

## REPORTING & DASHBOARDS

**The pressures on the expand the breadth, accuracy, and granularity of your financial and management reporting.**

Executives, investors, shareholders, auditors, and others want to know more than what's happened - they want to know why. And you want to surface this information quickly so your firm can correct problems or respond to opportunities before the moment is lost. Sage Intacct Reporting and Dashboards ensures you get the deep operational and business-performance insights that tell you why - and the real-time view that enables you to act today.

### KEY BENEFITS

#### See every dimension of your business

Easily create reports, graphs, dashboards, and visualisations that analyse performance by business driver. When you use dimensions to tag transactions and store financial or operational data along with its business context, you will fundamentally improve your reporting - and get fast answers to your business questions.

Sage Intacct Reporting and Dashboards includes ten built-in dimensions for capturing and reporting on business context. You can also create additional custom dimensions to track other business drivers.

#### Get the reports you need, the way you want them

Create reports that go deeper by drawing on your combined financial and operational data. What's more, you can drill down to source transactions for immediate, granular details or easily view consolidated reports without waiting for period-end. With Sage Intacct, you can do it all without exporting data to a spreadsheet, writing custom scripts, or waiting on someone to customise reports. Take advantage of more than 150 pre-built

accounting and financial reports - or build and customise your own reports right from within Sage Intacct. With flexible scheduling and delivery options, like email and cloud, you can get reports when you need them, where you need them.

#### Give stakeholders the insights they need

Display real-time reports, metrics, and insights tuned to the needs and perspectives of all stakeholders - in finance, sales, operations, and the boardroom - wherever and whenever they need them.

Dashboards provide at-a-glance views of what matters most: cash balances, project profitability, deferred revenues, revenue per square foot - practically any ratio or metric you need.

Data visualisation features let you easily flag important trends, display critical comparisons, highlight missed or hit targets, and more. Skip the hassle of exporting data to a spreadsheet or presentation program and emailing it; instead, just build a dashboard once, then let Sage Intacct update it for you in real time.

## KEY FEATURES

### Flexible reporting

**Guided user interface:** Quickly lay out sophisticated reports from scratch, from templates, or from existing reports.

**Built-in financial and operational reports:** Gain greater insight into financial performance and make better decisions, with 150 built-in reports.

**Dimension-driven reporting:** Create reports using a visual user interface that enables you to quickly filter, group, and summarise your data by business driver and quickly answer any business question.

**Ten standard dimensions:** Quickly slice, dice, and summarise your data by business drivers including project, customer, location, department, vendor, item, employee, warehouse, contract, and class.

**User-defined dimensions:** Add user-defined dimensions for greater reporting flexibility and granularity.

**Statistical accounts:** Use statistical accounts that store non-financial data and incorporate operational metrics and ratios in your financial reports.

**Budget vs. actual reporting:** Incorporate budgets into financial reports to track relative performance.

**Operational reporting:** Create new reports on dozens of types of records such as open invoices, missing time sheets, and customer aging.

**Flexible account groups:** Combine any accounts to build account groups and even create computational groups for advanced KPIs such as DSO and Inventory Days.

**Account groups in reports:** Drag and drop account groups to build virtually any reporting layout for various industry requirements.

**Drill-down capabilities:** Drill from summary numbers to detailed figures, journal entries, and underlying transactions.

### Comprehensive dashboards

**Tailored content:** Build dashboards that include reports, graphs, charts, visualisations, custom lists, calendars, links, and more.

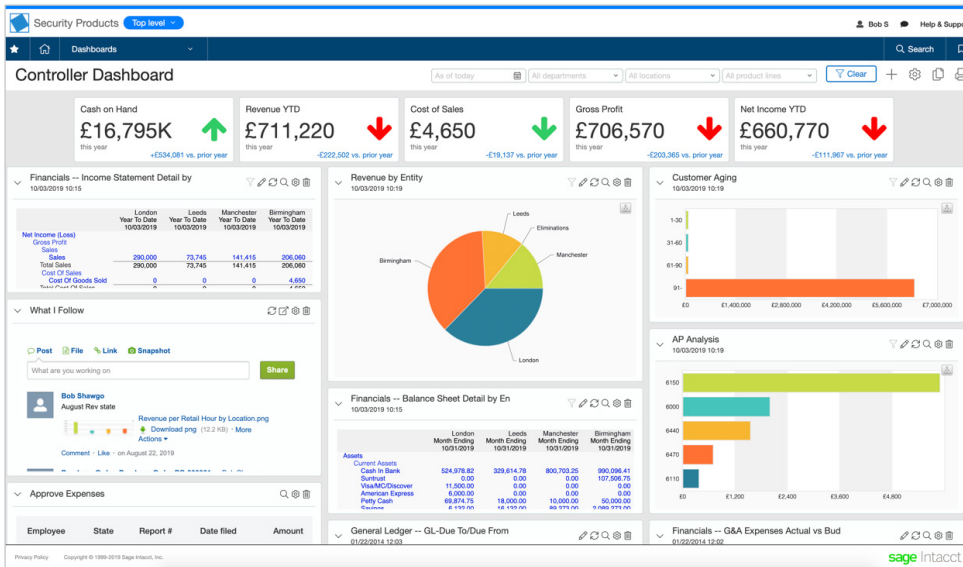
**Drag and drop:** Lay out dashboard elements quickly using drag-and-drop capabilities.

