Standard reports

With real-time data delivered from Sage 500 ERP into the familiar environment of Microsoft® Excel®, Sage Intelligence offers you the following standard reports that are fully customizable and flexible, with drill-down capabilities that enable you to get to grips with your business's data:

Financial reports	2
Inventory reports	4
Purchase reports	5
Sales reports	6
Financial Report Designer report*	7
Dashboard report*	9

*Please note: Some of the Financial and Dashboard reports require an active Report Designer license to run.

Additional reports available on an ongoing basis
On top of the standard reports that you receive with Sage 500 ERP Intelligence Reporting, there is a constantly updated library of **additional reports** available on our website for you to make use of. These reports are created according to customer feedback, for you to access on an ongoing basis. To make these reports easily consumable, we have also created a "Report Utility" that allows you to select the additional reports suitable to you, and automatically imports them into a "New Reports" folder in your Sage Intelligence Report Manager module. All you need to do is **download the Report Utility** and follow the easy steps to select the reports you would like. These provide a great basis for you to build useful reports for your business, with minimal customization required.

Sage 500 ERP 2016 Intelligence Reporting

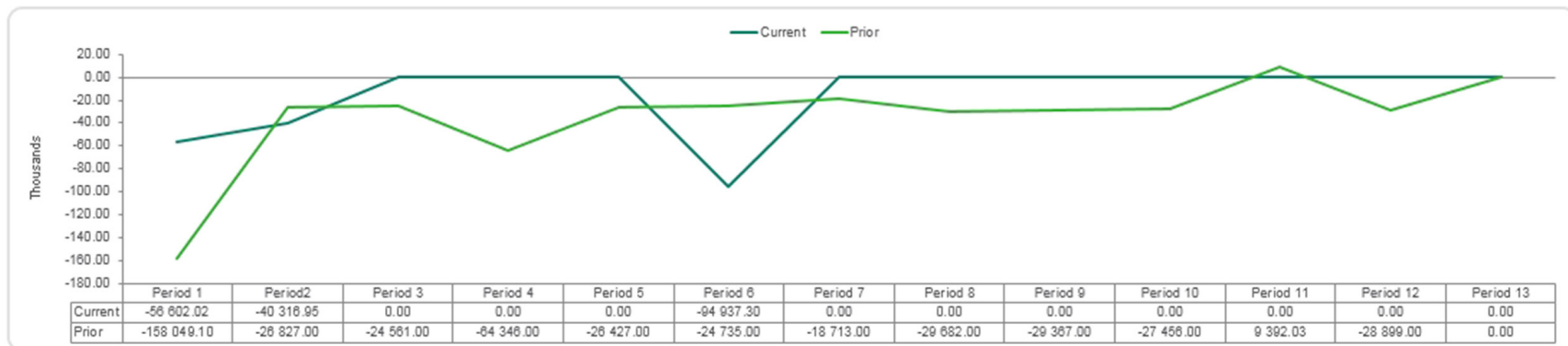| Report name	What you can expect
Financial reports	
Financial Trend analysis	**Find, track and analyze financial trends** This report enables you to find or track trends at a glance-across two years' worth of financial data. Feel like a financial pro with an immediate and intuitive analysis of these trends by being able to drill down to the source transactions for each balance.

Systems of America

Financial Trend Analysis - 4000000000 - Sales For 2008 with Budget Set 2

Please select account from drill down list b

GL Account | 4000000000 - Sales

Drill Down

Tip: To drill down select a value from the Current/PriorTable below and then click **Drill Down**

For the Current and Prior Year

Current Fiscal Year : 2008

	Period 1	Period2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	Period 13
Current	-56 602.02	-40 316.95	0.00	0.00	0.00	-94 937.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prior	-158 049.10	-26 827.00	-24 561.00	-64 346.00	-26 427.00	-24 735.00	-18 713.00	-29 682.00	-29 367.00	-27 456.00	9 392.03	-28 899.00	0.00
Variance	-64%	50%	-100%	-100%	-100%	284%	-100%	-100%	-100%	-100%	-100%	-100%	0%

	Period 1	Period2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	Period 13
Current	-56 602.02	-40 316.95	0.00	0.00	0.00	-94 937.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prior	-158 049.10	-26 827.00	-24 561.00	-64 346.00	-26 427.00	-24 735.00	-18 713.00	-29 682.00	-29 367.00	-27 456.00	9 392.03	-28 899.00	0.00

Sage 500 ERP 2016 Intelligence Reporting

Report name	What you can expect:
General Ledger Transaction Detail	**Time-saving, flexible analysis** Save time with a report that gives you comprehensive details across all General Ledger transactions, as well as the ability to filter by account category for viewing specific portions of your General Ledger. This enables you to quickly answer any financial-specific questions. You will also enjoy a flexible analysis of the General Ledger at a transactional level, using the graphical drag-and-drop functionality of a PivotTable to cater for any combination of views you choose.

