

E-book

# Master your data superpower: Turn financial data into real-time insights

ACUITY 24

Sage Business Partner





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## Introduction

# See the truth in your data



### Real time insights:

Make more informed decisions by generating tailored reports, board books, charts, graphs, performance cards, dashboards, and accessing financial data—all in real time. No more waiting around to pull financial data out of silos. Tap into a unified chart of accounts any time, from anywhere, to stop reacting and start performing.



### Save time:

Automate financial processes like Accounts Payable, month end close, generating audit trails, and take complex financial reporting from hundreds of hours down to minutes. Finalise budgets ahead of time and significantly reduce manual work and errors. Stop fighting fires—put your focus on strategy.



### Stitch your tech stack together:

Unify financial data whether from internal sources or external platforms, multiple entities, currencies and locations into a seamless, single, central system that delivers on-demand financial insights to help you drive your organisation's mission.

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MASTER YOUR DATA SUPERPOWER: TURN COMPLEX DATA INTO CLEAR INSIGHTS



# Maximise efficiency & your workflow superpower

Unlock smarter processes, reduce manual work, and drive growth with Sage Intacct.

## Current challenge

Many financial firms spend:

- 20+ days per month on consolidations and closes.
- 20-45 hours on manual accounts payable.
- Days preparing ad-hoc reports.

*2024 Sage Intacct customer research*

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What if you could make data-driven decisions in minutes, not weeks?

- **Free up time to drive business strategy:** Automate manual process like Accounts Payable using modern AI tools.
- **Automated multi-entity reporting:** Automate consolidations across complex entities, investment types, currencies, and locations—save time, minimise errors, and get real-time insights.
- **Self-service business intelligence:** No more sifting through endless systems—access on-demand financial insights across your portfolio.
- **Unified data access:** Consolidate your data from multiple systems into one centralised platform. Streamline access for faster, more informed decisions.
- **Built-in compliance:** Automate compliance and audit trails, allowing your team to focus on strategy rather than firefighting issues.

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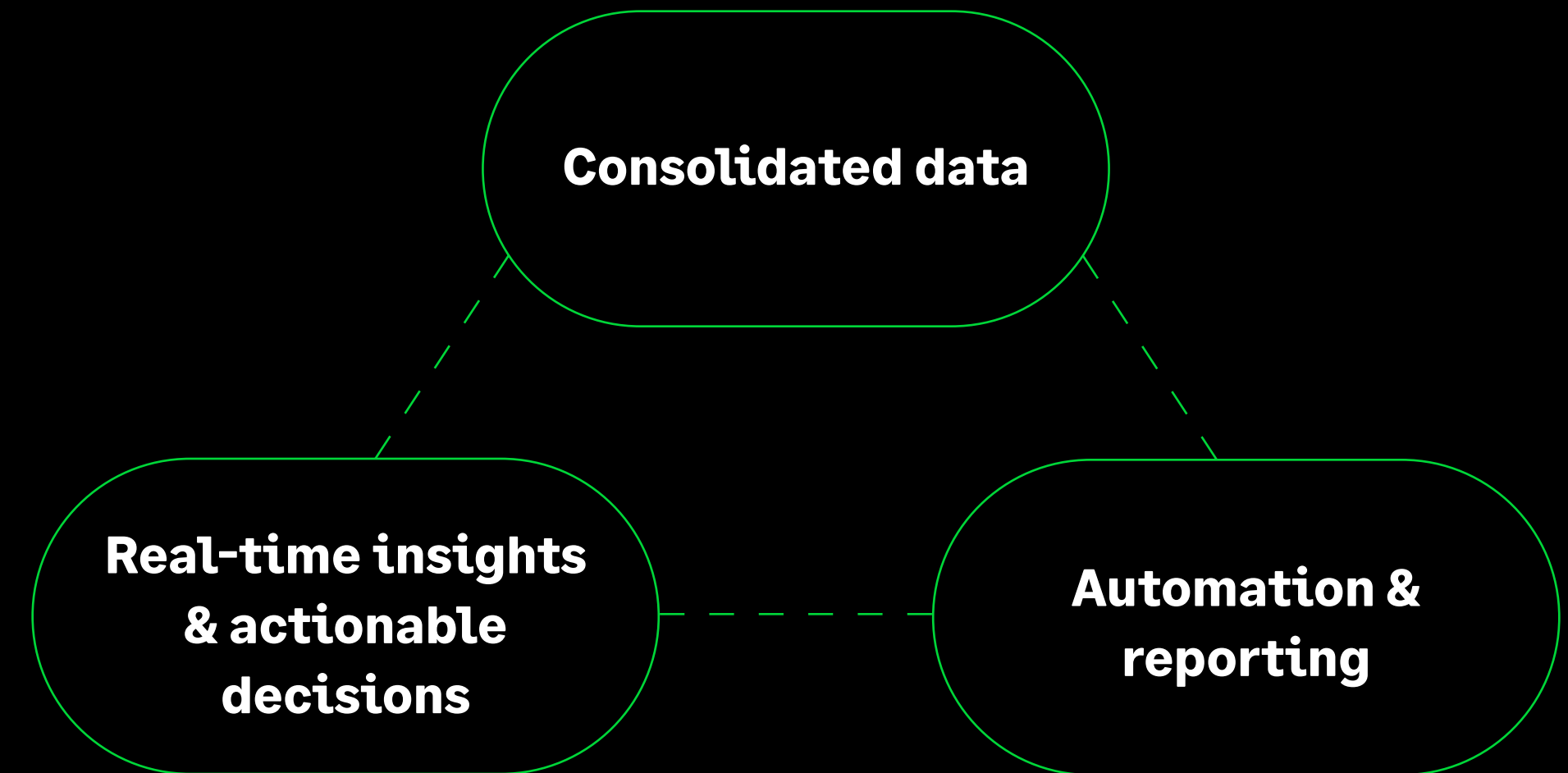
# Better management through **automation** and **self-service** **reporting**

