Product Brochure

Sage Intacct reporting and dashboards

Transform organization decision making with broad and deep visibility into financial and operational data.

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Essential visibility

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

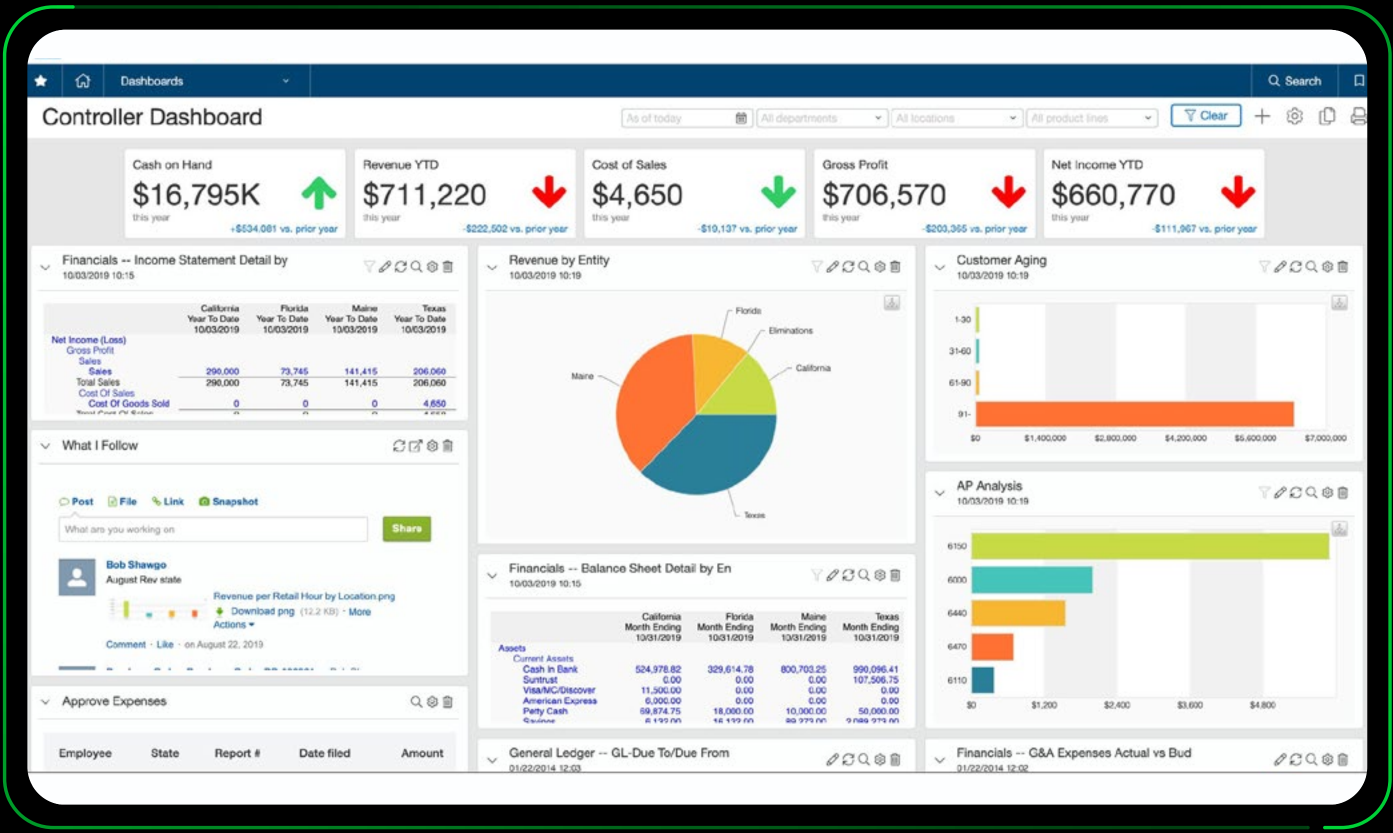
Data-driven decisions that transform organizations require broad and deep visibility into financial and operational data. Where other systems rely on external tools for visibility, Sage Intacct provides built-in tools to display real-time, drillable source data. By approaching data from multiple directions, through multiple tools, finance leaders can pull and analyze information from the Sage Intacct Intelligent GL™, subledgers, 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. Customizable 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 Center 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 subledger 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.

