

# sage One Intelligence Reporting Cloud

## THE OUTSOURCE CFO FINDS THE PERFECT REPORTING SOLUTION, in Sage One Intelligence Reporting Cloud

Jona was in search of a reporting solution that would help him deliver reports that suited his clients' needs, until he received notice of Intelligence Reporting. Since then, he has been able to provide his clients with almost any report that they request.



Accountant

**The Outsource CFO**

Industry

**Financial Consulting**

Location

**South Africa**

System

**Sage One**

### Finding the perfect solution

The Outsource CFO is a team of Chartered Accountants who have a wealth of experience in both corporate and entrepreneurial environments. This mix ensures that entrepreneurial flair is managed within sound financial principles. They offer a full array of financial, accounting and management services which are tailored to fit any company size, strategy and needs. The company not only creates reports for their clients, but also analyse them in order to help their clients make informed business decisions.

The Outsource CFO works mostly with start-up and small businesses, making Sage One the perfect accounting solution as it's simple enough for their customers to use. Jona Blecher, Managing Director (MD), likes Sage One because it has a lot of time-saving features like bank

uploads, and most importantly, because it's in the cloud, so there's no risk of it crashing and he can access his clients' books at any time, wherever he is.

Prior to using Sage One Intelligence Reporting Cloud, Jona had been spending a significant amount of time creating reports for his clients who all had unique requirements. Some clients wanted their reports at different times to others, and others wanted their reports to be presented in a very different way. He had started looking for a reporting solution that would be more efficient.

Jona and his team were introduced to Intelligence Reporting Cloud in February 2016 when it was launched. He saw a marketing communication about it and the advertised features were exactly what he was looking for! The other reporting solutions he had considered had great features, but weren't as perfect a match for his needs as is

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## Catering to clients' needs

It helps him create the exact reports that his clients need. For example, he has a client who needed a very different type of management report pack which was taking about two weeks to create. With Intelligence Reporting, he has been able to create this custom report pack, save it, and then re-run it for the client at the end of the month. Now his clients' reports are never delayed, as they have been previously.

Getting on board was easy, especially for the basic users in his team. Because he's the 'developer' in the company, being the one who creates custom reports, he needed more advanced skills. He was referred to Carmen Griessel, a Sage Intelligence Product Specialist, who helped him learn the intricacies of the software so he can take full advantage of its reporting capabilities. He's found it fairly easy to use continuously, especially because he understands Excel®, and it's been easy for him to train his staff on it.

60 percent of the reports he creates are done using the Excel Report Designer. Jona prefers Excel because it has the

functionality that makes it easier to customise reports. He is also very comfortable with Excel—stating that his Excel skills are excellent! A bonus is that he can copy reports from client to client, and is still able to make the necessary tweaks to suit each client's unique reporting needs. About 25 percent of the reports he creates are done by running the ready-to-use reports which are available with Intelligence Reporting. For the most part, he creates new, custom reports from scratch for his clients. He runs twenty reports at month end that are similar, but are also intrinsically different, since he services clients from different industries.

Jona says that for him, the three main benefits of Intelligence Reporting are: 1) time saving, 2) it helps customers make informed business decisions' quicker, 3) it helps him provide a more professional service, adding, "It makes me look good!"

He's also happy to say, "Intelligence Reporting has definitely delivered on my expectations." Jona recommends it to other accountants who use Sage One, and who aren't aware that this powerful reporting solution is available to them.

*"Intelligence Reporting has definitely delivered on my expectations."*

Jona Blecher, Managing Director, The Outsource CFO



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