

Factsheet

HOW HIGH-PERFORMANCE CFOs CAN USE SAGE AI TO **MAXIMIZE THEIR IMPACT**

The AI features in Sage Intacct



Sage

In the fast-moving world of SaaS, success hinges on an organization's ability to adapt to market demands quickly, leverage working capital efficiently, and scale people, technology, and processes seamlessly to drive sustained growth.

It's an industry where maintaining investor confidence is critical, navigating compliance complexities is challenging, and operational inefficiencies can severely hinder hard-won competitive advantages.

Yet too many SaaS CFOs are still relying on siloed legacy tools that lack the scalability and visibility needed to drive growth. Finance teams are spending too much time on manual, repetitive tasks—meaning finance leads don't have the capacity or insights to contribute to more impactful, strategic work. Cash shortfalls and inaccurate forecasts are holding back business planning, and entry-level systems prevent the billing customization that customers increasingly demand.

Faced with such challenges, artificial intelligence (AI) has become a strategic enabler for SaaS CFOs. With AI, high-performing CFOs can automate data entry, task tracking, and assurance. They can minimize human error, boost collaboration across teams, and win investor confidence with better reporting and insights.

But with so much hype surrounding AI, it can be difficult for CFOs to narrow down the right solution for their organization. Here, we cut through that noise to focus on three key benefits of the AI functions available with Sage Intacct. All help SaaS businesses optimize workflows today and build the capacity for growth in the future.

More than that, they help empower SaaS CFOs to take control of their finances, step into their position as a strategic lead at the forefront of the business' future, and maximize their impact on overall performance.



With more than eight years' experience of delivering AI solutions, Sage has saved businesses hundreds of hours of manual work. Sage Intacct extracts 24 million invoices annually, trains 35,000 AI models daily, and generates 1.2 billion predictions per year. The platform has received **some of the highest customer satisfaction scores in the industry on G2**, with customers **reporting up to 250% ROI and payback in less than six months**.

Save time with continuous accounting

Manual data entry and processing workflows absorb the majority of the finance team's capacity. Sage research found that 42% of finance leaders believe closing the books and managing accounts are either equally, or more challenging than two years ago. It's no surprise that one in four CFOs report feelings of burnout.

Sage AI takes that slow, unrewarding work away. It automates manual tasks, boosts efficiency, and streamlines key functions—from billing and revenue recognition, to forecasting and compliance. Sage Intacct uses a combination of traditional and AI-powered automation—and with this combination, you can get your data flowing automatically into your accounting solution, validate it at entry, and automate further processing. **That means your data is always up to date and accurate, so CFOs can:**



Boost productivity: by automating workflows such as accounts payable and purchasing, data entry, review, classification and approvals, SaaS businesses can increase team morale by freeing up time for higher value work.



Get billing out faster and increase cash flow: by connecting your CRM, such as Salesforce or HubSpot, to your financials. This integration helps you bring in revenue sooner.



Process vendor invoices in half the time: AP Automation with AI automatically creates draft bills for you, so you can free up time for other activities, while also getting real-time insights into cash flow.



Capture expense receipts automatically: with tools such as Intelligent Expense.



Automatically handle currency rate tables and conversions as the business scales: manual data entry and calculations are dramatically reduced.

Make smarter decisions

By removing the silos between departments and enhancing workflows with AI, CFOs have access to real-time data and insights that enable them to be a more strategic partner—something 93% of CFOs aspire to be.



Sage
Intacct

Has industry-leading SaaS intelligence with complete datasets and forecasting covering the past, current and future. That helps facilitate real-time reporting across hundreds of consolidated entries.



Can highlight budget variances and proactively deliver actionable spend insights throughout the month with Sage Copilot, our Gen AI assistant.



Automatically tags transactions and operational data with dimensions such as department, product, client, locale, or other important business drivers to facilitate more accurate reporting—without spreadsheets.



Has an interactive custom report writer tool providing deep reporting capabilities that allow for filtering, calculations and logic, and conditional formatting to create actionable insights and customizable reports.



Makes integration a breeze as REST APIs and automated bank feed options ensure seamless external data integration with more than 350 partner solutions and thousands of banks.



Is a single source of truth: merging your data into one unified source for all SaaS metrics, simplifying operations from revenue recognition to compliance, and granting CFOs a trusted, simplified route to high-performance.



