



Product Brochure

# Sage Intacct Reporting and Dashboards

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





“Now, I’m in a position to provide reports more quickly and be a true champion within the organization.”

**Braam du Plooy**

Controller, Atlanta Convention & Visitors Bureau

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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.

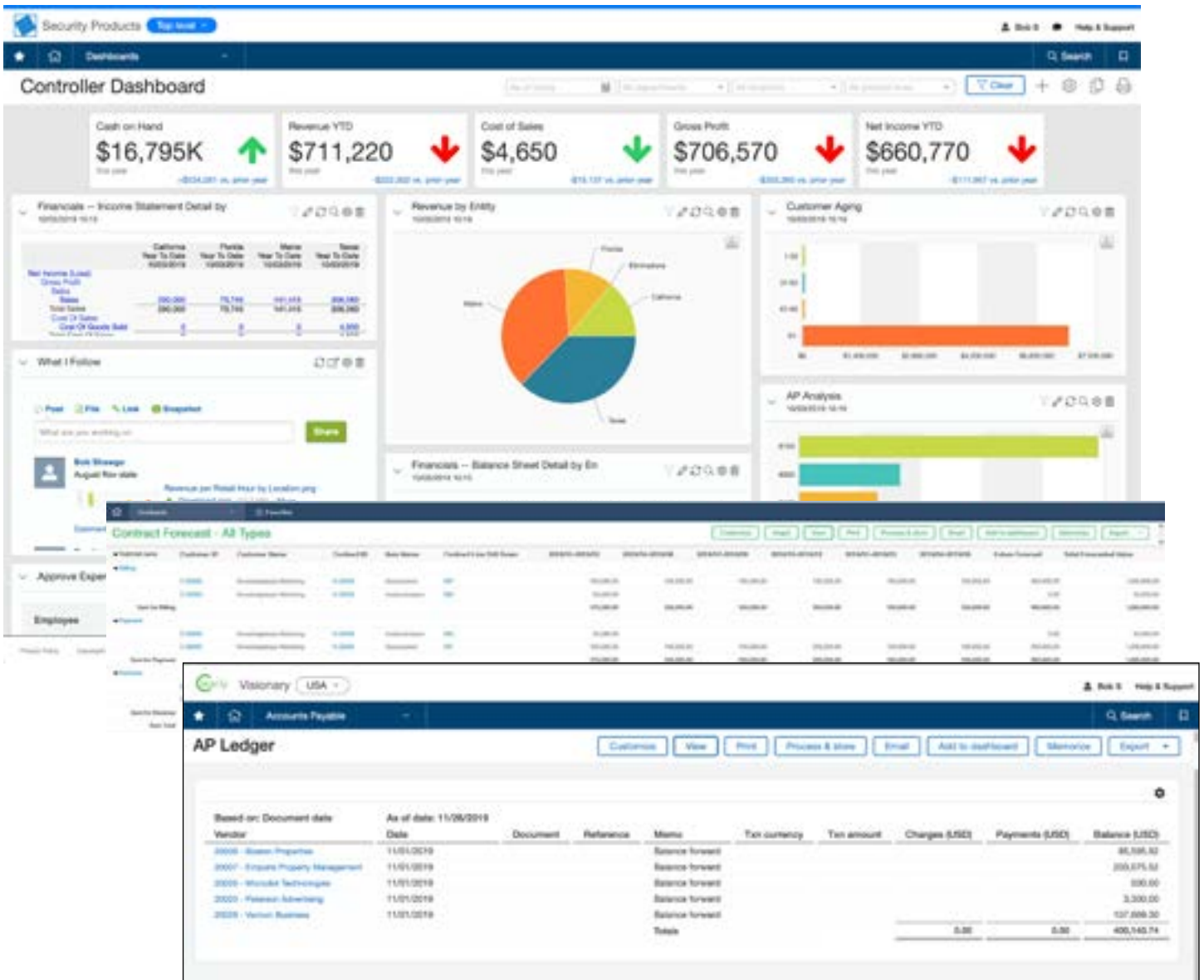
## Multiple points of accessibility

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.”

