

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## Sage North America – Sage View

[na.Sage.com](http://na.Sage.com)

Sage View is a cloud-based solution designed for accountants to easily monitor client performance and financial health in real-time. Through powerful dashboards, customizable key performance indicators (KPIs), and reports, Sage View empowers accountants to see, understand, and take action on client data immediately.

With Sage View, accountants can see the performance of clients in one place without having to request files, create elaborate spreadsheets, and dig into various client accounting packages. Accountants may connect to client data seamlessly using their current portfolio of solutions, including Sage One –U.S. Edition, Sage 50 Accounting – U.S. Edition, and Intuit QuickBooks® U.S. Desktop.

Sage View allows accountants to move from a role of data capturing and reporting to more of a proactive business advisor. With Sage View, accountants can enhance client relationships and attract new clients by offering real-time recommendations and high-value advice, leveraging Sage View's easy to use technology. In fact, in the 2014 Sage Accountancy Index, Sage found that 51 percent of U.S. firms do not have anytime, anywhere access to all of their clients' information.

Sage View enables accountants to stay close to client performance with up-to-date financials, including drilling down to compare how a client is doing today versus at any other point in time, and quickly identifying business opportunities and concerns proactively in order to recommend corrective action. Sage View helps accountants go beyond tax services to become the advisor their clients need them to be, creating new revenue streams with financial strategy and planning services. Sage View also allows accountants to get more done in a day.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

appear on a dashboard. Accountants can establish and save business rules on a per client basis within Sage View. Then, Sage View constantly monitors these business rules and alerts the accountant when any of the business rules' conditions are met. Sage View allows the accountant to turn numbers into deep financial insights and provide proactive advice to clients on an ongoing basis, helping clients make faster and better business decisions.

**Click here to see all of the [other nominees for the 2015 Innovation Awards](#).**

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved