

BUSINESS INSIGHTS AND REPORTING

Christianna Dorsey
Sage 100 Senior Business Analyst / Team Lead

MAY 16, 2024
NYC

Business Insights

- Business Insights provides a set of easy-to-use inquiry, analysis and reporting tools
- There are three options
 - Business Insights Explorer
 - Business Insights Dashboard
 - Business Insights Reporter

Business Insights Explorer

- Dashboard an inquiry application that makes viewing your data easy and customizable
- Drill-down and preview features allow you to explore your transactions
- Customize the data, apply filters and save the customizations for future use
- Sage 100 Tasks can be launched directly from Explorer

Business Insights Explorer cont'd

- Each Sage 100 module contains an Explore menu with Views designed for that particular module
- Options for print or export
- Options for export
 - Access
 - Excel
 - Word
 - Microsoft Query
 - XML

Business Insights Explorer cont'd

Sage 100 Business Insights Explorer - Account Transactions

File Edit View Data Preview Explore Tasks Tools Help

Back Setting Standard

Navigation Pane

Preview

☒ Account Transaction Detail
☐ Account History by Period

Look For: Search In (All Columns) Find Next

GL Account Transactions

Data Grid Chart

Drag a column header here to group by that column

Account	Account Description	Posting Date	Source Journal	Journal Register Number	Debit Amount
100-00-00	Cash on hand	12/31/2023	BB	000001	\$500.00
100-00-00	Cash on hand	05/31/2025	CD	000001	\$908.00
101-01-00	Cash in bank - Reg. check	12/31/2023	BB	000001	\$24,500.00
101-01-00	Cash in bank - Reg. check	01/31/2024	JE	000001	\$0.00
101-01-00	Cash in bank - Reg. check	02/28/2024	JE	000001	\$11,444.00
101-01-00	Cash in bank - Reg. check	03/31/2024	JE	000001	\$10,417.00

<Filter is Empty> Filter Builder...

GL Account Transaction Detail

Source Module Document Type Document Number Receipt Number Batch Type Batch Number Line

GL
Created by Data Conversion from Beg Balances

Account Transactions CMDorsey ABC 2478 rows 1 rows

Business Insights Dashboard

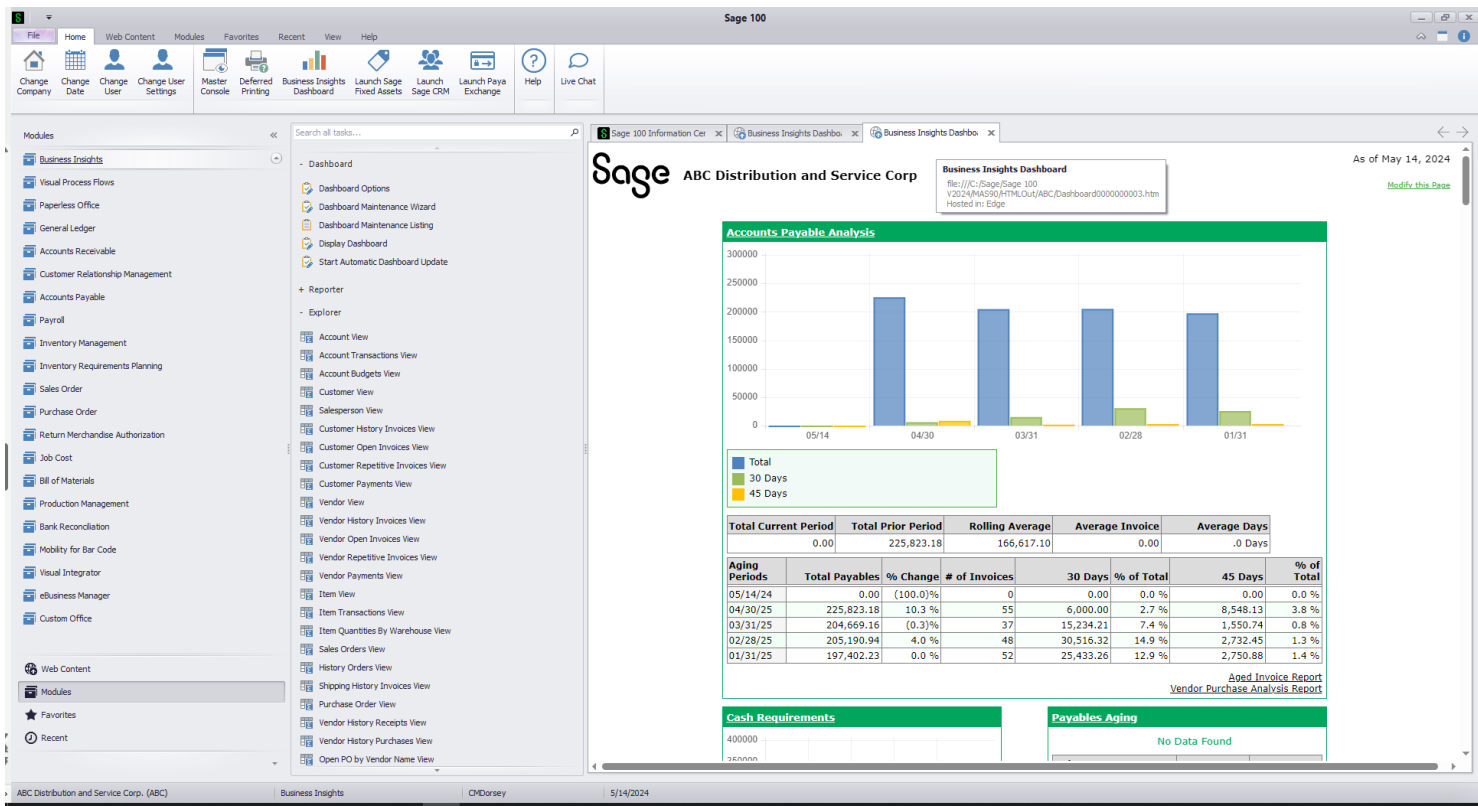
- The Dashboard presents key data elements and associated drill-downs
- Customizable home page using graphical presentation
- Allows those who do not have direct access to Sage 100 to have access to data vital to decision making