Systems of America

General Ledger Transaction Details Report

For Financial Year 2008 from Period 1 to Period 1

Company Name	Systems of America
Fiscal Year	(All)
Fiscal Period	(All)
Account Category Description	Other Income and Expense

GL Account No - Description	Posting Date	Posting Comment	Debit Amount HC	Credit Amount HC	Total HC
⊕ 9570000000 - Curr Exch Gain - Realized			0.00	-0.06	-0.06
⊕ 9575000000 - Curr Exch Loss - Realized			0.02	0.00	0.02
⊕ 9500000000 - Discounts Earned			0.00	-800,505.53	-800,505.53
⊕ 9585000000 - Curr Exch Loss - Unrealized			517.55	-512.39	5.16
⊕ 9580000000 - Curr Exch Gain - Unrealized			14,213.00	-18,390.13	-4,177.13
⊕ 9920000000 - Cost Tier Adj			0.00	-5,666.00	-5,666.00
⊕ 9900000000 - Issues			2,045.50	0.00	2,045.50
⊕ 9910000000 - Misc Adj			584.50	-12.00	572.50
⊕ 9930000000 - Phys Inv Adj			5,165.00	-4,230.00	935.00
⊕ 9700000000 - Miscellaneous Income			0.00	-5.16	-5.16
Grand Total			**22,525.57**	**-829,321.27**	**-806,795.70**

Sage 500 ERP 2016 Intelligence Reporting

Report name	What you can expect:
Inventory reports	
Inventory Status	**A holistic view of your inventory data** Easily filter your inventory data according to your preference with a report that gives you a holistic view of your inventory information. Enjoy the flexibility of further being able to customize your report for an in-depth analysis of your inventory by warehouse and/or product line to help you better manage your inventory levels. As a business owner/ buyer/ stock controller, you will be empowered to do the following, as well as much more: • Forecast the 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.

Systems of America

Inventory Status

As of 08 Dec 2015

Company Name	(All)	
Purchase Product Line Description	(All)	
Item Class Name	(All)	
Item Type	(All)	

ItemID - Short Description	Unit Measure ID	Warehouse ID	Available Qty	Qty On Purchase Order	Qty On Sales Order	Qty On Back Order	Qty On Work Order	Qty On Transfer	Avg Unit Cost HC
MP903 - Axle Total			**4 700.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.27**
⊟ MP902 - Axle Bracket	⊟ Each	ATL	4 820.00	0.00	0.00	0.00	0.00	0.00	1.42
MP902 - Axle Bracket Total			**4 820.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.42**
⊟ RM911 - Wagon Wheel, White	⊟ Each	ATL	13 650.00	4 000.00	0.00	0.00	0.00	0.00	1.50
RM911 - Wagon Wheel, White Total			**13 650.00**	**4 000.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.50**
⊟ MP901 - Wagon Body	⊟ Each	ATL	1 982.00	0.00	0.00	0.00	0.00	0.00	1.78
MP901 - Wagon Body Total			**1 982.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.78**
⊟ RM914 - Wagon Handle, Black	⊟ Each	ATL	3 875.00	1 500.00	0.00	0.00	0.00	0.00	2.00
RM914 - Wagon Handle, Black Total			**3 875.00**	**1 500.00**	**0.00**	**0.00**	**0.00**	**0.00**	**2.00**
⊟ MP101 - Red Wagon Body	⊟ Each	ATL	1 963.00	0.00	0.00	0.00	0.00	0.00	3.05
MP101 - Red Wagon Body Total			**1 963.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**3.05**
⊟ MP102 - Blue Wagon Body	⊟ Each	ATL	1 505.00	0.00	0.00	0.00	0.00	0.00	3.05
MP102 - Blue Wagon Body Total			**1 505.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**3.05**
⊟ MP103 - Yellow Wagon Body	⊟ Each	ATL	300.00	0.00	0.00	0.00	0.00	0.00	3.05
MP103 - Yellow Wagon Body Total			**300.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**3.05**
⊟ WA101 - American Flyer Red Wagon	⊟ Each	ATL	825.00	0.00	0.00	0.00	400.00	0.00	19.61
		CHI	245.00	0.00	0.00	0.00	0.00	0.00	19.61
WA101 - American Flyer Red Wagon Total			**1 070.00**	**0.00**	**0.00**	**0.00**	**400.00**	**0.00**	**39.22**
⊟ WA102 - American Flyer Blue Wagon	⊟ Each	ATL	570.00	0.00	0.00	0.00	300.00	0.00	19.61
		CHI	165.00	0.00	0.00	0.00	0.00	0.00	19.61
WA102 - American Flyer Blue Wagon Total			**735.00**	**0.00**	**0.00**	**0.00**	**300.00**	**0.00**	**39.22**
⊟ WA103 - American Flyer Yellow Wagon	⊟ Each	ATL	230.00	0.00	0.00	0.00	0.00	0.00	19.61
		CHI	65.00	0.00	0.00	0.00	0.00	0.00	19.61
WA103 - American Flyer Yellow Wagon Total			**295.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**39.22**
Grand Total			134 515.00	11 132.00	41 186.00	0.00	16 720.00	1 248.00	47 201.68

