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SAGE INTACCT
DASHBOARDS & REPORTING

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.

Organisations need to have the details that matter to all key stakeholders: investors, board members, executives, finance and other departments. When your financial information is spread out across disparate spreadsheets or tied up in manual process, it's a struggle to get insights to the right people at the right time.

Sage Intacct provides reports, dashboards and visualisations that are ready in real-time, so you can save up to 40 hours per month on reporting and cut time spent checking data accuracy by 75%.

WHY CHOOSE SAGE INTACCT?

- Save time, move fast
- Always trust the numbers
- Collaborate in real-time
- See the full financial picture
- Automate & streamline processes
- Complete integration
- Future-proof performance

BEST-IN-CLASS
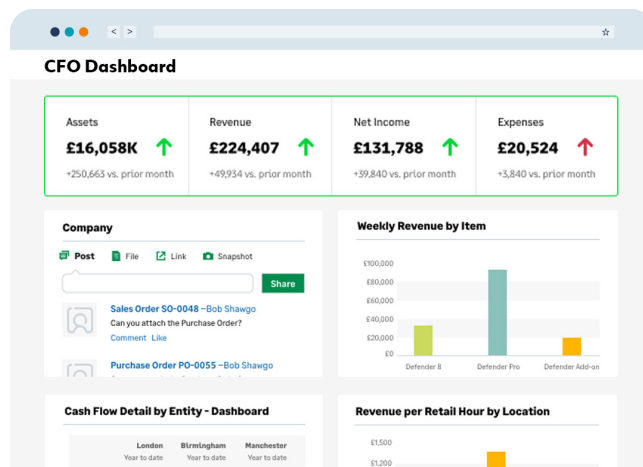## FINANCE SOFTWARE

ESSENTIAL VISIBILITY

Drive data-driven decision making to keep your organisation on the right path

Data-driven decisions that transform organisations require broad and deep visibility into financial and operational data. Where other systems rely on external tools for visibility, Sage Intacct provides built-in tools to display real-time, drillable source data.

By approaching data from multiple directions, through multiple tools, finance leaders can pull and analyse information from the Sage Intacct Intelligent GL™, sub-ledgers, and supporting data objects. Information can be shared through a variety of means like customizable dashboards or distributed through export or email, including PDF and Excel files.

Multiple points of accessibility:

1. Customisable dashboards allow role-based and process based metrics, reports, and charts to be created for quick insight and data-driven decisions.

2. For in-depth reporting, the Sage Intacct Report Centre contains a library of reports and financial statements, as well as charts and tools for modifying, duplicating, or creating completely new reports and charts.

3. Activity-specific sub-ledger reports, like customer aging and check registers, can also be found in the individual task area.

4. External processes, like business intelligence or data warehousing, can be driven by using Web Services APIs or setting up data delivery services.

FINANCIAL REPORTS & CHARTS

Real-time data from the Sage Intacct intelligent general ledger

Financial reports and charts rely on real-time data from the Sage Intacct Intelligent GL™ to produce income statements, balance sheets, cash flow statements, and more. They provide filtering and hierarchy based on dimensional structures. Dimensions are things like location, department, customer, or project, that can be assigned to or 'tagged' on transaction line items.

Organisations can even create custom dimensions, like grant, fund, or airplane - anything that they might want to report by. Individual dimensions and dimension groups can be defined by users to mix and match information, such as looking at sales orders by location and by customer. The financial report writer and chart builder give control to the finance team to get at key data to inform decision making.

BEST-IN-CLASS
FINANCE SOFTWARE

ACTIVITY SPECIFIC REPORTING

Task centred reporting on accounting processes

Out-of-the-box, task-centred reports have set, selectable filters based on standard financial processes. These 'standard' reports form the backbone of daily activity for the accounting team. Process reports provide the team with information for processing transactions, interacting with customers and vendors, and speeding up the close.

AD-HOC REPORTS

List reporting across related data tables

With the custom report writer, users create ad-hoc reports to lookup, sort, and filter information across related records, such as finding phone numbers for all the customers that purchased a particular item. These reports often work in conjunction with activity reports to provide data specific to an organisation's unique business processes. A report wizard makes building these reports fast and easy - no coding required.

ROBUST PERMISSIONS

Share just what is needed

With Sage Intacct, visibility and security go hand in hand. Reporting comes with granular permissions, allowing the administrator to grant access only when and where it's needed. You can choose to allow access to everyone, limit it to certain user groups, or give individual permission to key people.

