

Questions	Answers
<p>As a side question for clarification - does the cloud data in Canada get stored on Amazon servers in Canada or the US?</p>	<p>Yes, it gets stored on Amazon servers in Canada. All data from our Canadian customers do not leave Canada.</p>
<p>I'd be interested in hearing any information you have about the environmental impact of using AI.</p>	<p>The largest impact on the environment, by far, is the energy consumption using non-renewable resources which cause carbon emissions. A 2019 study found that training a single large NLP model could emit over 284 tons of CO<sub>2</sub>, equivalent to the lifetime emissions of five cars. Generative AI models like GPT-4 require immense computational power to train and operate.</p> <p>Data centers use water for cooling servers. Some AI training runs have been estimated to consume hundreds of thousands of liters of water, depending on the climate and cooling systems.</p> <p>Then there's also a consideration for e-waste. Rapid development cycles lead to frequent hardware upgrades. Discarded electronics contribute to growing e-waste, which is often improperly recycled or dumped in developing countries.</p>
<p>Is the AI feature in Sage an additional cost, or included in the basic license?</p>	<p>Some features come included, for example Sage AI Search Help and Outlier detection. AP Automation and Intelligent time are extra. That being said, our offerings do tend to change with release of new features, so be sure to check back on Sage.com for the most up-to-date features and bundling. Please feel free to reach out to find out more.</p>
<p>As a charity, we are required to be audited. What does the audit sector think?</p>	<p>The audit sector, like every other business sector, are also trying to stay on top of or ahead of technological trends. Therefore, a lot of the larger audit firms (think big 4) are constantly upgrading their tech and audit methodologies to keep up with the changing needs of the market they serve. This means adapting audits of financial system controls and policies or regulations that clients have in place.</p>

<p>I think part of the reason nonprofits are not up taking on AI is the environmental and ethical implications. Can you speak to that?</p>	<p>That is totally fair. As part of our CSR to our community and the customers we serve, Sage aims to be carbon neutral and net zero by 2040, with external validation and transparent reporting. Most large organizations like Sage or Microsoft (ChatGPT investor) have open carbon accounting methodologies that can be easily found on the web.</p> <p>I think one thing to be mindful of when it comes to the development of AI and ethical considerations, is whether the AI model is accounting for biases. This is something I am always mindful of when I'm performing any research using GenAI tools.</p>
<p>Given the current tools available, when considering prompt engineering, how do we ensure accuracy easily?</p>	<p>I don't think there's an easy fix here but tools like GPT and Co-pilot all cite their sources. Therefore, as mentioned in the webinar, it is important to check the source and date stamp of the content the AI tool is pulling from. You can also perform any additional research or sense checks. As someone who works with a LOT of data on a daily basis, I can tell you that I've had to learn to take all data with a pinch of salt and let go of perfection when it comes to completeness and accuracy. That's why "materiality" is a concept in audit and finance. :)</p>
<p>What data do you offer to ChatGPT when asking for financial analysis? Just reports, or is it possible to give it access to more info?</p>	<p>Honestly, after everything we've discussed about privacy and security, I would be very careful in providing any sensitive data to any open source AI models. However, models like ChatGPT and Sage AI are only trained on proprietary data that is not available for public download, so you can be a bit less wary here. That being said, I would still scrub any sensitive financial or customer data you upload in ChatGPT but anonymizing it for example. If, for example, here at Sage we use Microsoft Copilot within our own MS365 environment, the data we load in there is 100% secure as per Microsoft's privacy policy and cannot be shared outside of the Sage environment.</p>
<p>How does AI work with your online financial software? Or do you need to download your reports and upload to AI?</p>	<p>Sage AI is its own AI, so if you are a Sage Intacct user, then the AI is embedded as part of the core product or via an add on. You would not need to upload any reports. However, if you're talking about using AI</p>

	<p>outside of your financial software or your organization's environment (like if you use MS365 Copilot), then yes, you would need to upload the report you require for AI processing.</p>
<p>What are the risks of creating a ChatGPT account?</p>	<p>Largely everything we've already discussed:</p> <p><b>Privacy &amp; Data Risks</b> Data Collection: OpenAI collects data to improve its models. This may include your prompts, interactions, and usage patterns. Mitigation: Avoid sharing sensitive personal, financial, or confidential business information in chats.</p> <p><b>Account Security:</b> If your account credentials are weak or reused, it could be vulnerable to unauthorized access. Mitigation: Use a strong, unique password and enable two-factor authentication (2FA) if available.</p> <p><b>Misinformation Risks</b> Inaccurate Responses: ChatGPT can sometimes provide incorrect or misleading information, especially in complex or nuanced domains. Mitigation: Cross-check important information with trusted sources, especially for health, legal, or financial advice.</p> <p><b>Usage &amp; Dependency Risks</b> Overreliance: Users may become overly dependent on AI for decision-making or creative tasks, potentially reducing critical thinking or originality. Mitigation: Use ChatGPT as a tool to support—not replace—your own judgment and creativity.</p> <p><b>Ethical &amp; Professional Risks</b> Content Misuse: Generated content could be misused (e.g., plagiarism, biased outputs, or inappropriate automation). Mitigation: Always review and adapt AI-generated content to ensure it aligns with ethical standards and</p>

