

Sage Intelligence:

Get the Insight You Need  
Using the Tools You Know



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## Introduction

What is your biggest concern in today's business climate? Whether it has to do with growing profitability, improving efficiencies, or managing costs and risks, you have to be able to use business information to your advantage. What good is a monthly sales trend report if it is inaccurate or three months old?

CEOs often rely on their CFO for critical sales and financial information. CFOs have to use data that is entered by managers from across the business including sales, operations, and other financial personnel. With information spread out through different departments, it is difficult to get the information needed on demand—especially in a format that enables solid decision making. In addition, CFOs and accountants frequently turn to Excel® for data manipulation due to the inflexibility of standard reporting available with most ERP packages. However, they struggle with spreadsheet chaos and data accuracy.

Industry analysts have found that organizations of all sizes can benefit from Business Intelligence (BI) solutions. A recent Aberdeen Group<sup>1</sup> report discovered the top pressures driving small and medium-sized businesses (SMBs) to explore BI solutions:

- 42% cited too many business decisions based on inaccurate or incomplete data.
- 34% experienced a lack of operational visibility and inefficiency.
- 32% said their data was too fragmented or siloed to develop a clear picture of their business.

The good news: There is an easy-to-use, affordable solution to help you overcome the lack of visibility into your organization. Sage Intelligence can help you make better informed business decisions with graphical dashboards and reports that offer real-time insight into top KPIs from across your business. In fact, this reporting tool can help you solve the real problems you encounter every day dealing with business information—from access and report preparation to analysis.

Sage created this guide to help you solve the real problems you encounter every day dealing with business information—from access and report preparation to analysis. Each section of this paper will describe how Sage Intelligence solves specific reporting challenges faced by many SMBs today and empowers you to quickly and easily get information from across your business for insightful analysis so you can drive your business forward.

<sup>1</sup> Aberdeen Group Sector Insight, "Analytics for the SMB: Empowering Users, Leveraging IT," March 2013

## Problem 1: Report preparation takes too long and suffers from manual processes.

**Solution:** Sage Intelligence automates report preparation by pulling real-time trusted data directly from your ERP solution and delivering the business-critical information you need to make insightful decisions.

Do you know how many opportunities have been lost while you wait for reports to be compiled? Your business needs to stay agile and respond quickly to favorable—and unfavorable—business conditions. That just isn't possible if data is inaccurate or can't be produced on demand.

Sage Intelligence provides the important information you need—when you need it—so you can better manage exceptions and quickly adjust to changing conditions. A 2012 Aberdeen report found that 96% of leading companies established processes to handle routine information updates and distribution.<sup>2</sup>

Sage Intelligence pulls up-to-date, trusted data directly from your existing ERP solution, consolidates data from multiple sources, and delivers the business-critical information to decision makers across your organization. Data is delivered in Excel, the universal language of business and accountants, so users can leverage existing skills to manipulate, analyze, and distribute information.

You'll save time by using out-of-the-box, presentation-quality reports that deliver real-time meaningful information. Error-prone, manually prepared, and untimely reports will become a thing of the past. Executives and managers can monitor company health with graphical dashboard reports and prebuilt management reports to view current metrics and trends.

### Automate and simplify complex report processes

By pulling information directly from your ERP system, Sage Intelligence already knows your fiscal periods and has access to real-time transaction numbers and balance amounts. By leveraging standard report templates, you can turn your focus to analysis or easily create new, customized reports utilizing the familiar face of Microsoft Excel.

Some of the standard templates included are:

- Financial Analysis Reports.
- Dashboard Analysis.
- General Ledger.
- Inventory, Purchase, and Sales Masters.

<sup>2</sup> White, David, "The Grinning CFO," Aberdeen Group, October 2012

## Problem 2: It is difficult and time consuming to access information from across my business.

**Solution:** Sage Intelligence gives more people access to information they need, paving the way for true collaboration and better decision making across your business.

SMBs often find that data is too fragmented or trapped in data silos to develop a clear picture of the business.

Sage Intelligence breaks down the data silos and provides the information you need to have a clear understanding of transactional history and trends. The familiar Excel environment leverages existing skills in your business, making it easier for proactive analysis and decision making. In addition, the visual elements built into Sage Intelligence give executives and managers faster access to information and a real-time view of the company's KPIs and metrics.

Sage Intelligence automatically pulls and consolidates data from the multiple companies and departments across your business into one report.

Standard report templates are fully customizable, and you can also choose to build reports from scratch to consolidate information from any compliant data source. For example, sales managers can combine data from their CRM and ERP solutions to effectively track sales opportunities or customer profitability.

Another recent Aberdeen report<sup>3</sup> found that SMBs using packaged BI applications like Sage Intelligence are 64% more likely to have drill-down capabilities, an important tool that helps managers understand what happened and why. You can also leverage visual, graphical dashboards to track performance from anywhere and make timely decisions when they're needed most.

### Save time with Sage ERP Intelligence Reporting

Report Distribution is a powerful feature of Sage Intelligence. It enables you to schedule reports and establish automatic Report Distribution Lists, which saves time and effort. Here's how it works:

1. Save reports in your preferred format including Excel, PDF, or HTML.
2. Choose the reports you want to distribute and select the recipients. You can publish them to an FTP site, save to a file server, or send them by email.
3. Customize your email using your existing email client and conditional formatting based on the output of the report. For example, you can automatically send a report to your eastern region if their gross profit margin drops below an acceptable threshold.

