Brochure

Insights and Reporting in Sage 100

Sage

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Introduction

Sage 100 includes complimentary resources designed to provide insight to activities recorded as transactions in the various modules—keeping you current on the status of your overall business.

Basic record-keeping is a vital aspect of any well-run business, but perhaps more important is visibility into both the daily activities and the ongoing performance of the operations. Making an insight driven environment critical in your ability to plan for the future. With the tools provided in Sage 100, you can satisfy the regulatory and statutory requirements of the business as well as gain the daily oversight required to ensure your business continues to be positioned for success.

This document discusses each of the following Insight and Reporting tools included with your Sage 100 installation:

- Crystal Reports
- Sage Intelligence Reporting
- Business Insights
  - Explorer
  - Reporting
  - Dashboard

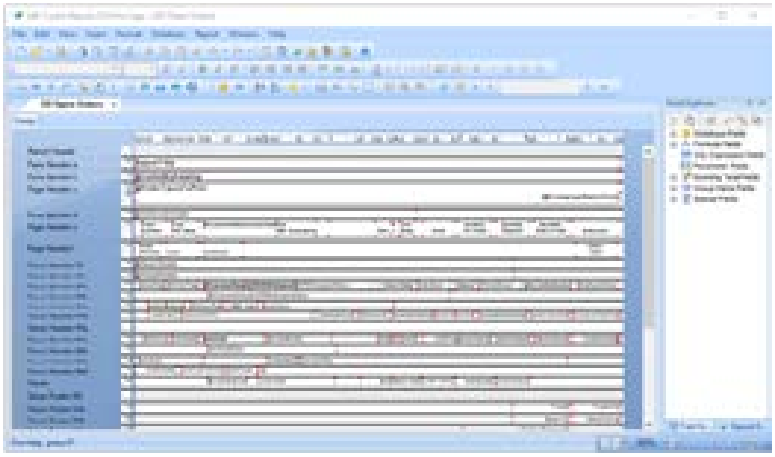
Additionally, included is a brief discussion of a few available third-party add-ons that you may find useful:

- Sage Alerts and Workflows
- Sage Data and Analytics
- Sage Enterprise Intelligence
- Sage Inventory Advisor

Crystal Reports

Sage 100 uses Crystal Reports from SAP as its primary report writer and form builder. Crystal Reports is a powerful Windows report writer that provides presentation-quality output for your custom reports. You can use sample reports straight out of the box or modify them to suit your needs, then save and run them anytime. Wizards can walk you through the steps to easily modify or create a new report.

Your installation includes a run-time editor version of Crystal Reports that enables the use of over 200 pre-defined, customizable reports, hundreds of journals, and over 50 forms within the software. Use this included tool to modify existing reports or forms. Then save the modified document under a recognizable name for reuse on future occasions.



Take control over the look of your documents by selecting font type, size, and color. Enhance the layout by applying lines, borders, and shading. Further enrich your reports to include your company specific information, pictures, diagrams, logos, and messages.

A single license seat for Crystal Reports Designer is also included with your Sage 100 installation (additional seats are available for an additional fee) that allows you to create your own custom reports based on Sage 100 dictionaries and tables. Your custom reports can then be saved as menu items for easy reuse.

Sage Intelligence Reporting

Sage Intelligence Reporting is a simple, flexible reporting solution that gives you meaningful insights into your information. Installed as a module in Sage 100, Sage Intelligence Reporting extracts data from Sage 100 and delivers it in a Microsoft® Excel® format that is easy to understand and manipulate, putting you in control of the design of your reports. Essentially, Sage 100 Intelligence Reporting empowers you to:

- Use your existing Microsoft Excel knowledge to easily write and edit reports, giving you instant visibility across your business.
- Spend more time focusing on analysis and interpretation of your information and less time pulling the data together.
- Design customized reports that suit your business's unique requirements.

Sage 100 Intelligence Reporting offers you four modules for purchase depending on your reporting requirements:

- **Report Viewer:** Run existing reports, in real time, when you want them.
- **Report Manager:** The Report Manager license allows you to do everything the Report Viewer does, plus it allows you to edit and customize your standard report templates and save them for future use, create new reports, sort, drill-down and aggregate your data, and automate the distribution of your reports. **Note: Sage 100 Business Care customers receive one Report Manager license for free.**
- **Report Designer:** The Report Designer has revolutionized financial reporting. It gives you two methods to create and control your financial reports depending on your Excel knowledge and your unique business requirements.
- **Connector:** The Connector enables you to access and consolidate information from multiple sources.

Financial Reporting
Sage 100 Intelligence Reporting is our recommended alternative to Microsoft® FRx®, and to get you started, comes with a set of standard reporting templates that give you immediate insight into and across your business.

Business Insights

Business Insights—Explorer
Business Insights Explorer provides predefined views of commonly used sets of data, such as the Customer view, Sales Orders view, and Open Invoices view. Data can be exported to a variety of output types, including Microsoft Excel, Microsoft Word, XML, and Web pages. Use Business Insights Explorer to navigate through data, and preview and drill into related data for the selected row to follow a transaction from beginning to end.