	<p>professional guidelines.</p> <p><b>Regulatory &amp; Compliance Risks</b></p> <p>Data Residency &amp; Compliance: Depending on your location (e.g., Canada), there may be concerns about where data is stored and how it's processed.</p> <p>Mitigation: Review OpenAI's privacy policy and terms of use to ensure compliance with local regulations like PIPEDA or GDPR.</p>
Can this be also used for Sage 300?	We do not have Sage AI available in Sage 300 yet.
When and where should AI-generated content and material be declared and credited in external facing communications or knowledge products?	I tend to always declare. But since this area is not yet regulated or policed, I would say it's at each individual's discretion.
I'd like to raise a question regarding privacy and security. Specifically, what concerns should we be aware of when sharing information with AI models? How secure are these models overall, and are some AI platforms more secure than others in terms of data protection and confidentiality?	We've addressed this question as part of the webinar and also some of the above questions. Indeed, some models are more secure than others. That's why I would always encourage everyone to self-inform to the best of your ability about how some of the AI models out there are developed and used.

<p>What privacy concerns to take into account and mitigation strategies to apply when sharing sensitive, internal or confidential information with AI?</p>	<p>Since we've already talked about privacy considerations during the webinar, here are some mitigation strategies.</p> <ol style="list-style-type: none"> <li>1. Limit Sensitive Input Avoid sharing personally identifiable information (PII), trade secrets, financial data, or internal strategy documents. Use abstracted or anonymized examples when discussing sensitive topics.</li> <li>2. Use Enterprise or Private Instances As mentioned earlier, if available, use enterprise-grade AI platforms with data isolation, custom privacy controls and no data retention policies Some providers offer on-premise or private cloud deployments for added security.</li> <li>3. Review Terms &amp; Policies Understand the provider's privacy policy, data usage terms, and security practices. Ensure alignment with your organization's compliance requirements (e.g., PIPEDA, GDPR).</li> <li>4. Educate Teams Train employees on safe AI usage practices, including what not to share; how to phrase queries safely; when to escalate to human review. It's a work in progress here at Sage for us as well.</li> <li>5. Implement Governance Controls Use access controls, audit logs, and usage monitoring to track AI interactions. Establish internal guidelines for AI use in marketing, product, legal, and customer support contexts. This is something every organization should be looking at</li> </ol>
<p>What about if you don't use a PO system? Then also a bill requires coding to dept and project, then possible intercompany process</p>	<p>That can still be done with Sage AI's AP automation OCR technology.</p>

<p>Auditors still ask for manual paperwork.</p>	<p>Yes, but that paperwork will be already uploaded to your finance system, easily searchable and retrievable in a system like Sage Intacct.</p>
<p>Hi, Sage Intacct can be integrated with salesforce? How is this process?</p>	<p>Yes, we do. We have an Open API that integrates with most softwares. We also have over 400 Marketplace Partners (software) that we have pre-built integrations with. Salesforce being one of them. Please contact us at Sage to find out more.</p>
<p>One of the challenges is providing a clean dataset. How can we use AI in conjunction with our dashboard. Especially if the dashboard doesn't come with API or AI?</p>	<p>You can use AI to detect any outliers or anomalies to clean/scrub your data. I would recommend removing any sensitive information before uploading though. ;)</p>
<p>Do you have to have SAGE INTACT product to use the AI?</p>	<p>Not necessarily. There are other providers out there that have actively integrated AI. However, Sage is the leader in Cloud AI finance.</p>
<p>How do AI support humanitarian and development programs in nonprofit?</p>	<p>AI can be a really helpful tool for nonprofits working in humanitarian and development spaces. It can make sense of huge amounts of data—like satellite images, social media posts, or field reports—to spot emerging issues, track crises, or figure out where help is needed most. It's also great for logistics, helping teams plan the most efficient routes to deliver aid or supplies, especially in hard-to-reach areas.</p> <p>On the program side, AI can help monitor progress by analyzing surveys and feedback quickly, so teams can adjust and improve in real time. It's also useful for breaking down language barriers with translation tools, and even for creating personalized learning experiences in places where access to education is limited. And when it comes to fundraising, AI can help tailor messages to donors and predict giving patterns to boost engagement.</p> <p>Of course, it's important to use AI responsibly—protecting people's data, avoiding bias, and keeping humans in the loop for sensitive decisions. When used thoughtfully, AI can really amplify the impact of nonprofit work and help organizations do more with less.</p>

