sage View

Easily turn data into actionable advice.

Be a more valued financial advisor to your clients with Sage View.

As an accounting professional, you'll be a more valuable contributor to your clients' successes if you can provide more frequent and meaningful strategic advisory services based on their financial performance and business trends.

Sage View empowers you to expand your role and become your clients' most trusted financial advisor by deepening client relationships, freeing up time so you can get more done in a day, and growing your firm with confidence.

Deepen client relationships

- Be your clients' "go-to" financial advisor year round
- Provide proactive advice that leads to immediate success
- See trends and recommend corrective action in real time

Get more done in a day

- Be more efficient through automated processes
- Get anytime, anywhere access in the cloud and from the mobile app
- Quickly find answers without using cumbersome and complex spreadsheets

Grow your firm

- Create new revenue streams
- Add new clients by expanding your financial services
- Show your value by providing your advisory services year round

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Try it free! Visit: sage.com/us/sageview

Go from number cruncher to trusted advisor

Sage View provides accounting professionals with a simple way to turn data into actionable advice, making them more valued financial advisors that leads to greater success for their clients.

Sage View helps you see your accounting clients in a new light by arming you with current Key Performance Indicators (KPIs), trends, analyses, alerts, and reports. Using this real-time information, you can monitor the financial health of your clients and advise them on opportunities as well as identify potential concerns and take preemptive action.

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It's not just a dashboard. It's a new way to make your clients' businesses more successful. You have a single, unified view of all their data, gathered through automated processes that save you time. They have a trusted accounting professional who sees what others miss. That's Sage View, and that's how you can go from tax time to all the time and become the year-round financial advisor your clients need you to be.

Get set up quickly and easily

- Easily connect to data in U.S. editions of Sage 50, Sage One Accounting, Intuit QuickBooks® Desktop, and Intuit QuickBooks Online (QBO)
- Once connected, data streams automatically
- It's cloud-based so there's no software to install
- Receive dedicated phone and chat support

Protect client data

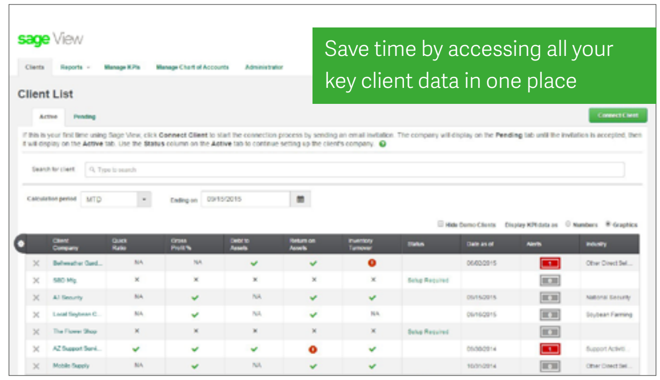
- SSL connections ensure your clients' data is strongly encrypted and safely transferred Limit access levels to select users

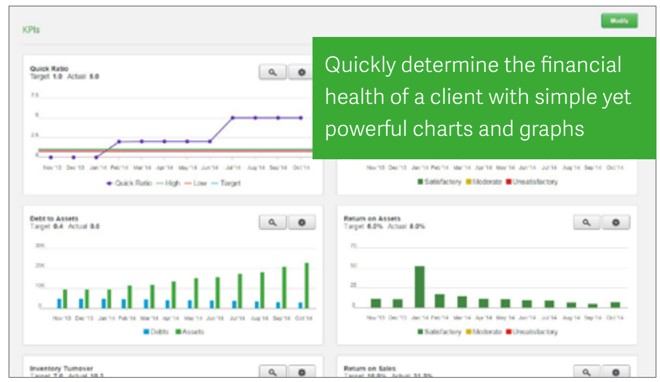
Make it your own

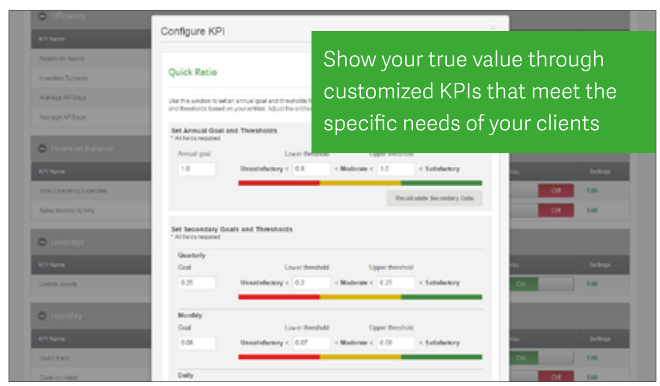
- Customize screens, reports, and Key Performance Indicators (KPIs) based on your personal preferences
- Track client financial health with up-to-date data in at-a-glance views that you configure

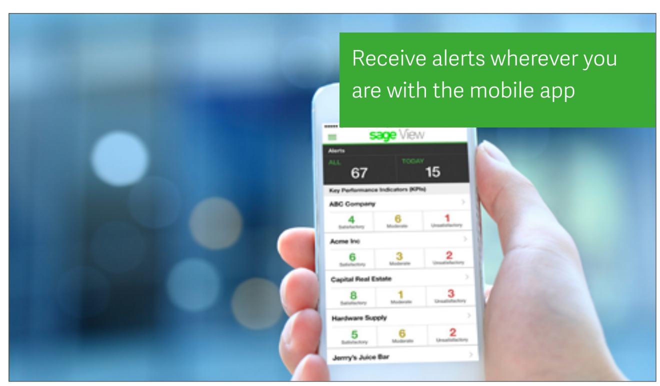
Focus on your clients

- See your clients' financial health and performance at a glance with reports and graphs that are easy to use and easy to understand
- Receive alerts wherever you are with the mobile app
- Provide automated client-facing reports that highlight the value of the services you deliver









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