sage 100 Intelligence Reporting

Frequently asked questions

Sage 100 2016 Intelligence Reporting partners

Contents

Overview of Sage Intelligence Reporting

What is Sage 100 Intelligence Reporting?
Sage 100 Intelligence Reporting is a flexible business reporting tool that integrates with your Sage 100 solution and allows for better insights into your business's data.

[1]What does Sage 100 Intelligence Reporting do?
Sage 100 Intelligence Reporting gives you a holistic view of your business by seamlessly consolidating your data from Sage 100, reducing spreadsheet chaos and improving collaboration across your business. With Intelligence Reporting, you can automatically run and distribute fully customizable reports in Microsoft® Excel®, so you spend more time analyzing the data and less time locating and preparing it. You have the choice to either customize the ready-to-use reports or create new reports to suit your business's unique requirements, ensuring that visibility of your information is always just a click away. You will also enjoy full control over your financial reports with a drag-and-drop Report Designer tool that is exclusive to Sage Intelligence Reporting.

Which versions of Sage 100 does Intelligence Reporting work with?
Sage 100 2014 and 2016.

Which version of Excel does Sage 100 2016 Intelligence Reporting support?
Microsoft® Excel® 2007, 2010, and 2013, both 32-bit and 64-bit versions.

Is this a Sage-developed product?
Yes, Sage Intelligence Reporting is a Sage-owned product. This means that your first line of support is handled by Sage. Other useful support platforms include the **Sage Knowledgebase** and the **Sage Intelligence Community**.

What countries is Sage Intelligence Reporting available in?
Sage Intelligence Reporting is currently available through the U.S. and Canada.

Is there a way for me to view the reports with my own data?
Yes; if you are on a Sage Business Care plan, Sage has provided you with one Report Manager license to get you started with Intelligence Reporting.

What are the benefits for the different Sage Intelligence components?
Below is a summary of the benefits you will receive with each component you acquire:

Components	Benefits
Report Viewer	• View and analyze existing reports in real time when you want them (no Excel skills required to view). • Easily drill down into the details of your data. • Set parameters such as timeframe and departments at the time of running the report.
Report Manager	Everything the Report Viewer offers, as well as the ability to: • Edit and customize your standard report templates and save them for future use. • Create new reports with the standard data tables available. • Sort, drill down, and aggregate data. • Send reports to a file, publish to an intranet site, or send by email with automated report distribution. • Set permissions and security for reports.
Report Designer	• Get full control of your financial reports through an Excel add-in that allows you to easily create and edit financial statements using a graphical "drag and drop" interface. • Get predefined report layouts for Income Statement, Balance Sheet, and Trial Balance. • Utilize Reporting Trees, which allow you to model a reporting structure and view your organization in many different ways. • Available for financial reporting only, Microsoft Excel 2007 and above.

Report Connector	• Access and consolidate information from multiple sources.
	• This allows for:
	    - Multicompany and multicurrency consolidations.
	    - Create new reports on any part of Sage 100.
	    - Connectivity to unlimited ODBC databases.

Pricing

What are the pricing options for Sage Intelligence Reporting?
Sage Intelligence Reporting offers three ways in which you can purchase the software:

The Subscription Bundle
The fist method of purchasing the software is through the Subscription Bundle. This is delivered under a subscription license with no long-term contract. Customers are licensed to use the service as long as their monthly dues are current and they remain on an active software support plan.

Rights to use the service include:
• An unlimited number of Sage Intelligence Report Manager and Report Viewer user licenses.
• Report Designer and Connector modules.
• Initial term contract of four months, followed by a monthly subscription thereafter.

Below is a table summarizing the subscription based pricing available:

Subscription based pricing for Sage 100 Intelligence Reporting Bundle	
1–2 ERP companies	$99
3–9 ERP companies	$129
10+ ERP companies	$199
Service activation	
Implementation with training (1-2 hrs.)	$395
Installation of Sage Intelligence Reporting includes the following:	
On the server: • Sage BMS Intelligence Reporting Connector module • Sage BMS Intelligence Reporting Designer module • Sage BMS Intelligence Reporting Report Manager and Report Designer modules	
• Sage BMS Intelligence Reporting Report Manager and Report Designer modules on one workstation • Sage BMS Intelligence Reporting Report Viewer and Report Designer modules on one workstation • A 30-minute overview of Sage BMS Intelligence Reporting	

Individual licenses
Sage Intelligence Reporting can also be licensed through individual users and modules. If you have already purchased Sage Intelligence Reporting, you cannot switch to the Subscription Bundle.

Below is a table summarizing the module-based pricing available:

Module-based pricing for Sage 100 Intelligence Reporting	
Report Manager (per additional user)	$1,060
Report Viewer (per user)	$370
Connector module	$1,060
Report Designer module	$1,060

Sage Business Care Service Plans
Sage Intelligence Reporting is now included in the three different service plans for Sage Business Care.
Find out what components are included in the different service plans.

Qualifying and selling Sage Intelligence Reporting

What questions should I ask to identify opportunities for my BMS customers?
Here are a few questions you can ask to identify which solution would be best for your customer:

- How do you currently run reports today?
- Are you pulling information for your reports from your BMS system or from multiple sources?
- How long does it take to run all of your reports?
- How do your reports get distributed to teams or individuals today?
- How do you create new reports?
- What are the top three reports that you use to run your business?
- What are your top three challenges with reporting?
- On a scale from 1-5, 1 being not familiar at all and 5 being an expert, how would you rate your level of familiarity with Microsoft Excel?