<sup>3</sup> Aberdeen Group Analyst Insight, "Packaged Analytics: The Gift that Keeps on Giving," January 2013.

## Problem 3: I can't get the reports I want, and my standard reporting processes are inflexible.

**Solution:** Sage Intelligence offers flexibility by empowering users to manipulate and distribute important information on demand.

It is hard enough to get information from multiple sources and consolidate it into meaningful reports. Unfortunately, many businesses struggle to customize the standard reports available in their ERP system because they typically require IT experts to code. With few IT resources available, executives and managers are left to settle for the reports they can get—which often leave out unique organizational data that is needed for key insights.

Sage Intelligence offers the flexibility you need in your reporting process. Using familiar Excel tools, you and your team have the power to manipulate data and create your own reports. Using simple drag-and-drop tools in the Sage Intelligence Report Designer, anyone in your organization can build advanced financial reports. The Sage Intelligence Report Designer Add-in also enables you to drag and drop Excel financial formulas right into your reports.

You can also simplify your financial reporting by using the convenient Reporting Trees functionality. It does not matter what type of GL structure you have; you can use the graphical tool to model any reporting structure. You can also switch views to different parts of your organization and, at the click of a button, control which financial information is made available to the stakeholders you choose.

Sage Intelligence addresses financial reporting challenges like departmental reporting, GL segmentation, and project reporting. You can choose to leverage ready-to-use reports or build fully customized reports to meet unique business requirements. By pulling your ERP data into Excel, you have the power and flexibility to analyze the data in a familiar business application. Plus, you can continue to “slice and dice” data using tools you already know, such as Excel PivotTables.

### Report Designer Add-in makes reporting quick and easy

Creating multiyear and multibudget financial reports is quick and easy using the simple drag-and-drop options. You can also easily control the way your accounts roll up using ranges and arithmetic, allowing you to present the required level of detail in your reports.

Plus, In-Memory technology takes financial reporting performance to new heights by precalculating financial values from your General Ledger and dynamically providing them to reports in Excel.

## Problem 4: Our budget is really tight right now, plus we don't have IT support for new software.

**Solution:** Sage Intelligence can be deployed seamlessly, offering immediate value and a rapid Return on Investment (ROI).

In today's challenging business environment, every dollar counts. It may seem unwise to implement another software application that eats up valuable budget dollars and IT resources. However, packaged solutions like Sage Intelligence can be implemented quickly and affordably. As a module of your Sage ERP solution, implementation is seamless, no new vendor relationships are required, and your business will benefit from a low total cost of ownership.

A recent Aberdeen Analyst Insight found that overall, companies that use packaged BI applications spend 35% less per BI user than those that do not.<sup>4</sup> Sage Intelligence keeps your costs low because it is easy to adopt, drawing information automatically from your ERP solution and delivering data into the familiar Excel environment. When you deploy Sage Intelligence, users can get up and running quickly with existing skills, ready-to-use report templates, and easy-to-use report designer tools.

With the ability to produce insightful reports on day one, you will be able to take advantage of sales opportunities as they happen and stop negative trends before they further harm your business.

### Members of the BI Community Share Free Report Templates

If you are looking to save time and money, join the [Free Report Templates Group on the BI Community](#). Group members are encouraged to share report templates that provide a sound basis for customization. Report templates are available for several Sage ERP products and include:

- ERP/CRM Sales Dashboard.
- Fast Moving Items Report.
- Monthly Sales Trend Report.
- Lost Customers in 12 Months Report.
- Financial Ratio Report.

<sup>4</sup> Aberdeen Group Analyst Insight, "Packaged Analytics: The Gift that Keeps on Giving," January 2013.

## Problem 5: Our staff simply does not have the skills to use BI, and we don't have the time or budget for training right now.

**Solution:** Sage Intelligence is more than a solution—it is backed by world-class resources to help you achieve success.

With Sage Intelligence, you get more than a business intelligence solution. It is designed to help you right out of the box with automatic data pulls and familiar tools. Plus, Sage provides you with world-class resources and the support you need to give your business a competitive edge. We are committed to your success and offer:

- Free live [webcasts](#) to share practical knowledge about the module and its features, reporting best practices, useful Excel functionality, and more.
- [BI Community groups](#) to provide unrestricted access to discussion forums, how-to videos, product documentation, free report templates, and more.
- [Sage Intelligence Tips and Tricks](#) or [Excel Tips and Tricks](#) to deliver tips straight to your inbox to improve your report writing skills—at no cost.
- [Sage University](#) providing Excel and Sage Intelligence training to get you up to speed.
- Customer support for Sage Intelligence in accordance with normal Sage Service Level Agreements (SLAs).

## Summary

It's time to put an end to your struggles with business information access, report preparation, and analysis. Sage Intelligence is an easy-to-use, affordable solution that will help you gain the visibility you need into your organization's critical data. Using the familiar face of Excel, users get access to real-time information and can analyze the data in many different, meaningful ways. Plus, you can get up and running quickly with seamless integration into your Sage ERP solution.

To be competitive, your business needs to empower users to access, manipulate, and distribute critical data on demand. Sage Intelligence delivers by giving more people access to the information they need, paving the way for true collaboration and better decision-making. Backed by world-class resources and support, Sage Intelligence can solve your reporting challenges and give you the insight you need to drive your business forward.

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