Sage 500 ERP 2016 Intelligence Reporting

Report name	What you can expect:
Purchase reports	
Vendor Purchases	**Your purchase reporting challenges solved within one report** Get the flexibility to group purchase data that is appropriate for your business's requirements. With this report, your layouts can be dynamically changed in Microsoft Excel to view the same data in different ways, including graphically, in trend charts, pie charts, bar graphs, and more. These different views can then be saved for reuse. You will also be able to perform a comparative analysis of your data using the drag-and-drop functionality in PivotTables-making this report fully customizable. For example, you may want to compare warehouses, divisions, or product lines, side by side, for either a detailed or summarized analysis. This report further helps you to identify vendors with whom volume discounts or faster delivery times can potentially be negotiated, giving you the ability to make more informed business decisions from better insights.

Systems of America

Vendor Purchases Report

For Jan 01 2008 to Dec 31 2008

Company Name	(All)
Vend Class Name	(All)
Item Class Name	(All)

Vendor ID - Vendor Name	Currency ID	Item Description	Current Exchange Rate	Unit Cost HC	Freight Amt	Discount Amt HC	Total Cost HC
ACS - Advanced Computer Solutions					0.00	441 366.62	8 827 332.40
AdvCons - Advantage Consulting					0.00	21 853.80	437 075.88
AtlTrade - Atlantic Trade Shows					0.00	5 259.00	105 180.00
BE - Bob Edgar					0.00	0.00	89.30
CorpExec - Corporate Executive Office Management					0.00	103.53	5 176.50
CPS - Clark Paper Supplies					0.00	295.68	14 784.00
CreatCat - Creative Catering					0.00	989.52	49 476.00
DJ - Dorothy Johanson					0.00	0.00	927.00
HIS - Handle Installation Services					0.00	100.00	2 000.00
IntInter - Intuitive InterLan					0.00	300.93	6 018.50
Jones,M - Mary Jones					0.00	0.00	18 000.00
LeadEdge - Leading Edge Accessories					0.00	648.35	12 967.00
MetroNet - Metro Network Services					0.00	208.34	4 166.80
MicroAcc - Micro Access					1 800.00	310 557.93	6 211 158.50
PacBell - Pacific Bell					0.00	128.17	2 563.33
PerspCon - Perspective Concepts					0.00	935.38	18 707.72
SCE - Southern California Edison					0.00	144.00	7 200.00
ShereTec - Sphere Technology					0.00	334 672.39	6 693 447.70
SmartOff - Smart Office Solutions					0.00	210.05	4 200.75
TapeTec - Tape Technologies					0.00	500.00	10 000.00
Tophat - Top Hat Productions					0.00	80.43	4 021.00
WN - William Norton					0.00	0.00	428.00
Z99Ins - Z99 Insurance					0.00	90.00	1 800.00
Grand Total					**1 800.00**	**1 118 444.12**	**22 436 720.38**

Sage 500 ERP 2016 Intelligence Reporting

Report name	What you can expect:
Sales reports	
Customer Sales	**Complete visibility into your sale**s Give selling power back to your sales team by allowing them to access this report on demand, and get up-to-date information immediately, instead of relying on the finance or IT department, or manually collating and updating reports in Excel. This will allow you and your sales team to analyze buying behaviors, identify up-and-cross-selling opportunities, and spend more time chasing prospects. With this report, you also have the flexibility to group sales data that is appropriate for your business's requirements. Your layouts can then be dynamically changed in Microsoft Excel to view the same data in different ways, including graphically, in trend charts, pie charts, bar graphs, and more. These different views can be saved for reuse. Enjoy a comparative analysis of your data using the drag-and-drop functionality in PivotTables-making this report fully customizable. For example, you may want to compare your sales regions side by side, or analyze sales performance by sales representative or by product.

