Introduction to Sage Intacct: A Powerful Financial Reporting Solution



KEY TAKEAWAYS

- Sage Intacct provides over 150 built-in reports, real-time dashboards, and automated scheduling to streamline financial reporting.
- Users can leverage interactive charts, graphs, and plug-and-play analytics to simplify financial insights and improve decision-making.
- Sage Intacct integrates with over 350 business applications, improving data accuracy, workflow efficiency, and cross-platform visibility.
- The platform ensures audit readiness with automated audit trails, user permissions, and multi-entity, multi-currency reporting.

Whether your business is a one-person start-up or a multi-national corporation, accurate financial reporting is a must.

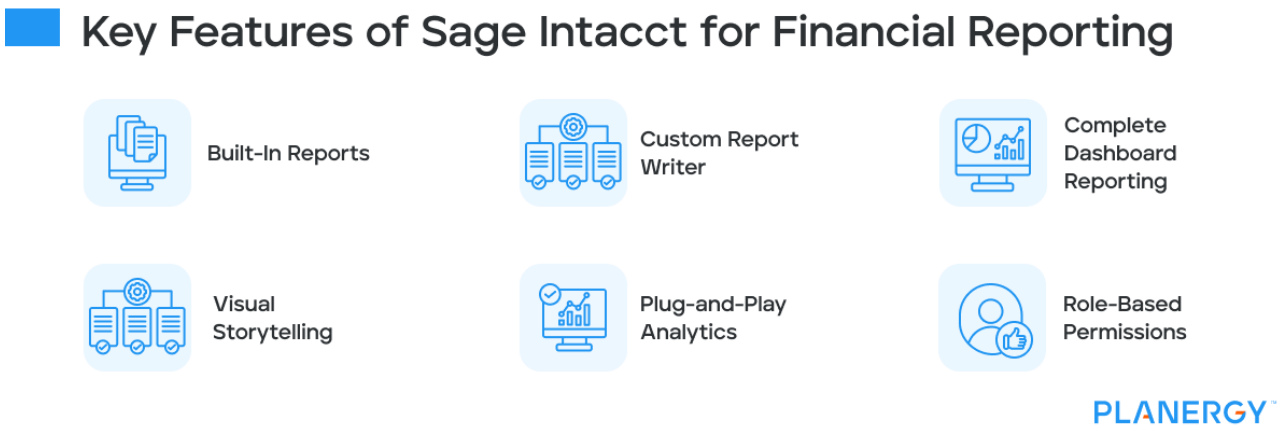
While spreadsheets continue to be popular reporting tools, they are also prone to

errors.

Sage Intacct reporting offers finance teams customizable financial reporting options, including real-time dashboards, designed to give business owners the information they need to make more informed decisions.

Key Features of Sage Intacct for Financial Reporting

If you're looking for an accounting software application that includes comprehensive reporting capabilities, Sage Intacct may be a good fit, with several key financial reporting features available.



Built-In Reports

Sage Intacct includes more than 150 ready-made reports that are completely customizable.

Whether you choose to print a balance sheet or income statement or want to customize a month-end report for a specific location, Sage Intacct has you covered.

Find the report you need and just click on the print option or take some time to customize the data to suit your needs.

All reports include drill-down capability, so you can easily view the numbers behind the numbers.

Custom Report Writer

For businesses with more complex reporting needs, Sage Intacct offers a custom report writer feature that allows you to create from-scratch custom reports for your business.

The report writer takes you step-by-step through the report creation process, guiding you every step of the way.

Complete Dashboard Reporting

Sage Intacct's financial dashboards offer real-time access to the financial data that matters to your business.

These multi-dimensional dashboards can be customized to include financial data by department, product, or employee, or provide company-wide financial data.

Visual Storytelling

Sage Intacct offers more than 25 interactive charts and graphs that can display the financial data of your choice, with easily read graphics that present data simply and clearly.

Plug-and-Play Analytics

If financial visualization is your preferred method for obtaining financial data, Sage Intacct is a good option, with more than 200 prebuilt interactive visual displays, with a drag-and-drop option and complete customization capability for better strategic decisions.

Role-Based Permissions

Sage Intacct users can create custom permissions for report access, providing access only to those who need it.

How Sage Intacct Enhances Decision-Making with Real-Time Insights

Sage Intacct provides real-time insight into a company's financial health, providing automated data updates so reports, dashboards, and analytical charts always contain the most recent information.

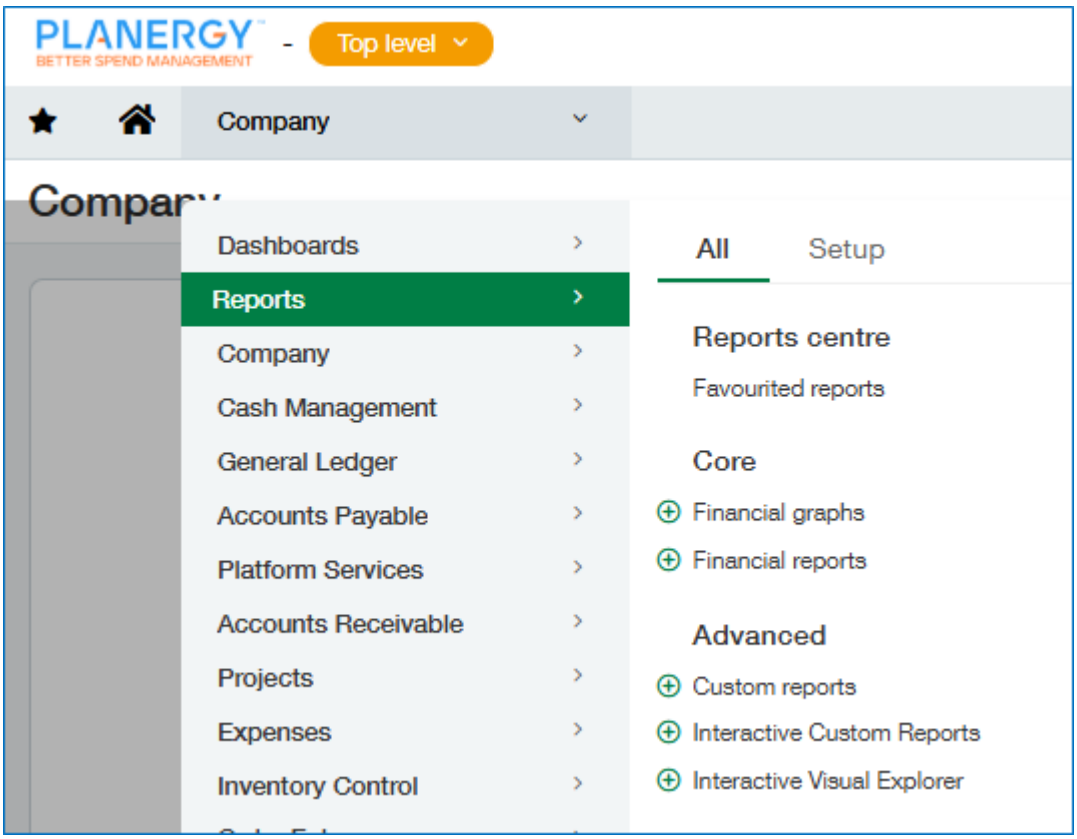
Having this information available at any hour provides stakeholders with the information they need to make critical business and financial decisions, create better forecasting models, and create more accurate budgets and strategic plans.