"We're now able to track contracts better because all our data is coming from one place, whereas before we used multiple sources and a lot of error-prone Excel manipulation. Sage Intacct delivers accurate reporting for all our billed and unbilled, deferred and paid contracts, providing full transparency into our customer base so we can keep our fingers on the pulse of everything from contract renewals, upsells, and cross-sells, to churn by product and amortized commissions expenses."

Lisa Schulz
Corporate Controller, Jobvite

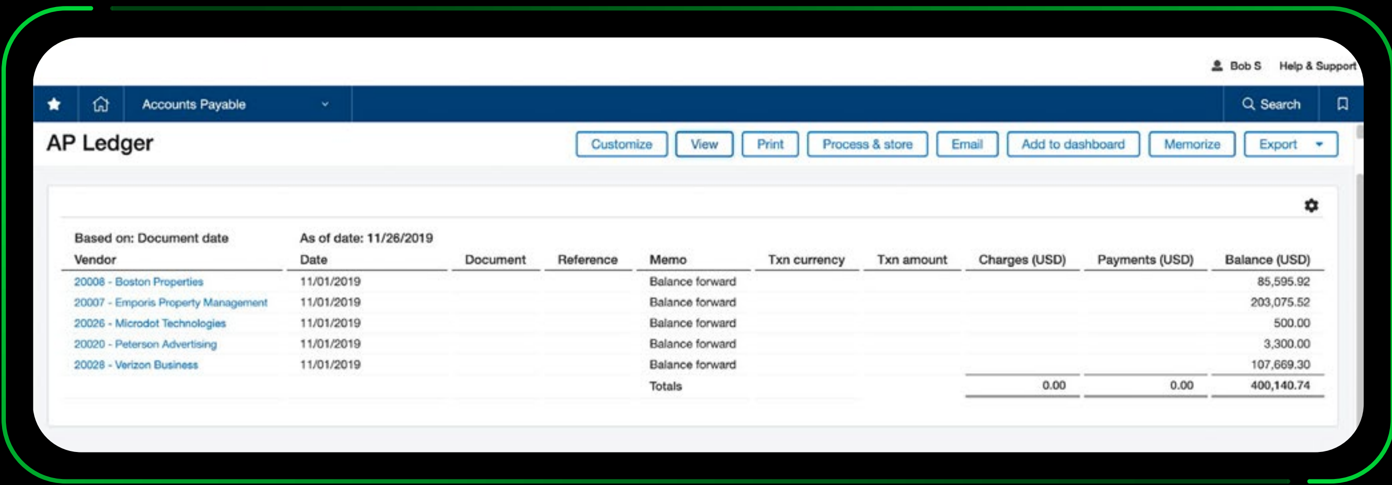


“Sage Intacct features dashboards, report writer, dimensions, and statistical capabilities which are just phenomenal. We created magnificent dashboards that were unimaginable to us just a couple months before deploying the system, and they’ve dramatically changed how we analyze financial data.”

