

Product Brochure

# SAGE INTACCT

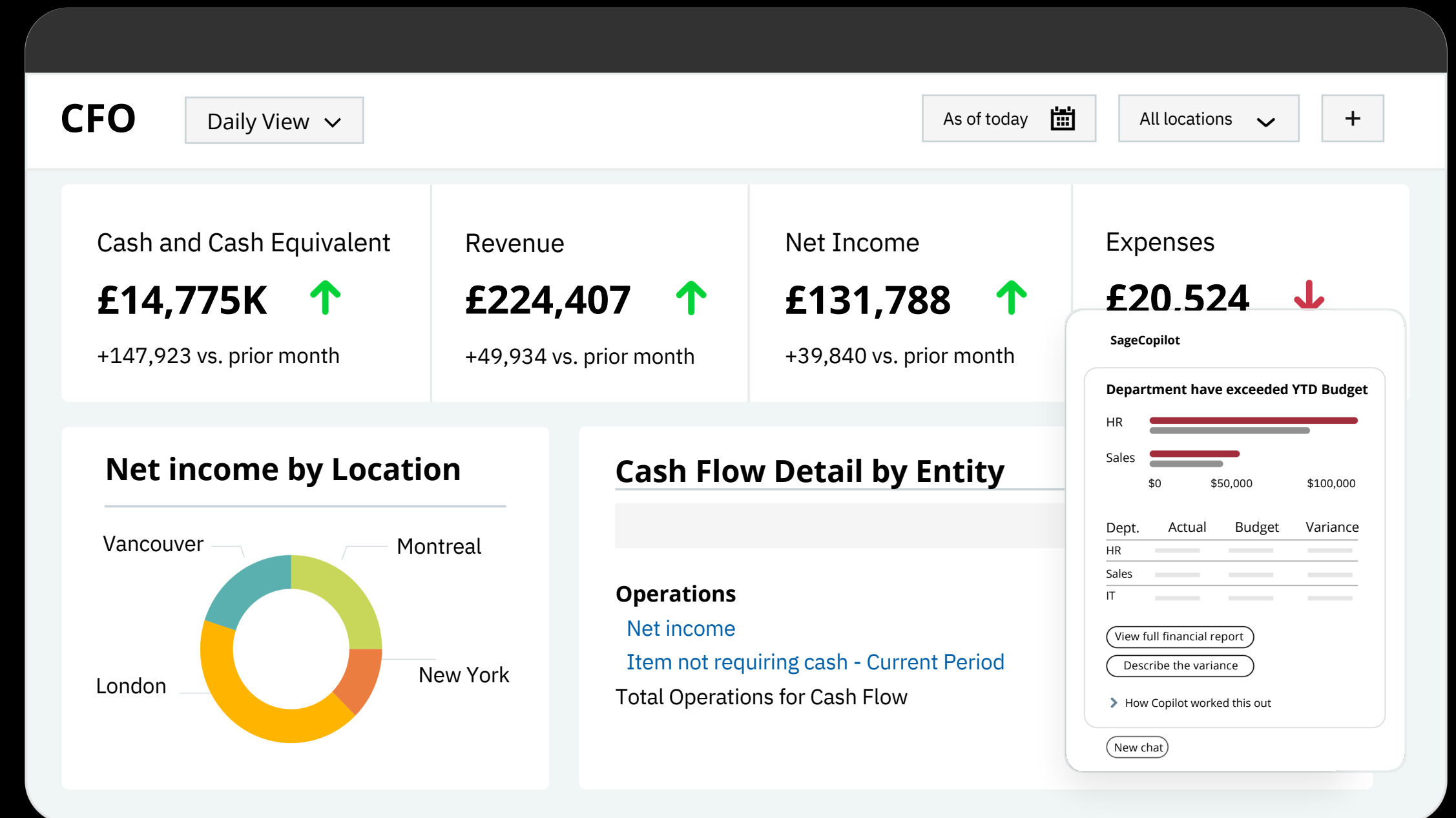
AI-powered, high performance software that delivers real-time insights through an intuitive, easy-to-use experience



Sage  Xperience

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# The leader in Finance AI and Automation

When lack of automation holds growth back, it's time for a change. Sage Intacct removes finance barriers to scale with AI-led automation, real-time trusted insights, platform agility and assurance.

Sage Intacct is trusted by 200,000 finance teams.

## Tailored solutions for:

- Gyms
- Charities
- Construction
- Consultancy firms
- Distribution
- Financial services
- Football clubs
- Franchises
- Gyms
- Hotels
- Media agencies
- Multi-academy trusts
- Private equity firms
- Recreation parks
- Recruitment agencies
- Restaurants
- SaaS
- Software and technology
- Wealth and asset management

# Automate manual work and close faster

Finance teams are under pressure to do more with less. With Sage Intacct, you can automate everything from procure-to-pay to order-to-cash, dramatically cutting manual work, eliminating errors, and freeing your team to focus on strategy, not spreadsheets.



Reduced manual data entry: integration with other systems means fewer spreadsheets and less duplication.

**Louise Weigh**

Head of finance, Pennington Choices

**Automate manual data entry**

Automate complex, high-volume quote-to-cash cycles so you can improve profitability and never miss an invoice thanks to billing and revenue connected in real time. Sage Intacct reduces manual data entry and tasks by 50% to 90%.

Our **Accounts Payable Agent** automatically processes your incoming bills, matches them to your POs and receivers, and creates drafts with +90% accuracy for your confirmation. Customers report their productivity increases by 2-3x.

**Automate billing, bank reconciliations, revenue recognition and consolidations**

Designed to speed up finance processes, Sage Intacct automates critical financial processes and workflows such as billing, bank reconciliations, revenue recognition, and consolidations. It's robust enough to automate complex subscriptions, specialised contracts, and recurring billing services.

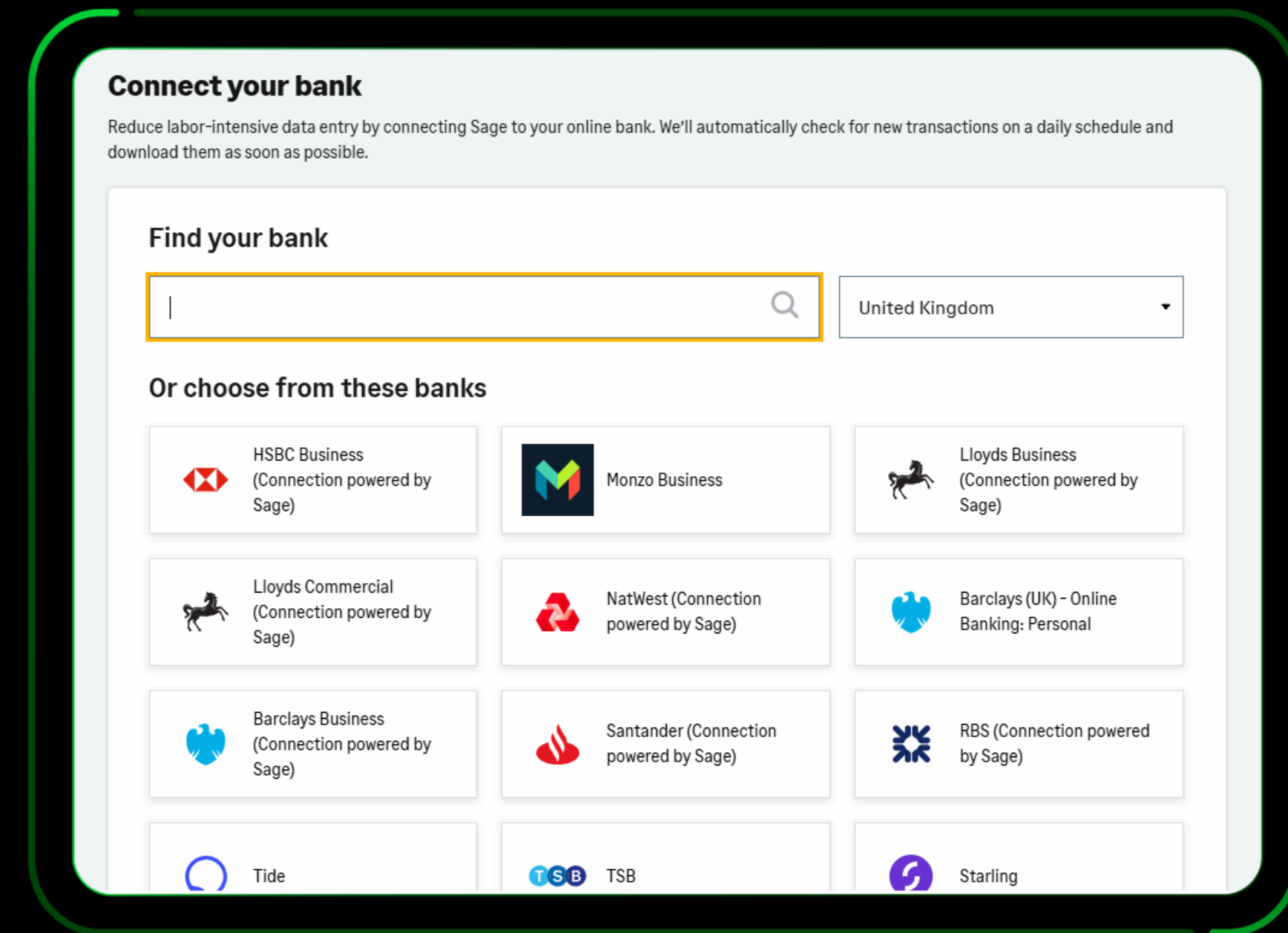
Sage Intacct automates project costing and billing to allow for faster bids and less revenue leakage. And when it comes to multi-entity management, Sage Intacct can consolidate hundreds of entities in seconds, automating eliminations, adjustments and reporting.



Industry Leading Vendor Match Prediction

**2-3x**

Productivity increase

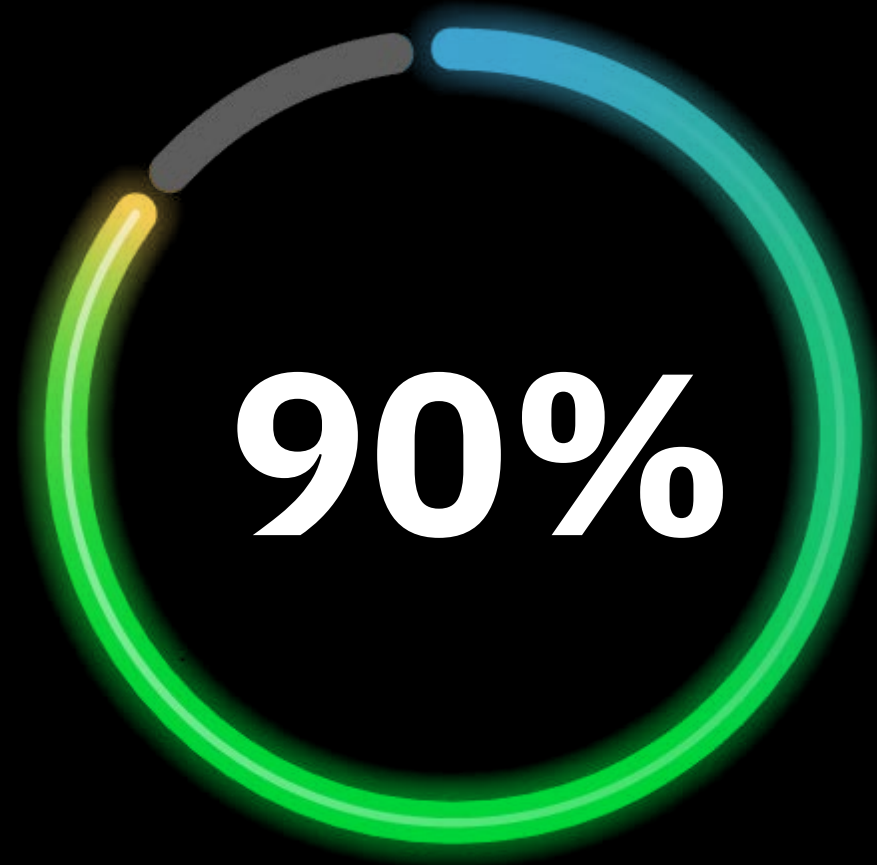


**Faster month-end close using AI**

Our **Close Agent uses Sage Copilot** to help you speed up month and year end by up to 90%. It handles reconciliations, calculates variances against budget, and flags unposted transactions early. This means you get insights such as general ledger, to subledger reconciliation variances and drill down reports instantly.

