



Datasheet

Sage Intacct Close Automation

Transform your close with real-time visibility, intelligent task management, and proactive insights.

The month-end close does not need to be a scramble. Accounting teams often juggle tight deadlines, complex task dependencies, and strict compliance requirements, which can lead to unnecessary stress and avoidable errors. When checklists live in spreadsheets and updates rely on manual follow-ups, teams lose time, visibility, and confidence in the process. Without clear oversight or standardization, it becomes difficult to stay on track and even harder to improve over time.

Sage Ai Close Automation gives your team a centralized workspace inside Sage Intacct that brings structure, clarity, and automation to every close. Customizable templates, interactive checklists, and real-time dashboards help everyone understand what needs to be done and when. Proactive insights and alerts surface issues earlier in the month so your team can resolve them before they impact reporting. The result is a faster and more accurate close that your entire organization can rely on.

Sage

“Close Automation finally gives us visibility across all our entities, right inside Intacct.”

Corporate Controller, Alaska Native Corporation

Checklists and Templates

Standardize your close with built-in templates that reflect your team's real-world workflows. Define task owners, dependencies, and deadlines across departments and entities. Transform your static close checklist into a dynamic tool for real-time collaboration. Assigned users can comment, document progress, and mark tasks as complete, ensuring everyone stays aligned and audit ready.

Close Progress Monitor

Gain real-time visibility into your financial close with the Close Progress Monitor. This interactive report provides a clear view of task status across teams and entities, helping finance leaders track progress, identify blockers, and manage dependencies before they cause delays. With intuitive visual charts and built-in filters, you can quickly spot risks, reassign tasks, and keep the close moving on schedule.

Variance Analysis

Identify budget versus actuals discrepancies as they happen. Close Automation flags variances early so your team can investigate, document, and resolve them during the period. Finance leaders can review variance explanations in advance, making sure reports reflect known and accounted-for changes instead of last-minute surprises.

Subledger Reconciliation

Confirm that subledgers match the general ledger before the close begins. Automated checks highlight discrepancies early and guide users through resolution steps. With live reconciliation status, drill-down access, and audit-ready documentation, your team avoids last-minute cleanup and can trust the numbers at every step.

Sage Ai Close Automation brings these capabilities together to help your team reduce manual work, prevent delays, and deliver a faster, more reliable close. To see how it fits into your existing workflow, contact your Sage Intacct representative to learn more.

sage.com
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