## **Automated financial consolidation:**

Streamline your processes: Automatically consolidate financials across multiple entities in just a few clicks, saving your team hours each month.

## **Empowered self-service reporting:**

Make reporting effortless by creating custom, ad-hoc financial reports without waiting on colleagues or combing through spreadsheets.



## **Simplified chart of accounts:**

A unified chart of accounts across all entities makes reporting seamless, freeing up time for analysis.

## **Seamless data access:**

Get financial snapshots and drill down into performance across your organisation anytime, from anywhere.



“Sage Intacct consolidation and elimination journals simplify our accounting considerably, allowing us to run reports and trial balances effortlessly,” Harjot notes. “Its reliability in financial consolidations is a **game-changer**, ensuring a smooth month-end close process and enabling us to generate financial statements swiftly by the seventh working day.”

~ Harjot Chatha, Finance Director

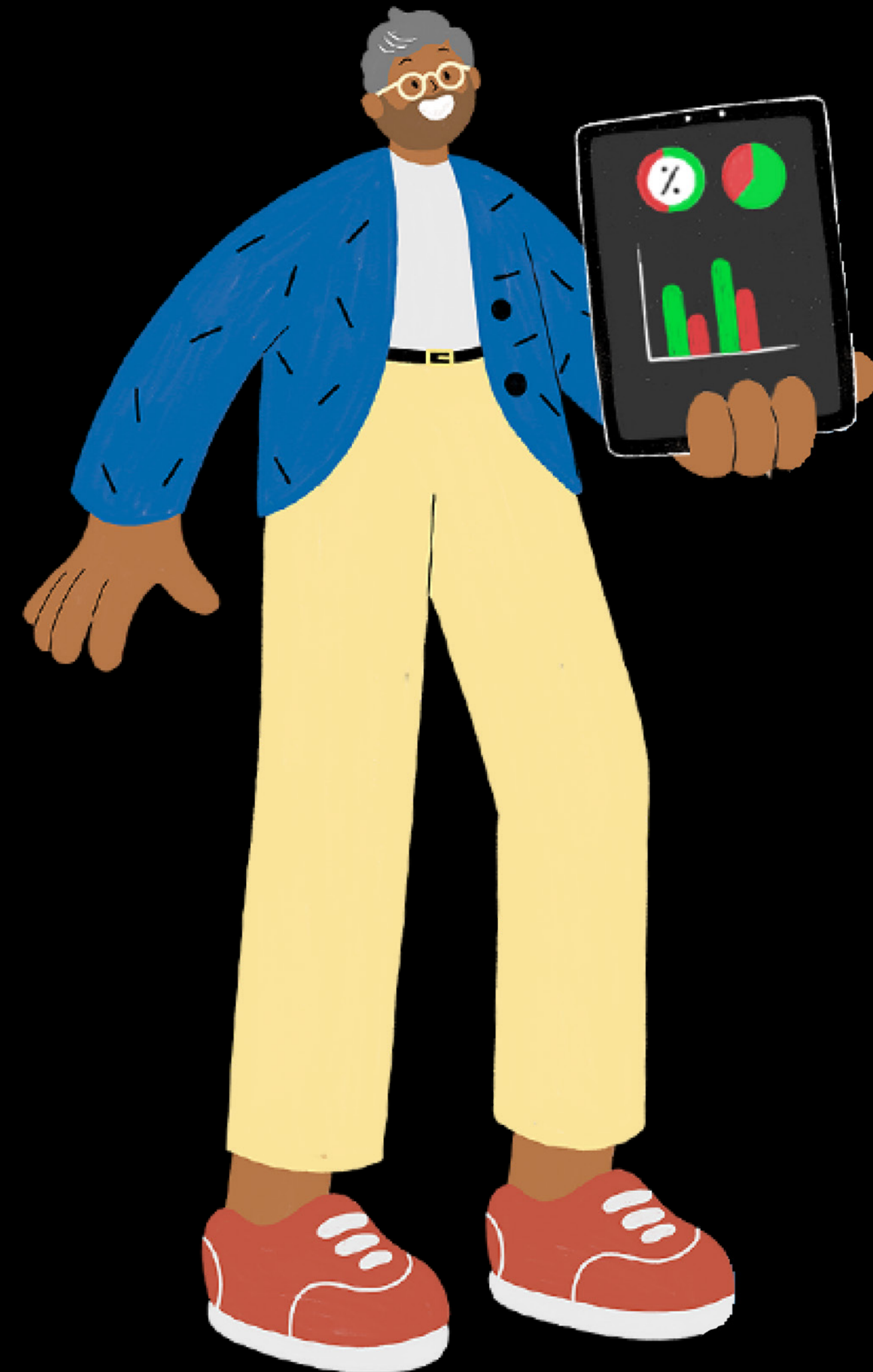




# Track business growth with customisable dashboards

Custom financial dashboards bring speed to insights, with performance cards and easy-to-read charts, graphs, and reports.

Dashboards are fully customisable according to a user's role and needs. Instantly view key metrics like assets under management or fair market value over time. From a central view, access drill-down capabilities into performance drivers for deeper insights into the "why" and "how."





“Our proficiency with Sage Intacct has grown, meeting the real-time data needs of our private equity backing. It’s pivotal in meeting our reporting deadlines and refining our monthly reports, **boosting efficiencies and outcomes.**”

~ Harjot Chatha, Finance Director





# Quality tools = quality insights

Effortlessly organise your data for contextual understanding with advanced tools like Sage Intacct. These tools allow financial service professionals to categorise and structure data, adding clarity and providing deeper insights for improved organisational growth.



## Leverage dimensions for tailored reporting:

Dimensions in Sage Intacct function like labels that categorise financial data, making it easier to track, filter, and analyse reports specific to your organisation's needs. Dimensions unlock more meaningful insights and enable better decision-making.



## How dimensions help:

- Tailored reporting: View financials by specific programs, business lines, or locations.
- Efficient analysis: Quickly sort and filter data to focus on the insights that matter most.
- Real-time dashboards: Generate up-to-date dashboards to monitor performance in real-time.



