

DATASHEET

## Sage Intacct Planning

*The self-guided planning software for finance & business teams who want to move fast and have greater impact*



**Save Time,  
Move Fast**



**Always Trust  
the Numbers**



**Collaborate  
in Real-time**



**See the full  
financial picture**

**Sage Intacct Planning** is an intuitive cloud planning solution that eliminates your reliance on uncontrolled, inflexible, unsecure spreadsheets and replaces them with a real-time single source of financial truth for agile and confident decision-making.

### Product Overview

Turn your planning efforts into a strategic advantage the entire business can use to make better, faster, more informed decisions for growth. You can start using Sage Intacct Planning in just a few hours to overcome planning and budgeting frustrations, put planning best practices to work, and free up time to focus on strategy & analysis. It has all the planning features you need for planning, budgeting, what-if scenario modeling, reporting, and so much more. And with spreadsheet-like formulas, best practices, and pre-built functionality, it's fast, easy, and affordable to get started.

### Key Benefits

**Self-discoverable.** Intuitive design and intelligent tools make it easy to deploy and use, no admins required

**Connected.** Intelligent Planning Wizard syncs your chart of accounts & Actuals data from the GL and guides you through the Planning setup process step by step

**Powerful.** Driver-based modeling, what-if scenarios, and rolling forecasts let you see the impact of key decisions and quickly course-correct

**Collaborative.** Engage your non-finance business users in the planning process in a way that builds trust and accountability

## Features that Make a Difference



### Intelligent Planning Wizard

Syncs your GL data and dimensions, & guides you through plan setup in minutes



### What-if Scenario Modeling

Evaluate multiple options and variables simultaneously



### Guided Tours & Walkthroughs

Easy to learn, navigate, and use, ensuring a fast learning-curve



### Financial Reports & Dashboards

Understand what's driving business performance



### Advanced Modeling

Customized planning for any use case and any department



### Multi-currency Planning & Reporting

Collaborate with budget owners from any location



### Built-in Financial Intelligence and Calculation Logic

Ensures formulas are always calculated correctly and consistently



### Intuitive Point-and-click Setup, No Code Required

Get up and running in hours, not months



### Rolling Forecasts

Modify plans and pivot strategies as business conditions change



### Community & Support

Access resources and connect with SIP experts

## Take Your Finance Team to the Next Level

# 250%

Average ROI

# 75%

Time Saving

# 4X

Forecasting Frequency

*"The first time I pulled up Sage Intacct Planning in our executive team meeting, they were absolutely blown away by how quickly I was able to create a scenario, plug in what they were asking for, and show the results in real-time."*

—**Natalie Bonczek,**  
**Controller, Red Door Interactive**



*"The move to Sage Intacct has been a huge turning point for our organization."*

—**Kyle MacDonald,**  
**Director of Finance and Operations, Aegis Project Controls**



[Contact us today](#) to see how Sage Intacct Planning can help your business thrive

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