Data in the Data View grid can be filtered, sorted, grouped, and summarized. You can also modify the columns in the grid by showing and hiding columns, changing the column order, changing the column names, and formatting the data that appears in the columns. Changes to the Data View grid can be saved to a setting. The information in the Data View grid can also be printed and saved to a report.

Business Insights—Reporter
Business Insights Reporter offers predesigned reports that you quickly can customize to get exactly the information you need. Calculated fields are easily created, and you can design your layout for everything from a quick status snapshot to a presentation-quality report. A step-by-step Wizard walks you through creation of your initial report and menu placement for reuse. Further modifications can also be made at a later date using the SAP Crystal Reports Designer.

Business Insights—Dashboard
Business Insights Dashboard presents information in a high-level, attractive graphical format that allows you to instantly ascertain the state of your business. Flexible and simple to use, the dashboard can be displayed in the Sage 100 ERP Business Desktop or in Microsoft Internet Explorer or Outlook. You can choose from more than 15 predefined reports and place them on your dashboard with the wizard-based customization tool. The ability to drill down to detail is built in, and data is automatically refreshed so you are always working with current information. Customize the data displayed to highlight the information most useful to your management team, using the color scheme and reports you choose for the most pertinent periods of time. You can also distribute the information to the appropriate individuals via the Outlook option.

Sage Alerts and Workflow

Imagine having a full-time advisor that provided a notice when:

- A customer goes seriously past due
- A delivery is going to be late
- A customer changes their buying habits

And not only provides the notice but takes actions to address the situation.

This is where Sage Alerts and Workflow can take your business management to the next level of efficiency.

Alerts and Workflow automatically monitors your Sage 100 data for critical, time-sensitive conditions. For example, Alerts and Workflow identifies past due clients; it sends alerts about them; it can put them on credit hold, and it can even re-send them copies of their overdue invoices. Alerts and Workflow is far more cost effective than hiring a full-time assistant.

Learn more about **Sage Alerts and Workflow**.

Sage Data and Analytics

Take advantage of anytime, anywhere, cloud-based data management, business intelligence, and analytics for Sage 100 with Sage Data and Analytics. Get fast, efficient financial and operational reporting. Add insight from additional data sources like CRMs, add-ons, and Excel, and enjoy a no-code alternative to hand-built data warehouses and data management.

You can get started with Data Management and Analytics straight out of the box!

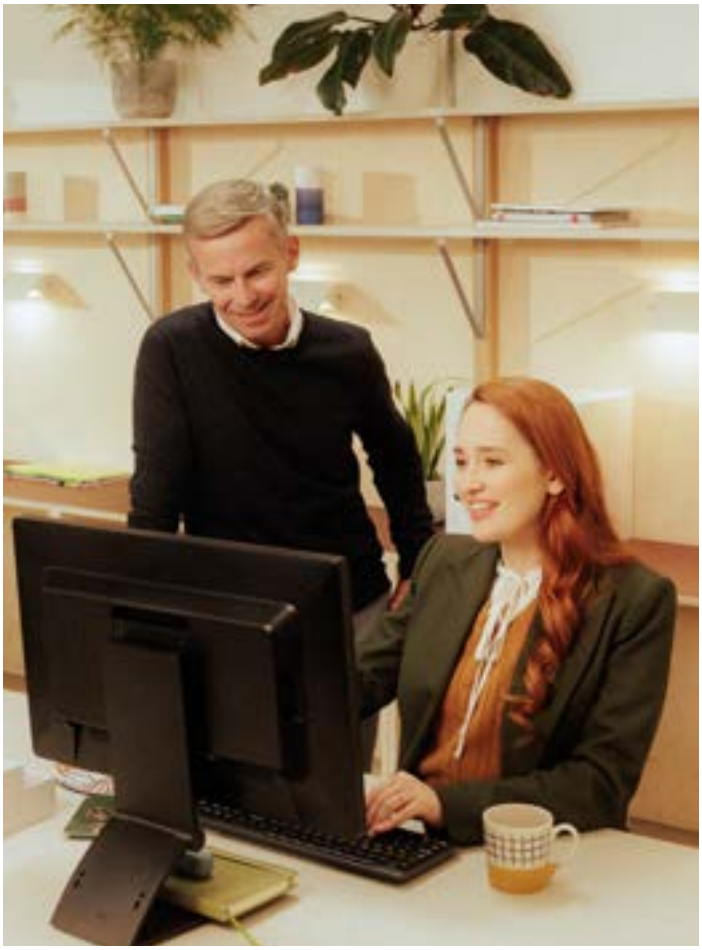
- **Automated:** Quickly gather data from Sage Data and Analytics for Sage 100, all add-ons, and all other data sources like your CRM, Excel, and legacy systems.
- **Ready-made:** Visualize, interpret, and act based on the data with our extensive range of reports, dashboards, statements, and analytics.
- **Flexible:** Pay only for the online storage needed for the portions of your data required for financial and operational reporting.

