

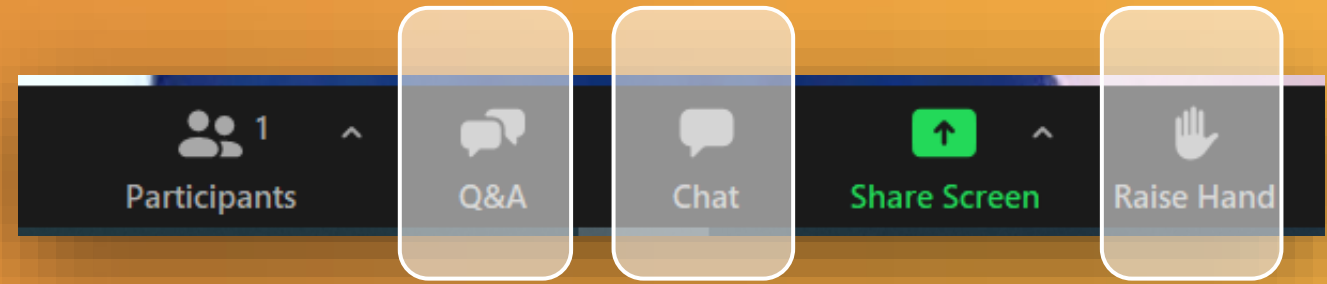
The Story Continues: Evolve with *Sage Intacct*

Design Dashboards Trusted to Guide Decisions

March 12, 2026

QUICK TIPS

Zoom Webinars



Ask Questions in Q&A Box

- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand

- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button

Today's *Presenters*



Jeremy Anderson
Manager

Jeremy has spent the last 4 years at Armanino, bringing an accounting background and firsthand experience as a former Sage Intacct user into his consulting work. Having worked on the client side, he understands the day-to-day realities teams face once they're live in the system. He enjoys partnering with client's post-implementation to help them increase efficiency, expand capabilities and improve system use. Leveraging practical experience and platform knowledge, Jeremy focuses on scalable, value-driven solutions that help organizations get more out of Sage Intacct.



Jennifer Jensen
Manager

Jennifer has spent the last 7 years on our Intacct team, partnering with clients across a wide range of industries—including Manufacturing, Construction, Inventory Management, Nonprofit and Cannabis. What she enjoys the most is working closely with clients to understand how they work today—and showing them how the right system configuration can streamline workflows, increase visibility and empower their teams. Turning complex challenges into practical, scalable solutions is where Jennifer thrives.



Agenda



Create
dashboards that
adapt to your
team's needs



Transform data
into actionable
insights



Make dashboards
intuitive, powerful
and decision-
ready

Dashboard
Demo



Expert Series Dashboard

12/31/2020

All departments

100--USA 1

Clear



Revenue

\$4,391,269

This year to date

+\$116,159 vs. prior year

Cost of Revenue

\$0

This year to date

-\$511,680 vs. prior year

Due from Entity 100

\$5,700

This month to date

Total Due to Entity 300

\$0

This month to date

> Working assignment



Message Board



Priority	Message
Urgent	03/06/2026 — Month End Recon Please do not post entries into February. We are working to close out the period. [Jennifer Jensen]

> External links



> Closed Thru Summary



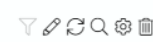
> Profit and Loss - Detail

03/06/2026 09:38:01 AM



> Balance Sheet - Detail

03/06/2026 09:38:03 AM



> Cash Flow Statement

03/06/2026 09:38:04 AM



> Profit and Loss - Actual vs. Budget YTD

03/06/2026 09:38:06 AM



> Custom Navigation



> Approve bills



> Approve journal entries



> Posted payments



Dashboard

Components



Dashboard Components



- **Record:** Checklist and Assignments
- **General:** Message Board
- **Smart Links:** External Links
- **General:** Closed Thru Summary
- **Report:** Profit and Loss – Detail
- **Report:** Balance Sheet – Detail
- **Report:** Cash Flow Statement
- **Report:** Profit and Loss – Actual vs. Budget YTD



- **General:** Custom Navigation
- **Record:** Approve bills
- **Record:** Approve journal entries
- **Record:** Posted payments
- **Performance Card:** Revenue
- **Performance Card:** Cost of Revenue
- **Performance Card:** Due from Entity 100
- **Performance Card:** Total Due to Entity 300

What We *Heard*



Create a Dashboard



Add Reports



Add Components

SESSION 2

Month-End Without the Madness

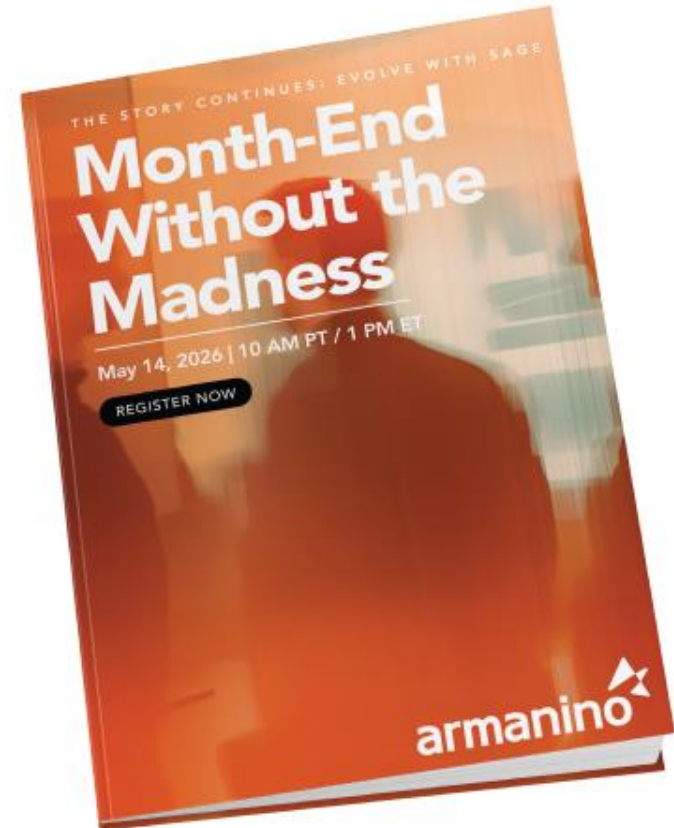
Month-end doesn't have to feel rushed, reactive or dependent on one or two people holding everything together. This session covers practical ways to improve your month end process using clear steps, checklists and coaching approaches for better team ownership. Learn how to reduce last minute issues and run a more predictable, manageable close.

Date: May 14 / 11:00 – 11:45 AM PT

What to Expect:

- Step-by-step guidance to accelerate month-end
- Checklists that help prevent common close issues
- Tips on empowering your team to close with confidence

REGISTER NOW



<https://www.armanino.com/events/sage-intacct-expert-series-webinar/#register>

You Can't Spell Armanino Without "AI"

Connect with us:

Jeremy.Anderson@armanino.com

Jennifer.Jensen@armanino.com

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