percipient

SAGE INTACCT
FINANCIAL MANAGEMENT

Best-in-class accounting for growing businesses

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WHAT IS
SAGE INTACCT?

Sage intacct is an award-winning, cloud-based financial management platform that delivers automation and control around billing, accounting and reporting.

Where most traditional accounting solutions only handle financial intelligence, Sage Intacct tracks and reports on both financial and operational data, providing an instant, multi-dimensional view of your business to drive growth.

WHY CHOOSE SAGE INTACCT

- Rapid implementation
- 1 million application requests per day
- 1 billion API calls per month
- +70% reducing time to close
- 100 entities consolidated in seconds
- 50 billion+ financial records
- 250% return-on-investment
- <6 months payback
- +65% productivity investment

*Using Sage Intacct we can manipulate data by an inordinate number of categories, by hotel, department, floor, room or time period. At any given point we have access to **one version of the truth** and can easily spot anomalies, patterns or opportunities.*

*The value of this **real-time insight** is that problems can be headed off before they become business risks, and opportunities can be leveraged to **drive increased service and profitability** while the window is open.*

**Dakota Hotels,
Percipient & Sage Intacct Customer**

BUILT BY FINANCE
FOR FINANCE

The true cloud accounting solution has an innovative modular design that gives you the flexibility to add more functionality as you need it to automate and streamline key business processes to give you greater speed, productivity and insight.

And it provides a clear, 360° view of business performance, with accurate, live sales and revenue data, across multiple services and facilities. Supporting complex reporting structures and simplifying processes across multiple sites, companies, and business groups, our systems will also ensure compliance to both industry and international legislation.

TRUE CLOUD ACCOUNTING

Born in the cloud, Sage Intacct delivers 4 major releases per year, with an average of 50 new features per release, so you can rest assured that you'll always have the latest finance technology at your fingertips.

THE BENEFITS OF SAGE INTACCT

- Consolidate multiple entities in just minutes
- Easily create and track transactions for multiple locations
- Manage permissions, giving the right access to the right people
- See your data in real-time
- Customise and schedule your reports
- Increase efficiency and shorten your close time

INDUSTRY-READY
FINANCE SOFTWARE

No matter what industry you're in or business model you follow, Sage Intacct is a robust and configurable finance solution that doesn't tie your business to a one-suite-fits-all tool.

Designed to enhance performance and help improve productivity for CFOs, by automating common finance tasks, Sage Intacct is a scalable solution that can be customised to fit your unique business requirements.

H0TELS & HOSPITALITY

Let Sage Intacct help you focus on your guests. Integrate your solutions and automate financial processes to gain deeper insights into your hospitality business, and make decisions that will boost profitability.

MEDIA & PRODUCTION

Sage Intacct brings financial proficiency around reporting, consolidations, and more, to enable media and production finance teams to regain control, automate processes, and focus on long-term business-wide strategy.

NON-PROFIT & CHARITIES

Sage Intacct will help you engage your workforce and easily manage donations, funding, projects, and complex reporting with greater efficiency and visibility.

HEALTHCARE

In distribution, timeliness is the key to ensuring customer satisfaction and gaining a competitive advantage. With speed and efficiency as standard, our Sage Intacct solutions can help to deliver success in many ways.

SPORTS, LEISURE & TOURISM

Managing seasonal demands, shared assets, special events, unpaid fees, and promotions can put pressure on your finance department. Sage Intacct is a sophisticated accounting solution with strong reporting capabilities and real-time visibility to help you stay in control.

PROFESSIONAL SERVICES

Whether it's financial services, IT, marketing, education, legal services, engineering, architecture, consultants or other special knowledge-based services, Sage Intacct finance solutions deliver greater visibility for your entire business.

SAAS & TECHNOLOGY

Sage Intacct is the powerful SaaS accounting software built for fast-growing SaaS companies. Supporting the software-as-a-service business model, Sage Intacct helps to automate complex subscription billing with real-time visibility of critical SaaS metrics.