What is the best value proposition to introduce Sage Intelligence Reporting?
Please see the Messaging guide on the Sage Intelligence Reporting playbook on **Sage Sell.**

However, at a high level, Sage Intelligence Reporting offers comprehensive and flexible reporting and gives organizations the insights across the company, helping them to make better informed business decisions, faster. The scheduling of reports to automatically run, and the automatic distribution of reports to teams or individuals through a variety of distribution methods, allow companies to improve their reporting efficiency and collaboration.

Sage Intelligence is designed with the needs of financial managers, directors, and accountants in mind; so it allows you to:

Gain control of
your reporting.

Make better decisions
through better analysis.

Get time back
through automation.

- **Gain control** of your financial reporting. With real-time integration into your data in a controlled and secure environment, you have your information immediately, accurately. Using real-time data, you can easily create and customize financial reports with drag-and-drop functionality and adapt them to your own needs.

- **Make better decisions** through better analysis of your data. When you integrate with your financial systems or with another database, you can see across your entire business, allowing you to truly visualize your data and drill down in Excel within the structure you want to view your data.

- **Get time back** by automating redundant processes. No more spreadsheet chaos. Reports can be scheduled for any time to be automatically distributed to teams through various formats and platforms.

Customer requirements

Sage Intelligence is an optional install during the Sage 100 workstation setup, making installing Sage 100 Intelligence Reporting a simpler process. Sage Intelligence is listed on the Module Menus toolbar and Tasks tab in Sage 100. Plese ensure your system at least meets the following requirements before installing the software:

Recommended system requirements
- One of the following operating systems fully installed and operational:
  - Windows 7 (32 and 64 bit)
  - Windows 8 (32 and 64 bit)
  - Windows Server 2008
  - Windows Server 2012
  - Windows Terminal Server

- Microsoft .Net Framework 4.0 (This will be installed if it is not present.)
- Microsoft Excel 2007 or higher; open Microsoft Excel at least once to ensure that it is fully licensed and activated before installing Intelligence Reporting, close Microsoft Excel before beginning the installation.
- Hardware: CPU > 1.3 GHz
- Memory: 2GB RAM
- Hard drive space: 350MB

Database connectivity supported
Sage Intelligence Reporting uses ODBC and OLEDB data connections to gain access to your database. The Sage Intelligence Connector ships with preconfigured data connections to any ODBC compliance database. By default, a connection has already been created to connect to Sage 100 ERP.

If you would like, you can add another data connection, to make data available from other data sourcesr.

Training available for Sage Intelligence Reporting

There are a variety of Sage 100 Intelligence Reporting on-demand courses available on: **Sageu.com.**

Resources

To help you sell and support Sage Intelligence, there are now more Sage Intelligence resources available in our resource library; you can also share these with your customers:

- Engage with partners and customers on **Sage Intelligence Community** forums.
- Download the one-page **Kick-off guide** to quickly get started on Sage Intelligence, including how-to videos and other great resources.
- Subscribe to Sage Intelligence and Excel tips and tricks emails.
- Register for upcoming **webcasts** conducted by a Sage Intelligence product specialist. Or view **recorded webcasts** anytime.
- Visit our **YouTube channel**, which includes step-by-step videos on the features of Sage Intelligence.
- Download our latest **Report Utility** tool, enabling you and your customers the ability to access continually updated report templates. Your customers no longer need to wait to download new report templates: They can be automatically imported into the Report Manager module.

Here are additional resources for business partners:
- Take a look at the Sage Intelligence Playbook on **Sage Sell**, which lists lots of marketing materials, including a quick sales cheat sheet.
- **Sandra Smith** is our Sage Intelligence product specialist based in Irvine, California, who supports our business partners. **Contact her** if you have any queries regarding Sage Intelligence.

Sales product specialists
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Where do I go to find out more about Intelligence Reporting?
Go to: **www.sageintelligence.com**

Out-of-the-box reports

Sage 100 2016 Intelligence Reporting ships with a number of predefined reports to get you up and running immediately. These include the following:

Dashboard Reports*
Dashboard Analysis

Financial Reports
Financial Trend Analysis
General Ledger Transaction Details

Financial Report Designer *
Balance Sheet
Balance Sheet—Current Period YTD
Income Statement—Actual vs. Budget (with variance)
Income Statement—Actual vs. Prior (with variance)
Income Statement—Actual, Budget, Prior (Current Period)
Trial Balance

Inventory Reports
Inventory Status

Purchases
Vendor Purchases

Sales Reports
Customer Sales

*Please note these reports require an active **Report Designer** license

Additional reports available on an ongoing basis
On top of the standard reports that you receive with Sage 100 2016 Intelligence Reporting, there is a constantly updated library of additional reports available on our website for you to make use of. These reports are created according to customer feedback for you to access on an ongoing basis. To make these reports easily consumable, we have created a "Report Utility" that allows you to select the additional reports suitable to you and automatically imports them into a "New Reports" folder in your Sage Intelligence Report Manager module. All you need to do is download the Report Utility and follow the easy steps to select the reports you would like. These provide a great basis for you to build useful reports for your business, with minimal customization required.

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