**Dashboard filters:** Use dimension filters to instantly view the metrics on any given dashboard - while focusing on a specific product, location, project, or other business driver.

**Mobile dashboards:** View mobile versions of dashboards on smart-phones and tablets.

**Date ranges:** Quickly get current or historical views into performance.





Include performance cards, financial reports, graphs, and more in your dashboards

## KEY FEATURES

### Visualisations

**Report visualisations:** Quickly highlight trends and exceptions in detailed reports using conditional highlighting, trend indicators, colour scaling, and spark lines.

**Charts and graphs:** Create charts and graphs - then publish them on dashboards or view them alone.

**Performance cards:** Highlight trends in key metrics using dashboard visualisations that show actual values, period changes, and variance from budget.

### Usability

**Secure access:** Restrict dashboard access to approved users.

**Automatic scheduling:** Push out scheduled reports on time, every time.

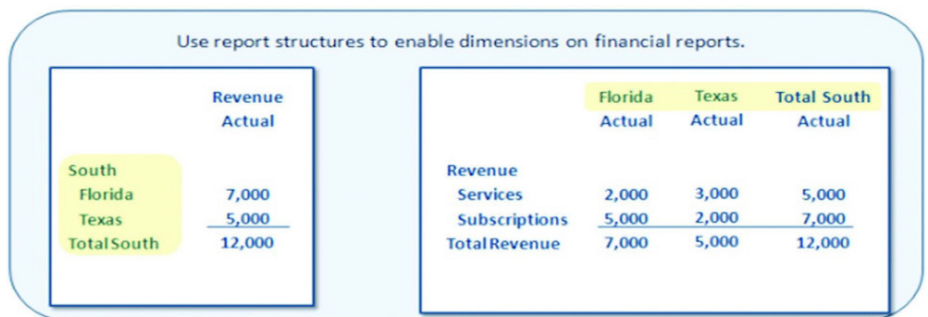
**Customised formatting:** Easily set fonts, colours, and spacing for reports.

**Report exports:** Output your reports in HTML, PDF, CSV, or Excel format.

**Chart and graph exports:** Output your chart or graph in HTML or PDF format.

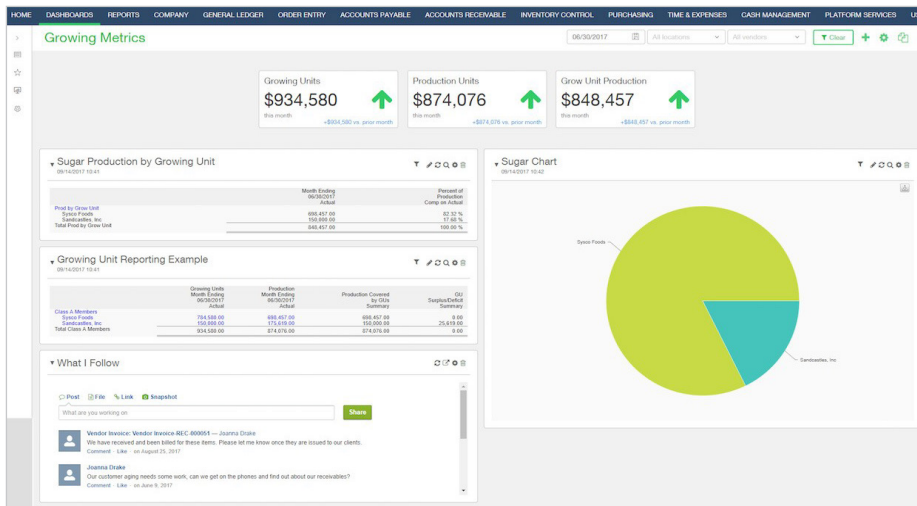
**Flexible delivery:** Send scheduled or manual reports to email, to Sage Intacct storage, or to the cloud.

Create the precise report layouts you need using dimensions across columns and rows.



Dimension structure on report rows.

Dimension structure on report columns.



Use statistical accounts to gain key insights into your operational data and quickly from your dashboard.

# SAGE BUSINESS PARTNER

At Percipient, we can help you get the most out of Sage Intacct. We are experienced in providing finance solutions across a wide range of industries, ensuring they work hard for our customers and deliver optimal performance to match their needs.

Call us today on **01606 871332** to talk to a Sage Intacct expert and book a product tour.