sage

Exciting new features in Intelligence Reporting

We've listened to your valuable feedback and included some of your suggestions in Sage 300 ERP 2014 Intelligence Reporting. Some of the things to look forward to include the new Report Designer module, giving you more control over your financial reports, a fresh user interface, and updated standard reports.

More control over your financial reports

The new Report Designer boasts a fresh new user interface and has vast improvements in performance through its powerful new In-Memory technology,* giving you a quick and responsive experience when designing reports in the familiar interface of Microsoft® Excel®.

The new Report Designer gives you two methods to create your financial reports depending on your Excel knowledge.
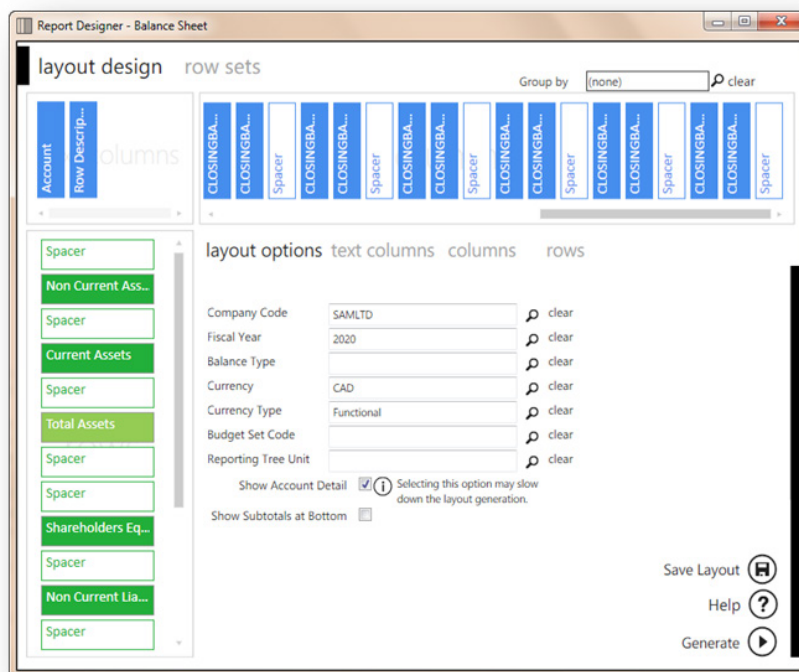
If you're still getting used to Excel, the **Layout Generator** is easy to use and automates the design and generation of simple financial report layouts quickly and accurately within Excel. The Layout Generator provides you with a set of standard financial layouts to get you up and running immediately and these can then be edited to suit your unique requirements.

Layout Generator interface for wizard driven creation of financial layouts.

Benefits

- Get better control of your reporting.
- Automate your reporting processes.
- Make better decisions through better analysis of your data.

Solution

- Sage 300 ERP 2014
- Sage 300 ERP Intelligence Reporting

"We've used the Report Designer very successfully. We use locations and department in our GL numbers, and being able to create one page financial reports have just made our reporting extremely easy."

Larry Leeds, Gibson Tel Data

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

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The Layout Generator user interface and performance has been enhanced, greatly improving your user experience. The generated layouts have also been given a cleaner look and feel and are now easier to customize using the Task Pane once your layout is created.

If you're more familiar with Excel, the new **Task Pane** greatly enhances your Excel reporting experience, by providing instant and dynamic access to data within the General Ledger. Previously known as the Add-In, the new Task Pane is now built in to the Report Designer module, meaning that no separate download is required. Simply drag in data lists, formulas, or Reporting Trees from the Task Pane on the right hand side of the Excel window and the In-Memory technology will update results instantaneously. You can also change the level of detail seen at a row level by using account ranges, account wildcards, and account exclusions, giving you maximum control and flexibility over your financial report layouts.

Task Pane Interface with an Income Statement by Product and Region Dimension

Four new Financial Report Templates
We have created four new Financial Report Designer Templates, these being an Income Statement, Balance Sheet, Financial Ratio Report and General Ledger Forecasting Report. These reports can be run from the Report Manager or Report Viewer module.

Note: You will need to have a Report Designer license for these reports to work.

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Updated look and feel of Standard Reports

The standard reports have been modernized to give you a cleaner look and feel, to provide a quick reference to helpful resources.