Intacct offers various report writing tools including, Financial Reports, Custom Report Writer (CRW) as well as Interactive Custom Report Writer (ICRW) and Interactive Visual Explorer (IVE).

Creating a Financial Report in Sage Intacct: A Step-by-Step Guide

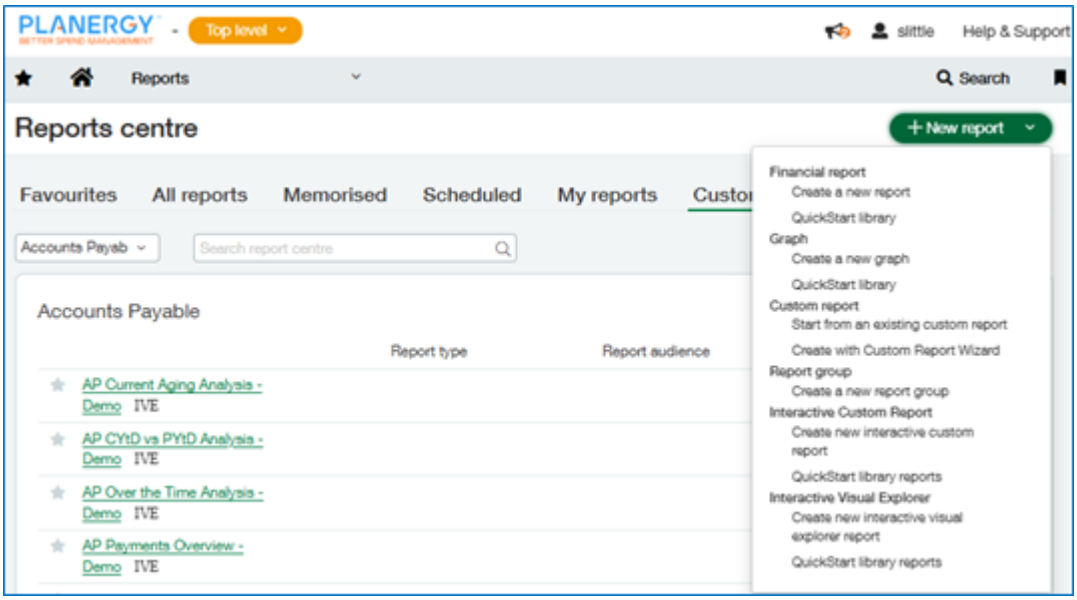
1. ## Go to the Reports Center

   Log into the main user dashboard and choose the 'Reports' option. Once in reports, choose the type of report you wish to create.



2. Create a Financial Report

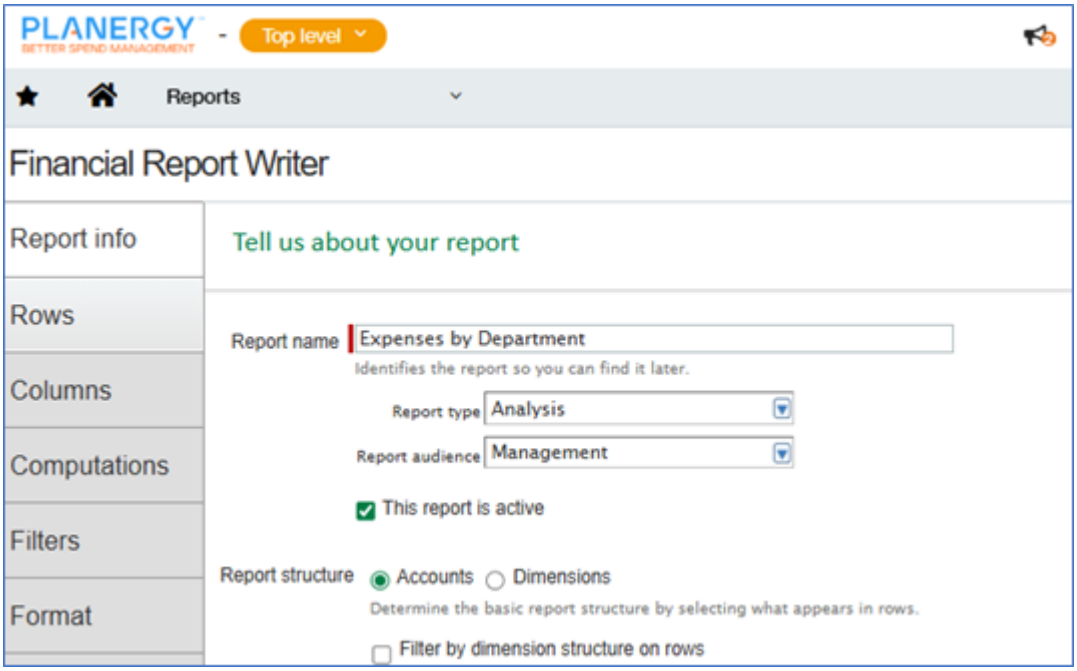
Click on the ‘New Report’ icon, then click on the ‘Financial report Create a new report’ icon.



