

sage 300 Intelligence Reporting

BELMONT HOUSE GETS TIMELY, ACCURATE REPORTS

thanks to Sage Intelligence Reporting



Sage Intelligence saves Belmont House a substantial amount of time when pulling and formatting reports, and is currently used for financial and payroll reports with a plan to expand into vendor reporting.

Customer

Belmont House

Industry

NPO

Location

Toronto, Canada

System

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An easy learning curve

Belmont House has a long charitable history of offering long-term care and retirement living in one of the last remaining green spaces right in the heart of downtown Toronto. The not-for-profit has a small, six member senior management team, all of whom require summarized, accurate, and timely management reports to ensure the continued smooth running of what has become Ontario's "Seniors' Home of Choice". The task of providing this information falls to Dennis E. Donovan, the enthusiastic and driven finance and information management director for Belmont House, who has developed a passion for Sage Intelligence Reporting.

Dennis had originally turned to Financial Link but was faced with limited functionality, which, while giving him access to the relevant data, left him with no time for analysis of the information and no way to display that data visually.

Having heard of Intelligence Reporting before, Dennis saw it in action for the first time at the Sage Summit in 2014, and by August of that year had already put this exceptional business reporting tool to use. Dennis has taken enthusiastically to it. A regular attendee of Sage Summit, he has also worked through many of the training courses and makes use of the Sage Intelligence Reporting Community. "The Sage staff have been great at answering questions about Sage Intelligence and the courses are an excellent base for learning how to create reports," says Dennis. He also enjoys a hands-on approach towards seeing what he can achieve with Intelligence Reporting and has taught himself a great deal about the capabilities of the product.

"It saves a lot of time, in terms of being able to run reports and very quickly get them out." Dennis told us, along with explaining how Intelligence Reporting has allowed him to easily format these reports and quickly save them back.

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Taking control

Intelligence Reporting also gives Dennis the ability to pull information from multiple databases, and he now simultaneously tracks and reports on both of the organizations, Belmont House and the Belmont House Foundation. Sage Intelligence affords cross company reporting, helping to keep the inter-company accounts in balance. The time he has spent playing with Intelligence Reporting in order to learn all the ins and outs has granted him a new perspective and he often finds it far easier to create financial reports from a blank canvas. By utilizing the robust Task Pane in the Report Designer rather than making changes to the standard financial layouts that ship with Intelligence Reporting, Dennis has been able to generate highly customized reports for Belmont House.

Dennis currently uses Intelligence Reporting for financial reports, dashboards and payroll reporting by department with both dollars and hours. The Board is happy to receive their results quickly through a summarised visual report

pack, giving them accurate management reports when they need them. Management is happy to receive their results quickly, giving them accurate management reports and drill-down capability. He eagerly keeps up with advances in Sage Intelligence and what few remaining doubts he has had have evaporated in the face of Sage's constant innovation of their products. He is currently working toward his next reporting project where he wants to implement vendor reporting. He has also installed Sage Intelligence on his colleagues' machines and looks forward to next year when he will start working with them to do their own reports.

Ultimately Dennis's hope for Intelligence Reporting was to get the information in the General Ledger to other people in a way that they can relate to. "As soon as they hear it's in the General Ledger, it's a scary place to be, and it's an accounting issue." Being able to create reports that business owners and decision makers can relate to, has greatly helped others to not only see their real numbers but also to be able to make the best use of that information.

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Dennis E. Donovan, finance and information management director, Belmont House