Alejandro Pérez
Chief Happiness Officer & CEO, Komet Sales

Contract Forecast - All Types

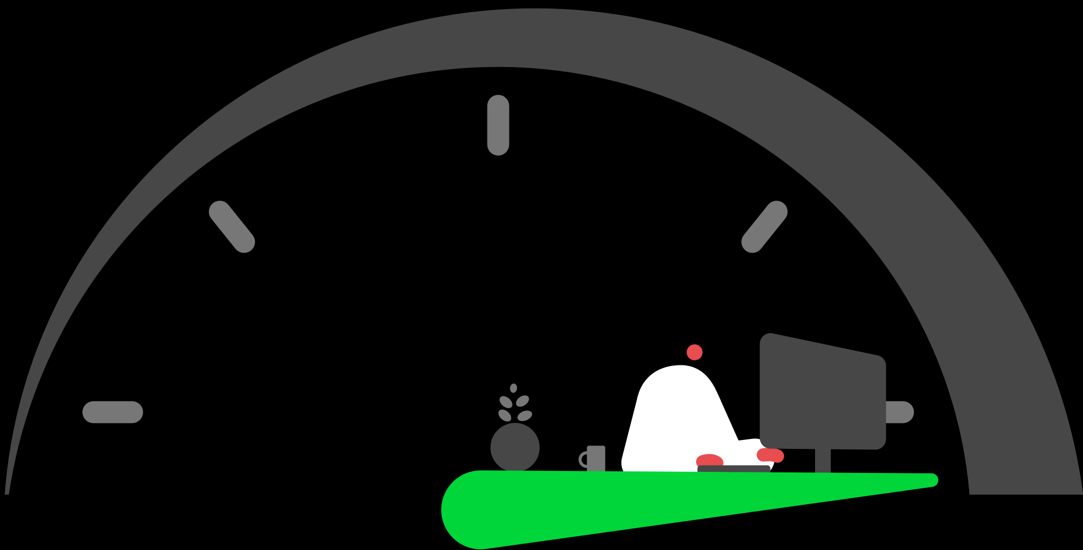
Subtotal name	Customer ID	Customer Name	Contract ID	Item Name	Contract Line Drill Down	2018/01-2018/03	2018/04-2018/06	2018/07-2018/09	2018/10-2018/12	2019/01-2019/03	2019/04-2019/06	Future Forecast	Total
Billing													
	C-00083	Knowledgebase Marketing	K-00045	Subscription	957	160,000.00	150,000.00	160,000.00	150,000.00	150,000.00	160,000.00	900,000.00	
	C-00083	Knowledgebase Marketing	K-00045	Implementation	958	25,000.00						0.00	
Sum for Billing						175,000.00	160,000.00	160,000.00	150,000.00	160,000.00	160,000.00	900,000.00	
Payment													
	C-00083	Knowledgebase Marketing	K-00045	Implementation	958	25,000.00						0.00	
	C-00083	Knowledgebase Marketing	K-00045	Subscription	957	150,000.00	100,000.00	150,000.00	200,000.00	150,000.00	100,000.00	950,000.00	
Sum for Payment						175,000.00	100,000.00	150,000.00	200,000.00	150,000.00	100,000.00	950,000.00	
Revenue													
	C-00083	Knowledgebase Marketing	K-00045	Implementation	958	2,083.35	2,083.35	2,083.35	2,083.35	2,083.35	2,083.33	12,499.92	
	C-00083	Knowledgebase Marketing	K-00045	Subscription	957	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	900,000.00	
Sum for Revenue						152,083.35	152,083.35	152,083.35	152,083.35	152,083.35	152,083.33	912,499.92	
Sum Total						502,083.35	402,083.35	452,083.35	502,083.35	452,083.35	402,083.33	2,762,499.92	



