

E-book

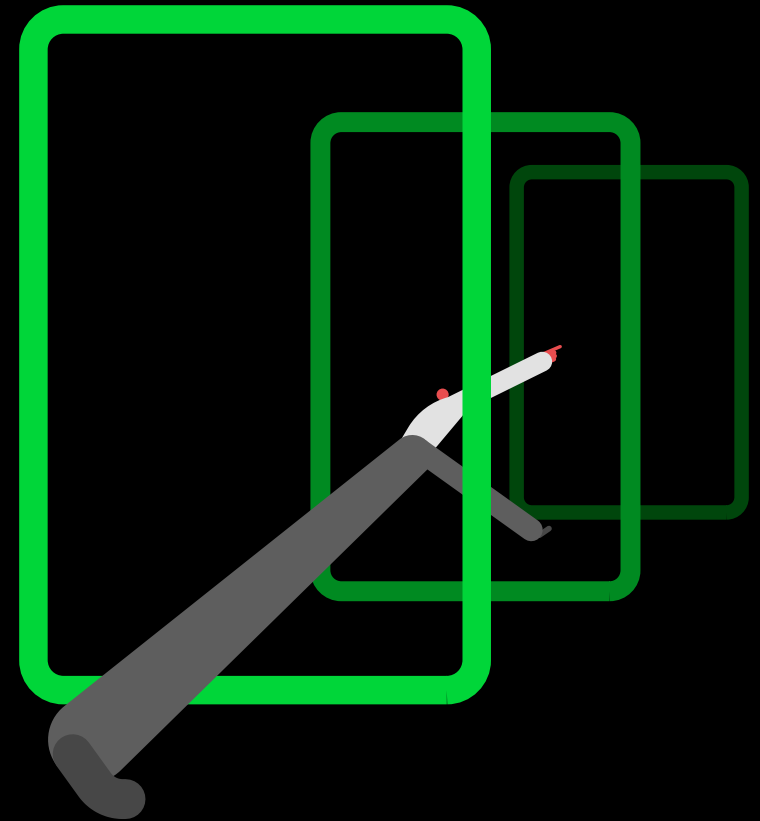
# The essential reporting checklist: are you missing anything?

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# The essential reporting checklist

## Does your current reporting software:

- Force you to build more than half of your reports in Excel?
- Limit your access to real-time information?
- Only report on one element of your data at a time.

If you said yes to any one of these questions, you may be wasting unnecessary time or missing out on the insights you need to make informed strategic decisions.





# Are you building **60% or more** of your reports in Excel?

Excel is a powerful, flexible tool that's essential for ad-hoc reporting. However, producing routine reports in Excel means you're stuck in manual processes and wasting time in spreadsheets.



This becomes a problem when a single report can take hours to days to create.

Producing reports slowly has a trickle-down effect. Delays and missed deadlines can impact management's ability to make timely, informed decisions.



If you're building reports manually in Excel, it also increases the chances for human error—people can select the wrong information, run the wrong formulas, or cause Excel formulas and links to break.

# Do you have trouble accessing your financial information in real time?

Any time you're exporting your financial information outside of your system, it's static and out of date.

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Finance teams may duplicate work or inadvertently use an out-of-date report. The lack of real-time data can also be troublesome for leaders who need to report on the latest business performance.

There's a potential for conflicting numbers. Or they could be basing important business decisions off stale or incorrect data.

# Are you unable to quickly report on multiple aspects of the business?

Unfortunately, there are some limitations with reporting in Sage 50. Reports are generated by one aspect of the business at a time, like location, department, customer, or project. So, there are a couple choices; deal with limited insights or use a workaround by creating segmented accounts for every variable and combination.



If anything goes wrong in building your spreadsheet, it can take hours or days to fix or run the report.

The limited reporting insight means that you could be missing out on critical information to make important strategic decisions.

“With Sage Intacct, we can finally report down to the region level and see our costs vs. income, as well as total headcount and clients in each region. We track important metrics like our gross profit per worksite employee and ratio of worksite employees to internal corporate employees. This insight is critical, because it helps us determine how productive a particular region is from one month to the next, make decisions about whether the business should stay in that region, and look at our future to forecast where we want to be.”

**Ronda Rogers**  
Controller, Nextep

“We’ve dramatically decreased tedious back office work since adopting Sage Intacct, and I have confidence the system will allow us to largely eliminate manual processes over time. In fact, I expect the time freed by the software will allow my team to take on new responsibilities and scale effortlessly with minimal, if any, added headcount.”

**Kyle O’Connor**  
VP of Finance & Accounting, Brookfield Public Securities





## Are you experiencing any of these Excel reporting symptoms?

- A single ad-hoc report can take hours or days.
- Delayed decision-making at meetings.
- Outdated data in reports.
- Errors in data or formulas.
- Limited reporting insight.

