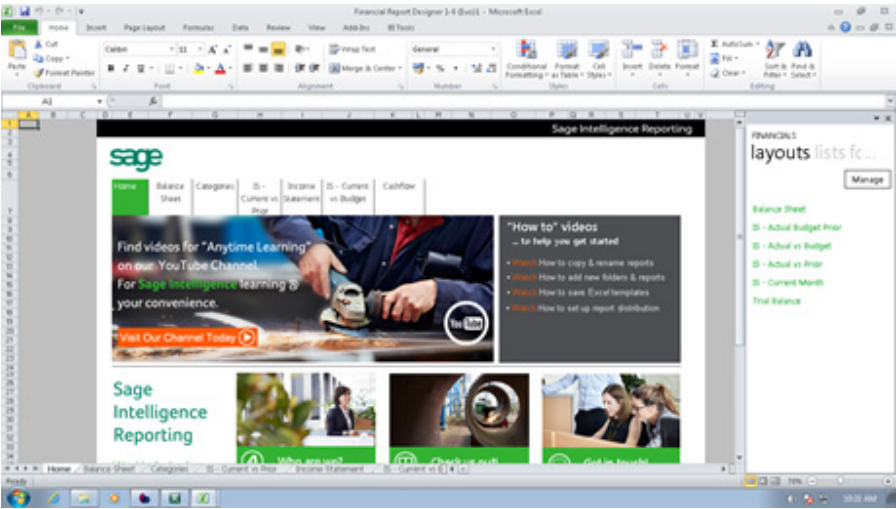# Sage Evolution Version 7 Intelligence Reporting
Standard Reports

Get a number of ready-to-use reports that give you immediate insight into and across your business. Delivered in the familiar environment of Microsoft® Excel®, the reports are fully customizable, and flexible with drill-down capabilities. You can access them at any time or have them delivered, real-time, from your Sage Pastel Evolution software to Microsoft® Excel®, in the format of your choice. It's as simple as that!

Report Name	Description	Business Benefits
Financial Reports		
Financial Report Designer	The Report Designer report enables users to create financial layouts based on their Sage Evolution data using net changes and balance (YTD) per General Ledger Account number per financial period for the financial years selected as parameters when running the report. The revamped report designer includes a Task Pane and enhanced Layout Generator, both utilizing a powerful in-memory engine, empowering users to take control of all design aspects of their reporting layouts. Income Statement and Balance Sheet layouts may be automatically generated once the user defined rows have been configured	**Easy drag & drop, flexible report design** You can now control how your reports are designed all the way down to each individual cell within Excel and because you are using Excel, you can design it anyway you prefer and use all of Excel's standard functionality for formatting, rules and charts and more. **Enhance Performance** Performance has been a key focus of the Report Designer and is enabled by an In-Memory engine which has been designed to help you calculate financial numbers fast to enable a quick and responsive experience when editing, designing and viewing financial reports. **Timesaving** The Layout Generators' Pre-defined financial layouts and calculations are real time-savers and eliminate the need for an advanced understanding of Excel formulas and functions. **Flexibility** You can now control how your reports are designed all the way down to each individual cell within Excel and the ability to report of multiple years, budgets and multi-currency has been greatly simplified.

Report Name	Description	Business Benefits
Inventory Reports		
Inventory Master	Displays stock on hand quantity and value, over/under stocked quantity and value; reorder levels grouped by warehouse, per Group and item code. The report can be run for one or more warehouses and excludes items where the Quantity on Hand and Under stocked is zero. The report can easily be filtered by item number and location or additional fields can be dragged and dropped into the report, using standard Excel PivotTable pivot table functionality for further analysis.	**Flexible** Easily filtered to view the data according to the user's preference, e.g. Warehouse, product line, item. Users have the flexibility to group and compare data to enable analysis that is appropriate for their requirements. **Customizable** Can be customized for in depth analysis of inventory by warehouse and/or product line to help you better manage your inventory levels and allow business owners / buyers / stock controllers to: • forecast consumption of goods for the near future • determine stock requirements with respect to seasonal fluctuations • measure statistics such as inventory turns • highlight inefficiencies in inventory management