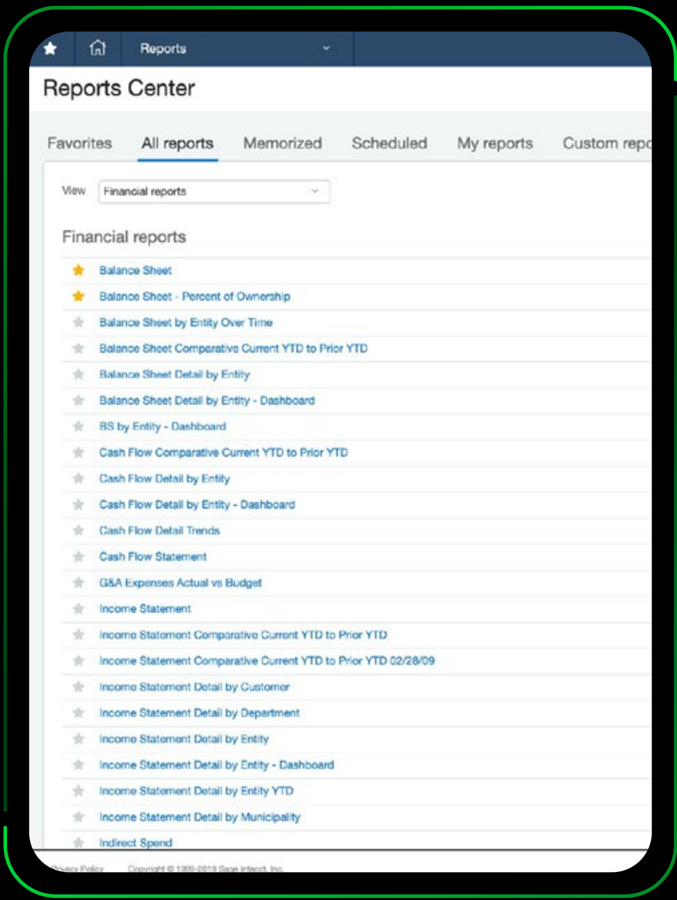
AP Ledger

Based on: Document date | As of date: 11/26/2019

Vendor	Date	Document	Reference	Memo	Txn currency	Txn amount	Charges (USD)	Payments (USD)	Balance (USD)
20008 - Boston Properties	11/01/2019			Balance forward					85,595.92
20007 - Emporis Property Management	11/01/2019			Balance forward					203,075.52
20026 - Microdot Technologies	11/01/2019			Balance forward					500.00
20020 - Peterson Advertising	11/01/2019			Balance forward					3,300.00
20028 - Verizon Business	11/01/2019			Balance forward					107,669.30
				Totals			0.00	0.00	400,140.74



Financial reports and charts



Real-time data from the Sage Intacct Intelligent GL

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.

Organizations 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.

“Sage Intacct has helped streamline our business by allowing us to create twice as many reports in less than half the time we needed in the past.”

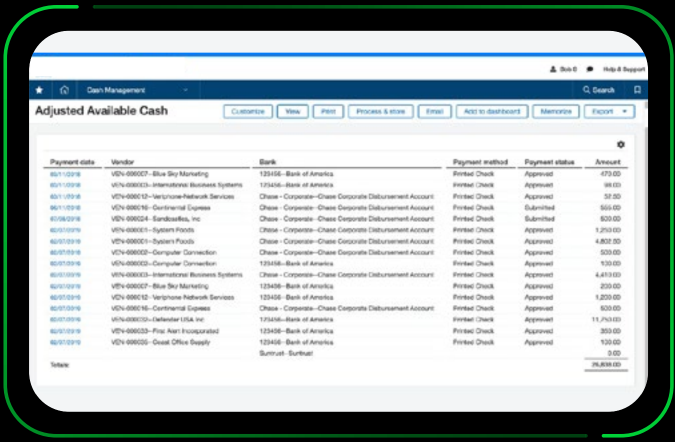
Pam Bakker
Controller, Laird Management

Activity-specific reporting

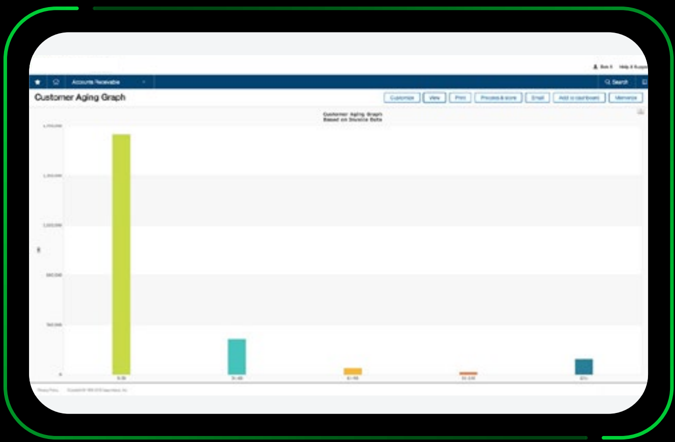
Task centered reporting on accounting processes

Out-of-the-box, task-centered 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.

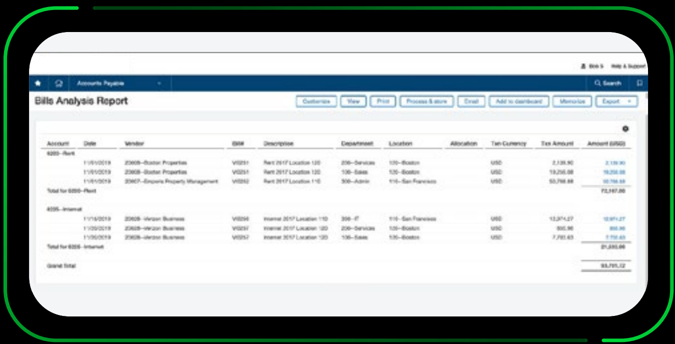
“With Sage Intacct, our general managers and department heads hold greater accountability, because management can quickly pinpoint areas of financial concern and have accurate information with which to make better business decisions. As a result, three of our struggling entities moved into the black, our overall gross margins improved by 20%, cash flow increased by nearly a half a million dollars, and our real estate asset values grew by over $5 million.”



