Nonprofit Financial Reporting and Dashboards

This course teaches you how to use the Financial Report Writer to create and manage nonprofit financial reports, including Statement of Financial Position, Statement of Activities, Statement of Cash Flows, and Statement of Functional Expenses. In addition, this course teaches you how to create graphs, dashboards, and performance cards to provide insight into your organization's performance. You will use account groups, dimensions, and calculations to create reports for analyzing data, identifying trends, and providing audit-ready financials. You will also schedule reports for delivery and run reports together in a report group.

***Note**: Either take Financial Reporting and Dashboards or Nonprofit Financial Reporting and Dashboards. Both classes teach you the basics of creating a financial report. However, Financial Reporting and Dashboards uses for-profit examples and Nonprofit Financial Reporting and Dashboards uses nonprofit examples.*

Class Details	
Audience:	This course is designed for accountants, accounting managers, controllers, and report writers in nonprofit organizations who are new to the Financial Report Writer and need to build or customize financial reports.
Prerequisite(s):	• Knowledge of basic accounting • Knowledge of financial and statutory reporting • Getting Started with Sage Intacct • Navigating Sage Intacct
Class Dates:	Monday, October 21 - Tuesday, October 22, 2019 9:00 AM – 5:00 PM (both dates) *Breakfast, lunch, and breaks will be provided on class dates.*
What You Need:	This is a hands-on course. Sage Intacct provides a sample environment for the activities. For the course, you need: • A wireless-enabled laptop (not a tablet) with a supported browser
CPE Credits:	• This course is eligible for 12 CPE credits • The field of study is Computer Software & App • The delivery method is Group Live
Cost:	$985

Course Objectives

At the end of this course you should be able to:

- Create and filter a financial report
- Compare financial data across time periods and dimensions
- Perform calculations using financial and statistical data
- Create actual-to-budget financial reports
- Schedule reports and run report groups
- Create graphs, dashboards, and performance cards

Course Topics

Running Financial Reports

- Running a financial report
- Chart of accounts
- Out-of-the-box account groups

Creating Financial Reports

- Creating a financial report
- Row and column settings
- Report permissions
- Formatting options

Comparing Financial Data

- Built-in reporting periods and offsets
- Comparing columns by time periods
- Expanding columns by time periods
- Expanding columns and rows by dimensions

Filtering by Dimensions

- Creating a dimension group
- Filtering a financial report

Creating Account Groups

- Creating account groups
- Report filters

Adding Statistical Data

- Statistical accounts, journals, and entries
- Automatic dimension counts

Performing Row and Column Calculations

- Statistical and computation account groups
- Adding row and column calculation
- Summarizing the amount of multiple columns
- Adding a percent of actual column

Creating Actual-to-Budget Financial Reports

- Reporting options for budgets
- Creating actual-to-budget financial reports

Managing Financial Reports

- Report management options
- Creating and running a report group

Creating Financial Graphs

- Creating financial graphs
- Data series and period comparison

Creating Dashboards and Performance Cards

- Creating a dashboard
- Component types
- Adding record, chart, report, and performance card components
- Nonprofit Financial Board Book powered by GuideStar

More Information

For more information regarding registration, refund, concerns, and program cancellation policies, please see our FAQ at www.sageintacct.com/training or contact us at training.sageintacct@sage.com.

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