If you said yes to two or more of these symptoms, there's a better way. What you need is a solution that can quickly give you the insights you need to make impactful, strategic decisions for your organization.





# Your path to better reporting and decision-making

**With Sage Intacct's fully cloud-based software, you can:**

- Get real-time visibility across all your companies in one single view.
- Slice and dice data with unlimited reporting on individual companies or the entire organization.
- Generate reports in seconds, rather than days- up to 98% faster.
- Run less than 10% of your reports in Excel.

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Sage Intacct provides powerful reporting capabilities right in your financial management software. Quickly pull up data and deliver a customized easy-to-understand report. With real-time, actionable insights, you can move out of routine, mundane tasks and into a more strategic role.

You can help drive decisions in your organization. You can identify trends and uncover new areas of opportunity, efficiencies, and close information gaps.

# Whole Family Health Center

**Sage Intacct can deliver significant, measurable gains for your organization. After making the switch, Whole Family Health Center was able to:**

- Improve overall accounting efficiency by 80%.
- Cut 12 hours a month of manual data entry into spreadsheets.
- Save 20 hours a month from reporting.
- Deliver more accurate reporting faster for executives, the board, and government funders.
- Reduce monthly close time by up to 73%.



“When [the board] saw the huge difference in reporting and presentation they said, ‘If we’d known this, we would have approved a new system a long time ago.’ They’ve been giving us compliments on how great the reporting has been with Sage Intacct. They can understand the reports and the numbers very easily.”

**Sabrina Rivera**  
AP and Payroll Specialist

# Graduate to Sage Intacct

As a member of the Sage family, your success is our mission. If you're starting to outgrow Sage 50 or may in the future, we're here to help you evaluate your next step with Sage.



**Customer case study:**  
**Whole Family Health**



**Reporting and Dashboards**  
**overview video**

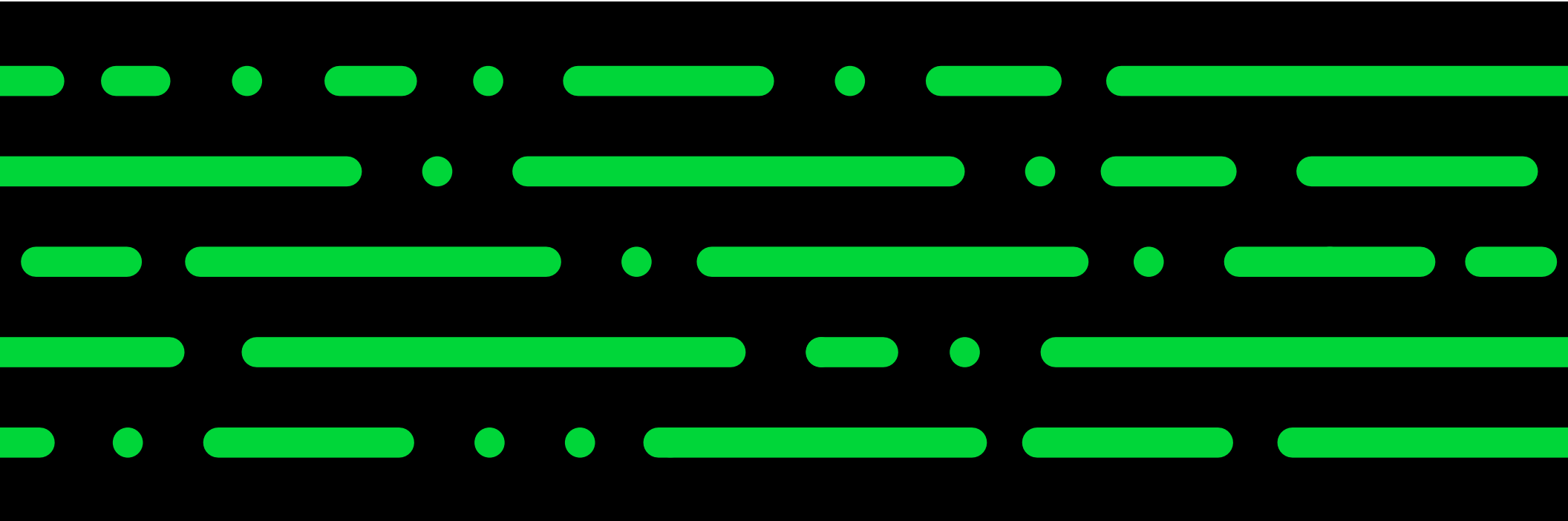


**Contact a Sage**  
**Intacct expert**

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