3. Set Report Information

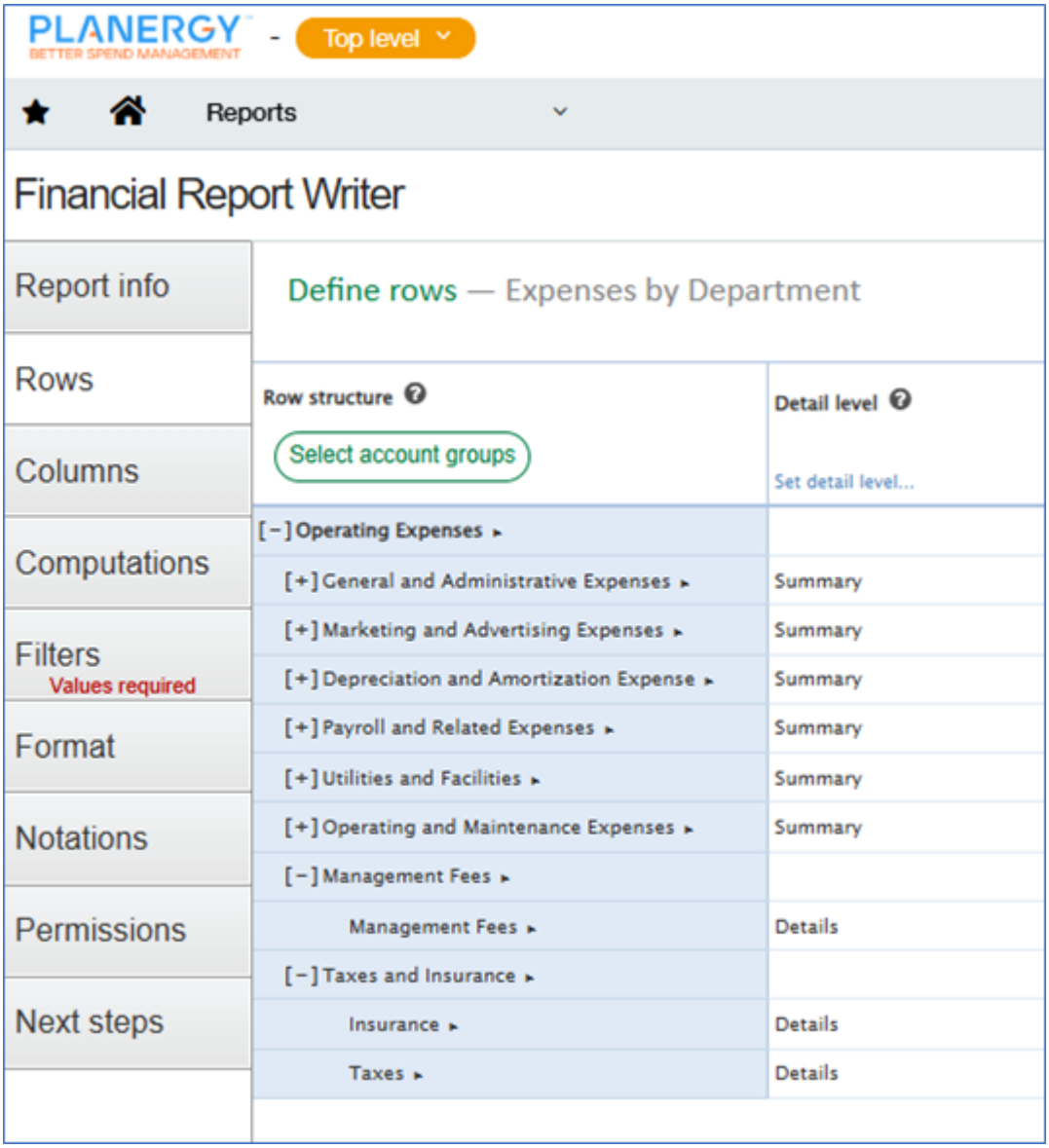
Give the report a name and set the report type, audience and structure of

the report.



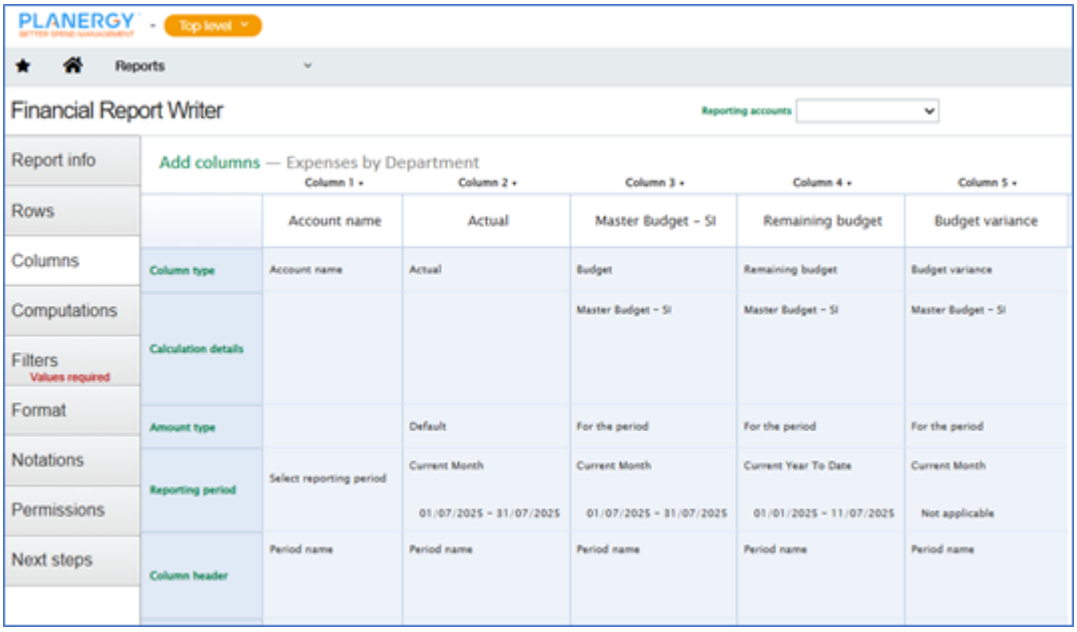
4. ## Select the Data Row Structure for the Report

   Select the appropriate data for the rows using Account Groups.



