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Sage North America – Sage View

na.Sage.com

Sage View is a cloud-based solution designed for accountants to easily monitor client performance and financial health in real-time. Through powerful dashboards, customizable key performance indicators (KPIs), and reports, Sage View empowers accountants to see, understand, and take action on client data immediately.

With Sage View, accountants can see the performance of clients in one place without having to request files, create elaborate spreadsheets, and dig into various client accounting packages. Accountants may connect to client data seamlessly using their current portfolio of solutions, including Sage One –U.S. Edition, Sage 50 Accounting – U.S. Edition, and Intuit QuickBooks® U.S. Desktop.

Sage View allows accountants to move from a role of data capturing and reporting to more of a proactive business advisor. With Sage View, accountants can enhance client relationships and attract new clients by offering real-time recommendations and high-value advice, leveraging Sage View's easy to use technology. In fact, in the 2014 Sage Accountancy Index, Sage found that 51 percent of U.S. firms do not have anytime, anywhere access to all of their clients' information.

Sage View enables accountants to stay close to client performance with up-to-date financials, including drilling down to compare how a client is doing today versus at any other point in time, and quickly identifying business opportunities and concerns proactively in order to recommend corrective action. Sage View helps accountants go beyond tax services to become the advisor their clients need them to be, creating new revenue streams with financial strategy and planning services. Sage View also allows accountants to get more done in a day.

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appear on a dashboard. Accountants can establish and save business rules on a per client basis within Sage View. Then, Sage View constantly monitors these business rules and alerts the accountant when any of the business rules' conditions are met. Sage View allows the accountant to turn numbers into deep financial insights and provide proactive advice to clients on an ongoing basis, helping clients make faster and better business decisions.

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