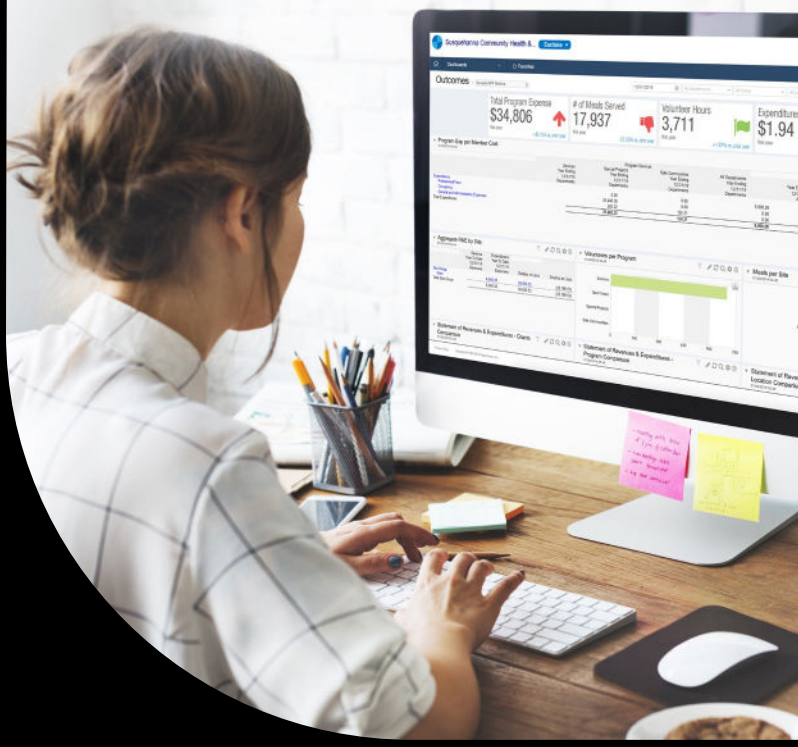
Datasheet

Sage Intacct Nonprofit Financial Reporting and Dashboards



Achieve real-time visibility into your nonprofit's performance.

Nonprofits need more timely, insightful financial reporting to make data-driven decisions. Sage Intacct provides easy-to-create reports, dashboards, and visualizations that are ready in real-time, allowing finance professionals and executives to look forward and plan for programs, fundraising, staffing, and more based on what's really happening.

Turn data into insight

- **Dimension-driven reporting**: Access or create reports that analyze real-time data that can be customized by role, program, location, funding source, and more.
- **Out-of-the-box functionality**: Use predefined financial reports and dashboards out of the box and add more to reflect the unique needs of your nonprofit.
- **Flexible delivery options**: Share real-time views on dashboards, through email or in the cloud. Archived copies can be kept directly in Sage Intacct or published into a cloud repository of choice.