INTERACTIVE CUSTOM REPORTING

In-depth, interactive analysis

The Sage Intacct interactive customer report writer provides in-depth look-up and analysis of transactional data for making comparisons and finding trends. The interactive report writer is available for view only or build and view. With view only, users can drill, filter, sort, and expand reports to answer specific business questions. A library of more than 60 interactive reports allow for a quick start and rapid analysis of key transactional information.

For data-savvy users, the build and view option provides powerful and advanced report creation with live production data while building, hierarchical field selection, drag and drop, automatic formatting, formulas, and subtotals.
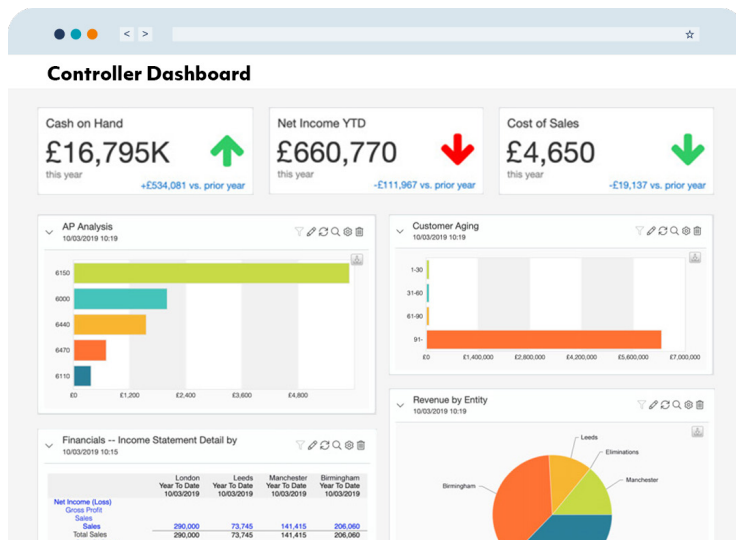
LEARN TO REPORT IN NO TIME

With Sage Intacct, the commitment to customer success extends to providing learning resources in reporting. With hands-on courses held live in various cities, virtual classroom instructor led courses, and on-demand learning available through the Sage Intacct education centre, the entire finance team can quickly become Sage Intacct reporting pros.

Reporting courses include:

- Financial reporting and dashboards
- Non-profit financial reporting and dashboards
- Advanced reporting and insights
- Interactive custom report writer

MUST HAVE
FINANCE FEATURES

TOOLS THAT MAKE A DIFFERENCE

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.

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SAGE INTACCT
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 include 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 for 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.

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TOOLS THAT MAKE A DIFFERENCE

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.

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.

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.

SAGE INTACCT
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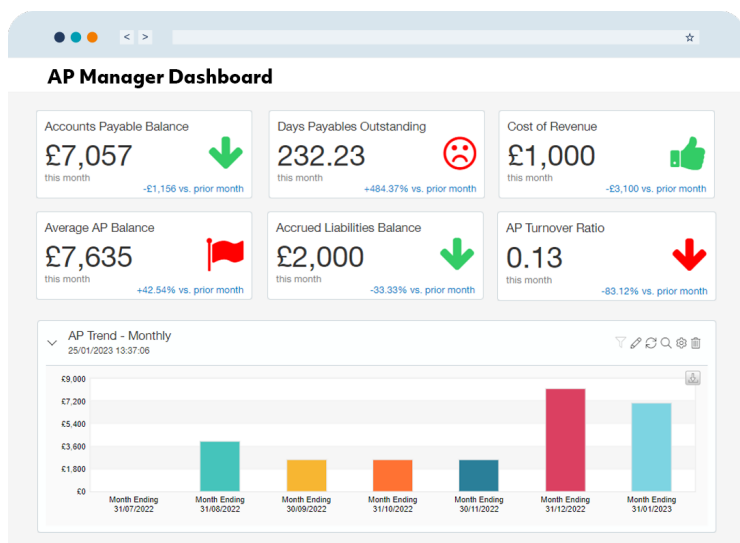### GIVE STAKEHOLDERS THE INSIGHTS THEY NEED

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.

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

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.

BEST-OF-BREED
SOFTWARE

FINANCE MADE SIMPLE

Sage Intacct offers a wide range of accounting capabilities, in a modular format that gives each department within your organisation the flexibility to choose the best software applications for its needs.

If you would like to know more about Percipient and how we can help you invest in the right finance technology for your business, call the team on **01606 871332**.

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