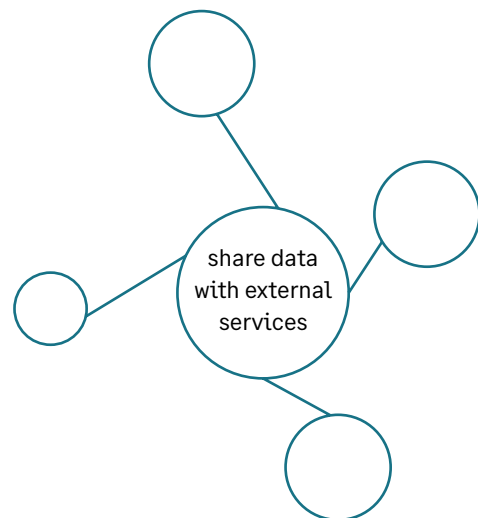
**Lisa Schulz**

Corporate Controller, Jobvite



“Sage Intacct’s dashboards, report writer, dimensions, and statistical capabilities 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

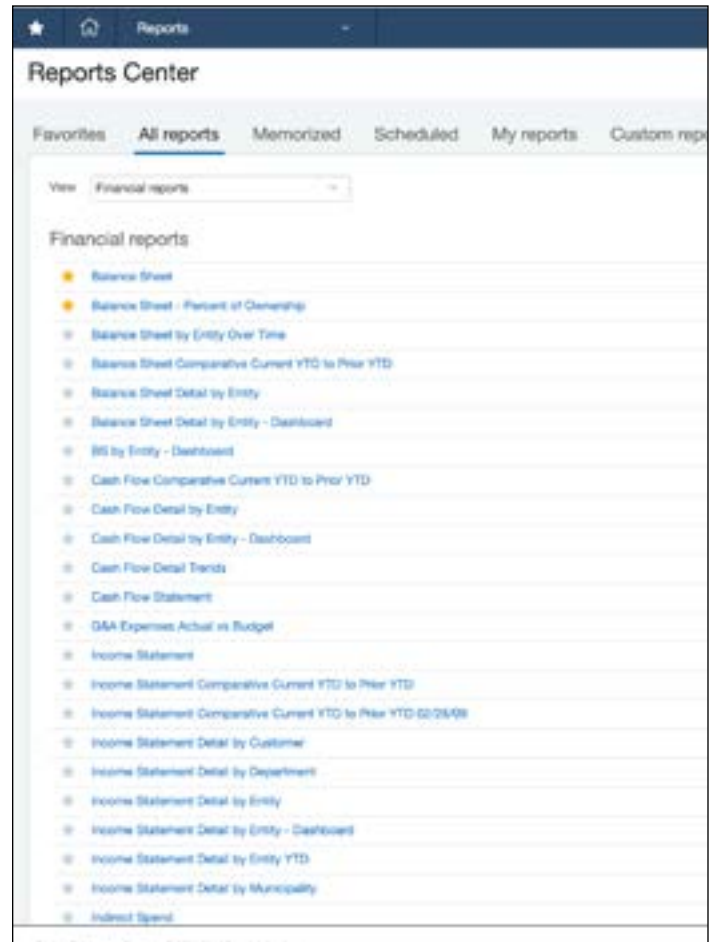




# Financial reports and charts

## 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, cashflow 