Boost trust and transparency

Sage Intacct provides continuous assurance to business stakeholders by alerting CFOs to compliance requirements and potential fraud, while upholding the highest standards of security.



Catch errors immediately: outlier detection uses AI to automatically scan for and flag any unusual transactions or errors. It can review thousands of transactions in minutes to augment your review and boost the reliability of your financials.



Spot possible fraudulent activity: by analyzing historical data, AI can identify potential risks and areas of concern.



Improve access control: with functionality to meet preventative and detective internal control requirements.



Automate compliance reporting: in line with ASC 606 and IFRS 15, plus automatic updates when regulatory changes occur.



Power up with automation: leverage AI to handle the manual tasks that are more challenging to automate using traditional automation, such as entry of vendor invoices, timesheets, and expenses. This allows your team to be involved in reviews and approvals for a strong technology/team partnership.



What is Sage Copilot?

Our dedicated Gen AI assistant helps you work faster and more effectively. It keeps an eye on your data and workflows, flagging anomalies, errors, and opportunities to help you make key decisions faster.

With advanced automation capabilities to take care of your to-do lists—like sending reminder emails to customers and tracking expiring quotes—Sage Copilot is a trusted member of your team.

You can even use the chat function to ask how-to questions or track monthly close tasks with ease. Plus, Copilot has the ability to track project spend against the relevant budgets, and provide proactive notifications to flag overspend throughout the month.

This saves you time, prevents issues escalating, and helps safeguard your business, meaning you can focus on moving the dial.



Other technical specifications

International standards:

ISO 27001:2013 (Information Security)

ISO 27017:2015 (Cloud Security)

ISO 27018:2019 (Privacy)

Security features:

Multi-layer security controls with 24/7 monitoring.

Security Operations Center (SOC).

Regular penetration testing by independent security firms.

Performance:

99.9% guaranteed system uptime (24/7/365).

Sub-second average response times (0.4-0.5 seconds)

Zero-downtime updates for routine maintenance.

Geographic failover capabilities with zero data loss.

Flexibility for the future:

Four new releases annually.

Each release includes an average of 50 new features and enhancements.

Proven scalability with enterprise-ready features and plans.

Competitive and predictable pricing with flexibility.

Saving \$420k by automating manual work

Florida-based MotionPoint is an international website translation provider that was struggling to keep up with monthly invoicing, which was slowing cash flow down. The team went looking for a solution that would make the whole process faster, easier and better.

After integrating Sage Intacct, the company has been able to reduce days outstanding by 20%, accelerated \$2.5m in operating cash flow, and saved around \$420,000 in annual allocated costs. Monthly close has been reduced from three weeks to six days, revenue recognition time is now immediate, and the team can tap into on-demand insights to optimize profitability.

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I've enjoyed Sage Intacct the most out of all the systems I've used ... You have the ability to make it what you want it to be.

Amanda Fishman
VP and controller, MotionPoint



\$80B in IPOs on Sage Intacct, start simple, scale big



SaaS CFOs using Sage Intacct have successfully raised millions in funding rounds. For scaling Software and Technology organizations, Sage Intacct transforms your finance operations with AI-powered tools for billing, accounting, compliance, and reporting. With 500+ billing models, investor-grade reporting 80% faster, and seamless compliance across global operations, Sage Intacct is your single source of truth, enabling scalable growth and empowering SaaS finance leads to do their best work.

Learn how Sage for SaaS and Technology Plans can support you with streamlined accounting and automated financial processes, designed to scale with your business and ambitions.



Subscription billing: seamlessly managing 500+ subscription, usage, and hybrid billing models while effortlessly mastering revenue recognition.



Start fast, grow faster: easy setup, leveraging prescriptive best practices, means you can start using the platform quickly, with the flexibility to add more capability as your business expands.



Gain real-time visibility: deliver 200+ investor-ready SaaS reports and forecasts up to 80% faster.



Integrate seamlessly: experience the power of having one unified system of record, where data is automatically synchronized across all the applications including your CRM, billing systems, and other essential SaaS tools.

Find out more about the implementation process by downloading our guide:

[**Implementing Sage Intacct for your SaaS organization** →](#)





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High-Performance
Finance Software

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