CORE FINANCIALS

AUTOMATE COMPLEX PROCESSES & MULTI-DIMENSIONAL DATA ANALYTICS

Core financials is the main accounting module in Sage Intacct's finance software. Designed to help save you time and money, this innovative modular platform makes it easy to share data and connect seamlessly with other best-of-breed solutions, like Salesforce, without the sky-high IT costs.

SAGE INTACCT CORE FINANCIAL MODULES INCLUDE

Intelligent GL
Multiple entities, currencies, geographies - consolidate it all in minutes.

Cash Management
Track multiple accounts with real-time visibility and easy reconciliation's.

Accounts Payable
Streamline workflows across the AP cycle with exceptional speed and efficiency.

Order Management
Automate complex, high-volume quote-to-cash cycles and improve profitability.

Accounts Receivable
Automate the invoicing and collections process to accelerate your cash cycle.

Purchasing
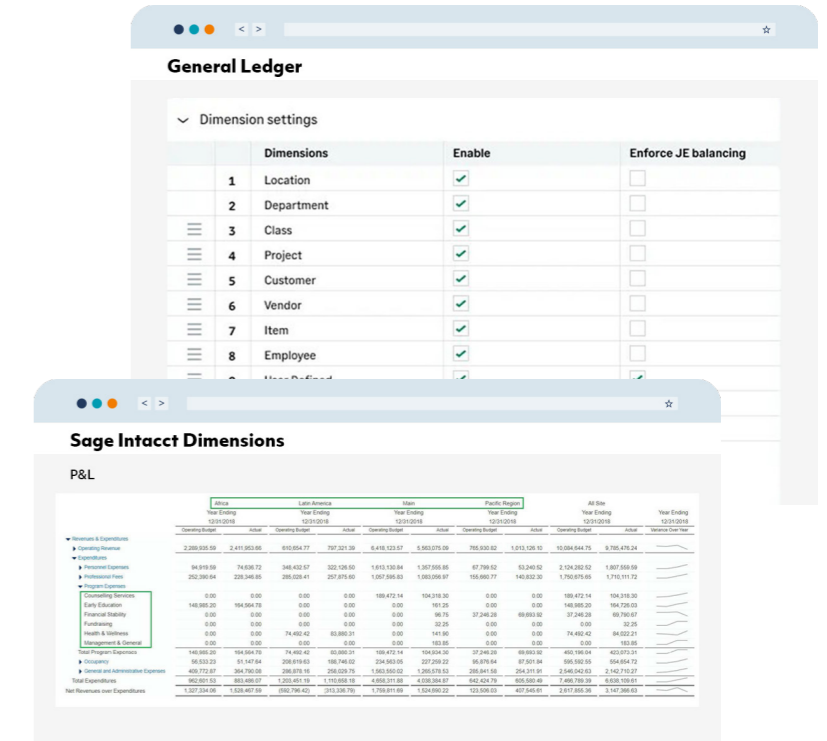Achieve speed, accuracy, and visibility with structured transactions and approvals.

SAGE INTACCT DIMENSIONS

Innovate your general ledger, helping you to find money easily, save time, and focus on building profits.

Sage Intacct comes with built-in dimensions including:

- Locations
- Department
- Vendor
- Customer
- Employee
- Project
- Item
- Class

Unlike accounting systems that rely on a long list of segmented linear accounts, Sage Intacct dimensions are maintained independently so you can expand your insight while keeping a lean set of account codes. Even as your business changes, you can evolve tracking without cluttering the chart of accounts.
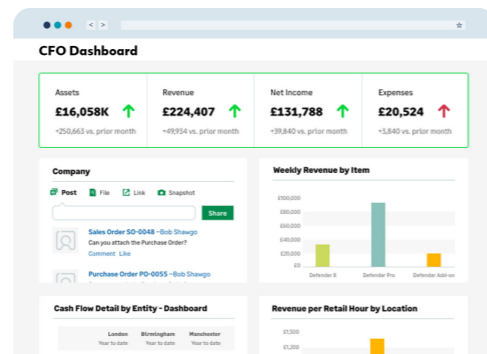
DASHBOARDS &
REPORTING

DIVE DEEPER INTO YOUR OPERATIONAL & BUSINESS PERFORMANCE INSIGHTS

With Sage Intacct dashboards you have the agility and flexibility to quickly dissect the details that matter to all key stakeholders. And when you have new questions, dive deeper into your data with custom reports, dashboards or visualisations, to reach the answers you need for faster, confident decision-making.