<p>Where do you see as the greatest pain points in organizations that Sage will be addressing/implementing in the next year?</p>	<p>The obvious one is automating the financial period end. How much time does everyone spend closing the books every month, quarter or year? At its core, Sage is aiming to fix the headache that comes with closing the books every month. You know the drill—chasing down spreadsheets, reconciling subledgers, waiting on updates, and hoping nothing breaks at the last minute. It’s stressful, slow, and often messy. Sage Copilot steps in to take the pressure off by automating the grunt work, flagging issues early, and keeping everything moving smoothly. So instead of scrambling to meet deadlines, finance teams can focus on what really matters—understanding the numbers and helping the business make smarter decisions. This is currently available as part of Sage AI in our US product. Canada TBD</p>
<p>What software / AI should I be exploring to implement an AI policy bot? How about AI to automate forms?</p>	<p>You can use AI to find out more about this ;). At Sage we also have an add-on product called Forms and Flows that integrates with our core Sage Intacct accounting system. It's not AI in and of itself, but you can certainly leverage AI for analysis. Find out more by speaking with a Sage rep.</p>
<p>How or where is the best way to learn about AI?</p>	<p>There are tons of resources everywhere on the web. As we mentioned, the AI hype has inundated our world with content on AI. Youtube, news forums, using Google, ChatGPT, or other AI models.</p>
<p>When looking at the ethical implications of using AI, environmental considerations are generally not discussed by those encouraging the use of these tools. How does Sage offset its AI environmental impact?</p>	<p>Please refer to previous answer on Sage's commitment to net zero by 2040. :)</p>
<p>I don't see how the question around privacy was addressed by the response? I think one of the key concerns is around feeding data that wouldn't be appropriate into the AI tool to get the response out of the tool. There doesn't seem to be confirmation that this isn't an inherent risk everyone is committing to by using the tool and I have heard lots of comments on that beyond even the non-profit</p>	<p>That is indeed the crux of the matter here - is that there is an inherent risk that everyone should inform themselves on. Please see answers to previous questions about privacy.</p>

<p>industry (ex. wealth management, FI and lending etc).</p>	
<p>Unless that can be confirmed I think it would be inappropriate to recommend us to use the tool.</p>	<p>We are not recommending, we are simply trying to ensure everyone has a baseline understanding of what it means to use AI and how AI shows up around us, in finance and in nonprofits.</p>
<p>Can you dive a little deep on how to automate AP?</p>	<p>Oooh, this is a complex and loaded one! The gist is basically, uploading invoices (maybe even e-invoices one day), auto-matching, searchability, automating pay. The list goes on. Please refer to Sage.com or reach out to a rep to see some demos. :)</p>
<p>How can AI help the non-profit organization navigate the global instability brought by politics, nature, policies, and the like, and overcome the proliferation of fake information and fraud?</p>	<p>AI can offer some useful support to non-profits dealing with global instability—whether it's political shifts, natural disasters, or changing policies. It can help organizations stay ahead of potential disruptions by analyzing patterns in data and offering early warnings. Tools that monitor news and social media in real time can also give teams a clearer sense of what's unfolding globally, helping them make more informed decisions and adjust their strategies as needed.</p> <p>When it comes to misinformation and fraud, AI can help spot red flags early. It's not perfect, but machine learning models can detect fake content and unusual financial activity, which is especially helpful for maintaining donor trust and operational transparency. You just need to make sure you know how to prompt it properly. AI can also assist with consistent communication—like translating messages across languages or verifying facts before they're shared. It's more about adding a layer of support than replacing human judgment, helping non-profits navigate complexity with a bit more confidence and clarity.</p>
<p>How does Sage Intacct manage projects and authorization processes for payments or disbursements to our agencies overseas?</p>	<p>Yes, we do. Please refer to sage.com or get in contact with Sage rep for more info or request a demo :)</p>

When using AI to analyze documents, what is the best way to redact confidential information before the document is input into the AI?

Redacting confidential information before feeding documents into an AI system is a smart and necessary step, especially when dealing with sensitive data. The best approach is to use automated redaction tools or scripts that can scan for personally identifiable information (PII), financial details, or other sensitive content and replace it with placeholders (like [REDACTED]). This can include names, addresses, phone numbers, account numbers, and even internal project codes. If you're working with structured documents like PDFs or Word files, there are tools that can do this reliably without altering the document's format too much.

If you're handling unstructured text (like emails or reports), natural language processing (NLP) techniques can help identify and mask sensitive phrases. It's also a good idea to keep a record of what was redacted and why, especially if the document will be used for analysis or shared later. And of course, always double-check the output—automated tools are helpful, but a human review adds an extra layer of assurance. Would you like help setting up a redaction workflow or finding tools that fit your needs?