



2024 | BOSTON
INNOVATE
JMT CONSULTING

Preconference: Sage Intacct Insights Elevation: Harnessing Advanced Reporting and Dashboards Mastery

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Housekeeping

- This session qualifies for 7 CPE credits.
- Please make sure you sign in on the sheet.
- You must complete the survey through the QR code at the end in order to receive your CPE certification.
- The survey can be completed using your mobile device. Optional paper surveys are available and must be turned in at the registration desk.
- Please silence your mobile device during the presentation.



Introduction



Dagi Stanton

Manager, Education Services

- With JMT 9+ years
- Subject Matter expert – Sage Intacct
- Certified Consultant for Abila Fund Accounting, Payroll, HR, EWS, and Drillpoint
- Over 30 years experience in working with non-profits
- MBA; BS in Accounting

Introduction



Taylor Bost

Senior ERP Implementation Consultant

Intacct Implementation Certified

5 years of Intacct Implementation experience

Subject Matter Expert in Sage Intacct

Agenda

- Reporting ingredients
- Tools to build your reports
- Serving your reports to users

Today's selection – Dashboard

- Insert screenshot of spiffy Dashboard here



Today's selection – Report Ingredients

- Transactions
- Accounts
- Account Groups
- Dimension Groups



Today's selection – Reporting Tools

- Custom Views
- Standard Reports
- Financial Report Writer
- Custom Report Writer
- Interactive Custom Report Writer

Account Groups Types

- Account Group
- Statistical Account Group
- Group of Groups
- Computation Account Groups

Account groups

All ▾ Manage views ▾ Include private [Advanced filters](#) [Clear](#)

Name ▾	
Edit	View 990IX Benefits paid to or for Members
Edit	View 990IX Compensation of Officers, Directors, Trustees
Edit	View 990IX Conferences, Conventions, and Meetings
Edit	View 990IX Depreciation and Amortization
Edit	View 990IX Fees for Service
Edit	View 990IX Grants and Other Assistance
Edit	View 990IX Information Technologies
Edit	View 990IX Information Technology
Edit	View 990IX Insurance
Edit	View 990IX Interest
Edit	View 990IX IT
Edit	View 990IX Occupancy
Edit	View 990IX Office Expenses
Edit	View 990IX Other Employee Benefits
Edit	View 990IX Other Expenses
Edit	View 990IX Payments of Travel for Public Officials
Edit	View 990IX Payments to Affiliates
Edit	View 990IX Payroll Taxes
Edit	View 990IX Retirement Contributions
Edit	View 990IX Royalties
Edit	View 990IX Salaries and Wages



Dimension Groups & Structures

- Dimension groupings you created to group your data based on shared attributes
- Dimension Groups are used to filter data in reports
- Dimension Structures are used to build reports based around these groups

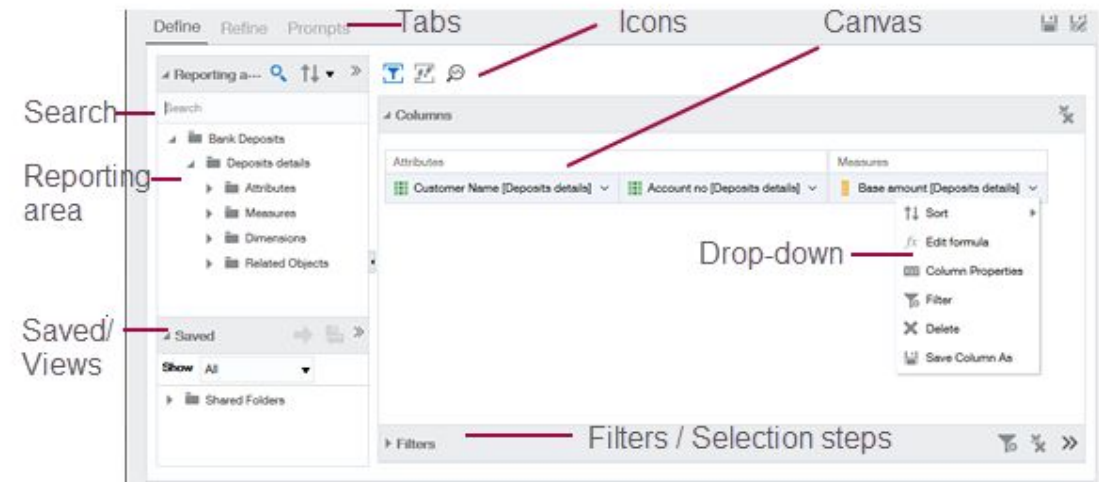


Custom Report

- Create specialized sets of information based on company data - financial data, nonfinancial data, or a combination of both
- Report on fields from almost any record or transaction, as well as related data
- Export information in custom report for use in applications
- Based on individual records and fields that can also be grouped together
- Custom reports can be memorized, scheduled, and added to a dashboard

Interactive Custom Report Writer

- Build powerful reports across a wide range of reporting areas
- Consumers of report can access interactive detail analysis of report data in real-time
- Includes a report library full of ready-made template reports to get you started and get creative juices flowing



How is ICRW different from other report writers?