See across the dimensions of your nonprofit

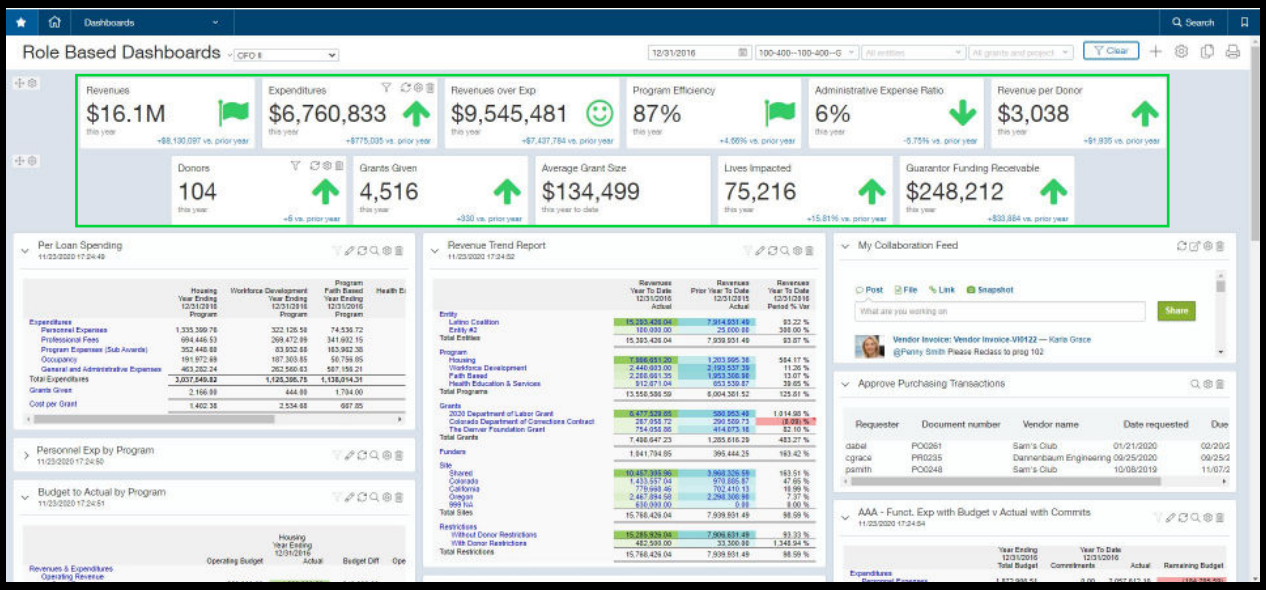
- **Automated reporting of outcomes**: Use statistical accounts to monitor outcomes and impact—whether that impact is measured in patients treated, meals served, or workers trained.
- **Drilldown capabilities**: Drill down to source transactions and attachments for financial transparency. Flag trends and spot exceptions with powerful report visualization. Sage Intacct keeps tabs on the historic workflow and audit trail, so you don't have to.

Deliver the insights different stakeholders need

- **Tailored views**: The finance team can easily configure dashboards for any user role and set permissions to ensure that each user receives only the information that is relevant and approved for their role.
- **KPI visibility**: Select the key performance indicators (KPIs) that matter most to your organization and track them on your dashboards.
- **Slice and dice data**: Because every transaction in the system is tagged with key business driver attributes called "dimensions," finance teams can sort, view, filter, and report on the specific information needed with just a few clicks of the mouse.
- **Visual indicators in reports**: See the information that matters the most with visual indicators that draw your eye. If you're over budget, you'll see it immediately.