## Leverage Modern Visual Reporting Tools:

- Latest interactive reporting tools provide users with ease and speed of report creation, and an enhanced user experience to address complex reporting needs.



## Did you know?

Sage Intacct's budgeting and planning tool integrates seamlessly with dimensions, allowing you to build detailed budget plans based on the specific categories you've set up. By integrating dimensions, you can easily compare budget vs. actuals, streamlining forecasting and analysis while saving time and minimising manual work.



“It’s helping the operations team focus on where they need to **improve and find efficiencies** that contribute to an improved gross profit margin for clients.”

~ Andy McKeon, Group Financial Controller





# Bring all your financial data together in one place, **in real-time**

Did you know?

## 80%

of companies report significant operational improvements within the first few months of adopting cloud technology.

*2024 Sage Intacct customer research*

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## Key Benefits

### 1. Effortless data integration:

- **Seamless integration across systems:** Connect your business apps—such as Salesforce, Webexpenses, or Avalara—directly into your financial management system using Sage Intacct’s open API architecture. Eliminate redundant data entry and errors caused by manual processes.
- **Always up-to-date:** Real-time data flows from all systems, ensuring financials are always current.

### 2. Anytime, anywhere access:

- **Work from anywhere:** Access your financial data 24/7 from any location, as long as you have internet access. Whether in the office or on the go, stay connected to insights that drive your business forward.

### 3. Enhanced security and data continuity:

- **Built-in data backup:** Your data is protected with leading-edge cybersecurity and automatic backups, ensuring that critical information is always available and secure.
- **Peace of mind:** Maintain data security and continuity with robust cloud-based protections, so your business stays up and running no matter what.

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# Achieve peace of mind and save hundreds of hours with **automated, compliance-ready processes**

## Key Benefits

### 1. **Simplified auditing:**

Equip auditors with tools to drill down into ledgers, subledgers, reports, reconciliations, and transactions. Automatically generate audit trails, tracking every transaction's "what, when, and who," while attaching necessary documentation directly in Sage Intacct. Use collaboration tools to store comments and conversations, providing full transparency for audits.