See every dimension of your business
Easily create reports, graphs, dashboards, and visualisations that analyse data 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.

When you have a flexible foundation and quick access to insights, you expedite your decision-making time and drive growth.

Improve Business Visibility
With all your financial and operational data in one place, Sage Intacct's best-in-class multi-dimensional visibility enables you to slash time spent checking the accuracy of your financial data so you can start making strategic decisions that will impact your business.

Rich Financial Reports
With Sage Intacct, financial reporting and analysis options are almost limitless. Compare operational statistics with financial metrics. Check summary roll-up figures for multiple entities - even if it's only mid-month. Drill down to source transactions for granular transparency instantly. Flag trends and spot exceptions with powerful report visualisations.

Dive Deeper
Sage Intacct's interactive custom report writer lets you easily create real-time reports that tackle your toughest reporting needs. Get the insights you need in seconds to address complex issues and respond to market changes.

SAGE INTACCT
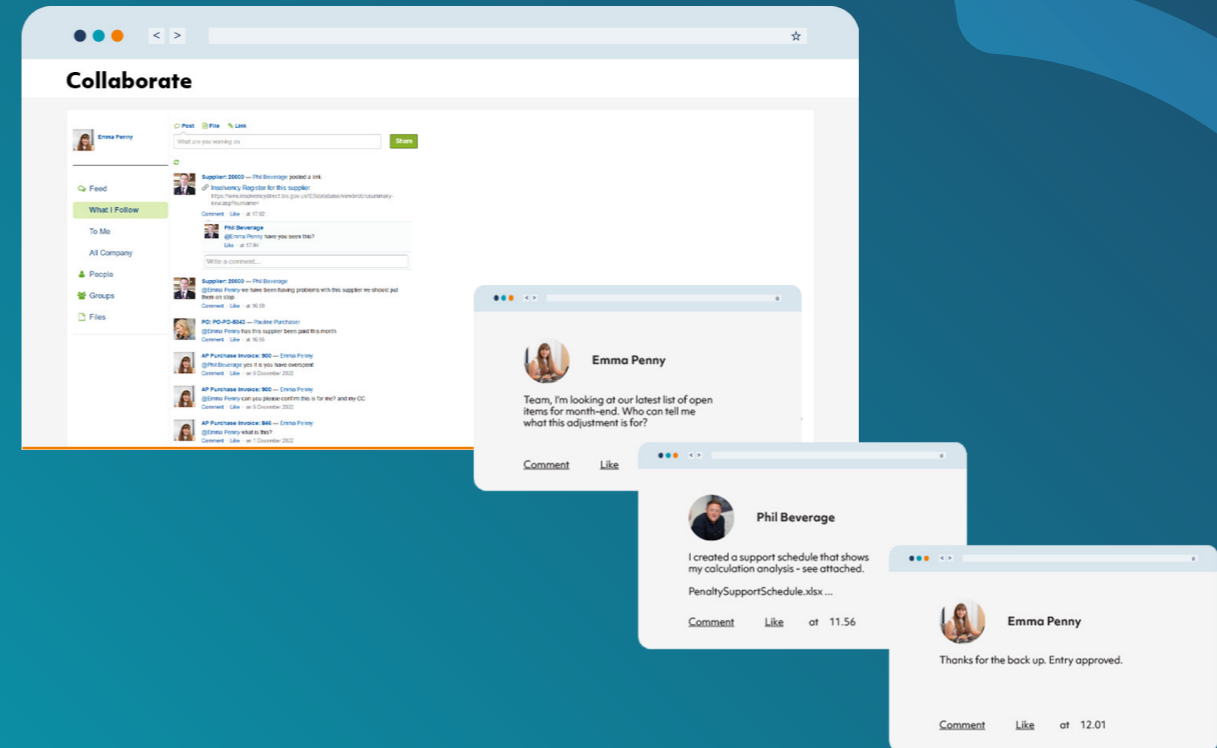## COLLABORATE

SEE A CLEARER PICTURE

Sage Intacct Collaborate helps speed up financial management processes while keeping you in control.