To make monitoring progress truly effortless, you get intuitive checklists, charts and proactive notifications that keep you informed of pending tasks.

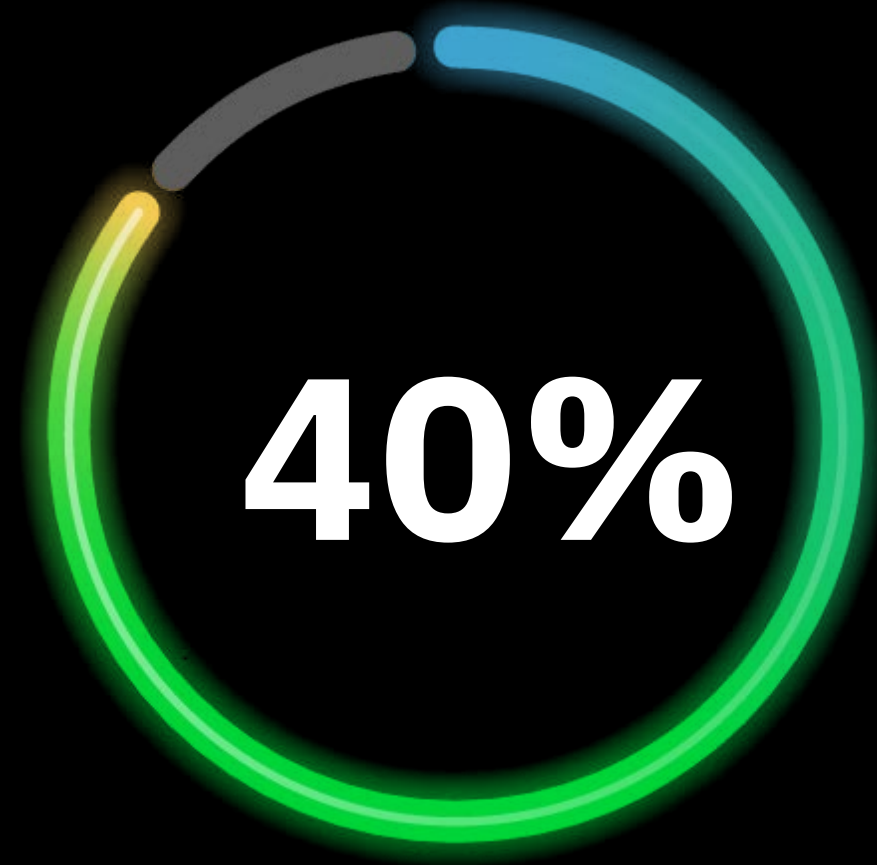
Our Close Agent using Sage Copilot handles reconciliations and flags issues early helping you speed up month and year end by up to



**Faster timesheet entry using AI**

Our **Time Agent** builds timesheet entries based on calendar, email, and app activity, making time tracking faster and more accurate. The Time Agent has led to a 40% increase in timesheets for our customers.

The Time Agent has led to an increase in timesheets for our customers by



# Meaningful, accurate, proactive insights

“50% faster reporting and  
real-time budget visibility  
for all departments”



With Sage Intacct, we can generate reports instantly and give teams the visibility they need.

**Louisa McCann**

Finance direction, Bristol Old Vic

Finance shouldn't be held back by data silos and manual data gathering. The right software can help to tackle those pain points. And that's where Sage Intacct comes in.

With the combined power of its Intelligent General Ledger, customisable reporting tools, AI agents and Sage Copilot, finance teams can say goodbye to silos and manual processes, and hello to real-time insights that help them make smarter business decisions fast.

### Financial and operational KPIs

Sage Intacct's Intelligent General Ledger is at the core of the software's real-time insights. It seamlessly blends financial and operational data, giving you the complete picture in all of Sage Intacct's reporting tools.

From checking summary roll-up figures from single or multiple entities—even if it's only mid-month—to flagging trends and spotting exceptions with powerful report visualisations, you'll have the information required to make informed decisions.