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



# 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

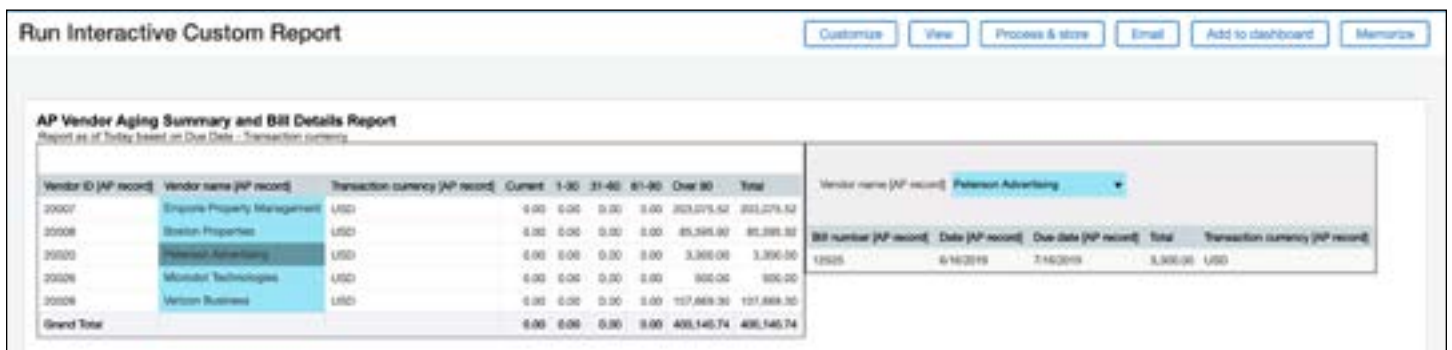
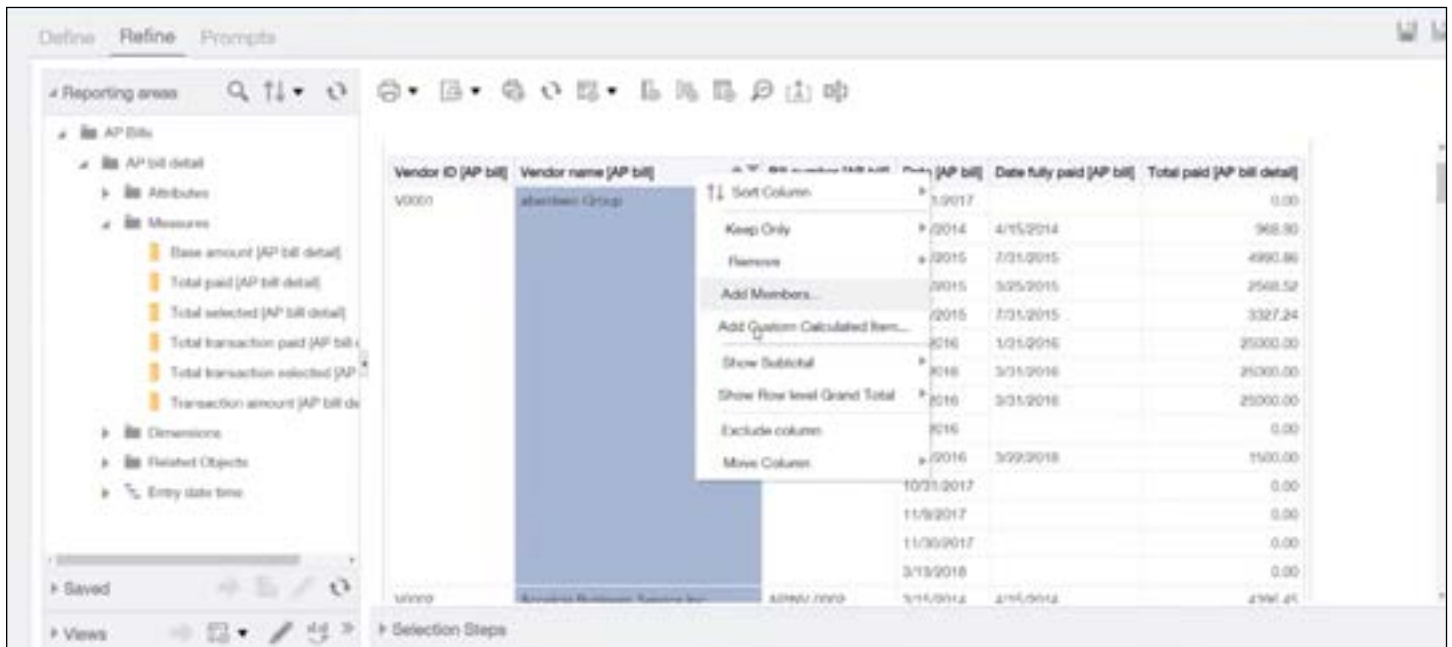


# Interactive custom reporting

In-depth, interactive analysis

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.