Forget endless email threads. When issues arise, you can communicate within Sage Intacct to resolve specific journal entries, accounts, projects, invoices, purchase requisitions and more.

For Salesforce users, these same conversations appear in Salesforce Sales Cloud, so sales teams can participate using the system they're most familiar with.

THE BENEFITS OF SAGE INTACCT COLLABORATE

- Communicate faster and smarter to strengthen teamwork, expedite processes and improve decision making

- Stay informed with one-click access to all related messages and the ability to leave notes and have conversations inside Sage Intacct

- Connect your back office and Salesforce front office (Salesforce customers only)

FINANCE SOFTWARE
THAT GROWS WITH YOU

The scalable nature of Sage Intacct's intelligent cloud finance software helps you maintain your freedom to choose which applications are right for your business now, with the power to extend the functionality as required in the future.

EXTENDED
CAPABILITIES

FLEXIBLE FINANCE MODULES
FOR TOTAL FINANCIAL MANAGEMENT

If your company has more complex or industry-specific needs, Sage Intacct's advanced accounting modules will help to keep your financials in one place. Automating and streamlining your processes whilst providing powerful insights and control over your entire business. These extended capabilities are particularly beneficial for multi-entity, multi-location, and multi-currency organisations.

Advanced Financials
Extend your business's financial capabilities with Sage Intacct's advanced accounting modules.

Billing & Revenue
The intelligent, automated, and faster way to manage billing and revenue complexities.

Project Accounting
Sage Intacct provides everything you need from project tracking to employee tie tracking, with full-featured costing and resource management, to billing and revenue recognition solutions.

Sage Intacct Planning
Sage Intacct Planning (SIP) is a powerful cloud-based financial planning and budgeting solution for finance and business teams who want to move fast and have a greater positive impact.

BILLING SOLUTIONS

AUTOMATE COMPLEX REVENUE & BILLING PROCESSES

The intelligent, automated, and faster way to manage revenue complexities. When it comes to subscriptions, specialised contracts, recurring billing services and the added complexities of compliance, Sage Intacct is the cloud solution finance trusts.

Contract & Subscription Billing
Sage Intacct subscription billing software adapts to your needs for smarter and easier payment management.

Whether you need greater automation or a seamless data flow between business systems, Sage Intacct can make your subscription, contract and recurring billing services a whole lot easier.

Project Costing & Billing
Sage Intacct project-billing software simplifies billing processes for project-based professional service organisations with a diverse mix of customers and projects.

If you have a range of customers who require differing billing terms and invoicing formats and data, Sage Intacct streamlines critical processes so you can bid smarter.

Revenue Recognition
Revenue recognition software provides valuable insights into how a business spends money and makes revenue.

Sage Intacct removes the complexity, time and frustration associated with revenue recognition. It will help you to simplify revenue management by flexibly configuring expense amortisation to match or differ from your revenue terms.

PLATFORM SERVICES

BUILT IN TOOLS FOR GROWTH

Today's businesses require infrastructure solutions to give them an extra edge over the competition, be that in efficiency, cost savings, or by allowing them to make better decisions. Sage Intacct platform services make those requirements a reality.

Platform Services
Sage Intacct integrates with other best-in-class solutions and provides the flexibility to build the best option for your organisation.

From seeing what you need with customised lists to importing data from integrated sources, Sage Intacct provides the tools you need to gather, display and analyse the unique data that drives your business.

