



SAGE INTACCT

# Data-Driven Decision Making: Unlocking Insights With Sage Intacct Dashboards



# Agenda

- ◆ Introductions & Firm Overview
- ◆ Why and How of Dashboards
- ◆ Purposes of Sage Intacct Dashboards
- ◆ Dashboard Components
- ◆ Planning Your Dashboard
- ◆ Use Cases
- ◆ Live Demo



# Today's Presenters



## Tom Achor

Sr. Solutions Consultant

With over 30 years of experience, Tom specializes in delivering accounting support and helping clients evaluate, implement, and optimize cloud-based financial and ERP software investments.

Tom has a diverse background working across various public and private industries, with added focus on nonprofit, government, cannabis, healthcare, and retail.



## Michael Sudberry

Sr. Systems Implementation Specialist

With over 7 years of experience, Michael specializes in helping companies implement and optimize financial management solutions for their unique business needs. Michael has worked extensively with clients in the restaurant, non-profit, and professional services industries.





# Sensiba

## Firm Overview



◆ 40+ Years in Business

◆ Serving 8,000+ United States & International Clients

◆ Thousands of Community Service Hours Each Year

◆ 6+ Locations throughout the West Coast

### Tax

Business, International, Private Wealth, Research & Development (R&D) Tax Credit, State & Local, Estate & Trust

### Audit & Assurance

Financial Statement Audits, Reviews & Compilations, Internal Audit, Sarbanes-Oxley Compliance (SOX), Employee Benefit Plans

### Risk Assurance

HIPAA, SOC Reports, ISO Certification, NIST

### Consulting

Outsourced Accounting, Lease Accounting, Family Office

### Technology

Sage Intacct, ERP, BlackLine, Limelight, Finance Automations

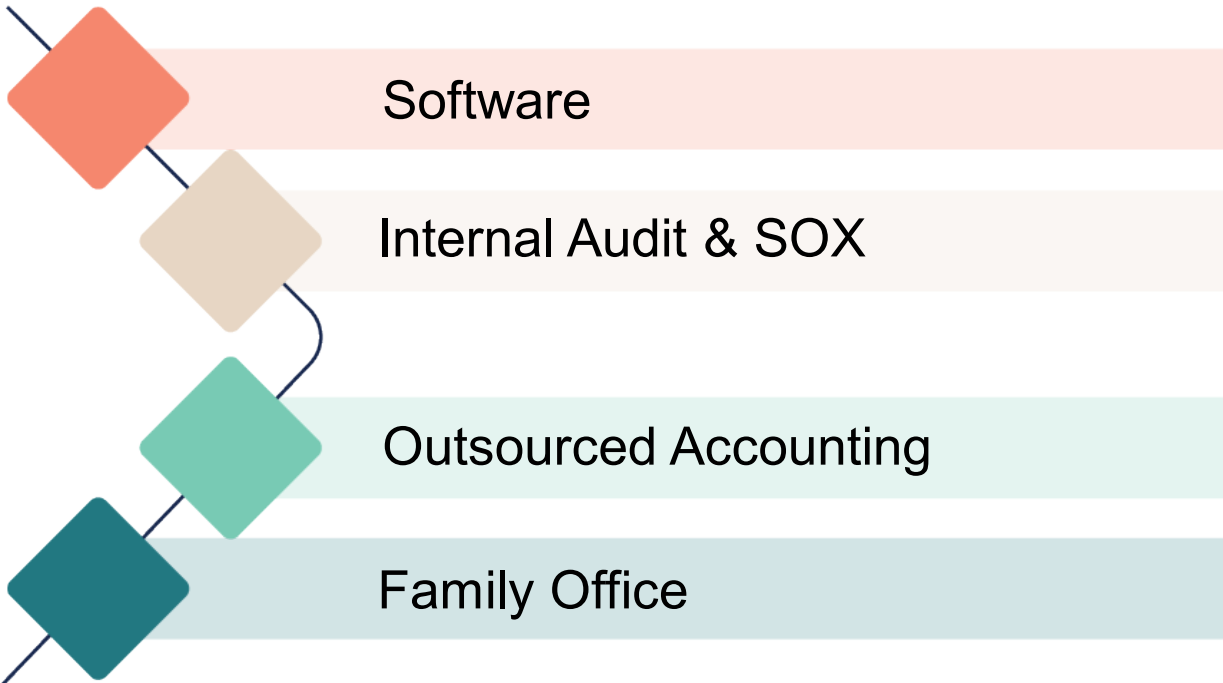
### Sustainability

B Corp Certification, SASB Standards & CDP, Impact IQ ESG Assessment, Climate Neutral Certification



# Sensiba

Consulting Practice



## Software Services

- ◆ Assessments
- ◆ Implementation
- ◆ Upgrades
- ◆ Assessments
- ◆ Implementation

## Certified Partner



# The Why and How of Dashboards

What gets in the way of using them?