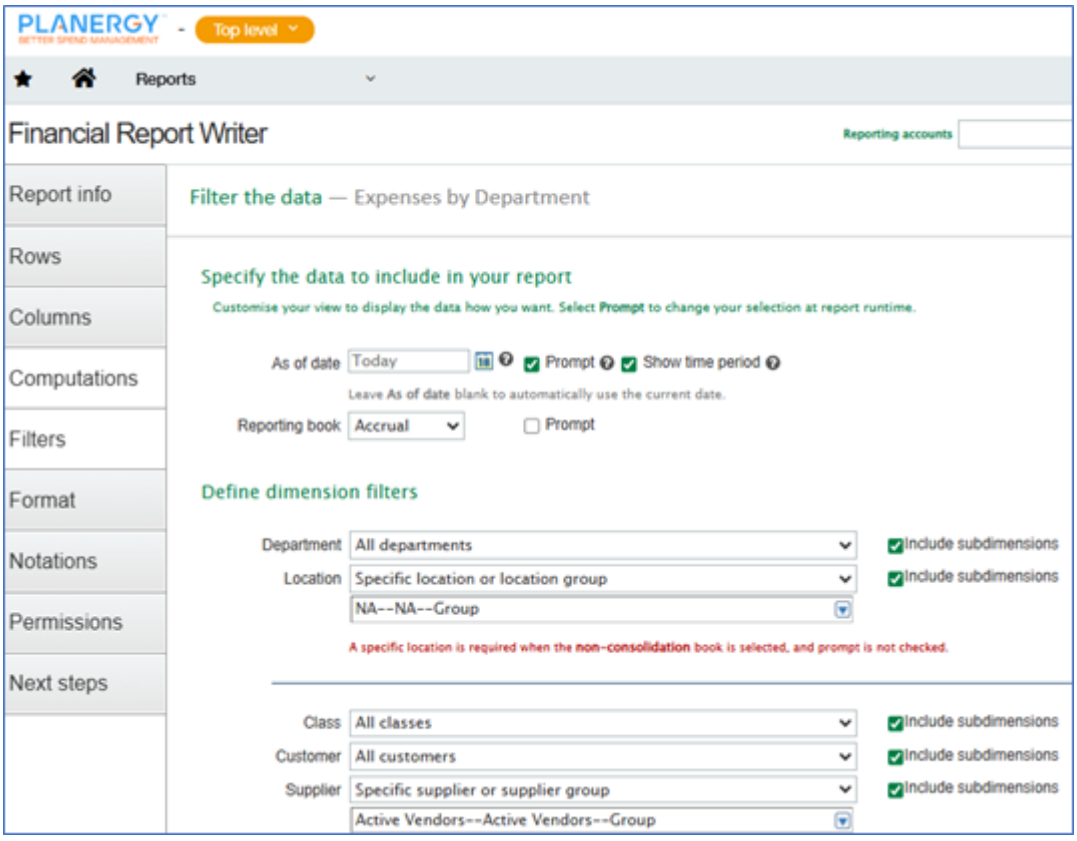
5. ## Select the Columns for the Report

   Select the appropriate columns for your report such as actuals, budget, budget variance.



6. Select the Filters for the Report

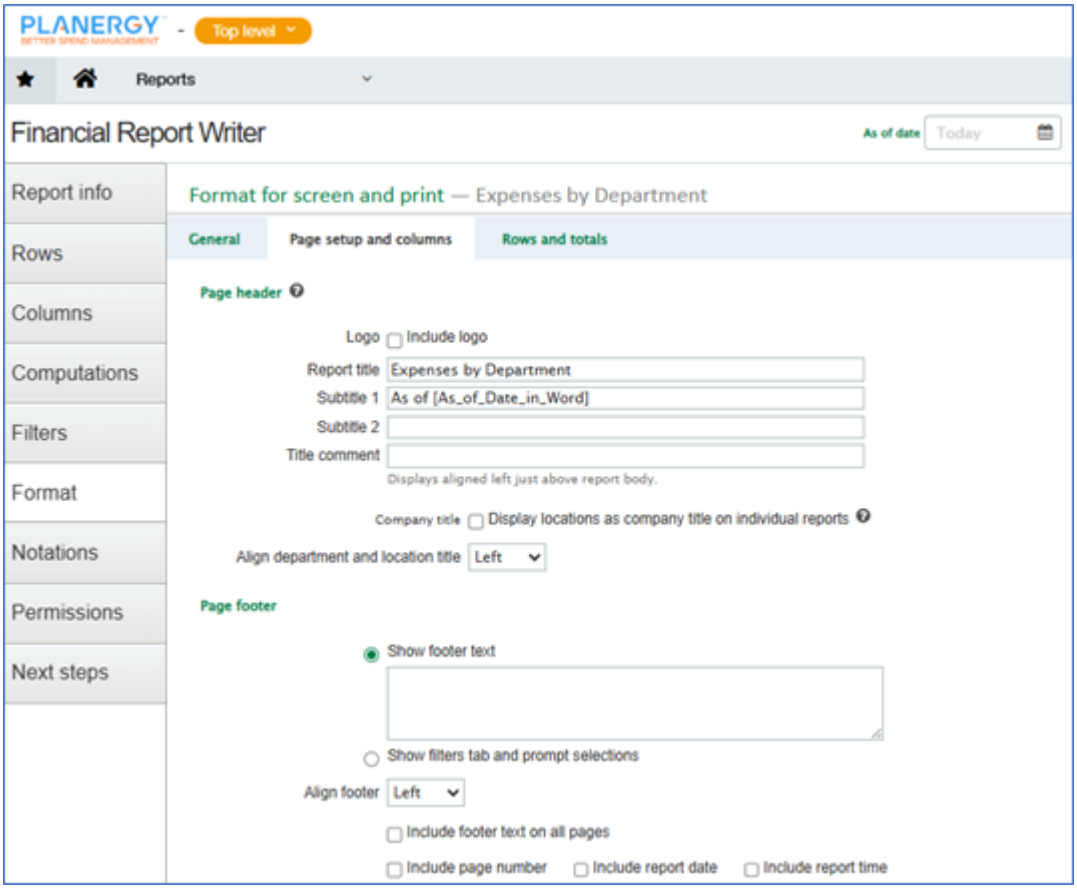
Select the appropriate filters for your report.