Bills analysis report shows bills by account



Adjusted available cash report allows for timely decisions



Customer ageing graph tells your DSO story at a glance

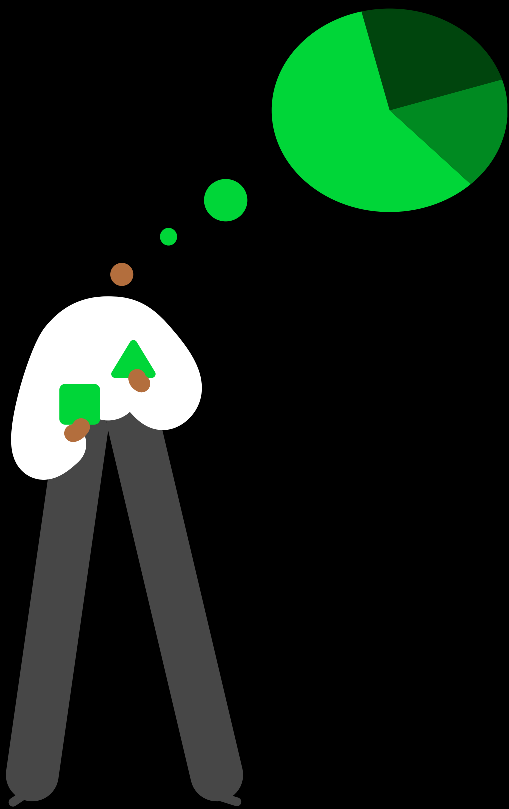
Ad-hoc reports

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 organization's unique business processes. A report wizard makes building these reports fast and easy—no coding required.

"Sage Intacct lets us run utilization, efficiency, and expense reporting at the project, task, department, or customer level for granular transparency into our labor costs and profitability across various operational categories. This valuable insight helps CTI's leaders manage existing employees' workloads, as well as project future employment needs based on upcoming projects and proposals."

