

FEATURE SUMMARY

Business Insights
 Explorer

for Sage 100cloud



Business Insights Explorer is the most convenient way to navigate your business. It brings ad hoc inquiry, drill-down, drill-around analysis up to a whole new level. Turn your data into knowledge that you can act on by using powerful sorting, grouping, filtering, and charting capabilities that you personalize to your specific needs and role within your company.

This easy-to-use inquiry and analysis application optimizes your daily decision-making tasks in the most critical areas of your business. A streamlined grid interface spans multiple data elements in one view, and you can choose among predefined views for Sales Order, Accounts Receivable, General Ledger, Accounts Payable, Bill of Materials, Inventory Management, and Purchase Order. Use quick-click charts for a visual representation of the data and to show trends. Change views for the same customer, plus drill down to the transaction level and access customer maintenance for edits without having to go to other modules in Sage 100cloud. What's more, you can launch your familiar Sage 100cloud tasks directly from within Business Insights Explorer and find the information you're looking for without losing your place. In fact, you and your employees can efficiently go through daily tasks from Business Insights Explorer that may exceed your productivity using the traditional menu layout. This 360-degree view gives you the ability to quickly access timely, up-to-the-minute business information. The result favorably impacts your bottom line and your long-term success through more accurate decision-making and enhanced customer satisfaction.

Benefits

- Get timely access to key business information in a format that is easy to read and understand
- Easily apply query, reporting, and statistical analysis to make faster and better decisions for your future—this afternoon or next year
- Use quick-click charts for a visual representation
- Quickly assess the state of your business; monitor a new product's acceptance rate or the impact that a competitor's promo is having on your sales
- Share information with others in your organization in a meaningful way
- Use intuitive grid-based view of key entity and transaction-level data for more precise tracking and resolution
- Easily drill around into original records and change views for at-your-fingertips access to invoices and transactions
- Save views containing customized preferences and predefined filters for future use and navigation
- Gain quick access to key system tasks for the displayed entity with powerful task launch options
- Enable a wide range of sorting, grouping, and reorganizing functionality with easy-to-use customization and personalization features.

Business Insights Explorer provides you with a better way to access and understand your data— offering you a powerful, intuitive reporting tool—and you don't have to be a programmer to use it! First-time users can start right away. Even more important, Business Insights Explorer is great for analyzing “what-if” scenarios that can keep you awake at night. Who are the top customers for each of your salespeople? What products do they buy? How many new customers did you gain last month? And, because of the depth of functionality, Business Insights Explorer will continue to grow with you and your business far into the future.

Features

Easy-to-Use Interface	Business Insights Explorer provides a single, user-friendly interface that gives you quick access to crucial information, and related data—all the way down to the individual transaction.
Quickly Preview Key Information	View key information about a specific entity, such as a customer and related transaction information, including invoices and orders, in a single view using the Preview option. Apply filters to any view, displaying data according to your preference.
Quick-Click Charts	Quickly convert your Business Insights Explorer grid information into a chart and display your information the way you want to see it. Convert the data that best visualizes the knowledge you've discovered into a bar, line, area, or pie chart. Add your title, and narrow to one or more selected series—so you can share with others inside or outside your company. You can further personalize by reordering and choosing how many data points you want to display.
Access Sage 100cloud Tasks	Use Task view to launch familiar Sage 100 ERP tasks from the Business Insights Explorer screen. When you're finished with that task, just close the Sage 100 ERP pop-up screen to return to where you were in Business Insights Explorer.
A Single Point of Access for Related Data	The Explore option allows you to perform extensive drill-down and drill-around investigations into related data records. You can easily click on another selection in the primary grid, and the secondary grid shows related data. When changing views, context is passed as a filter from the original view to a new view.
Efficient Search	If you're looking for a particular entry, simply type a specific clue (such as "\$825.50") into the Look For field. Then, you can easily narrow the search by a selection in the Search field. This saves you time scrolling and scanning through lines of information.
Convenient Access to Task Management Functions	Task Management options provide an easy way for you to quickly access key tasks for the displayed view, including customer information update and order creation capabilities.
Robust Customization and Personalization	Convenient view filtering capabilities enable you to sort, group, reorganize, and rename columns within the grid, as well as save and share personalized views. You also can create custom fields based on simple or complex formulas..
Microsoft® Office Integration	TA simple right-click can export your data to predefined Word templates, plus Excel®, Access®, or XML files. Easily create mail-merge documents based on the filtered data being viewed.

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