

Data sheet

Sage Intacct Planning

The self-guided planning software for finance and business teams who want to move fast and have greater positive impact



Sage Intacct Planning is an intuitive cloud planning solution that eliminates your reliance on uncontrolled, inflexible, unsecure spreadsheets and replaces them with a real-time single source of financial truth for agile and confident decision-making.

- Save time, move fast
- Always trust the numbers
- Collaborate in real-time
- See the full financial picture

Product overview

Turn your planning efforts into a strategic advantage the entire business can use to make better, faster, more informed decisions for growth. You can start using Sage Intacct Planning in just a few hours to overcome planning and budgeting frustrations, put planning best practices to work, and free up time to focus on strategy & analysis. It has all the planning features you need for planning, budgeting, what-if scenario modeling, reporting,

and so much more. And with spreadsheet-like formulas, best practices, and pre-built functionality, it's fast, easy, and affordable to get started.

Key benefits

Self-discoverable: Intuitive design and intelligent tools make it easy to deploy and use, no admins required

Connected: Intelligent Planning Wizard syncs your chart of accounts and actuals data from the GL and guides you through the planning setup process step by step.

Powerful: Driver-based modeling, what-if scenarios, and rolling forecasts let you see the impact of key decisions and quickly course-correct

Collaborative: Engage your non-finance business users in the planning process in a way that builds trust and accountability



Tools that make a difference

Intelligent planning wizard

Syncs your GL data and dimensions, and guides you through plan setup in minutes

Guided tours & walkthroughs

Easily learn, navigate, and use—ensuring a fast learning-curve.

Advanced modeling

Customize planning for any use case and any department.

Built-in financial intelligence and calculation logic

Ensure formulas are always calculated correctly and consistently.

Rolling forecasts

Modify plans and pivot strategies as business conditions change.

What-if scenario modeling

Evaluate multiple options and variables simultaneously.

Financial reports and dashboards

Understand what's driving business performance.

Multi-currency planning and reporting

Collaborate with budget owners from any location.

Intuitive point-and-click setup, no code required

Get up and running in hours, not months.

Community and support

Access resources and connect with SIP experts.

Take your finance team to the next level

250% average ROI

75% time saving

4x forecast frequency

“The first time I pulled up Sage Intacct Planning in our executive team meeting, they were absolutely blown away by how quickly I was able to create a scenario, plug in what they were asking for, and show the results in real-time.”

~ Natalie Bonczek, Controller, Red Door Interactive

“The move to Sage Intacct has been a huge turning point for our organization.”

~ Kyle MacDonald, Director of Finance and Operations, Aegis Project Controls



© 2022 The Sage Group plc or its licensors. Sage, Sage logos, Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.