Brian Lawrence
Senior Director, Finance & Taxation, CTI

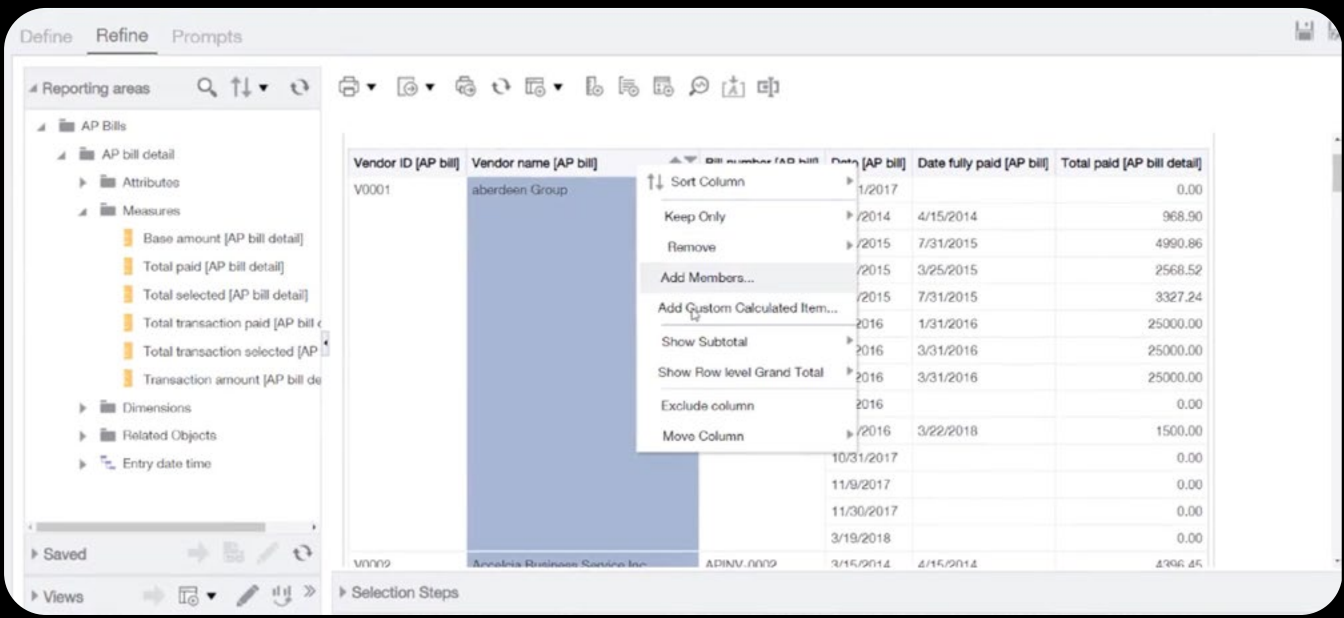


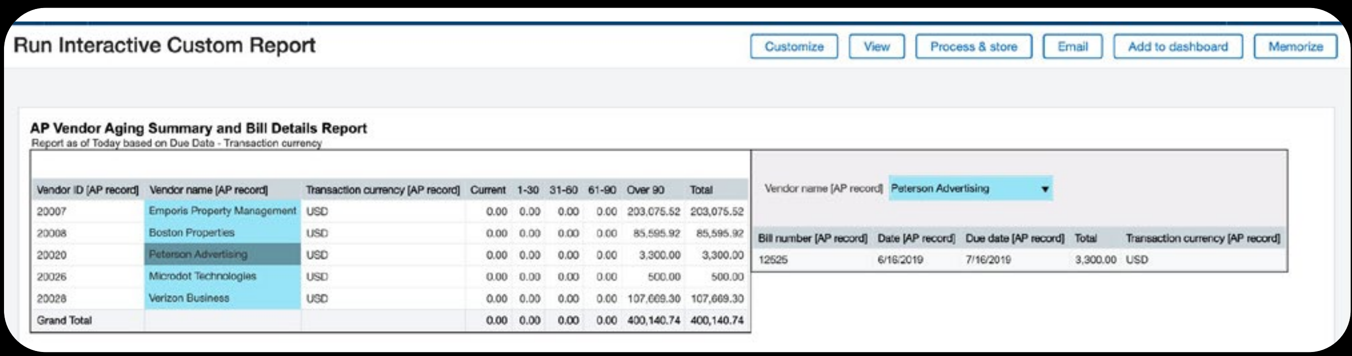
Interactive custom reporting

In-depth, interactive analysis

At 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.

"One of my favorite things about Sage Intacct is having the ability to easily create custom reports on my own. Now, I'm in a position to provide reports more quickly and be a true champion within the organization."





