password and multi-factor authentication (MFA) methods remain available as a backup. [Learn More](#)

Email sender allow list enforcement

Sage Intacct will now enforce the Allowed sender email addresses list. When enforcement begins, only email addresses on your company's allowed list can be used as sender or reply-to addresses. This change helps protect your organization from email spoofing by ensuring that only approved email addresses can be used as sender or reply-to addresses.

To help you prepare, review and update your allowed sender email addresses list now to ensure your email processes continue to work as expected when enforcement is enabled.

Enforcement of the Allowed sender email addresses list will begin the week of November 9, 2026. [Learn More](#)

Review license usage by user type

Use the new License usage page to quickly view user counts by type in one place. Instead of filtering the Users page multiple times, administrators can review current usage and compare it against licensed limits to help manage subscriptions and avoid unexpected charges. [Learn More](#)

Comprehensive List of Changes Made in 2026 R4

Accounts Payable

- [Reimburse employee expenses through Accounts Payable or payroll](#): Sage Intacct now allows reimbursement of employee expenses using Accounts Payable or remit employee expenses through your external payroll provider. This update helps align employee reimbursements with your existing payment process while improving control and visibility over expense payments. Previously, you could reimburse employee expenses using the legacy reimbursement option.
- [Split multi-page documents into individual transactions with AP Automation—Early Adopter](#): Upload a document containing multiple transactions and automatically split it into separate transactions for processing in AP Automation.
- [Other enhancements to AP Automation and Purchasing](#): Admins can now configure AP Automation with Purchasing to post entity-emailed transactions at the top level while controlling how line locations are assigned.
PO Automation now populates memo fields using descriptions extracted from uploaded documents, reducing manual entry while preserving document-specific information in Purchasing transactions.
When a transaction definition is configured to inherit the source document number, AP Automation with Purchasing now honors that setting. Generated transactions use the document number from the matched source transaction instead of being assigned the next available document number.

Accounts Receivable

- [Custom approvals for invoices—Early Adopter](#): Introducing approval workflow support for customer invoices. Create and manage custom approval workflows for invoices from a centralized Approvals application. Define approval rules using invoice data and business-specific criteria, automatically route invoices to designated approvers, and review approval history.
- [Customer Payments powered by Fortis—General availability](#): Accelerate cash flow by offering a self-service payment option to your customers directly from their invoices, with options to make partial payments and schedule payments in the future. This embedded payment experience streamlines your receivables process, allowing you to accept card or ACH payments on any invoice, save payment methods using tokenized card and ACH details for frictionless repeat payments, and issue refunds directly from Accounts Receivable.

- **Use inter-entity bill back with entity transactions:** You can now streamline your inter-entity accounting when your organization transacts at the entity level only. Inter-entity bill back accurately records transactions between two entities in the same organization. When one entity sells goods or services to another, the receiving entity automatically gets a bill to process and pay. This ensures both sides of the transaction are recorded correctly. Previously, inter-entity bill back supported top level transactions only.
 - **With this enhancement, you can do the following:**
 - Post invoices for bill back in the respective entity.
 - View the resulting bill back transaction details when you select the Record generator ID link in the invoice." Customer refunds and partial payments are now supported through the Fortis payment service, eliminating the need for outside processing and preventing duplicate payments.
- **Updates to Customer refunds:**
 - Void refunds that have a linked bill
 - View linked vendors from refund records
 - Issue customer refunds for VAT/GST/tax-enabled companies

Cash Management

- **Upload bank file payments to cloud storage:** Deliver payment files to your online cloud storage through a secure cloud connection so your team can send files faster without manual downloads. This is especially important when your bank requires enforced validation and traceable delivery of payment files.
- **Enter account number using letters and numbers:** Include letters as well as numbers in the account number of a bank account (now for all account currencies). Previously, non-Euro currency accounts allowed only numbers.
- **Bank files to replace Standard ACH:** The Standard ACH payment method will be retired in a future release in 2027. To continue processing ACH payments after Standard ACH is retired, configure your company, vendors, and bank accounts to use bank file payments.

Consolidation

- **New Consolidation data table for faster processing—Early Adopter:** We've made Sage Intacct Consolidation subscriptions and reporting faster and more efficient. When you run a consolidation, Intacct now writes consolidation entries to a new data table. Any book or ownership structure you create going forward will write to the consolidation data table, while legacy books will continue writing to legacy journals in General Ledger.
 - Use the same process to generate financial reports and standard reports. You can use the Custom Report Wizard to report on consolidation entries from new books that you create and any existing ownership structures in Advanced Ownership Consolidation.
 - Intacct distinguishes new consolidation books from legacy books by adding a Legacy book setting with new books set to No.
 - Because Intacct now writes consolidation entries to the new table, there's no need to write to journals. You can still include user-defined books in any consolidation book you create. Intacct automatically adds all the journals from your user-defined book to your new consolidation book.

