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## Frequently asked questions

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### 1. What is Sage 300 ERP Intelligence Reporting?

Sage 300 ERP Intelligence Reporting helps you to easily control, automate, and analyze your data to make better informed decisions, more quickly, across your business. It consolidates data from your Sage ERP system and virtually any system, giving you a single version of the truth in Excel, helping to reduce spreadsheet chaos and improve collaboration.

### 2. How has Sage 300 ERP Intelligence Reporting been enhanced for Sage 300 ERP 2014?

The biggest thing to look forward to is the new Report Designer module, which boasts a fresh look and feel and has vast improvements in performance through its powerful In-Memory technology, giving you a quick and responsive experience when designing your financial reports. The user interface for Intelligence Reporting has been updated to be friendlier and easier to use. Sage 300 ERP Intelligence Reporting is now compatible with both 32-bit and 64-bit versions of Microsoft Excel® 2007, 2010, and 2013.

For more details on the Sage 300 ERP Intelligence Reporting enhancements, please refer to the [Sage 300 ERP 2014](#) site for more information.

### 3. What is In-Memory processing?

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

### 4. Where do I go to find out more about Intelligence Reporting?

Go to [SageERPSolutions.com/Intelligence](http://SageERPSolutions.com/Intelligence)

### 5. What versions of Sage 300 ERP does Intelligence Reporting work with?

Sage 300 ERP 2012 and 2014.

### 6. Which version of Excel does Sage 300 ERP 2014 Intelligence Reporting support?

Microsoft® Excel® 2007, 2010 and 2013, both 32-bit and 64-bit versions.

# Sage 300 ERP 2014 Intelligence Reporting

## Frequently asked questions

### 7. What reports do I get with Intelligence Reporting?

In total, Intelligence Reporting ships with 17 predefined report templates to get you up and running immediately. These include the following:

- CRM Analytics
  - Top 5 Customers
  - Top 5 products
  - Top 5 Vendors
- Dashboard
  - Dashboard Analysis
  - Dashboard Analysis AR
- Financials
  - Financial Trend Analysis
  - General Ledger Transaction Details
- Report Designer Financials
  - Demonstration Report Designer
  - Financial Balance Sheet
  - Financial Forecasting
  - Financial Income Statement
  - Financial Ratio
  - Financial Report Designer
- Inventory
  - Inventory Master
- Purchases
  - Purchases Master
- Sales
  - Sales Master
  - Sales Master AR

### 8. Is there a way for me to view the reports with my own data?

Yes, with the Sage 300 ERP Business Care plan Sage has provided you with one full Report Manager License to get you started with Intelligence Reporting.

### 9. Will customized reports built in an older version of Sage 300 ERP Intelligence Reporting be compatible in Sage 300 ERP 2014 Intelligence Reporting?

Yes, you are able to bring your existing reports into Sage 300 ERP 2014 Intelligence Reporting through a simple export and import process. Please work with your Sage business partner and let him know what existing reports you would like to bring into Sage 300 ERP 2014 Intelligence Reporting.

### 10. Where can I get the Report Designer Add-In?

The Report Designer Add-In is now part of the new Report Designer and has been renamed the Task Pane.

### 11. How has the new Report Designer changed?

# Sage 300 ERP 2014 Intelligence Reporting

## Frequently asked questions

The new Report Designer has 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. 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 (previously the Report Designer Add-In) greatly enhances your Excel reporting experience, by providing instant and dynamic access to data within the General Ledger. You can 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.

### **12. What is the Sage ERP Intelligence Reporting Subscription Bundle?**

The Sage ERP Intelligence Reporting Subscription Bundle is a new way to purchase Sage ERP Intelligence Reporting and is delivered under a subscription license with no long-term contract. Customers are licensed to use the service as long as their monthly dues are current and they remain on an active software support plan.

Rights to use the service include:

- Unlimited number of Sage Intelligence Report Manager and Report Viewer user licenses.
- Report Designer and Connector modules.
- Initial term contract of four months, monthly subscription thereafter.

Customers that have already purchased Intelligence Reporting cannot switch to the Sage ERP Intelligence Reporting Bundle. Intelligence Reporting is available to be purchased through individual users and modules outside of the Sage ERP Intelligence Reporting Bundle.

### **13. Do I have to purchase the Subscription Bundle or can I purchase licenses individually?**

Sage ERP Intelligence Reporting can still be licensed through individual users and modules. If you have already purchased Sage ERP Intelligence Reporting you cannot switch to the Subscription Bundle.

### **14. What is the Sage ERP Intelligence Reporting Profitability Dashboard?**

The Sage ERP Intelligence Reporting Profitability Dashboard enables Sage 300 ERP users to quickly identify the profitability of customers, products, and salespersons based on weekly, monthly, quarterly, or annual segments. The Sage ERP Intelligence Reporting 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.

# Sage 300 ERP 2014 Intelligence Reporting

## Frequently asked questions

### **15. What are the differences between the two versions of the Profitability Dashboard?**

The biggest difference between the two versions of the Profitability Dashboard is the compatibility with Microsoft Excel 2013. The Excel 2007 and 2010 version are compatible with Sage 300 ERP versions that support Excel 2007 and/or Excel 2010. The Excel 2013 version is compatible with Sage 300 ERP 2012 PU2 and 2014. The Excel 2013 version does have additional functionality that utilizes Excel's built in capabilities, such as mapping, bubble timelines, and data selection features.

### **16. Where can I get the Profitability Dashboard?**

The profitability dashboard can be downloaded in the [Sage Support website](#) under the Sage ERP Intelligence Reporting download page for Sage 300 ERP. You will need to import the report into Sage 300 ERP Intelligence Reporting after you download the report. Please reach out to your Sage business partner, or if you choose Sage to help with the installation of Intelligence Reporting, Sage will import the dashboard as part of the installation. Please note that Sage support does not assist with importing reports into Intelligence Reporting.

### **17. Do I get access to the Sage ERP Intelligence Profitability Dashboard?**

The Sage Intelligence Profitability Dashboard is available as a report to import into Intelligence Reporting. Customers that have purchased additional Sage Intelligence licenses and are current on their Sage Business Care or on the monthly Sage ERP Intelligence Reporting Subscription Bundle can access this report.

### **18. How do I get additional training on Intelligence Reporting?**

To get you started, there are a range of how to videos, webcasts, and other resources available on [Sage University](#). Additional resources can be found [YouTube](#) under the Sage Intelligence user channel as well as the [Sage 300 ERP Intelligence Reporting Group](#) on the [Sage Intelligence Community](#).