- Drag-and-drop capabilities through interface
- Expanded use of icons for ease of use and faster report creation
- Enhanced features for refining reports and fine-tuning results
- Calculation columns with complex math functions, case and if statements, rolling sums, and trend analysis
- Can link ICRW reports together and reduce or eliminate the need for spreadsheets
- Flexibility to add content in a logical order and change and update content as needed



How is ICRW different from other report writers?

- Enables you to build reports with access to interactive data analysis in real time
- Combines advanced business intelligence with transactional analysis
- It's a lot like baking – if you have the right ingredients in place and a recipe to follow it is a fantastic, easy to use reporting tool.
- But if you go in with a hodge-podge of ingredients, limited knowledge of the system, and no recipe or plan to follow, you may run into some frustrations.



Add a little spice:

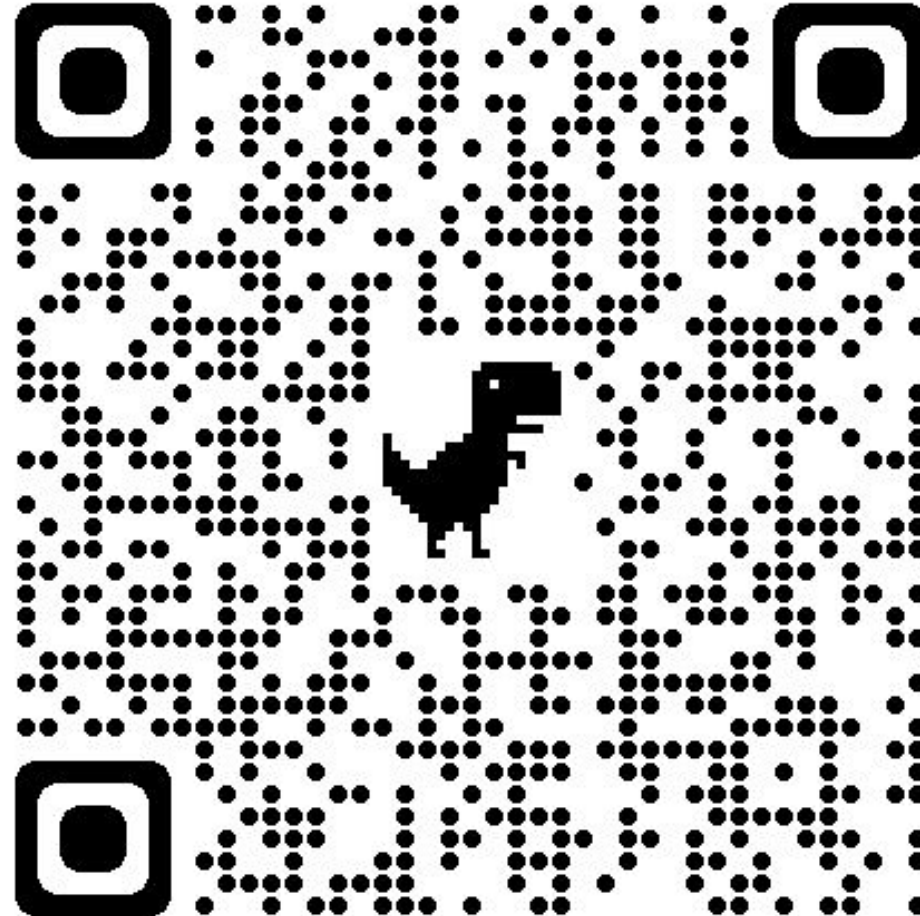
- Financial Graphs and Charts
- Collaborate Feeds
- Custom Lists
- Record Lists
- Interactive Visual Explorer (additional subscription)
- Smart Links

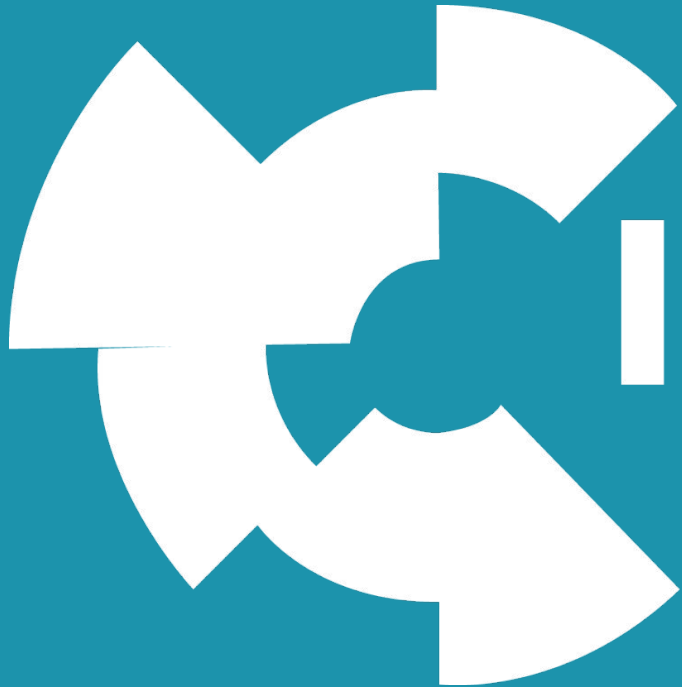


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