- ◆ Customers have not explored possible uses for dashboards
- ◆ Customers expect dashboards to be difficult to create



# Purposes of Sage Intacct Dashboards

- ◆ Reporting for stakeholders
  - ◆ Can be view-only with optional drilldown
- ◆ Operational users
  - ◆ To facilitate job efficiencies
- ◆ Other uses
  - ◆ Inter-entity reconciliation, consolidations, auditor access





Live Demo



# Dashboard Components

- ◆ Reports
- ◆ Graphs
- ◆ Performance cards
- ◆ Collaborate

- ◆ Approval queues
- ◆ Checklists
- ◆ Shortcuts
- ◆ Smart Links



# Planning Your Dashboard

## Identifying Your Needs

- ◆ Who is the User?
- ◆ What permissions/views do they have or need?
- ◆ Key information for their role



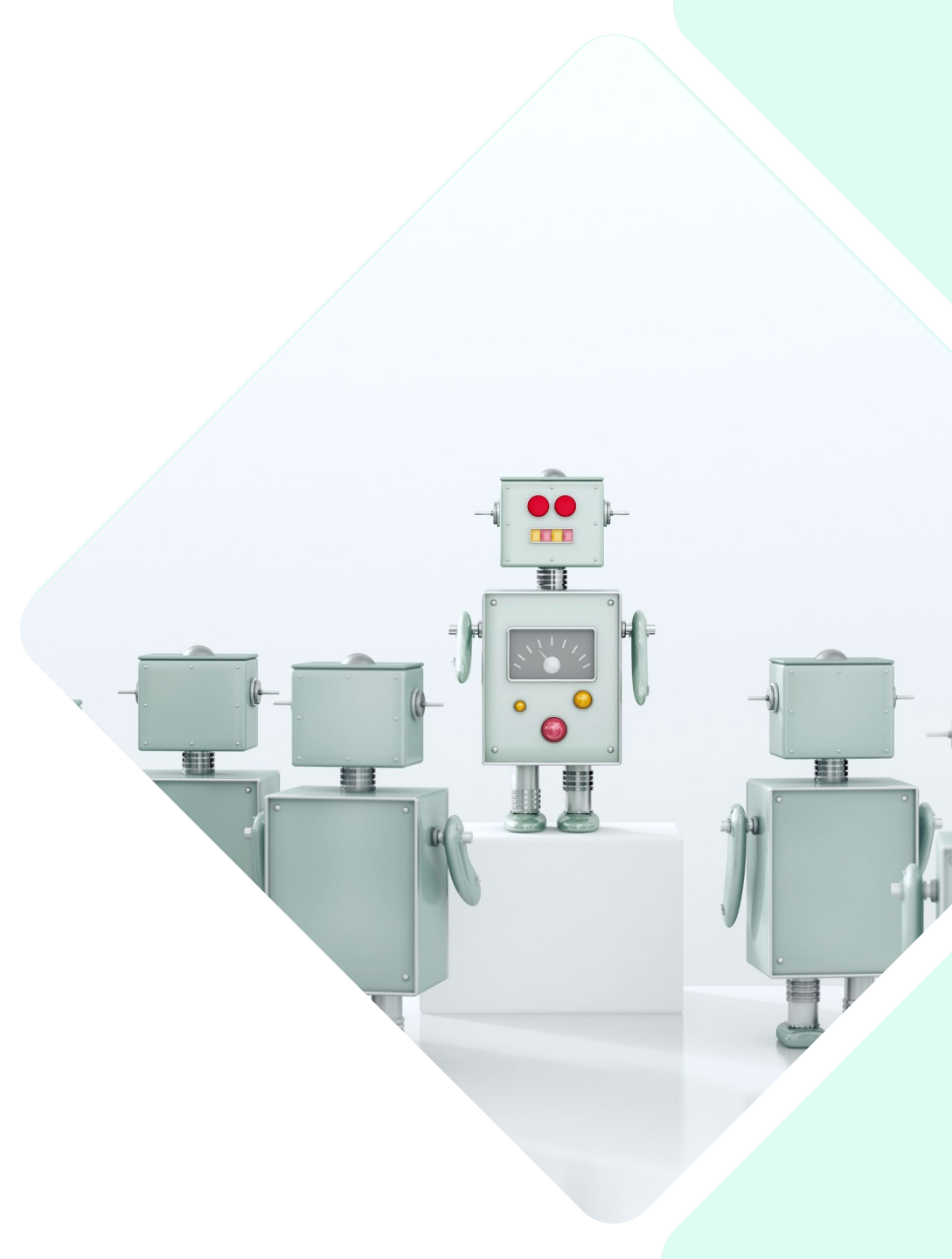
# Planning Your Dashboard

## Account Groups

- ◆ Financial
- ◆ Statistical
- ◆ Computational

## Dimension Structures

- ◆ Department/Program
- ◆ Location
- ◆ Project/Grant
- ◆ Others





Live Demo



Thank you!

Questions?

[Contact Us](#)

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