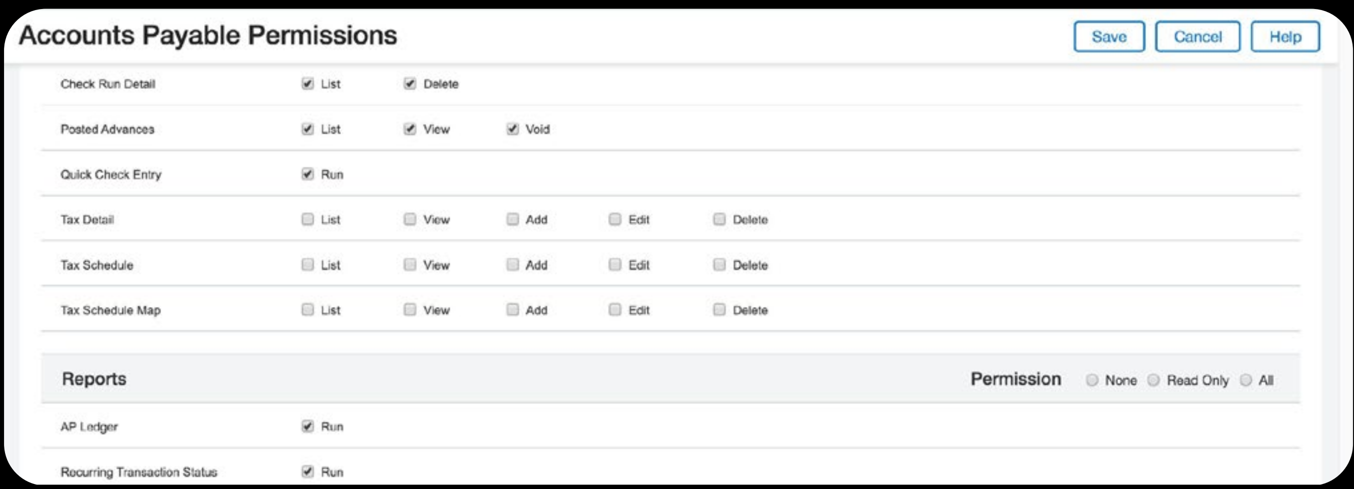
Robust permissions

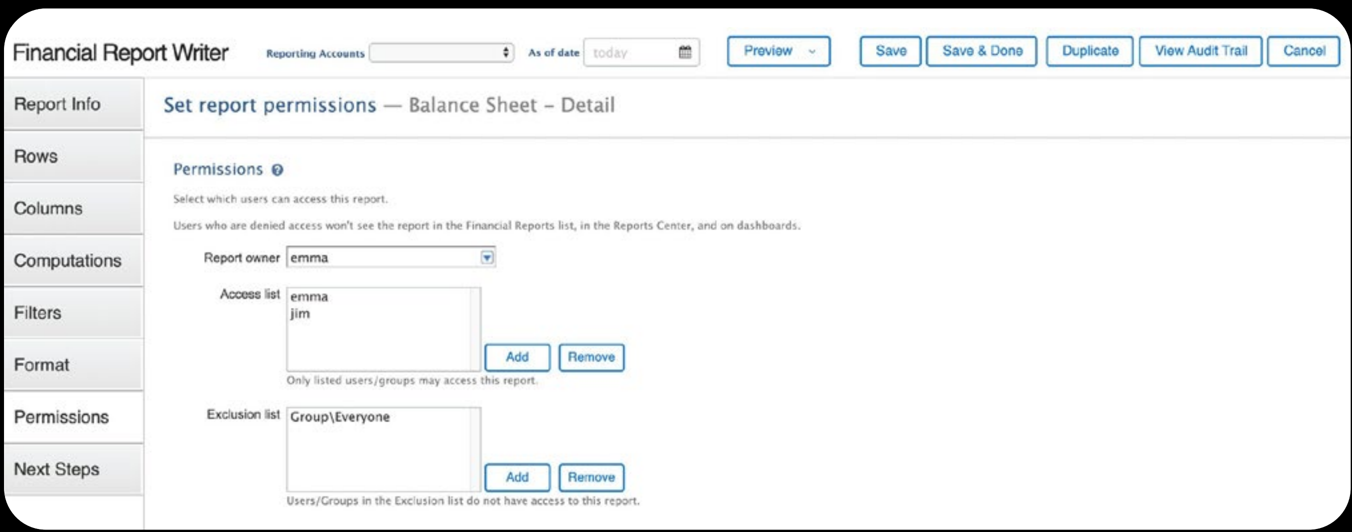
Share just what is needed

At 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.

"Sage Intacct puts real-time financial information into the hands of our managers so they're more apt to take ownership and be proactive. They no longer call finance to ask, 'why are my food, paper, or repair costs so high?' because they have the tools they need to identify problem areas themselves and investigate what's impacting their store's profitability."

Tammy Getschman
Director of Accounting, (Culvers) S&L Companies





Sage

Learn to report in no time

At 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 instructorled courses, and on-demand learning available through the Sage Intacct education center, the entire finance team can quickly become Sage Intacct reporting pros.

Reporting courses include:

- Financial Reporting and Dashboards.
- Nonprofit Financial Reporting and Dashboards.
- Advanced Reporting and Insights.
- Interactive Custom Report Writer.

A Sage partner

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Technology Partners are a Sage Strategic Partner with over 20 years Sage experience. We specialise in Sage 200cloud integrations and development, ensuring the software is specifically tailored for your unique needs.