**“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.”**

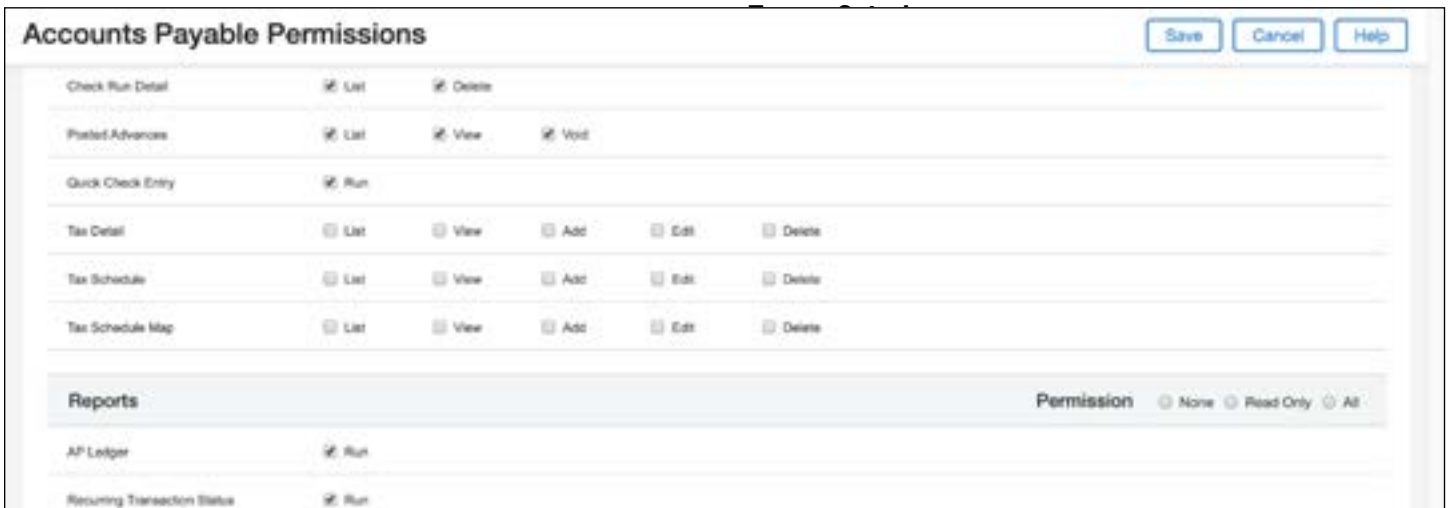


# Robust permissions

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.

Share just what is needed

**“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.”**



The screenshot shows the 'Accounts Payable Permissions' configuration page. It features a table of permissions for various AP-related functions. At the top right are 'Save', 'Cancel', and 'Help' buttons. Below the table is a 'Reports' section with a 'Permission' dropdown menu set to 'None'. The table includes the following items:

Item	Permissions
Check Run Detail	List, Delete
Printed Advances	List, View, Void
Quick Check Entry	Run
Tax Detail	List, View, Add, Edit, Delete
Tax Schedule	List, View, Add, Edit, Delete
Tax Schedule Map	List, View, Add, Edit, Delete
AP Ledger	Run
Recurring Transaction Status	Run