Sage Data and Analytics is designed for instant insight into your important data points.

- **Instant analysis:** Interactive sales dashboards, graphical cashflow analysis, detailed and trusted P&L reports and more—all out of the box.
- **Access on-the-go:** Easy access through a responsive browser-based application, Sage Data and Analytics for Sage 100 is optimized for desktop and mobile.
- **Time savings:** Microsoft Azure-based and with maintenance and upgrades all automated, so you can focus on insight not infrastructure.

Learn more about **Sage Data and Analytics**.

Sage Enterprise Intelligence



Sage Enterprise Intelligence (SEI) is an intuitive, web-based reporting tool that helps you make faster and more informed business decisions. This is made possible by its ability to convert massive amounts of data from across your entire Sage 100 system (not just your financial modules) into meaningful insight and powerful real-time reports.

Plus, SEI provides data visualization tools such as gauges, charts, and dashboards that help you more easily spot trends, trouble spots, and opportunities.

Sage Enterprise Intelligence can help you get a clear picture of your whole business and develop collaboration across departments. Out of the box, it can be used to analyze inventory, sales and customer service, production, purchasing, budget management and more.

While SEI offers an optional Excel add-on, the product is natively web-based. Particularly for those less comfortable with Excel spreadsheets and formulas, you'll find that the drag-and-drop interface of Sage Enterprise Intelligence is easy to learn and use with no special technical skills or expertise required. And because it's web-based, the application can be accessed and shared using a variety of devices including your desktop, tablet, or mobile device.

Key Features

- Intuitive interface that's easy to learn.
- Real-time data updates, fully integrated with Sage 100.
- Drill-down and drill-up to see transaction details.
- Fast processing of large data volumes.
- Ready-to-use KPIs and reporting templates.
- Extensive data visualization (gauges, maps, charts).
- Powerful search and browsing features.
- Web-based interface with mobile capabilities.
- Integration with your entire ERP system beyond just financials.

With Sage Enterprise Intelligence, you'll go beyond the limits of spreadsheets to unlock the true power of your data and transform it into actionable business insight.

Contact your Sage Business Partner for additional information.

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Sage Inventory Advisor

Even though your inventory control is near-perfect in Sage 100, do you still have too much of the inventory that never sells, and always stock out of your top-sellers? Let Sage Inventory Advisor take your Sage 100 inventory to the next level.

Sage Inventory Advisor is a web-based inventory analysis tool designed to provide you with real-time insights into the performance of items in your warehouses. Features include:

- **Dashboards to Manage by Exception**—You can't manage what you don't measure. The only way to keep on top of inventory performance is with KPIs to track how you're improving over time, and exceptions lists to highlight items that need attention today.
- **Item Classification to Focus Resources**—Classify items by value and velocity to continually focus your attention, and working capital, on the items that contribute most to your bottom line.
- **Easy Forecasting**—You cannot plan today if you don't know what you're going to sell tomorrow. Computer-generated forecasts take the drudge work out of daily operations. Augment these with market intelligence from your sales team for optimal forecasts.
- **Orders at the click of a button**—Automatic inventory data collections and processing fixes your ideal order recommendations with one click.
- **Raw Materials and Manufacturing Requirements**—Order the correct raw materials, at the right time and in the right quantities, to fulfill the forecast demand on the finished good items.
- **Centralize Procurement, Then Distribute**—Orders at the central warehouse cover direct sales from the central warehouse and rolled-up demand from all sub-locations.

Learn more about **Sage Inventory Advisor**.

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Sage Partner Cloud

If you've been thinking about a cloud option, we have a solution.

Sage developed the Sage Partner Cloud—so you can still benefit from the vast suite of in-depth features, cost effectiveness, and adaptability of Sage 100. You can deploy Sage 100 in the cloud with Microsoft Azure, AWS, or Sage-accredited cloud platforms including ADSS Global, Cloud at Work, CompuData, RKL Solutions, and SWK Technologies.

Still not certain if a move to the cloud is right for you, consider a few benefits:

- Data migration in a single day[1] with no retraining necessary.
- Multi-layered security.
- On-demand scalability.
- Improved operational efficiency.
- Overall reduction of IT costs.
- Flexibility of remote access.
- Sustainability of a carbon-neutral cloud platform.[2]

1. *Estimate is provided by our Sage Partner Cloud Beta Program Partners. In some more complicated cases, data migration may take more than one day.*
2. *Learn more about Microsoft's sustainability practices* **here**.

Learn how you can deploy Sage 100 in the cloud– **Sage Partner Cloud.**

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Discover the power of a trusted and reliable solution, designed to help you automate processes, decrease risk, and scale with ease.

Schedule a **Sage 100** demo or contact us at 866.756.7243.

sage.com
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