Web Services
With over 300 supported API methods, most customers integrate with at least two external applications, giving them the flexibility to choose the best software options for their business needs.

Salesforce Integration
Sage Intacct offers pre-built integration with Salesforce to give you a best-in-class financial management platform with the best-in-class Salesforce cloud CRM platform.

Widely referred to as 'the power couple', together they deliver a complete view of every customer, streamlined accounting workflows, and a smarter quote-to-cash process.

UPGRADE TO
SAGE INTACCT

While your existing finance software has worked well for your organisation up to now, you may be starting to experience signs that you've outgrown the software and it could be time to move to a fully cloud-based financial management solution.

Finance work's best when there is a seamless collaboration between departments and functions. Some accounting systems often aren't well-integrated with other enterprise-level tools and systems. These limitations can leave you trapped in manual processes, spreadsheets, cumbersome workarounds and slower workflows.

Let's use **Sage 50** as an example of a great accounting platform, which may no longer be viable for your current business needs.

5 SIGNS YOU'VE OUTGROWN YOUR FINANCE SOFTWARE

1 **Have manual processes become normal operating procedure?**
Without automation for processes like PO approvals, invoice generation, payment processing and currency conversions, it's easy to lose days of productivity to manual processes. And when your systems aren't able to communicate, integrations are replaced by manual workarounds.

2 **Does your close time take +10 days / are you managing more than 2 entities?**
Developed as an on-premise solution, Sage 50 wasn't built to handle the needs of organisations that often have multiple business entities. As a result, setting up a new entity may feel like a whole new implementation.

Customisations have to be reconfigured , the chart of accounts has to be rebuilt and all the entities are siloed off from each other. Because of that, inter-entity transactions have to be manually keyed in to ensure the books are balanced and consolidations can take days to complete. These delays ultimately impact the speed you can close the books, making it feel like a never-ending cycle.
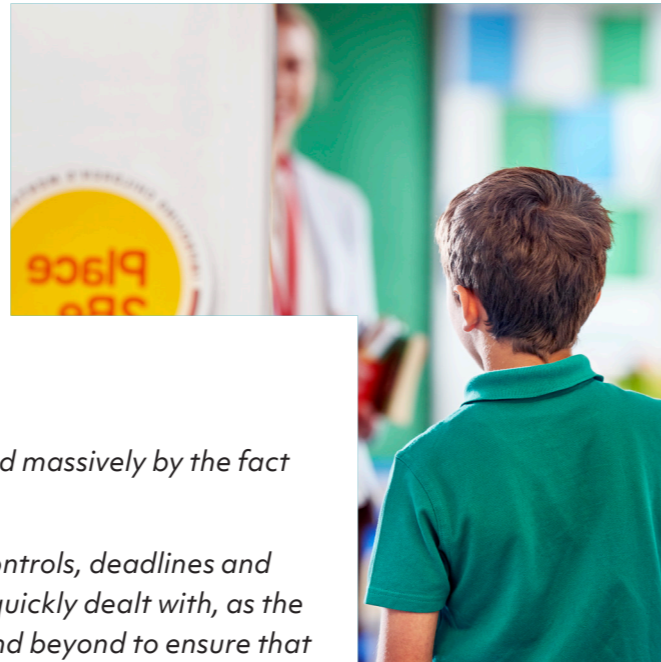
3 **Are you configuring your reports in Excel?**
As your business grows and develops a need for more complex reporting, it may simply outpace what your existing accounting solution can provide. For example, you may not be able to 'slice and dice' your data in the ways that you need because the software lacks the dimensions and calculated fields. Without the ability to create calculated fields, you may be unable to combine financial and non-financial data to easily see information.

4 **Do you need to access your accounting system remotely?**
With on-premise software you have two choices, work from the office or set up a remote access server. True cloud-based software gives you and your team the ability to work anywhere, anytime.

5 **Is your software struggling to keep up?**
While it likely helped to build the business, you may find Sage 50 is unable to keep pace with your current growth. As you add business units and expand into new markets and geographies, you may feel your existing software is holding you back.