### Customisable and drillable dashboards and reports

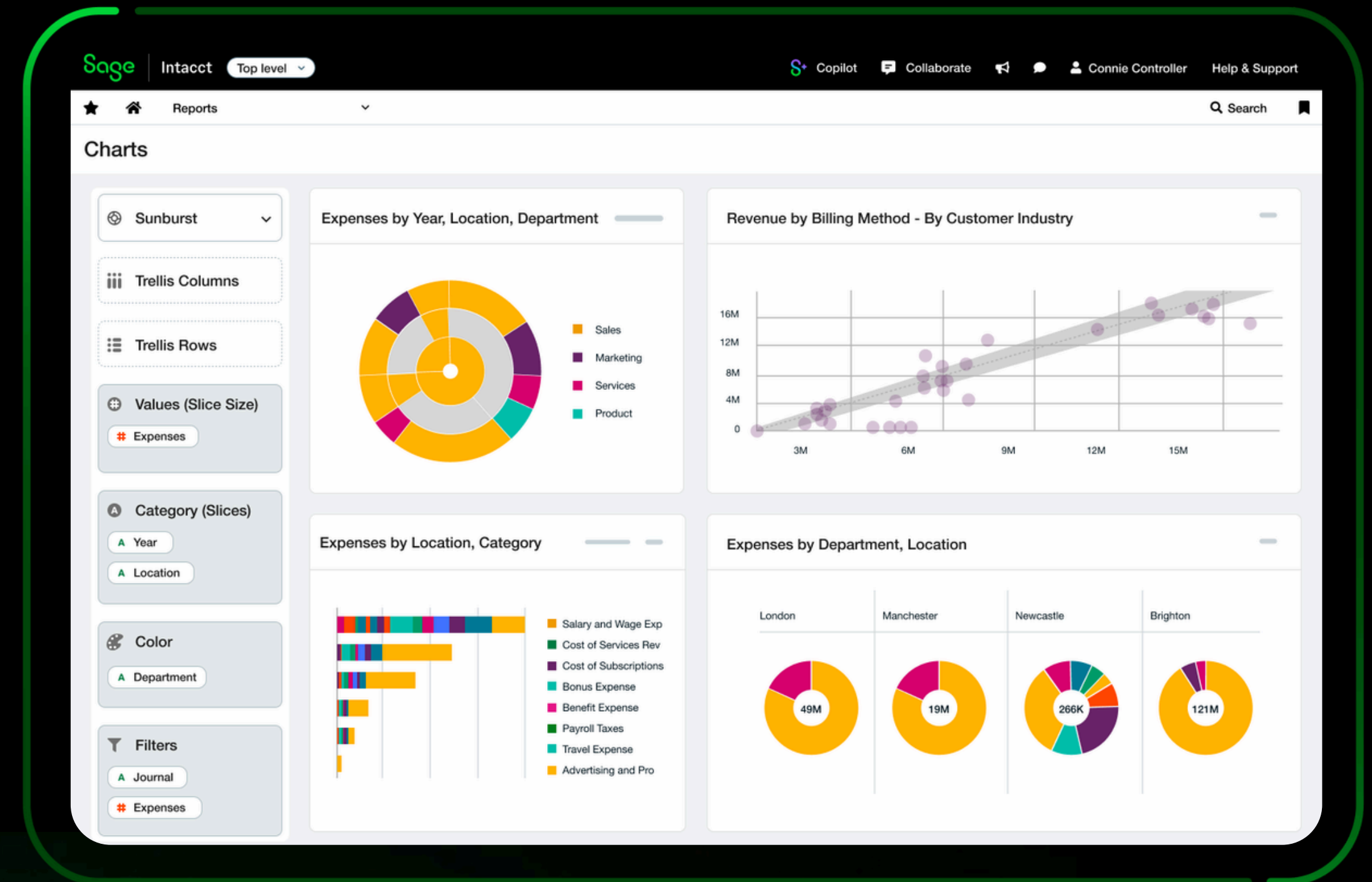
You can get insights out of the box through drillable dashboards and reports that let you go down to source transactions in a few clicks without the burden of manual data gathering. Using Sage Intacct's report editors and builders, with easy-to-use features such as drag and drop and pivot, you can customise reporting to suit the exact needs of your business.

### Budgeting and forecasting

Our budgeting and planning tools let you view your plans, budgets, and forecasts in one place without having to rely on spreadsheets. Generate driver-based modelling, what-if scenarios, and rolling forecasts, so you can see the impact of your decisions quickly and course-correct when required.