7. Select the Formatting for the Report

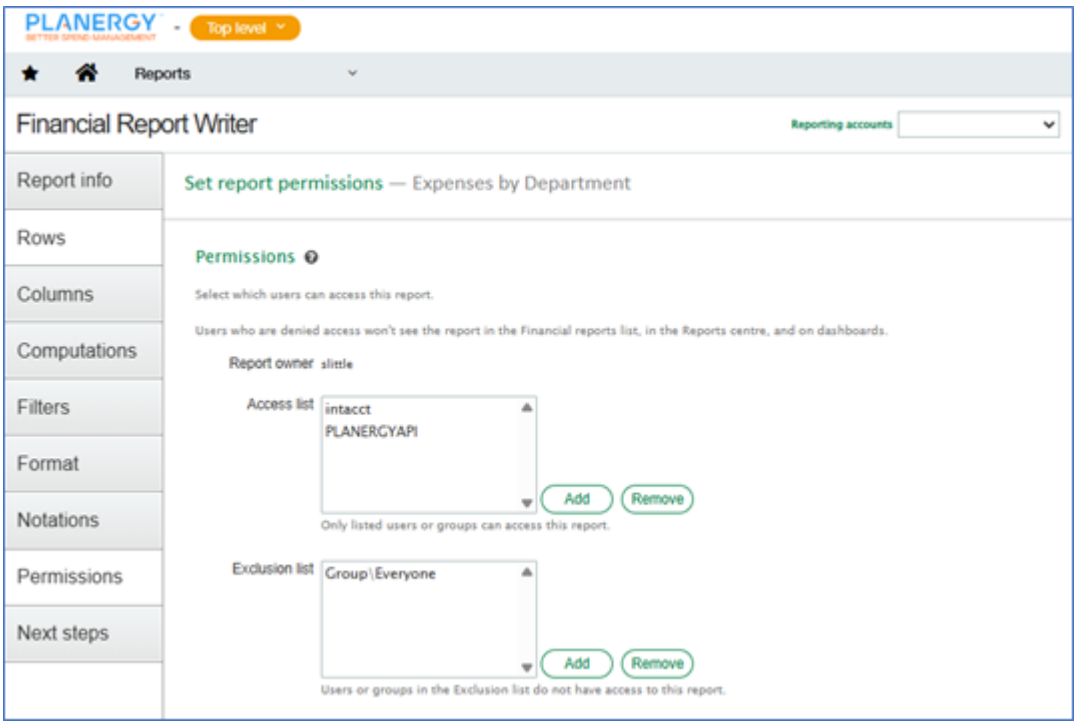
Select the appropriate formatting for your report such as font type, size

and rounding.



8. ## Select the Permissions for the Report

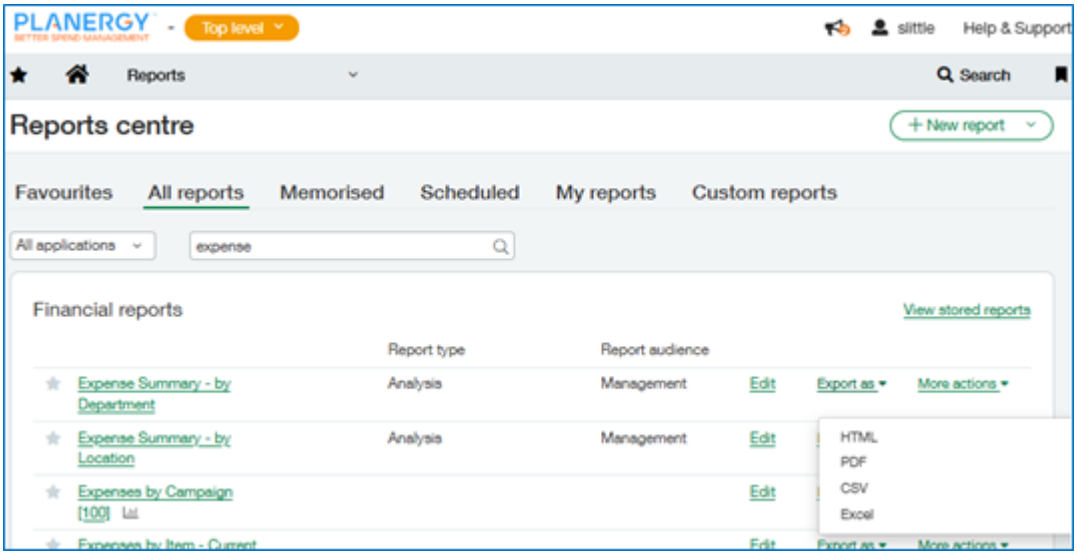
   Select the appropriate permissions for your report adding or excluding users or groups as required.



9. Run Your New Report

When all changes have been made and saved, you're ready to run your new report.

If you wish to export the report, you can choose the type of export such as PDF, CSV, or Excel.

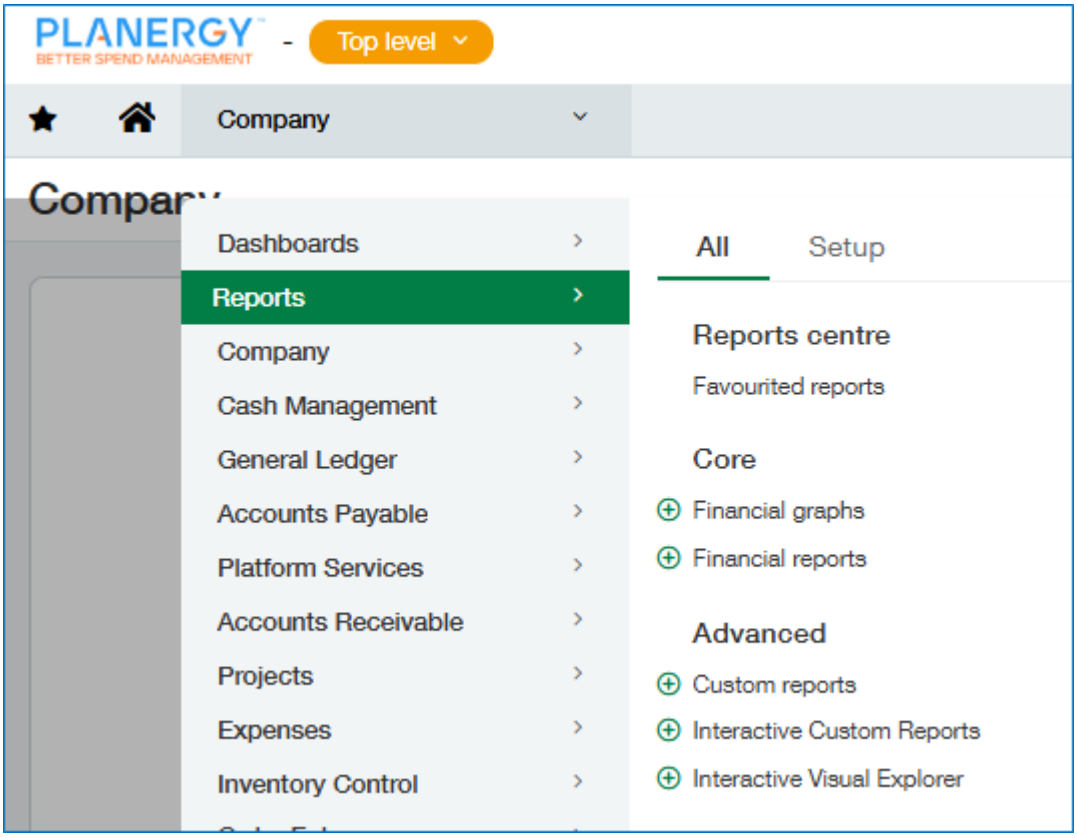


Creating a Custom Report in Sage Intacct: A Step-by-Step Guide

Creating a custom report using the Interactive Custom Report Writer is easy, with users able to access the custom report wizard, which takes you step by step through the entire report creation process.