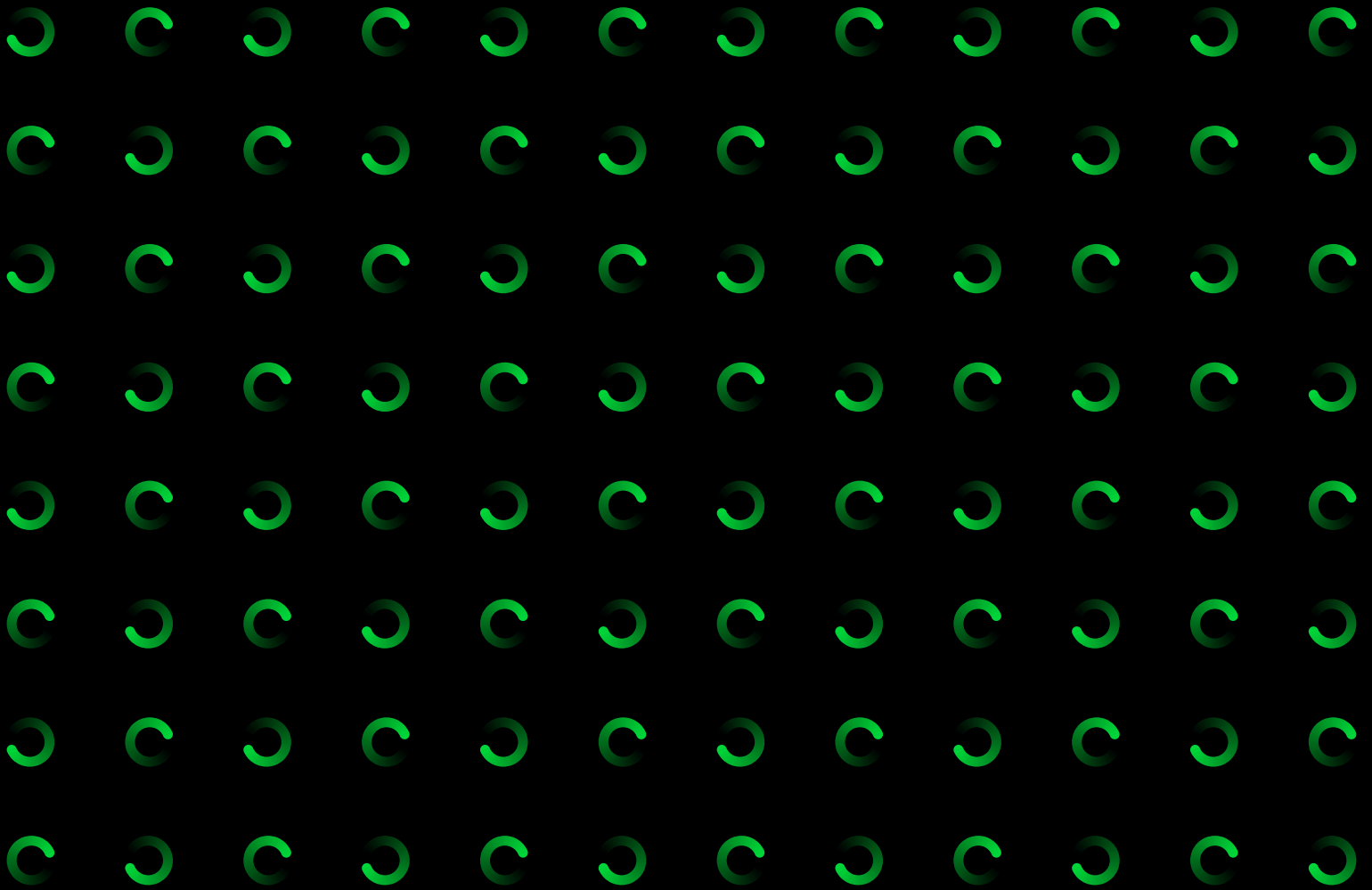
The screenshot shows the 'Financial Report Writer' interface for setting permissions on a 'Balance Sheet - Detail' report. The 'Permissions' section is active, showing a 'Report owner' dropdown set to 'emma'. Below this are two lists: an 'Access list' containing 'emma' and 'jim', and an 'Exclusion list' containing 'Group/Everyone'. Each list has 'Add' and 'Remove' buttons. The interface also includes a sidebar with navigation options like 'Report Info', 'Rows', 'Columns', 'Computations', 'Filters', 'Format', 'Permissions', and 'Next Steps'. At the top right, there are buttons for 'Preview', 'Save', 'Save & Done', 'Duplicate', 'View Audit Trail', and 'Cancel'.

# 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 instructor-led 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





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