Business Insights Dashboard

Some of the data elements are

- Cash Expectations / Cash Requirements
- Sales by Division
- Accounts Payable Analysis
- Top Items
- Income Statement Summary
- Operational Efficiency Ratios

Business Insights Dashboard



Business Insights Reporter

- Reporter provides a wizard to help easily create custom *Crystal Reports* reports
- These custom Crystal Reports can be added to the Sage 100 modules
- These reports are easily printed
- The Business Insights Reporter Wizard takes you step-by-step through creating a custom report

Sage Intelligence

- A module that extracts data from Sage 100 in an Excel format that is easy to understand and manipulate
- Easily customize and design your own reports
- Several reports are included with Sage Intelligence
 - GL Transactions
 - Dashboard Analysis
 - Inventory Status
 - Vendor Purchases
 - Customer Sales

Sage Intelligence cont'd

Benefits of Sage Intelligence

- Time savings: Reduce redundancy, increase productivity with automated business reporting
- Flexible reporting: Analyze data in the familiar environment of Excel
- Improved Access to information: Give more people access to information they need for better decision-making

Sage Intelligence cont'd

- Report Designer give you the ability to customize your financial reports without modifying your General Ledger
- Layout Generator allows you to use the drag and drop interface
- Reporting Trees allow you to have complex hierarchies
- Distribution allows you to e-mail reports

Advanced Lookup Engine (ALE)

- ALE allows users to customize a lookup panel allowing you to create a “mini” report
- Select the fields
- Add filters
- Set as default
- Export to Excel with just one click

Advanced Lookup Engine (ALE) cont'd

S * Customer List

Customer No.	Name	City	State	ZIP
01-ABF	American Business Futures	Milwaukee	WI	53
01-ABS	ABS - Sage cloud for invoices	Newport Beach	CA	92
01-AVNET	Avnet Processing Corp	Racine	WI	53
01-BRESLIN	Breslin Parts Supply	Molalla	WI	53
01-HILLSB	Hillsboro Service Center	Hillsboro	WI	53
01-INACTIV	Inactive Customer **INACTIVE**	Milwaukee	WI	53
01-INTMEX	Int. Cust with Mexican Address...	Ensenada	BC	
01-MAVRK	Maverick Papers	Chicago	IL	60
01-RSSUPPL	R & S Supply Corp.	Milwaukee	WI	53
01-SHEPARD	Shepard Motorworks	Milwaukee	WI	53
02-ALLENAP	Allen's Appliance Repair	Fountain Valley	CA	92
02-AMERCON	American Concrete Service	Anaheim	CA	92
02-ATOZ	A To Z Carpet Supply	Newport Beach	CA	92

Search: Customer No. Begins with Find

Filters... View W/City, State, Zip

Custom... Lookup Wizard... Select Cancel

Found 20 records

Thank you for attending!

Lisa Margolies

Sage 100 Consulting Manager

646.293.1771

lmargolies@netatwork.com

Daryl McFadyen

Sage 100 Sales Supervisor

646.293.1730

dmcfadyen@netatwork.com

Rob Bassett

Director of Client Experience

804.298.3813

rbassett@netatwork.com

Christianna Dorsey

Sage 100 Team Lead

781-713-0815

cdorsey@netatwork.com

HelpDesk

646.293.1777

helpdesk@netatwork.com