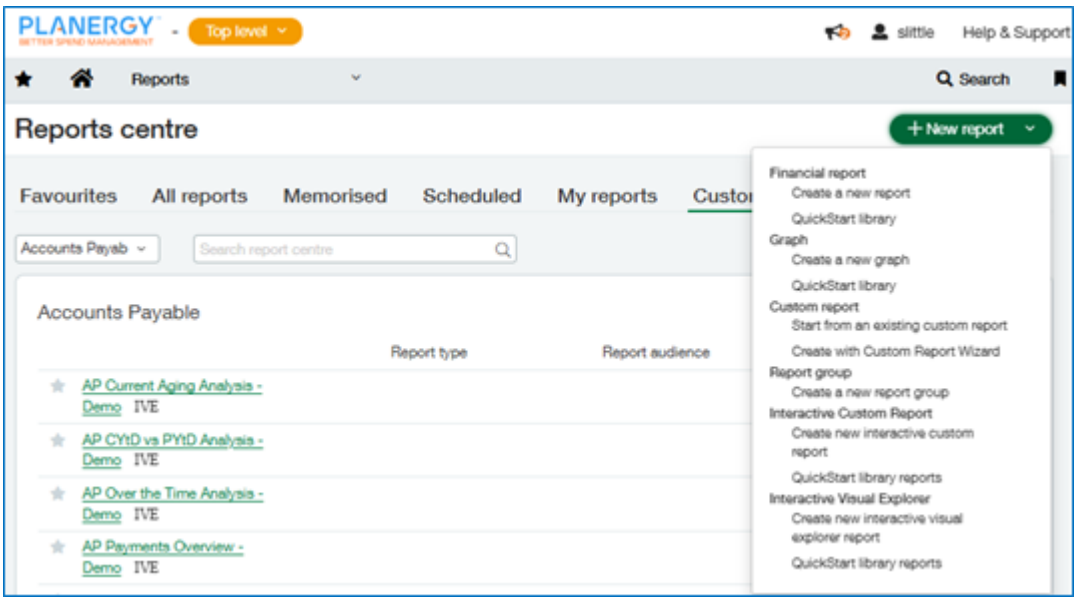
1. Go to the Reports Center

Log into the main user dashboard and choose the '*Reports*' option. Once in reports, choose the type of report you wish to create.



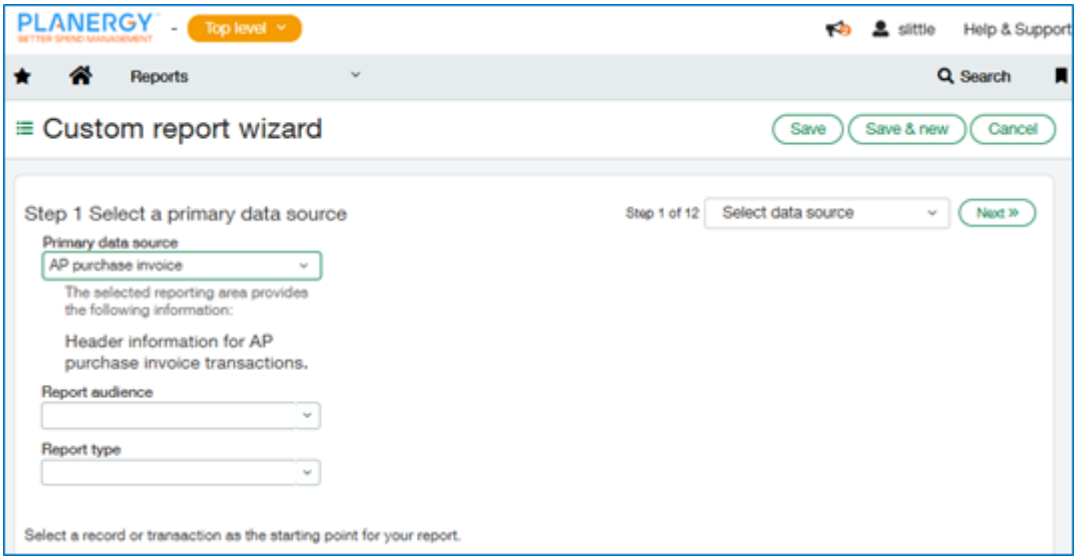
2. Create a Custom Report

Click on the '*New Report*' icon, then click on the '*Create with Custom Report Wizard*' icon.



3. Select the Data for the Report

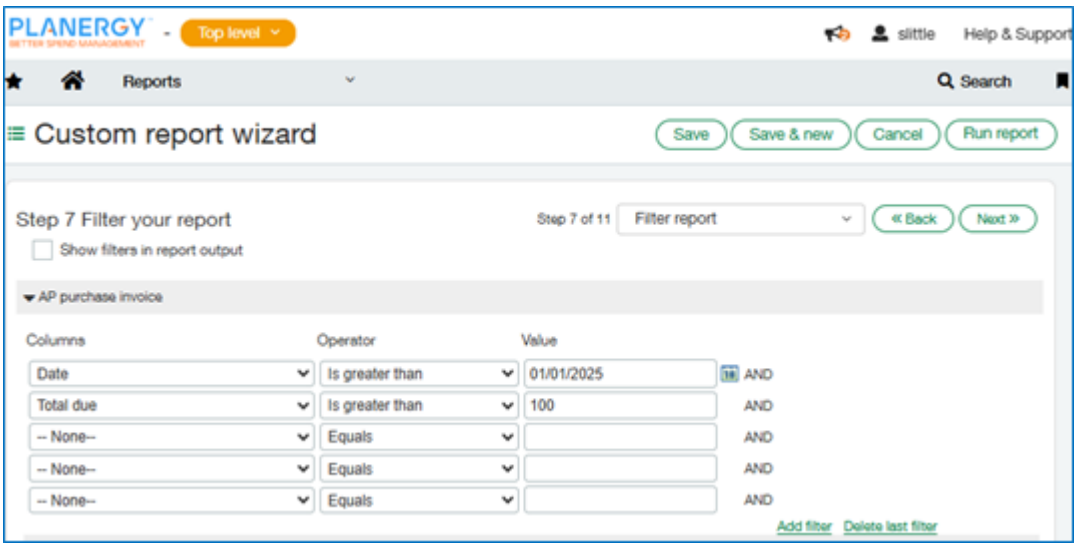
Select the appropriate data source(s) for your report.