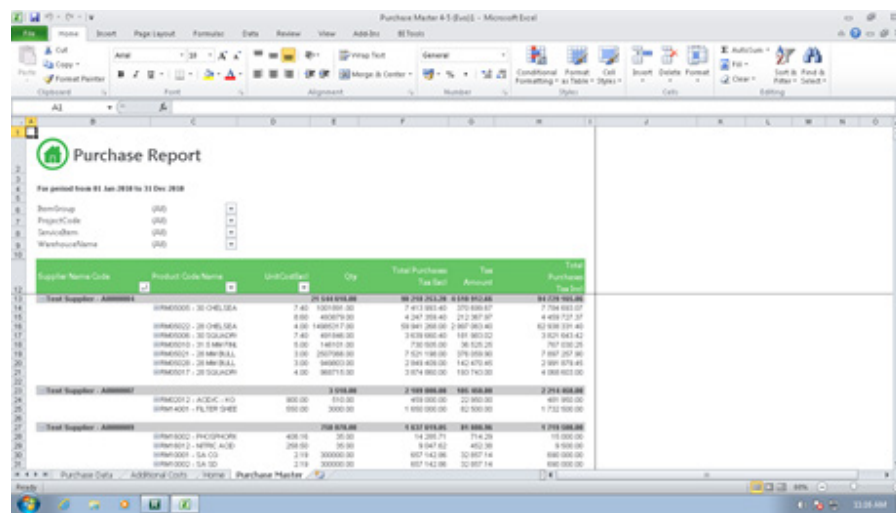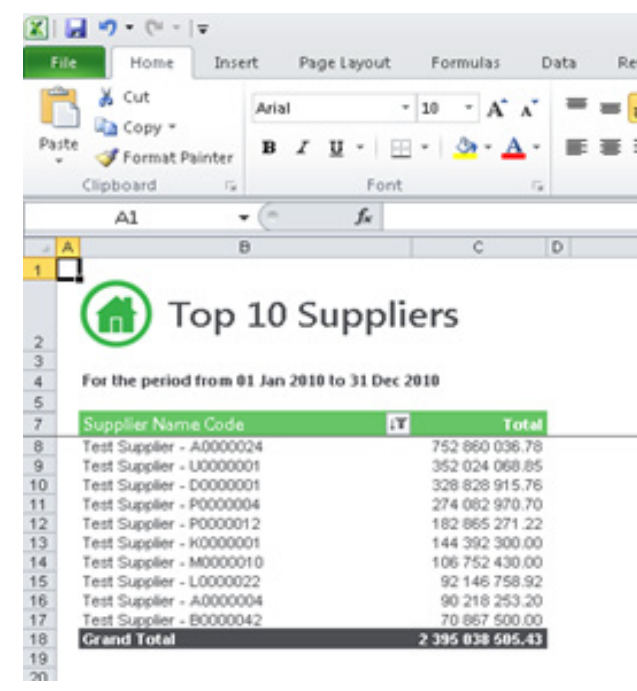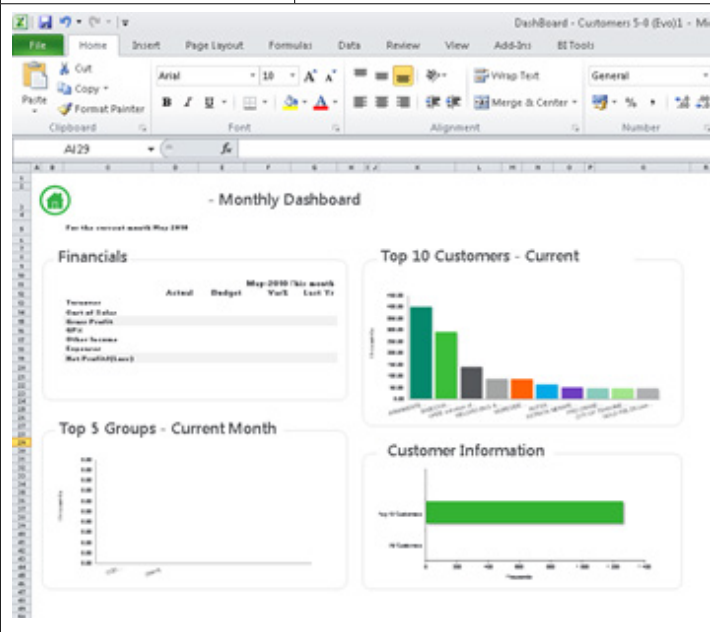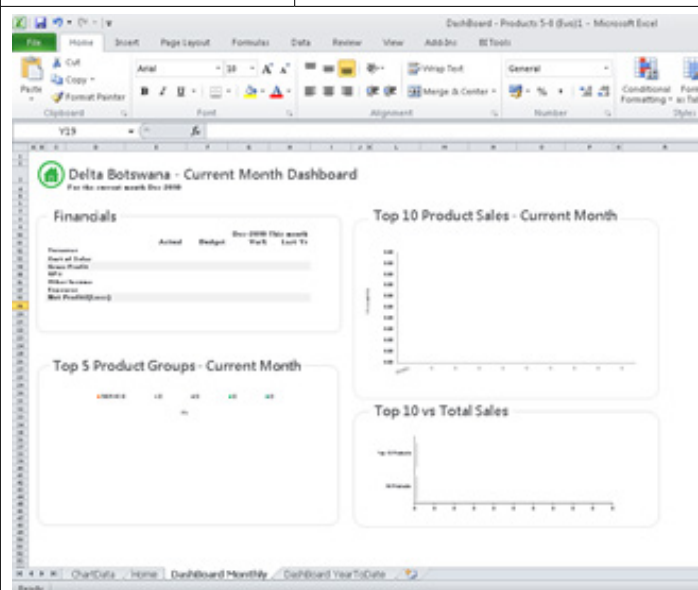| Report Name	Description	Business Benefits
Purchase Reports		
Purchase Master	Displays Quantity and Purchase values grouped by Supplier per Product for a selected date range. Includes document details Lists relevant purchase cost information by supplier and item number for any given date range and can be filtered by Item Group, Project Code, Service Item or Warehouse Name.	**Comprehensive** All your purchasing reporting requirements solved within one report. **Powerful and Simple** Allows for comparative analysis using drag-and-drop functionality in PivotTables. For example, comparing warehouses, divisions, product lines side by side for detailed or summarized analysis. Helps to identify vendors with whom volume discounts or faster delivery times can potentially be negotiated. **Flexible** Users have the flexibility to group data that is appropriate for their requirements. The layouts can be dynamically
Top 10 Suppliers	Summary report displaying the Top 10 Suppliers in descending order of purchase value for a selected period. Includes an option to select a date range at runtime. Similar to other reports, additional elements can be added to the PivotTable for further manipulation and analysis.	