Our deployment was incredibly smooth, helped massively by the fact that the Percipient team was outstanding.

Communications were excellent, with tight controls, deadlines and collaboration at every point. Any issues were quickly dealt with, as the team was responsive and keen to go above and beyond to ensure that the project was a success and that we were all in the best position to get the most from the system.

**Place2Be,
Percipient & Sage Intacct Customer**

BETTER BUSINESS
VISIBILITY

Save time and manage your resources intelligently with a range of connected apps that work perfectly with your Sage Intacct software - analyse, strategise and make the most of every opportunity, across more areas of your business. By integrating Sage Intacct with other cloud-based software, you can extend the already world-class accounting functionality even further, to transform your organisation. From payments and payroll, to reporting and forecasting, choose from 100+ business apps and cloud solutions that automate processes, drive business efficiencies, and make change easier.

SOMETHING FOR EVERYONE
Make it easier for your business to manage subscriptions, point of sale, payroll, projects, and more. If someone in your business needs it, you will probably find it in the Sage Intacct Marketplace. Robust Sage Intacct integration helps your data automatically flow into your financials, giving you a single place to get your full financial picture.

FUTURE-PROOF YOUR BUSINESS
If your business requirements change in the future, no problem. Unlike suite solutions, Sage Intacct lets you maintain your freedom to choose what is right for your business, when it is right for your business. Just visit the Sage Intacct Marketplace whenever you need to extend your Sage Intacct ecosystem.

YOUR SUCCESS
IS OUR SUCCESS

We specialise in using Sage Intacct's finance technology to help businesses gain a clear picture of their performance so they can work better, faster and smarter. With 20 years of experience, across multiple industries, plus a few notable awards along the way, we're proud to be a trusted Sage UK business partner.

Following our tried and tested methodology, we start by getting an understanding of your pain points. What works well for you and where our technology can help you to improve. Then, working collaboratively we design a business software solution to evolve around your business needs.

WHY CHOOSE PERCIPIENT

- Award-winning Sage Intacct partner
- Rapid implementation in as little as 9 weeks
- One of the first Sage Intacct partners in the UK
- We have one of the largest Sage Intacct teams in the UK
- We have the most live Sage Intacct projects in the UK
- Dedicated customer support packages
- Proven experience across a variety of sectors

1 INITIAL INTRODUCTION

We'll use this to understand your pain points, where there are problems and why you need to change.

2 ON-SITE DISCOVERY

We'll meet your key people, look at what works well and what doesn't in each area of your business and see how our technology can best help.

3 DEMO & DETAILED SCOPE

A half to full day on-site demonstration, also covering the work required, what's needed from both parties and a breakdown of cost.

6 ON-SITE KICK OFF

Our and your teams meet for the first time, to set out how the project will be managed and what's expected from both parties.

5 PROJECT TEAM ASSEMBLED

Percipient's project team is selected for the most relevant skills and experience before the sales team handover.

4 CONTRACTS & DATES AGREED

Once details are agreed, contracts are signed and the kick off date set.

7 DESIGN & BUILD

Although it varies with each project, our collaborative process maximises the technology and minimises the stress for your business.

8 TESTING & GO LIVE

Before launch, the system is tested with the help of our support team, the final data is loaded and we're ready to go-live.

9 ONGOING SUPPORT

Our ongoing support makes sure your new technology evolves as your needs change, adding new features as they develop.

*Percipient has been a **true partner**, helping us to work through the various challenges we've come up against, and bringing new ideas, creative thinking and solutions along the way.*

*As our business changes and we add more services, we have **100% confidence** that the team will support us in ensuring smooth transitions, the right capabilities to support us, and the **most value**.*

Denbighshire Leisure,
Percipient & Sage Intacct Customer

LET'S TALK

If you would like to know more about Percipient and how we can help you to invest in the right finance technology for your business, email us at **info@percipient.co.uk** or call us on **01606 871332**.