4. Choose Report Filters

Choose filters for the custom report so that only the necessary data is included.

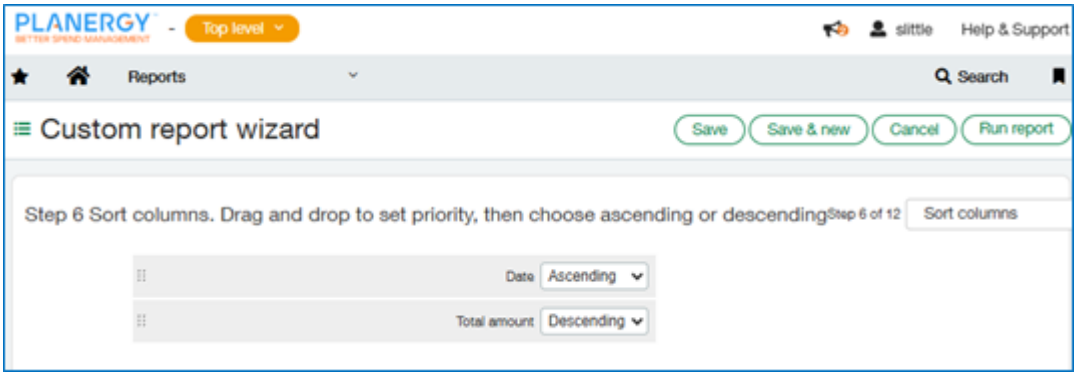
This includes defining conditions such as specific accounts or date range.



5. Format Your Report

Select and arrange columns that should be included in the report.

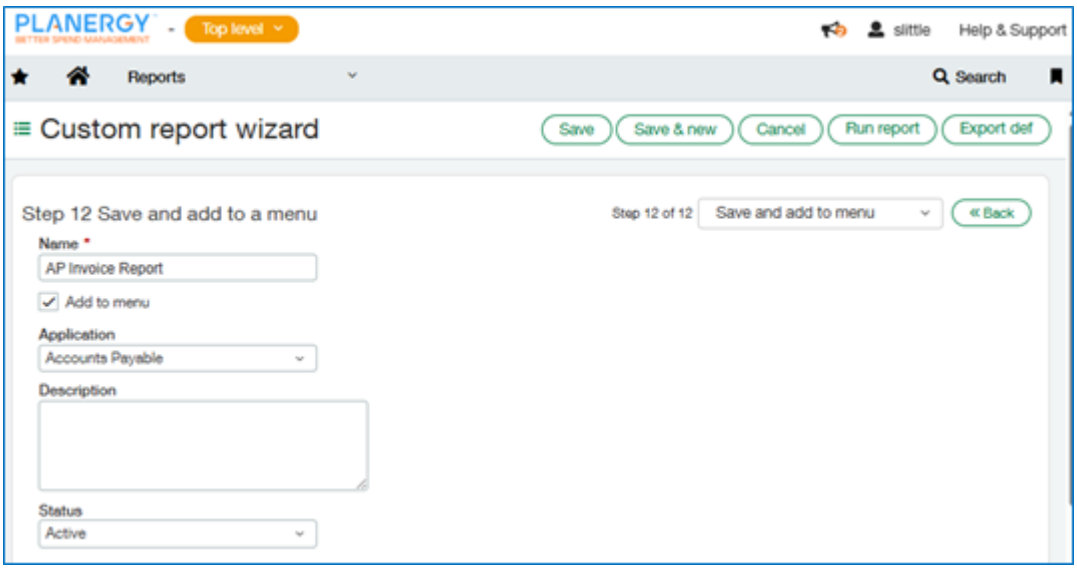
This should also include data grouping and sorting, which determines how the report data is presented.



6. Preview and Save Report

Click the '*preview*' option to view your report.

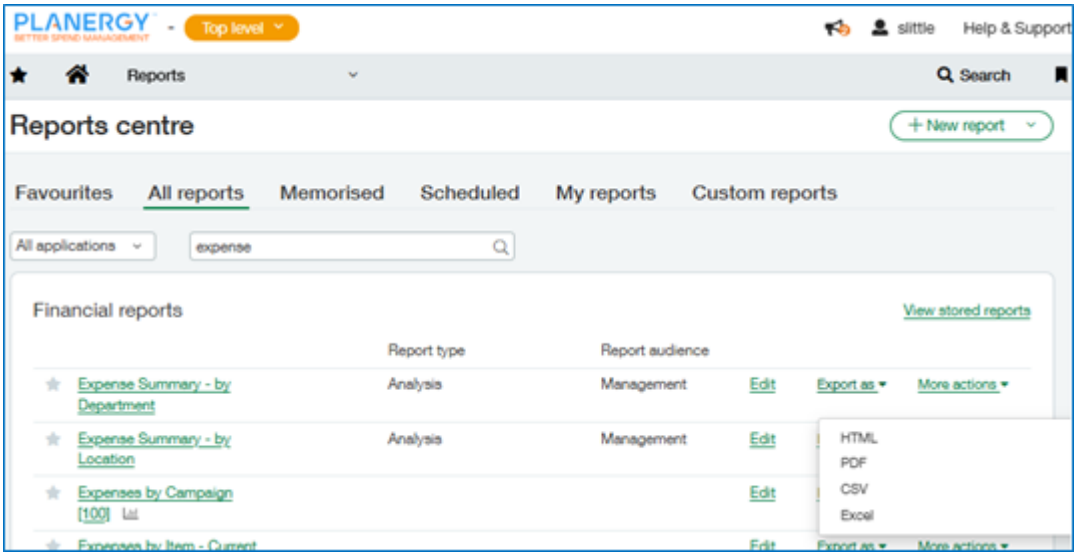
This will allow you to make any changes before you save it. Once it's approved, you can save the new report.



7. **Run Your New Report**

   When all changes have been made and saved, you're ready to run your new report.

   If you wish to export the report, you can choose the type of export such as PDF, CSV, or Excel.