### 2. **Foreign currency management:**

Simplify foreign currency transactions with IFRS 102 compliant multi-currency consolidations. Perform currency conversions with ease while maintaining compliance with global standards.

**Confidence in your data means  
confidence in every decision you make.**



Customer success

# How pensions disruptor Isio ensures success with Sage Intacct



## Rapid growth prompted the search for a robust, scalable solution

Newly independent firm Isio urgently required a new financial management system compatible with its time-tracking tool, Kimble. Facing rapid growth and acquisitions, Isio needed scalable, robust financial and HR systems for complex operations and timely investor reporting.



## Integrated solutions for a growing business

PwC advised Isio to adopt Sage Intacct, to handle rapid growth and acquisitions efficiently. Tailored training ensured correct use of the software’s capabilities and integrations so they could deliver a streamlined month-end close and timely, accurate reports.

Harjot recalls that they completed the switch “well ahead of schedule. It’s given us better control over our finances.”



## Advanced control and consolidation features give your business room to grow

Isio now works more efficiently, with streamlined financial operations and swift consolidations. It delivers timely and accurate reports to stakeholders, which drives further growth in the business.

Harjot remarks, “The support from Sage Intacct was unparalleled, far surpassing others during our company’s tech implementations.”



“Its reliability... is a game-changer, ensuring a smooth month-end close process and enabling us to generate financial statements swiftly by the seventh working day.”

~ Harjot Chatha, Finance Director





# Sage Intacct kickstarts process overhaul for Colmore PS



## Inherited systems hindering innovation

Legacy solutions and inherited processes meant long-winded and fiddly manual process were hindering the way Colmore PS wanted to operate. The company needed a simple way to create a centralised financial data repository with increased flexibility and more automation.



## Accelerating processes

One of the first areas for overhaul was invoicing, with Sage Intacct helping the company save over six hours per month through new invoice processes. The finance team can easily track any outstanding invoices or payments to suppliers, and weekly bank reconciliations go through the system to monitor cash levels.



## Optimising monthly consolidation

With four entities based in Switzerland, the UK and the US — all operating in their own currencies — monthly consolidation for Colmore PS was a very complex, time-consuming task with a lot of manual inputs. With Sage Intacct, consolidation is now a one-click process, taking just five minutes instead of several hours each month.

“

*Sage Intacct had the functionality we were looking for around consolidations, multi-entity and multi-currency; and it's good value for money.”*

Andy McKeon,  
Group Financial Controller

<sup>3</sup>2024 Sage Intacct customer research



## Conclusion

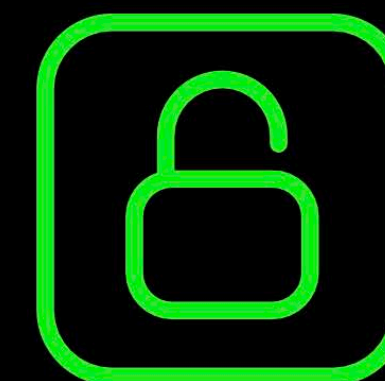
# Harness your data superpower— drive smarter, future-ready decisions

Your financial services firm has ambitious plans to grow—make sure your financial system is ready to help you harness the full power of your data. With Sage Intacct, you can:

- **Accelerate with automation:** Speed up processes like consolidations, turning weeks of work into minutes.
- **Customise reporting to fit your needs:** Build dashboards that deliver real-time, actionable insights.
- **Gain full visibility:** See your entire financial landscape in real-time, empowering you to make data-driven decisions.
- **Stay compliant:** Reduce risk and stay ahead of audits with automatic, transparent audit trails.



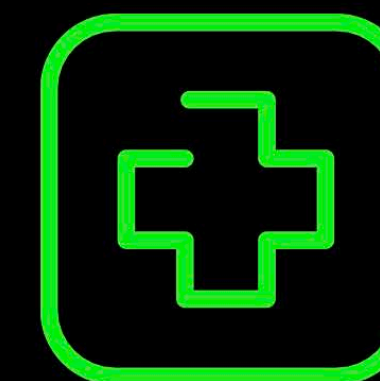




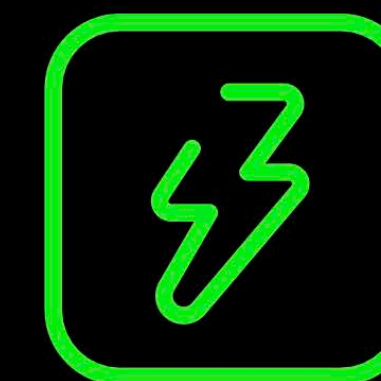
Fixed Price Services



Global Experience



Unlimited Service Options



Flexible Payment Options

Get in Touch:

[Marketing@acuity24.com](mailto:Marketing@acuity24.com)

[Acuity24.com](https://Acuity24.com)

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