



Sage Active Planner

Take control of the budget process and bring strategic insight to business planning with Sage Active Planner, an enterprise-wide, purpose-built budgeting and planning application. With Sage Active Planner, you can make quicker, more informed business decisions by shortening budgeting and planning cycles. And with a planning process that is easier and more efficient, you can encourage collaboration across all lines of business and tie budgeting activities to organizational performance.

Organize and manage the budgeting and planning process

Free yourself from time-consuming spreadsheet mechanics and focus on strategic budgeting and planning. With Sage Active Planner, you improve the flow of key information, such as business drivers and transaction data, through templates, automatic distribution and consolidation of the budget, central control over budget revisions, real-time seamless integration of data sources, and built-in security mechanisms. With more control over your budgeting and planning process, you can create effective, more accurate budgets and forecasts, and render a true analysis of company performance.

Utilize bottom-up or top-down budgeting processes—or a combination of both

Whether you need to allocate a revenue target or cost projection from the top down, or consolidate several different budget plans from the bottom up, Sage Active Planner accommodates your organizational structure and provides a purpose-built solution. Strong management capabilities allow for seamless integration of budget submissions from multiple departments, using “Plan Sheets” that have a familiar spreadsheet look and feel.

- Integration with all enterprise data
- Integration with general ledger (GL)
- Email notification
- Spreadsheet-like control



A flexible and powerful planning and budgeting application, Sage Active Planner helps enable quicker, more informed business decisions by automating and shortening the budgeting and planning cycles. It makes the planning process more efficient, encourages collaboration across all lines of business, and ties budgeting activities to actual results.

MANAGEMENT FEATURES

- Allocate budgets from bottom up, top down, or a combination of both. You can also consolidate several different budget plans.
- Strong management capabilities allow for seamless integration of multiple department budgets, using “Plan Sheets” that have a familiar spreadsheet look and feel.
- Automatic integration of your most important financial information is available directly from your general ledger.
- Comprehensive security lets you limit the use of Plan Sheets to authorized users as well as define their ability to view, edit, or modify information.

ANALYSIS FEATURES

- Create “what if” analyses to reorganize budget structures so you can view the impact of potential changes to your plan.
- Extract important data and create relationships between data points to illustrate patterns, trends, and exceptions that indicate how your business is doing—and where it is going.

CALCULATION FEATURES

- Apply calculations to a group of columns and spread back to individual periods using factors such as seasonal trends, business drivers, and prior year balances.
- Global formulas can be used by anyone in the system, eliminating the need for users to rekey standard formulas.