### Data visualisation

Interactively explore your financial data using a multi-angle, multi-dimensional graphical tool. With data visualisation, you can clearly understand insights at a glance. You don't need special skills or IT to explore your data. You can simply turn your insights into action with visual storytelling and narration. In a few clicks, you can convert graphs and charts into slides for you to present to business leaders and stakeholders.



# Instant answers using Sage Copilot

Our Finance Intelligence Agent is transforming the way finance teams work. Ask questions, get instant insights, find records and transactions, analyse data, and take actions all by asking natural language questions with Sage Copilot.

The screenshot shows the Sage Intacct 'AP Reconciliation Report' for location 'E100--Riverside' as of 30/06/2026. The report is a table with columns for Vendor, Date, Document, Reference, Memo, Charges, and Payments. It lists various vendors like Coast Tele, HC Equipment Repair, JournalGram, North Gas and Electric, PaperClips, RWS Commercial, and Salesforce, along with their respective transactions and balances. A 'Sage Copilot' chat window is overlaid on the right side of the report. The chat window displays a greeting 'Hi Connie', a message about recommended actions for cash requirements, and a button labeled 'Process payment reminders'. Below this, there is a section for asking questions, a text input field, and a 'Send' button.

Vendor	Date	Document	Reference	Memo	Charges	Payments
V0003 - Coast Tele	01/06/2026			Balance forward		
	17/06/2026	1144-AP			7,416.99	
	17/06/2026					7,416.99
<b>Total for Coast Tele</b>					<b>7,416.99</b>	<b>7,416.99</b>
V0007 - HC Equipment Repair	01/06/2026			Balance forward		
V0011 - JournalGram	01/06/2026			Balance forward		
V0005 - North Gas and Electric	01/06/2026	1144-AP			4,363.65	
V0010 - PaperClips	07/06/2026	J-28360	B		18,796.23	
V0004 - RWS Commercial	01/06/2026					
	14/06/2026	1144-AP			67,000.00	34,840.00
	17/06/2026					34,840.00
<b>Total for RWS Commercial</b>					<b>67,000.00</b>	
V0006 - Salesforce	01/06/2026			Balance forward		5,908.55
	17/06/2026					5,908.55
	20/06/2026	SI-29389			5,908.55	
<b>Total for Salesforce</b>					<b>5,908.55</b>	<b>5,908.55</b>
<b>Totals</b>					<b>103,485.42</b>	<b>48,165.54</b>

# Trust your data everyday



Board reports now compile with more accurate, real-time data, saving at least half a day per month. Using Excel, there for more room for human error — now I'm much more confident in sending the reports.

**Laura Burns**  
Financial controller, Pizza Pilgrims

Accuracy is critical in finance because so much depends on it. Even small errors can lead to mis-stated results, regulatory risk, or poor strategic choices. That's why Sage Intacct is built to deliver consistent, real time, and audit-ready accuracy across everything.

**Reduce errors with true multi-dimensionality**

Sage Intacct's Intelligent General Ledger significantly improves data accuracy. Instead of complex, error-prone charts of accounts, simply tag transactions with easy-to-set-up dimensions. You can analyse performance across any business driver with complete confidence.

That means that every report, slice of data, and insight is reliable, structured and trustworthy, so you can focus on analysis and strategy, rather than checking your numbers manually to ensure basic data accuracy.

**Spot errors instantly with Finance Assurance Agent**

Our **Financial Assurance Agent** constantly reviews your data, spotting outliers, errors, and reconciliation mismatches when they happen. In the past 12 months alone, we've scanned **3.2b+ transactions**, flagging and helping to **fix 190m+ potential errors** — giving finance teams high trust in their data and insights.

**Always be compliant and audit ready**

With Sage Intacct, be confident going into scheduled and ad hoc compliance reviews, thanks to our automated audit trails, traceable approvals and documentation. You can avoid reputational risk as you're supported with compliance, including SOC 1 & 2, GDPR, GAAP, IFRS, VAT.

190M+

Potential errors fixed

# Drive growth with agility and ease



Sage Intacct has transformed how we operate, cutting manual effort and letting us focus on growth.

**Nathan Holliday**

Head of finance, Everflow

As your organisation grows, so does complexity. With more moving parts, your finance team shouldn't be left struggling to keep up, whether that's managing more transactions, invoices to processes, users, entities, currencies or new workflows. Sage Intacct is an agile, flexible platform designed to scale effortlessly, no matter how fast your business moves.

### Platform flexibility

Sage Intacct's infrastructure solutions have been designed to give you a competitive edge, driving efficiency, cost savings and better decision-making across the business. Sage Intacct Platform Services allows you to create solutions precisely tuned to individual business needs.

### Easy setup of entities

Sage Intacct's Intelligent General Ledger is built for scale and flexibility. It effortlessly handles multi-book, multi-entity, and multi-currency processing, so finance teams don't need separate systems, IT support or need to perform manual tasks. You can add and set up new entities in minutes and scale effortlessly with a shared chart of accounts.

As you scale and transaction volumes surge—whether through growth or seasonal peaks—Sage Intacct is built to handle it all: high-volume transactions, subscriptions, invoices, bank feeds, and more, without ever slowing finance down. Your finance team can configure key functionalities themselves, adapting the system to your needs as your organisation evolves.

### Advanced functionality

If your business requires some of our advanced features, you can add them to your Sage Intacct subscription at any point in time. Here's a few examples that are available to you.

- **Fixed Assets:** Automated asset management.
- **Inventory Management:** Track, value, and manage stock while maintaining accuracy at each step.
- **Project Accounting:** Manage costs and revenue, keep projects on time and maintain profitability.
- **Spend Management:** Take care of company purchasing vs budgets and never exceed spending caps.
- **Time and Expense Management:** Keep your team focussed on client goals, not admin.



# Sage Ai and Sage Copilot automate within your guardrails

Sage Ai is an intelligence and automation engine that can help to transform your finance function by reducing manual work, improving accuracy, and supporting strategic decision making—with real impact you can trust.

Sage Ai is built from the ground up to be transparent, secure and in your control, so only what you approve goes to your ledgers. Our Ai Trust Label is embedded within Sage Intacct and provides users with a comprehensive view of how Ai works every single time it is in play.

Sage Ai is centred on human control, so you decide how much to automate and when to review recommendations. AI insights are explainable, overridable, and continuously improved by your feedback, so confidence grows over time. Sage Intacct's AI agents are designed specifically to automate finance processes and elevate the work of finance teams using them.

Sage Copilot is your AI finance assistant that responds to natural language queries, helping your team work faster with clearer insights, fewer errors, and less administration.

# Sage and AI compliance

- Apply internationally recognised standards to data security and use independent assessments to test how well Sage is applying those standards.
- Sage uses trusted AI risk and security frameworks, including: NIST AI Risk Management Framework, UK NCSC AI Cyber Security Code of Practice and OWASP AI/LLM Security Best Practices.
- Sage complies with key data privacy and AI regulations, including CCPA, GDPR, and the EU AI Act.



Sage Ai in the last 12 months

3.2b+

Transactions  
processed

45m+

Invoices  
automated

190m+

Anomalies  
flagged

96%+

Data  
accuracy

50m+

Estimated admin  
hours saved

## Native Ai

Embedded into workflows,  
working securely with  
your permission

## Accurate Ai

Designed by Finance  
Professionals, trained 7+  
years with real data

## Authentic Ai

You are always in control of  
what Ai does for you, and what  
is posted to your ledgers

# Sage Intacct Marketplace

Sage Intacct provides pre-built integrations with hundreds of the latest apps and technology in its Marketplace. You can seamlessly connect with the tech to automate everything across your workflows – from CRM, payroll and payments to cash flow, expenses, Carbon Accounting, and more.



# Supporting our customers

## Buy With Confidence Programme

The Buy With Confidence Programme is a promise we make to our customers. We incorporate this promise into our contract with each customer to ensure we uphold our word as part of the customer agreement. The programme guarantees that the application will be up and running 99.8% of the time. Users get 10% credit for every 1% of downtime below 99.8%, which is calculated on a monthly basis.

Sage Intacct offers comprehensive customer support every day of the week to ensure you get the most out of your software. Here are some key aspects of the support services.



### 1. Technical Support

Customers can access technical support through various channels, including live chat, email, and phone. This support covers troubleshooting, product issues, and general enquiries.



### 2. Community Forums

Customers can connect with industry experts and other businesses through community forums. They're a great place to get product help and share useful insights.