The standard reports included are Financial Trend Analysis, General Ledger Transaction Detail, Financial Report Designer, Demonstration Report Designer, Financial Income Statement, Financial Balance Sheet, Financial Ratio, Financial Forecasting, Dashboard Analysis, Dashboard Analysis AR, Inventory Master, Purchase Master, Sales Master, Sales Master AR, and Metrics & KPIs.
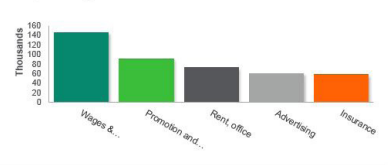

Dashboard Analysis report showing you giving you a one-page summary of your KPIs

New Profitability Dashboard

The Sage ERP Intelligence Profitability Dashboard enables you to quickly identify the profitability of customers, products, and salespersons based on weekly, monthly, quarterly, or annual segments.

The 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.
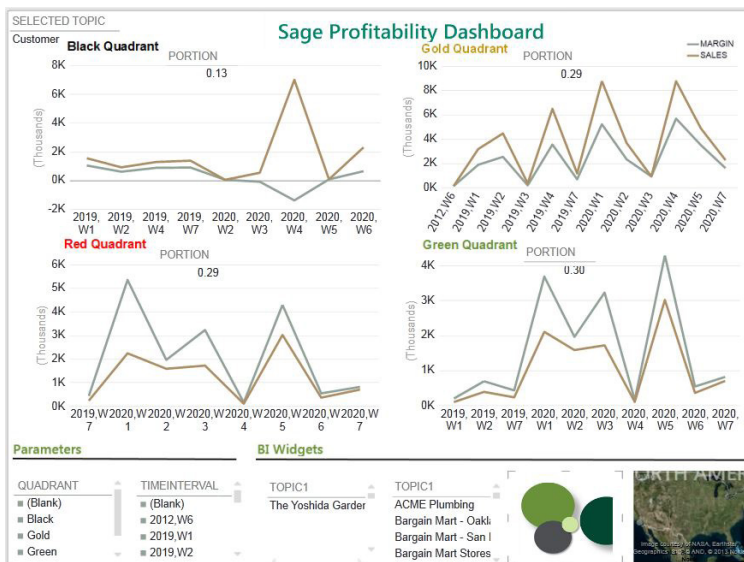
Excel 2013 version of the Profitability Dashboard

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The Sage Intelligence Profitability Dashboard will be available to all Sage 300 ERP SQL database clients as a report to import into Intelligence Reporting. If you have purchased Sage Intelligence and are current on your Sage Business Care or on the monthly Sage ERP Intelligence Reporting Subscription Bundle, you will be able to access this report.

Latest Microsoft Excel technology
Intelligence Reporting is now compatible with the 32-bit and 64-bit versions of Excel 2007, 2010, and 2013 to allow you to take full advantage of the latest Microsoft Excel functionality.

Modernized User Interface
Easy access to commonly used features
The Report Manager and Connector module boasts a new ribbon feature with informative icons and labels for each function, allowing you to easily identify and access the features that you require. Menu items have been restructured and grouped and the more commonly used menu items are now accessible from the Home and Help tabs.
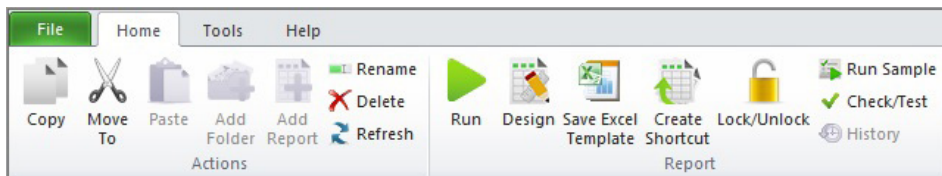
Simplified Right-click menu
The Right-click menus in the Report Manager have been simplified to provide you with a more concise list of options as well as option labels that are more informative.
- The Right-click options "Run Sample" and "Refresh" on the Report Context right-click Menu have been removed and are now accessible in the Report Manager Ribbon through the Home tab.
- The Labels "Create and Link Template" and "Purge Instance History" have been replaced by less technical, and therefore more easily understandable, labels of "Save Excel Template" and "Clear Report History" respectively.

About The Sage Group plc
We provide small and medium-sized organisations with a range of easy-to-use, secure and efficient business management software and services-from accounting and payroll, to enterprise resource planning, customer relationship management and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia and Brazil. For further information please visit: www.sage.com