Report Name	Description	Business Benefits
Sales Reports		
Dashboard Customers	The Dashboard Customers report template Displays summarized Financials and Customer Sales for the current month and Year to date which are split onto two different layouts. It contains both text and graphics to help with daily and long-term planning. In addition, comparative Profit and Loss figures are displayed for both the current month and year-to-date figures. This report allows you to easily drill down to get further insights into the Customer data.	**Real-time** Provides a real-time overview of the overall health of the business at a glance. **Consolidation of data** Delivers critical information in one place to help business owners make better, faster,and smarter decisions for a significant competitive advantage. **Ease of Use** Can be generated at the click of a button no copying, cutting and pasting of data from different sources. **Ready for Distribution** It can be scheduled, published to the web, and shared via e-mail to relevant people in the organization - putting critical information at their fingertips thereby improving collaboration and productivity. **Customizable** It can be customized to suit the unique requirements of a particular organization, providing access to real-time business information, even across multiple companies, divisions, and databases, to improve business decisions.

Dashboard Products	The Dashboard Products report template Displays summarized Financials and Product Sales for the current month and Year to date which are split into two different layouts. It contains both text and graphics to help with daily and long-term planning. In addition, comparative Profit and Loss figures are displayed for both the current month and year-to-date figures. This report allows you to easily drill down to get further insights into the data.	
Dashboard Analysis	The Dashboard Analysis report template displays Daily Sales Snapshot displaying the Top 10, Customers, Products and sales Representatives for the Day, and also displaying the sales per day for the last 5 days. It contains both text and graphics to help with daily and long-term planning. In addition, comparative Profit and Loss figures are displayed for both the current month and year-to-date figures. This report allows you to easily drill down to get further insights into the Customer data	

Sales Master	Displays pertinent sales information including item sales quantities, costs and gross profits by customer and item. Displays Quantity, Cost, Selling Price, GP and GP% grouped by Sales Rep, Customer and Product with an option to select a month and year at runtime. Includes Document numbers and dates for all sales related transactions.	**Timesaving** Gives selling time back to the sales team by allowing them to access this report on-demand and get up-to-date information immediately instead of relying on IT or spending time collating and updating reports in Excel. Enables the sales team to analyze buying behaviors, identify up- and cross-selling opportunities and spend more time chasing prospects.

Sales by Customer, Group and Area	Summary report displaying Sales values by Customer, Group and Area. Includes a graph by group by area. Includes an option to select a date range at runtime. Similar to other reports, additional elements can be added to the PivotTable for further manipulation and analysis.

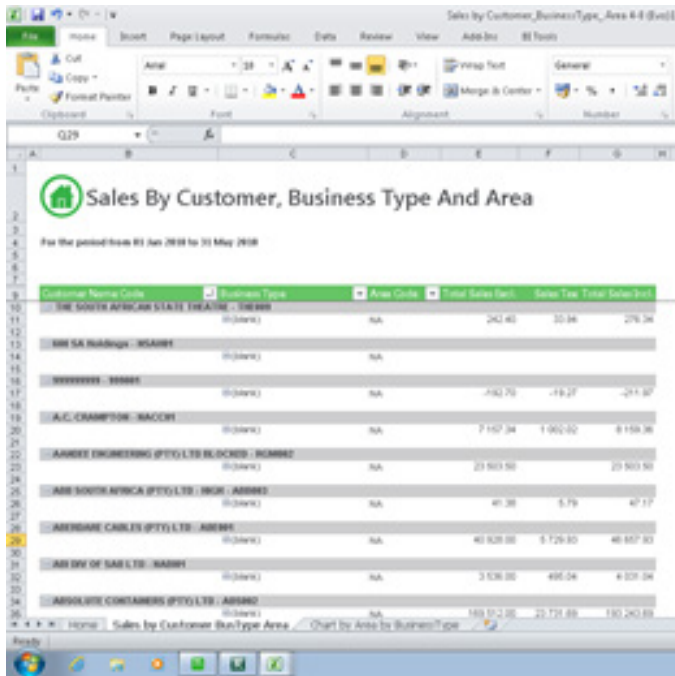| Top 10 Customers	Summary report displaying the Top10 Customers in descending order of Sales value for a selected period. Includes an option to select a date range at runtime. Similar to other reports, additional elements can be added to the PivotTable for further manipulation and analysis.	

Sales by Rep by Customer	Summary report displaying Sales values by Rep by Customer for a selected range of 12 months. Includes an option to select one or more sales representatives at runtime and the date range required. Includes an option to select a date range at runtime. Similar to other reports, additional elements can be added to the PivotTable for further manipulation and analysis.	

| Sales by Customer, Business Type and Area | Summary report displaying Sales values by Customer, Business and Area. Includes a graph by business and by area. Includes an option to select a date range at runtime.

Similar to other reports, additional elements can be added to the PivotTable for further manipulation and analysis. | |