Systems of America

Customer Sales Report

For Feb 01 2008 to Feb 29 2008

Company Name	(All)
Salesperson ID	(All)
Cust Class ID	(All)
Item Class Name	(All)

Customer ID - Name	Currency ID	Item Short Description	Unit Cost HC	Unit Price HC	Cost of Sales HC	Sales Amt HC	Disc Amt HC	Sales Amt Excl Disc HC	Gross Profit	GP %
⊞ CompSol - Compound Solutions					2 974 312.52	3 973 805.01	0.00	3 973 805.01	999 492.49	25%
⊞ DawsComp - Dawson Computer Products					73 022.20	96 962.20	0.00	96 962.20	23 940.00	25%
⊞ FounFlow - Fountain Valley Florists					13 217.00	11 975.00	0.00	11 975.00	-1 242.00	-10%
⊞ Gros,Mic - Michael Grossman, MD					8 935.00	14 336.00	0.00	14 336.00	5 401.00	38%
⊞ JohnLumb - Johnson Lumber Co.					16 238.50	23 114.20	0.00	23 114.20	6 875.70	30%
⊞ LibInter - Liberator Intervention Co.					911 525.25	1 286 903.00	0.00	1 286 903.00	375 377.75	29%
⊞ LowryAFB - Lowry Air Force Base					4 637 600.00	5 845 691.00	0.00	5 845 691.00	1 208 091.00	21%
⊞ Neely,R - Robert Neely, D.D.S.					913.65	1 286.00	0.00	1 286.00	372.35	29%
⊞ PaigAndr - Paige Anderson, C.P.A.					8 935.00	13 976.00	0.00	13 976.00	5 041.00	36%
⊞ RadioSal - Radio Sales and Service					9 100.00	15 200.00	0.00	15 200.00	6 100.00	40%
⊞ ScottBro - Scott Brothers Computers					11 798.00	19 104.00	0.00	19 104.00	7 306.00	38%
⊞ TaylrBus - Taylor Business Systems					444 595.00	729 850.00	0.00	729 850.00	285 255.00	39%
⊞ UnitRent - United Rent-All					137 020.35	189 161.00	0.00	189 161.00	52 140.65	28%
Grand Total					19 030 687.62	25 183 261.09	0.00	25 183 261.09	6 152 573.47	24%

Sage 500 ERP 2016 Intelligence Reporting

Report name	What you can expect:
Financial Report Designer	
This report generates a Report Designer-enabled workbook with raw financial data from Sage 500 ERP, allowing for the use of the unique Report Designer interface launched from within Excel. This interface empowers you to take advantage of the Layout Generator or Task Pane option to generate and create powerful Financial reports. **Note:** The following reports require an active Report Designer license. The Report Designer enables you to create financial layouts based on your current Sage ERP data, using companies, sites, and budget sets. The revamped Report Designer includes a Task Pane (previously known as the Report Designer Add-In) and the Layout Generator, both utilizing a powerful in-memory engine, enabling you to take full control of all design aspects of your financial reporting layouts.	
Layout Generator	The **Layout Generator** provides a wizard-type environment for building customized Financial reports. The interface is easy to use and automates the design and generation of simple financial report layouts quickly and accurately within Excel. You will enjoy the following benefits: • **Easy drag-and-drop report design**-You can now control how your reports are designed, all the way down to each individual cell within Excel. • **Save time** – The predefined financial layouts are real time savers, and eliminate the need for an advanced understanding of Excel formulas and functions. • **Flexibility and control of your Financial reports** – In addition to having control over how your reports are designed, you will also have the ability to report on multiple years, budgets, and multicurrency.

Sage 500 ERP 2016 Intelligence Reporting

Report name	What you can expect:
Task Pane	The Report Designer Task Pane allows you to take full control of all design aspects of your report layouts, and takes the complexity out of designing Financial reports inside of Microsoft Excel. The Task Pane further allows you to break down a report into reusable pieces, and then control where and how these pieces fit together to create a report that suits your business. The demonstration layouts created from the SOA demo company include an Income Statement, Balance Sheet, Trial Balance, and Summary, Categories, Cash Flow, Cash Flow detail, Division, Department, Region and statistical layouts. Enjoy the following benefits and more from the Report Designer Task Pane: • **Easy drag-and-drop report design**-Take control of all the design aspects of your financial reporting layouts. In addition, because you are using Excel, you can design them anyway you prefer, and use all of Excel's standard functionality for formatting, rules, charts, and more. • **Enhance performance** – Enjoy a quick and responsive experience when designing and viewing Financial reports. • **Flexible reporting** – Easily drag and drop pieces of your financial report into Excel, simplifying the ability to report on multiple years, budgets, and multicurrency. • **Reporting Trees** – These can be used in conjunction with the Task Pane, and allow you to capture your business's organizational hierarchy, in a tree-like structure, into the software, and then specify account filter rules at each level.

