Quickstart guide

Welcome to Sage Intacct Planning!

If any of the following apply to you, you can benefit from this quickstart guide:

- You have an existing budget in Excel
- You have a Planning cycle scheduled prior to the planned implementation of Intacct
- You have a dedicated FP&A team to manage the planning process

Prepare your data and create your first budget

Sage Intacct Planning has a built-in **Planning Wizard** that walks you through the process of creating your first budget.

To prepare your data for the Planning Wizard:

1. Determine and define your **Dimensions** and **Dimension values**, which help classify your data in your financial reports. For more information, see Dimensions.
2. Download the Planning Wizard template (Excel, 12 KB) to assist you with preparing the data.
3. Prepare your budget data in Excel as described in Prepare your data for the Planning Wizard.
4. Follow the steps in Create your plan with the Planning Wizard.

For more information to get you up and running with your new budget, see The basics.

Next steps

- If you share your budget with colleagues, see the Contributors quickstart guide.
- Add users and share your budget with contributors. For more information, see User management.
- Create your first scenario. For more information, see Scenarios.
- Create your first model. For more information, see Models.
- **For Sage Intacct users**- After you implement Sage Intacct, link your budget to produce budget vs actuals reports, or create a new budget with the integration. For more information, see Set up Sage Intacct Integration.

> The more you match **Dimensions** in Planning to the way you intend to set them up in Intacct, the more benefit you get from the plan that you create before the integration.