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—General availability](#): Record and track payment applications and valuations in line with regional construction industry practices and requirements.
- [Work with project costs at your preferred level of detail in work in progress \(WIP\) management—General availability](#): You can now choose the level of detail to use in WIP schedules for viewing project costs and entering PM cost forecasts.
 - Entering more detail can help you go beyond seeing how your projects are performing, and gain insight into the reasons for their performance.
- [See commitment amounts in work in progress \(WIP\) management](#): A new Commitment amount field in WIP schedules shows the purchase order or subcontract amount for each project, including posted change orders. Easily compare estimates to both actual costs and committed costs to better understand your WIP projects.
- [Other updates to Sage Intacct Construction](#):
 - Gain more flexibility in posting retainage
 - Analyze advanced retainage calculations more effectively
 - Prevent duplicate source line conversions
 - Streamline project cost reporting with standardized cost categories
 - New fields on primary documents

Contracts

- [Copy lines and expenses when duplicating contracts](#): Save time when duplicating contracts by copying existing lines into the new contract. Copy all contract lines, contract line-level expenses, and contract expenses, or select only the items you want to include. Previously, duplicating a contract copied only the contract header information.

Expenses

- [Reimburse employee expenses through Accounts Payable or payroll](#): Sage Intacct now allows reimbursement of employee expenses using Accounts Payable or remit employee expenses through your external payroll provider. This update helps align employee reimbursements with your existing payment process while improving control and visibility over expense payments. Previously, you could reimburse employee expenses using the legacy reimbursement option.
- [Adjust employee expense reimbursements using AP bills or payroll](#): Expense adjustments are handled differently depending on how you reimburse employee expenses. This update ensures that adjustments align with your selected reimbursement method while maintaining accurate accounting.
- [Manage employee advances using expense types](#): When you reimburse employee expenses through Accounts Payable or payroll, you must manage employee advances using expense types. This enhancement streamlines how advances are tracked and applied, and improves visibility into advance balances during expense reporting. Previously, employee advances were managed through a separate workflow.
- [Updates to Expenses when you reimburse expenses through Accounts Payable or payroll](#):
 - Select a journal for cash and accrual posting
 - VAT lines now appear on bills created from employee expenses
 - Updates to the Expense ledger report
 - Removed Employee aging report and graph

Fixed Assets Management

- [Revert asset splits:](#) Easily undo asset splits that were created by mistake without manual adjustments or workarounds. Reverting a split deletes the assets created by the split and restores the original asset to its state before the split.
- [Reverse asset transfers:](#) Reverse asset transfers in Fixed Assets Management to restore an asset's previous dimensions and correct transfer errors. Unlike reverting a transfer, reversing preserves the original transfer record and accounting activity while creating an offsetting journal entry that clearly records the correction.
- [Reverse CIP asset capitalizations:](#) Correct capitalization errors while preserving posted accounting activity. Reverse asset capitalizations in Fixed Assets Management to return assets to the Construction in Progress state. Unlike reverting a capitalization, reversing preserves the original accounting activity and capitalization record instead of deleting it.
- [Other enhancements for Fixed Assets Management:](#)
 - Import asset classifications in bulk
 - Display depreciation details in the Roll Forward report
 - View the last actual posting date for depreciation schedules
 - View depreciation entry IDs in depreciation schedules
 - Changes to capitalization fields

General Ledger

- [Updates to GL account reconciliations:](#) We've improved General Ledger (GL) account reconciliations to make it easier to match transactions confidently and have full visibility into the timing of reconciliation activity.
- [Other updates to General Ledger:](#)
 - Changes to the Configure General Ledger page
 - Updates to the accounting sequence setting

Lending Management

- [Strengthen your brand consistency with custom statements in Lending Management:](#) Use printed document templates to create customized, professional templates for loan statements. The templates combine the formatting power of Microsoft® Word with the flexibility of merge fields from Sage Intacct to show specific loan account data.

Multi-entity

- [Track and report on inter-entity activity with bill back and affiliate entity dimension:](#) Automated inter-entity bill back now uses the affiliate entity dimension to auto-tag the customer and vendor in an inter-entity transaction. When enabling the affiliate entity dimension, Sage Intacct automatically records the affiliate entity dimension on invoice and bill detail records. The affiliate entity dimension records carry over to the General Ledger (GL) entries when you post the bill or invoice.
 - You can use this information throughout your reporting, reconciliation, and consolidation processes. This helps ensure accurate elimination during consolidation.

Order Entry

- [Custom approvals for Order Entry transactions—Early Adopter](#): Introducing approval workflow support for Order Entry transactions. Create and manage custom approval workflows for transactions from a centralized Approvals application. Define approval rules using transaction data and business-specific criteria, automatically route transactions to designated approvers, and review approval history.
- [Variable-quantity and tiered billing for billing groups](#): Improve billing accuracy by invoicing customers based on actual activity such as transactions, hours, or units. Quantity entries capture billable activity and supply quantities for sales invoices generated from billing groups. For an even more powerful billing workflow, you can combine variable quantities with Order Entry price lists and tiered pricing to automatically calculate charges based on recorded activity and pricing rules. This enhancement enables scalable, quantity-based billing without requiring manual calculations.
- [Apply flexible pricing to billing groups with OE price lists](#): Use an Order Entry price list to calculate billing group charges, instead of entering prices manually. For more advanced pricing scenarios, you can also set up tiered pricing that adjusts charges based on total quantities, progressive quantity tiers, or fixed tiers. This enhancement supports more flexible billing models while reducing manual price calculations. Sage Intacct applies the pricing during sales invoice generation and displays the calculation details during invoice preview.
- [Other enhancements for billing groups](#):
 - Assign user-defined dimensions on charges
 - Include inventory items on charges
 - View all billing group members
- [A new way to combine multiple documents into a single transaction](#): You can now simplify your workflow during conversion by combining multiple documents, or specific line items, into a single transaction. For example, when you need to send a customer invoice for multiple sales orders, you can create a single invoice transaction from multiple documents, including specific line items.
- [Post multiple draft transactions at once](#): Save time and reduce manual effort by posting transactions in bulk when you turn on enhanced lists. Previously, you could only post these transactions one at a time.

Platform Services, Customizations, & Extensions

- [Warnings for unapproved email addresses in trigger configuration and logs](#): Improve security and consistency by knowing which emails are not on your company's allowed list. A warning about the use of an email that's not authorized appears if you try to include it in your Send email trigger type.

Purchasing

- [Other enhancements to AP Automation and Purchasing](#):
 - Admins can now configure AP Automation with Purchasing to post entity-emailed transactions at the top level while controlling how line locations are assigned.
 - PO Automation now populates memo fields using descriptions extracted from uploaded documents, reducing manual entry while preserving document-specific information in Purchasing transactions.
 - When a transaction definition is configured to inherit the source document number, AP Automation with Purchasing now honors that setting. Generated transactions use the document number from the matched source transaction instead of being assigned the next available document number.

Reporting & Insights

- [Reporting for Excel—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 to the linked data through Excel.

Taxes

- [Transaction allocations for VAT and GST in Accounts Payable—Early Adopter:](#) Accurately distribute Accounts Payable (AP) bill amounts across dimensions when your entity uses a VAT or GST tax solution. You can apply a percentage-based transaction allocation directly to a bill line, reducing manual work while maintaining the appropriate tax calculation and allocation details for reporting and audit purposes.
- [Get ready for 1099 season:](#) Prepare for Tax Year 2026 reporting by reviewing this year's form changes, verifying your 1099 setup, and deciding how you'll file forms.
- [Exemption certificate management with Avalara Tax—General availability:](#) Sage Intacct's integration with Avalara's Exemption Certificate Management (ECM) brings ECM visibility into Sage Intacct. You can confirm customer exemption status, request missing certificates, and stay audit-ready without switching between systems. This integration helps reduce billing delays, improves accuracy, and simplifies exemption workflows.
- [Avalara use tax in Purchasing—General availability:](#) 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.
- [Enhancements for Taxes:](#)
 - Set reporting date basis for tax submissions
 - Tax memo field update for custom reports

Time

- [Assign delegates to approve timesheets:](#) Assign delegates to approve timesheets while you're out of office. When employees submit timesheets while an approver is absent, delegates can approve or decline them to ensure that payroll processing continues smoothly.
- [Manage crew timesheets using Sage Intelligent Time:](#) Sage Intelligent Time allows you to create and submit timesheets for multiple employees in a single action using crew timesheets. This feature saves time, reduces repetitive data entry, and helps ensure consistency for teams that work the same shifts, tasks, or cost codes.
- [Access Sage Intelligent Time preferences from My preferences:](#) Access Sage Intelligent Time (SIT) preferences directly from My preferences to quickly find and manage time-related settings. This update provides a clear access point for SIT preferences and reduces duplicate configuration.

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!

DSD Sage Intacct Support Team**Email:** sageintacctsupport@dsdinc.com**Phone:** 800-627-9032**Strategic Account Manager****Contact:** Andre' Maund**Email:** AndreM@dsdinc.com**Phone:** 800-627-9032 x255