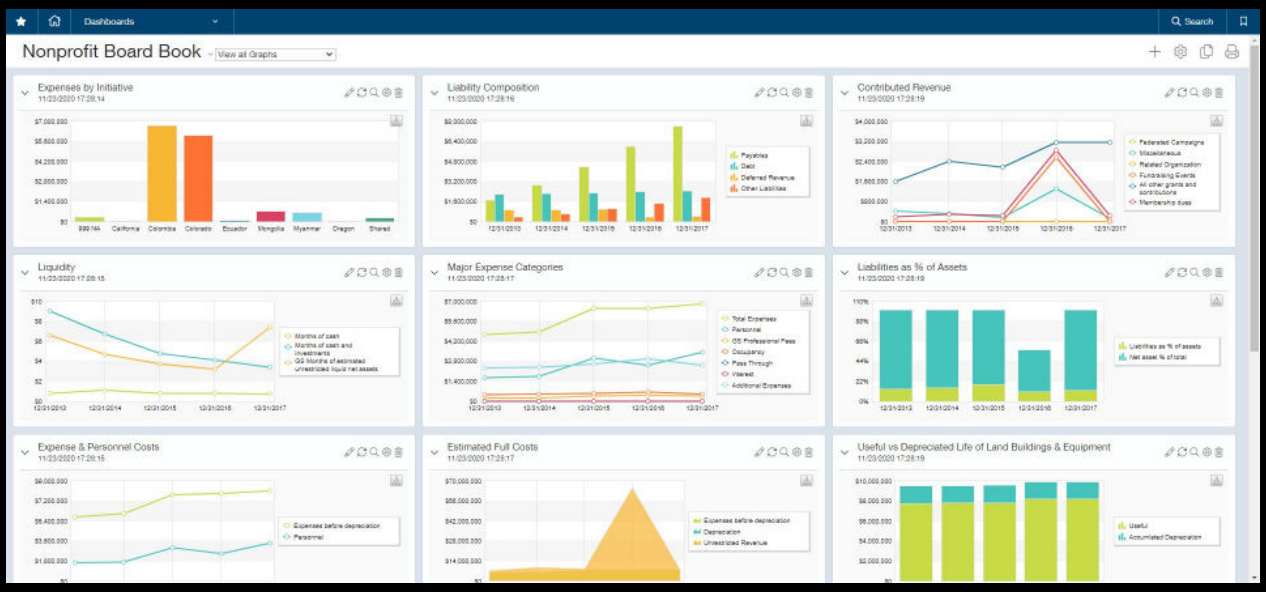
Sage

Role-based dashboard example



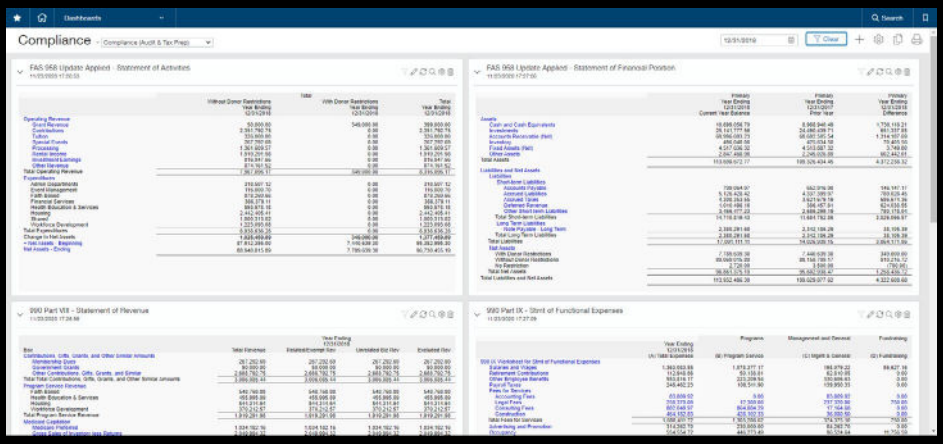
Sage Intacct role-based dashboards provide at-a-glance views of relevant information based on programs and responsibilities—like visibility into revenue and operational efficiency for leaders, metrics related to programs and budgets for program managers, and fundraising efficiency for development. You can even create a dashboard for your auditor with read-only access to streamline the audit process; reducing time and cost. Many dashbaords have “score card” elements—giving you a snapshot of the current state of your nonprofit’s financial status and putting real-time information at your fingertips.

Nonprofit digital board book example



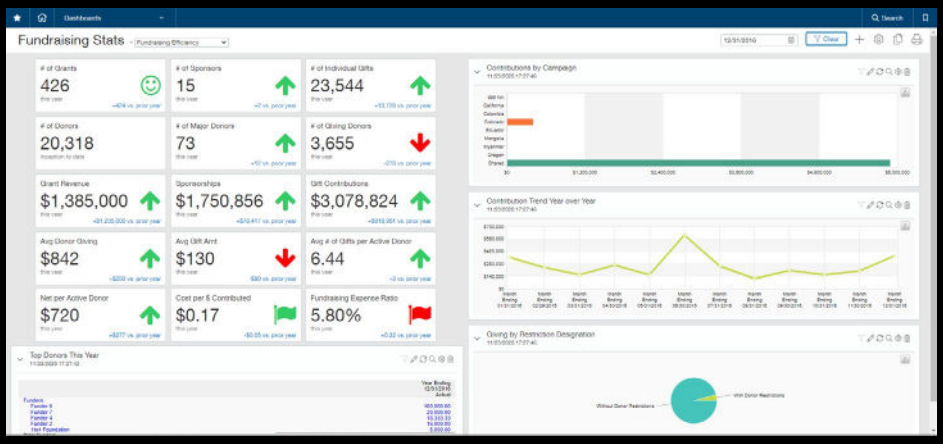
To improve the financial health and sustainability of your nonprofit, the Sage Intacct Nonprofit Digital Board Book provides best practice metrics to deliver real-time insights into your organization’s performance and mission impact.