### 3. Training and Certification

Sage offers extensive training resources, including live and on-demand training sessions, to help customers get up to speed with their software. They can also earn certifications to demonstrate their expertise.



### 4. Member Masterclass

Sage Intacct customers have access to talks and articles from leading experts, providing valuable business insights and advice.



### 5. Business Advice

The Sage Advice blog offers practical advice on a range of business topics, helping customers make informed decisions and improve their operations.

These support services are designed to help Sage Intacct customers maximise their productivity and effectively navigate their software.

# Industry solutions

## Not-for-Profit

- Fund, grant and restricted income reporting (SORP-ready)
- Grant and donor-level tracking of income, spend, and outcomes
- Audit-ready controls for trustees and regulators

## Regulatory Reporting

- Real-Time Portfolio & Asset Visibility
- Strong Financial Controls & Auditability



We can run project reports and see an instant snapshot of all donations.

**Roger Bayramian**  
Financial controller, Children's Hunger Fund



Sage Intacct's reliability is a gamechanger, enabling us to generate financial statements by the seventh working day.

**Juliette Nwodi**  
Financial controller, Kingdom Bank



## Professional Services

- Project accounting and profitability tracking
- Multi-dimensional reporting
- Scalable support for growth and M&A
- Integration with PSA and CRM tools



Sage Intacct sends out invoices automatically, saving us three days per month.

**James Proctor**  
Chief operating officer, Phase 3

## Wholesale & Distribution

- Inventory and order management integration
- Revenue recognition for complex contracts
- Scalable multi-entity, multi-site support



We're able to spread work evenly... closing in as few as eight days thanks to Sage Intacct.

**Adam Herman**  
CFO, Total Distribution Inc

## Hospitality

- Location-level performance reporting
- Automated AP and workflow management
- Labour and cost control insight



It's crucial to have real-time, accurate insights... Sage Intacct moves us away from guesstimates.

**Sophia Shafiq**  
Controller, Red and White Fleet



## Healthcare

- Operational and financial insights that guide growth, patient care and efficiency
- Compare business scenarios to drive outcomes and gain clinical advantage
- Revenue forecasting capitalising on patient trends, profitability and costs



Thanks to automation in Sage Intacct, I do very little transactional work.

**Jensen**  
Financial director, Behavioral Health Resources

## Education

- Out-of-the-box sector specific metrics at group and individual school level
- Automate invoice processing and bank reconciliation
- Track grants and reconcile with confidence



This solution has transformed our financial management processes and provided us with unparalleled insights into our finances.

**Karen Bromage**  
Chief finance and operations officer, Delta Academies Trust





## SaaS & Technology

- Automate quote-to-cash with CRM integrated
- Complex usage-based subscription billing
- Multi-currency-based revenue recognition and multi-entity management
- Out-of-the-box SaaS metrics



Our previous software required quite a few manual adjustments and we wanted to free up time. We wanted more dimension tracking, which would give us... better business insights.

**Angela Cruickshank**  
CFO, Gemba

## Construction

- Track actual and committed costs in real-time across projects
- Simplify change order tracking to capture all cost adjustments
- Track subcontractor and supplier payments
- Integrate job costing with your project management tools



An end-to-end cloud system that boosts efficiency across the business.

**Joe Murray**  
CEO, ACT Construction

# Unlock the Sage difference

At Sage, we have 40 years of experience supporting UK and Irish businesses through regulatory shifts and downturns.

Up to

**5x** **200k+** **G2**

ROI                      Businesses                      Top-rated

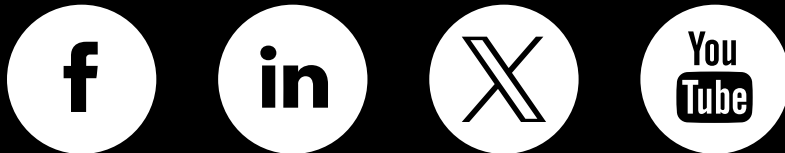
Sage Intacct helps finance professionals increase efficiency and drive growth for their organisations. How? By automating your processes, so you can run your day-to-day business better. This gives you greater insight and flexibility to make confident, long-term decisions, and act fast to execute changes.

**Ready to learn more?**

**0800 923 0340**



Built With Xperience



Sage



Xperience

High-Performance  
Finance Software

POWERED BY 

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