

### 1. What is Sage 100 ERP Intelligence Reporting?

Sage 100 ERP Intelligence Reporting helps you to easily control, automate, and analyze your data to make better informed decisions, more quickly, across your business. It consolidates data from your Sage ERP system and virtually any system, giving you a single version of the truth in Excel, helping to reduce spreadsheet chaos and improve collaboration.

### 2. How has the installation and access to Intelligence Reporting changed in Sage 100 ERP 2014?

Sage Intelligence is now installed during the Sage 100 ERP Workstation installation, making installing Sage 100 ERP Intelligence Reporting a simpler process. Sage Intelligence is now listed on the Module Menus toolbar and Tasks tab in Sage 100 ERP 2014.

### 3. How has Sage 100 ERP Intelligence Reporting been enhanced for Sage 100 ERP 2014?

The user interface for Intelligence Reporting has been updated to be friendlier and easier to use. The Report Designer Add-In is included in the Sage Intelligence installation, no longer requiring a separate installation. Sage 100 ERP Intelligence Reporting is now compatible with both 32-bit and 64-bit versions of Microsoft Excel® 2007, 2010, and 2013.

For more details on the Sage 100 ERP Intelligence Reporting enhancements, please refer to the [Sage 100 ERP 2014 website](#).

### 4. Where do I go to find out more about Sage Intelligence?

Go to [SageERPSolutions.com/Intelligence](http://SageERPSolutions.com/Intelligence) to learn how your business can make better decisions, more quickly, across your business.

### 5. Which versions of Excel does Sage 100 ERP 2014 Intelligence support?

Sage 100 ERP 2014 Intelligence Reporting supports Microsoft® Excel® 2007, 2010 and 2013, both 32-bit and 64-bit versions.

### 6. What reports do I get with Sage Intelligence?

In total, Sage Intelligence ships with eleven predefined report templates to get you up and running immediately. These include the following:

- Financial Report and Consolidated Financial Report
- Financial Trend Analysis

- General Ledger Transaction Detail
- Financial Report Designer and Consolidated Financial Report Designer
- Report Designer Add-In and Consolidated Report Designer Add-In
- Dashboard Analysis
- Inventory Status
- Vendor Purchases
- Customer Sales

## **7. Is there a way for me to view the reports with my own data?**

Yes, if you are current on a Sage 100 ERP Business Care plan, Sage has provided you with one full Report Manager User License to get you started with Sage Intelligence.

## **8. Will customized reports built in an older version of Sage 100 ERP Intelligence Reporting be compatible in Sage 100 ERP 2014 Intelligence Reporting?**

Yes, you are able to bring your existing reports into Sage 100 ERP 2014 Intelligence Reporting through a simple export and import process. Please work with your Sage Business Partner and let them know what existing reports you would like to bring into Sage 100 ERP 2014.

## **9. Where can I get the Report Designer Add-In?**

The Report Designer Add-In is included in the Sage Intelligence installation, no longer requiring a separate installation. The Report Designer Add-In requires the Report Designer module.

## **10. What is the difference between the Report Designer Add-In and the Report Designer Layout Generator?**

Intelligence Reporting gives you two methods to create financial reports depending on your Excel knowledge. If you're still getting used to Excel, the Layout Generator, found in the "Designer" folder of reports, is easy to use and automates the design and generation of simple financial reports within Excel for you.

If you're more familiar with Excel, the Report Designer Add-In enhances your Excel experience and offers you maximum control and flexibility over your report layouts. The Report Designer Add-In gives you a quick and responsive experience when designing and viewing your financial reports through new In-Memory processing.

## **11. What is In-Memory Processing?**

In-Memory processing is a database management system that stores data entirely in your computer's RAM. Because working with data In-Memory is much faster, Sage Intelligence is now able to report on larger data volumes, greatly enhancing the performance of your financial reporting.

## **12. What is the Sage ERP Intelligence Reporting Subscription Bundle?**

The Sage ERP Intelligence Reporting Subscription Bundle is a new way to purchase Sage Intelligence and 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:

- Unlimited number of Sage Intelligence Report Manager and Report Viewer user licenses.
- Report Designer and Connector modules.
- Initial term contract of four months, monthly subscription thereafter.

Customers that have already purchased Sage Intelligence cannot switch to the Sage ERP Intelligence Reporting Bundle. Sage Intelligence is available to be purchased through individual users and modules outside of the Sage ERP Intelligence Reporting Bundle.

## **13. Do I have to purchase the subscription bundle or can I purchase licenses individually?**

Sage ERP Intelligence Reporting can still be licensed through individual users and modules. If you have already purchased Sage ERP Intelligence Reporting you cannot switch to the subscription bundle.

## **14. What is the Sage ERP Intelligence Reporting Profitability Dashboard?**

The Sage ERP Intelligence Reporting Profitability Dashboard enables Sage 100 ERP users to quickly identify the profitability of customers, products, and salespersons based on weekly, monthly, quarterly, or annual segments. The Sage ERP Intelligence Reporting Profitability Dashboard allows companies to:

- Meet customer demand by identifying and focusing on high volume products.
- Quickly identify top performing salespeople.
- Make decisions quicker using meaningful graphics.

## **15. What are the differences between the two versions of the Profitability Dashboard?**

The biggest difference between the two versions of the Profitability Dashboard is the compatibility with Microsoft Excel 2013. The Excel 2007–2010 dashboard report is compatible with Sage 100 ERP versions 4.5 and newer when using Excel 2007 or 2010 (32-bit). The Excel 2013 dashboard report is compatible with Sage 100 ERP versions 2013 and 2014 when using Excel 2013 (32-bit). The Excel 2013 version does have additional functionality that utilizes Excel's built in capabilities, such as mapping, bubble timelines, and data selection features.

#### **16. Where can I get the Profitability Dashboard?**

The Profitability Dashboard can be downloaded in the [Sage Support Portal](#) on the Sage Intelligence Reporting download page for Sage 100 ERP. You will need to import the report into Sage Intelligence after you download the report. Please reach out to your Sage business partner or if you choose Sage to help with the installation of Sage Intelligence, Sage will import the dashboard as part of the installation of Sage Intelligence. Please note that Sage Support does not assist with importing reports into Sage Intelligence.

#### **17. Do I get access to the Sage Intelligence Profitability Dashboard?**

The Sage Intelligence Profitability Dashboard is available as a report to import into Sage Intelligence. Customers that have purchased additional Sage Intelligence licenses and are current on their Sage Business Care or on the monthly Sage Intelligence bundle can access this report.

#### **18. How do I get additional training on Sage Intelligence?**

To get you started with Sage Intelligence there are a range of how to videos, webinars and other resources available on [Sage University](#). Additional resources can be found [YouTube](#) under the Sage Intelligence user channel as well as the [Sage 100 ERP Intelligence Reporting Group](#) on the Sage Intelligence Community.