Compliance dashboard example



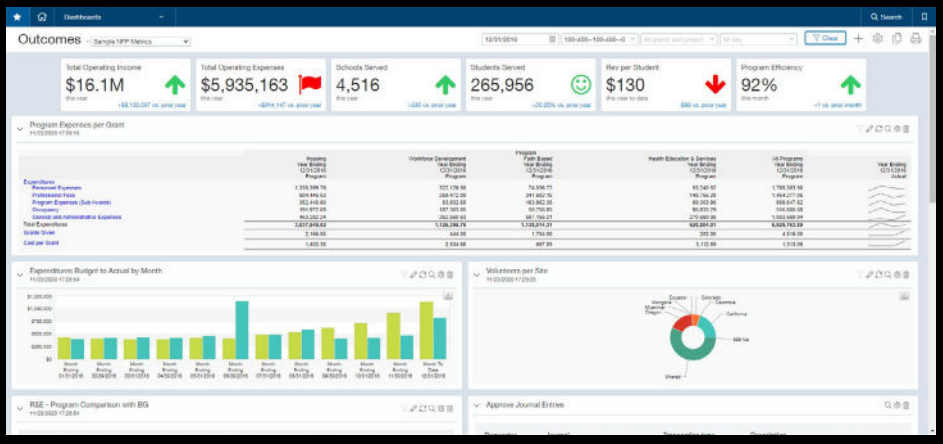
With Sage Intacct Compliance Dashboards, you'll have a central place for both financial and disclosure information. Easily track compliance to FASB 958, disclosures, and Form 990 reporting.

Fundraising dashboard example



Easily track and tag your expenses and revenue to automatically calculate fundraising metrics like number of donors, scholarships, average giving and more.

Outcomes dashboard example



When you combine financial and operational data into a single multi-dimensional outcomes dashboard, you share a true picture of your organization's impact with donors.

Integration dashboard examples

Sage Intacct open APIs let you connect to existing or future systems. This means you can leverage key data from donor management, payroll, budgeting, CRMs like Salesforce, and other systems to track metrics that are central to your organization's operations and programs in one place.

Achieve real-time visibility for data-driven decisions
Sage Intacct's reporting and dashboards empower nonprofit organizations to stop looking backward and start planning forward—at every level—from program managers to executives.

Achieving real-time visibility gives nonprofits the ability to make data-driven decisions that will allow for better stewardship and greater impact.

"Sage Intacct is our one-stop-shop where we see not only the organization's financial data, but statistical details like income and expenses per constituent as well. One thing that's been really helpful for us is Sage Intacct's personalized dashboards, where each manager, executive, and finance team member can get the information we need in one place and drill-down to explore the data as needed."

~ Dana Bakker, Controller, Hope Haven

HOPE HAVEN

BOOK A CONSULTATION

Jim Norton, CPA
Principal, Accounting
Technology Services

jnorton@grfcpa.com

https://bit.ly/GRF-SI-Meeting

grf
CPAs & ADVISORS

Sage

Sage

© 2022 The Sage Group plc or its licensors . Sage, Sage logos, Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors . All other trademarks are the property of their respective owners .