Sage 500 ERP 2016 Intelligence Reporting

| Report name	What you can expect:
Dashboard report **Note:** The following report require an active Report Designer license.	
Dashboard Analysis	**A real-time, holistic view of your business** Get a one-page summary of key performance indicators, featuring a financial analysis and "Top 5" reporting on customers, items, and expenses, with information pulled from the Order Entry module. This report contains both text and graphics to help with your daily and long-term planning. In addition, comparative Profit and Loss figures are displayed for both the current month, as well as the year-to-date figures from the start of the current financial year. Among other benefits, you will enjoy the following: • **Consolidation of your data**–This report delivers all your critical information in one place to help you make better, faster, and smarter decisions – giving you a significant competitive advantage. • **Ease of use** – With this report, you can generate reports at the click of a button – eliminating the need to copy, cut, and paste data from other sources. • **Distribution-ready reports** – Reports can be scheduled, published to the web, and/or shared by email to the relevant people in the business – putting critical information at their fingertips • **Flexible reporting** – Reports can be customized to suit your unique business requirements, providing access to real-time business information.

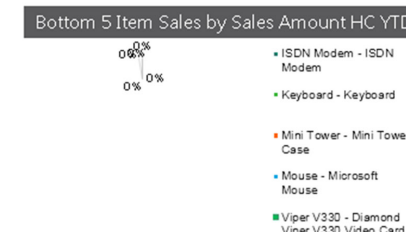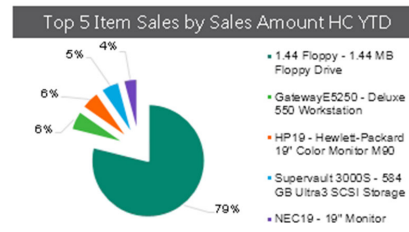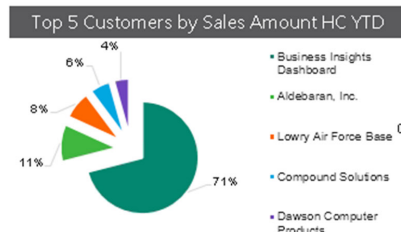**Dashboard - Systems of America**

From period 1 to period 9 for year 2008

Profit & Loss	Actual	Budget	Variance	Indicator
Sales	0	34 239 449	-34 239 449	↓
Cost of Sales	0	509 805	-509 805	↓
Gross Profit	**0**	**33 729 644**	**-33 729 644**	↓
Expenses	0	96 128	-96 128	↓
Other Income and Expenses	0	24 177	-24 177	↓
Net Income before tax	**0**	**33 657 693**	**-33 657 693**	↓

Actual Vs Budget
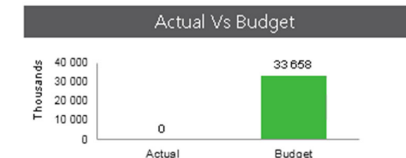
Top 5 Customers YTD	
Customer Name	**Sales Amt HC**
Business Insights Dashboard	88 643 418
Aldebaran, Inc.	13 534 706
Lowry Air Force Base	9 970 581
Compound Solutions	7 303 640
Dawson Computer Products	5 421 719
Total	**124 874 065**

Top 5 Items YTD	
Item Name	**Sales Amt HC**
1.44 Floppy – 1.44 MB Floppy Drive	88 805 776
GatewayE5250 – Deluxe 550 Workstation	6 533 806
HP19 – Hewlett-Packard 19" Color Monitor M90	6 313 800
Supervault 3000S – 584 GB Ultra3 SCSI Storage	6 216 000
NEC19 – 19" Monitor	4 674 400
Total	**112 543 782**

Bottom 5 Items YTD	
Item Name	**Sales Amt HC**
ISDN Modem – ISDN Modem	0
Keyboard – Keyboard	0
Mini Tower – Mini Tower Case	0
Mouse – Microsoft Mouse	0
Viper V330 – Diamond Viper V330 Video Card	0
Total	**0**

Top 5 Customers by Sales Amount HC YTD

Top 5 Item Sales by Sales Amount HC YTD

Bottom 5 Item Sales by Sales Amount HC YTD

About Sage
Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimagined business and brings energy, experience and technology to inspire our customers to fulfil their dreams. We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries. For more information, visit www.sage.com.