Automating Financial Reporting with Sage Intacct: Saving Time and Reducing Errors

The best way to ensure that reports are delivered to the correct staff on time is to automate the reporting process.

In Sage Intacct, you can filter report delivery by department or location, choose a start and end date for reporting, and choose the incremental time that reports should be printed and delivered, such as daily, weekly, monthly, or yearly.

You can also choose how the report should be delivered, with an option to deliver reports to the cloud, where those with the appropriate permissions can access them as needed.

Best Practices for Financial Data Visualization in Sage Intacct

To get the best from data visualization features, consider these options:

- **Choose the Correct Metrics:** To get the most out of data visualization, first consider what it is you want to view.
- **Use Existing Reports:** You don't have to start from scratch.Using existing reports provides you with an existing foundation that you can further expand as needed.
- **Select the Type of Chart You Want:** If you're looking for comparisons between categories, choose a bar chart, while if you're looking for trends over a specific period, use a line chart.
- **Choose Interactive Elements:** Choosing interactive elements such as drill-down capability allows users to explore data origins easily, leading to better understanding.
- **Customize the Sage Intacct Dashboard for Each User:** The accounting clerk's dashboard will look considerably different from the CFO dashboard.Make sure each one is set up with the correct options.
- **Keep it Simple:** Including too much data can be confusing.Choose a simple design and the most important metrics and eliminate everything else.

Because of its customization capabilities, you can tailor each visualization for a specific end user.

Integrating Sage Intacct with Other Business Systems for Better Insights

Sage Intacct offers a complete ERP system that can integrate with more than 350 software applications in a variety of categories including expense management and procurement, business management, CRM, inventory management, and payroll.

There are several key benefits derived from integrating Sage Intacct with other applications including:

- **Improved Accuracy** – proper integration ensures that data is accurate across all platforms.
- **Improved Visibility** – when systems are integrated properly, users can view data across all platforms when necessary.
- **Streamline Workflows** – integrating systems eliminates the need for manual data entry across multiple systems while eliminating repetitive tasks.
- **Better Decision-Making** – having real-time access to data across multiple platforms provides the information needed to make data-driven decisions.

KPI Tracking and Performance Metrics: Maximizing Sage Intacct's Potential

Sage Intacct's customizable dashboards make it easy to track KPIs and other financial management metrics including revenue, cash flow, net income, operating expenses, sales conversion rate, accounts receivable days outstanding, product performance, and employee productivity.

This makes it easy for users to create the dashboards they need to track KPIs specific to their department.

Compliance and Audit Readiness: How

Sage Intacct Helps Ensure Accuracy

For publicly traded companies, it's essential to remain compliant with regulatory agencies.

But even small companies that are privately owned need to comply with certain regulations to be audit-ready.

Sage Intacct offers several key features that can help businesses remain compliant.



1. **Automated Audit Trail** – Every transaction made in Sage Intacct is recorded, allowing internal and external auditors to track every entry or change in the system.
2. **Customizable Workflows** – Creating customizable workflows allows businesses to establish proper approval levels and document validation rules to ensure that the necessary controls are in place.
3. **Drill-Down Capability in all Financial Statements** – Auditors or other interested individuals can drill down to originating numbers in all financial statements.
4. **Customizable User Permissions** – Segregation of duties is essential in accounting. In Sage Intacct, managers can set permissions to allow access to confidential data to select employees which helps minimize fraud.
5. **Centralized Storage** – Having all pertinent documents stored in a secure cloud platform makes it easy to access and provide the necessary documents for an audit.

Multi-Entity and Multi-Currency Reporting in Sage Intacct

For businesses with multiple entities, Sage Intacct helps facilitate the creation of consolidated financial reports.

In addition to consolidated reports, Sage Intacct can also create entity-specific reports when necessary.

For instance, you can choose to look at the top level of income for entities or view income for a single entity by simply choosing the entity in the drop-down menu on the dashboard.

In addition, Sage Intacct includes multi-currency capability, handles currency conversion rates, and exchange rate fluctuations, and can produce entity-specific or consolidated reports regardless of location or currency.

For example, you can create a global balance sheet that provides detailed information on assets and liabilities for each global location.

How PLANERGY Supercharges Sage Intacct Reporting

While Sage Intacct provides powerful financial reporting tools, it needs accurate, timely procurement and AP data to reach its full potential. That's where PLANERGY comes in.

PLANERGY integrates directly with Sage Intacct to:

- Capture real-time spend and invoice data
- Sync POs, receipts, and invoices automatically
- Enforce budget controls before purchases are made
- Improve data quality for cleaner financial reports

For example, if a department is overspending its budget, PLANERGY will flag the purchase before it is approved and committed to, helping maintain compliance and avoid surprises at month-end.

Real-World Example: From Messy Reports to Strategic Insight

Before using Sage Intacct and PLANERGY, one mid-sized nonprofit struggled with manual reporting and late-month surprises. Financial reports were outdated by the time leadership reviewed them.

After integrating PLANERGY with Sage Intacct:

- Procurement was centralized and standardized
- Budget overruns dropped by 80%
- Monthly close time decreased from 15 to 5 days

With accurate, timely data flowing from PLANERGY into Sage Intacct, the CFO finally had the insight needed to guide strategic decisions.

Enhancing Sage Intacct Financial Reporting with PLANERGY

For more advanced spend management and comprehensive reporting, consider integrating Sage Intacct with PLANERGY.

PLANERGY's features such as automated invoice processing, real-time reporting, and enhanced spend controls, when coupled with Sage Intacct, offer additional reporting options including real-time spend dashboards for both accruals and committed spend and dashboards for budgets and vendors.

What's your goal today?

1. Use PLANERGY to manage purchasing and accounts payable

We've helped save billions of dollars for our clients through better spend management, process automation in purchasing and finance, and reducing financial risks. To discover how we can help grow your business:

- Read our case studies, client success stories, and testimonials.
- Visit our Accounts Payable Automation Software page to see how PLANERGY can automate your AP process reducing you the hours of manual processing, stoping erroneous payments, and driving value across your organization.
- Learn about us, and our long history of helping companies just like yours.

Book a Live Demo

2. Download our guide “Preparing Your AP Department For The Future”

Download a free copy of our guide to future proofing your accounts payable department. You’ll also be subscribed to our email newsletter and notified about new articles or if have something interesting to share.

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3. Learn best practices for purchasing, finance, and more

Browse hundreds of articles, containing an amazing number of useful tools, techniques, and best practices. Many readers tell us they would have paid consultants for the advice in these articles.

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