



Swiftly Acquire Actionable Knowledge with  
Business Insights Explorer

Presenter: Tracey Brinkman

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# Agenda – Business Insights Explorer



- ◆ Drilling Into Data
- ◆ Sorting Data
- ◆ Show and Hide Columns
- ◆ Save Settings
- ◆ Bookmark Records
- ◆ Filtering Data
- ◆ Grouping Data
- ◆ Summarizing Data
- ◆ Charting Data
- ◆ Opening Tasks

# Drilling Into Data



**sage MAS 90 Business Insights Explorer - Vendor Open Invoices**

File Edit View Data Preview Explore Tasks Tools Help

Back Standard

Navigation Pane

**Preview**

- Vendor Open Invoice Transaction
- Vendor History Invoices
- Vendor Payments

Select Preview Setting...

Preview

Explore

Tasks

Vendor Open Invoices

Look For: Search In (All Columns) Find Next

**Vendor Open Invoices**

Data Grid Chart

Drag a column header here to group by that column

Invoice	Div	Vendor	Name	Invoice Date	Due Date	Disc Date	Terms
0001053190	01	ALLCLIM	Allclimate Maintenanc	05/31/2010	06/10/2010		NET 10
▶ 1053190	01	ALLCLIM	Allclimate Maintenanc	05/31/2010	06/10/2010		NET 10

(Balance > 0.00) and (Div = 01) and (Vendor = ALLCLIM) Filter Builder...

**Vendor Open Invoice Transactions**

Invoice	Trans Date	Trans Type	Check Number	Check Date	Bank Code
▶ 1053190	05/31/2010	Invoice			
1053190	05/31/2010	Payment	001712	05/31/2010	
1053190	05/31/2010	Adjustment			

BKD ABC 2 rows 3 rows

# Sorting Data

The screenshot shows the Sage MAS 90 Business Insights Explorer - Vendor interface. The top menu bar includes File, Edit, View, Data, Preview, Explore, Tasks, Tools, and Help. Below the menu is a toolbar with various icons, including a 'Sort Ascending (Alt+Up)' button which is highlighted with a red box. The main area displays a 'Vendor' data grid with columns: Div, Vendor, Name, E-mail Address, and Primary. The 'Name' column header is highlighted with a red box, and a red arrow points to a small downward arrow icon next to it, labeled 'Sort Arrow'. The data grid shows several rows of vendor information, with the row for 'AIRWAY' (Airway Property) highlighted in blue. A search bar at the top right contains the text 'Look For:' and 'Search In (All Columns)'. A sidebar on the left lists various vendor-related options, with 'Vendor Open Invoices' selected.

Preview

- Vendor Purchases History by Pe
- Vendor Contacts
- Vendor Memos
- Vendor Payments
- Vendor History Invoices
- Vendor Open Invoices
- Vendor Repetitive Invoices
- Purchase Orders

Look For: Search In (All Columns) Find Next

**Vendor**

Data Grid Chart

Sort Arrow

Drag a column header here to group by that column

Div	Vendor	Name	E-mail Address	Primary
01	ANDERS	Anders Auto Repair		BILL AM
02	AMEX	American Express Company		
02	AMERALR	American Alarm Service		
01	ALLCLIM	Allclimate Maintenance	janice@allclimate.com	JANICE
01	AIRWAY	Airway Property	lhenry@bestsoftware	LEO HE
02	AIRTRAV	Airport Service Travel		

<Filter is Empty >

# Show and Hide Columns

The screenshot displays the Sage MAS 90 Business Insights Explorer - Vendor window. The interface includes a menu bar (File, Edit, View, Data, Preview, Explore, Tasks, Tools, Help), a toolbar with navigation and action icons, and a 'Column Selection' dialog box. The dialog box has a 'Look For:' field, a 'Search In (All Columns)' dropdown, and a 'Find Next' button. Below the dialog, the 'Vendor' section is visible, featuring a 'Data Grid' tab and a 'Chart' tab. A 'Drag Fields' callout box points to the column headers of the data grid. The data grid contains the following information:

Div	Vendor	Name	Telephone	Address 1	Address 2	Address 3	City	State
01	ANDERS	Anders Auto Repair	(714) 555-3030	1010 Main Street	Suite A-103	Attn: Accounting	Orange	CA
02	AMEX	American Express Company	(800) 555-6675	P.O. Box 666654			Dallas	TX
02	AMERALR	American Alarm Service	(617) 555-5561	3333 North Grand	Suite 331		Indianapolis	IN
01	ALLCLIM	Allclimate Maintenance	(714) 555-1013	2331 Trinity Drive	Suite 1600	Attn: Janice	Costa Mesa	CA
01	AIRWAY	Airway Property	(714) 555-0980	7888 Saddlebush Trail	Bank Building	Suite 1008	Orange	CA
02	AIRTRAV	Airport Service Travel		6666 Campus Drive			Newport Be.	CA

Below the data grid, there is a '<Filter is Empty>' message and a 'Filter Builder...' button. The 'Vendor Open Invoices' section is also visible, showing a table with columns for Invoice, Name, Invoice Date, Due Date, Disc Date, Terms, Hold, Balance, and Discount.

Invoice	Name	Invoice Date	Due Date	Disc Date	Terms	Hold	Balance	Discount
0000106020	Airway Property	05/15/2010	05/30/2010		NET END OF MONTH	No	\$1,750.00	\$0.00
0000106145	Airway Property	05/17/2010	05/30/2010		NET END OF MONTH	No	\$1,600.00	\$0.00

# Save Settings – Vendor Address

The screenshot displays the Sage MAS 90 Business Insights Explorer - Vendor application. A 'Save Setting As' dialog box is open, allowing the user to save a setting. The dialog box contains the following information:

- Setting Name: VENDOR ADDRESS
- Save as Public Setting
- Save as Private Setting

The background shows a table of vendor data with the following columns: ID, Name, Address 1, and Address 2. The table contains the following data:

ID	Name	Address 1	Address 2
02	AMERALR	American Alarm Service	(617) 555-5561
01	ALLCLIM	Allclimate Maintenance	(714) 555-1013
01	AIRWAY	Airway Property	(714) 555-0980
02	AIRTRAV	Airport Service Travel	6666 Campus Drive

# Saved Settings

The screenshot displays the Sage MAS 90 Business Insights Explorer interface for the Vendor module. The title bar reads "sage MAS 90 Business Insights Explorer - Vendor". The menu bar includes File, Edit, View, Data, Preview, Explore, Tasks, Tools, and Help. The toolbar contains navigation and action icons, including Back, Forward, Refresh, and Save. The main window shows a tree view with "VENDOR ADDRESS" selected under the "Public" folder. A "Column Selection" dialog box is open on the left, listing various columns such as Account, Average Days Over Due, Average Days To Pay, Balance Due, Comment, E-mail Address, and Ext. The "Columns" tab is active, and the "VENDOR ADDRESS" column is highlighted in the tree view.

# Bookmark Records

The screenshot displays the SAP MAS 90 Business Insights Explorer interface. The 'Edit' menu is open, and the 'Bookmark Selected Row' option is highlighted. An arrow points from this menu item to the selected row in the 'Vendor' table below.

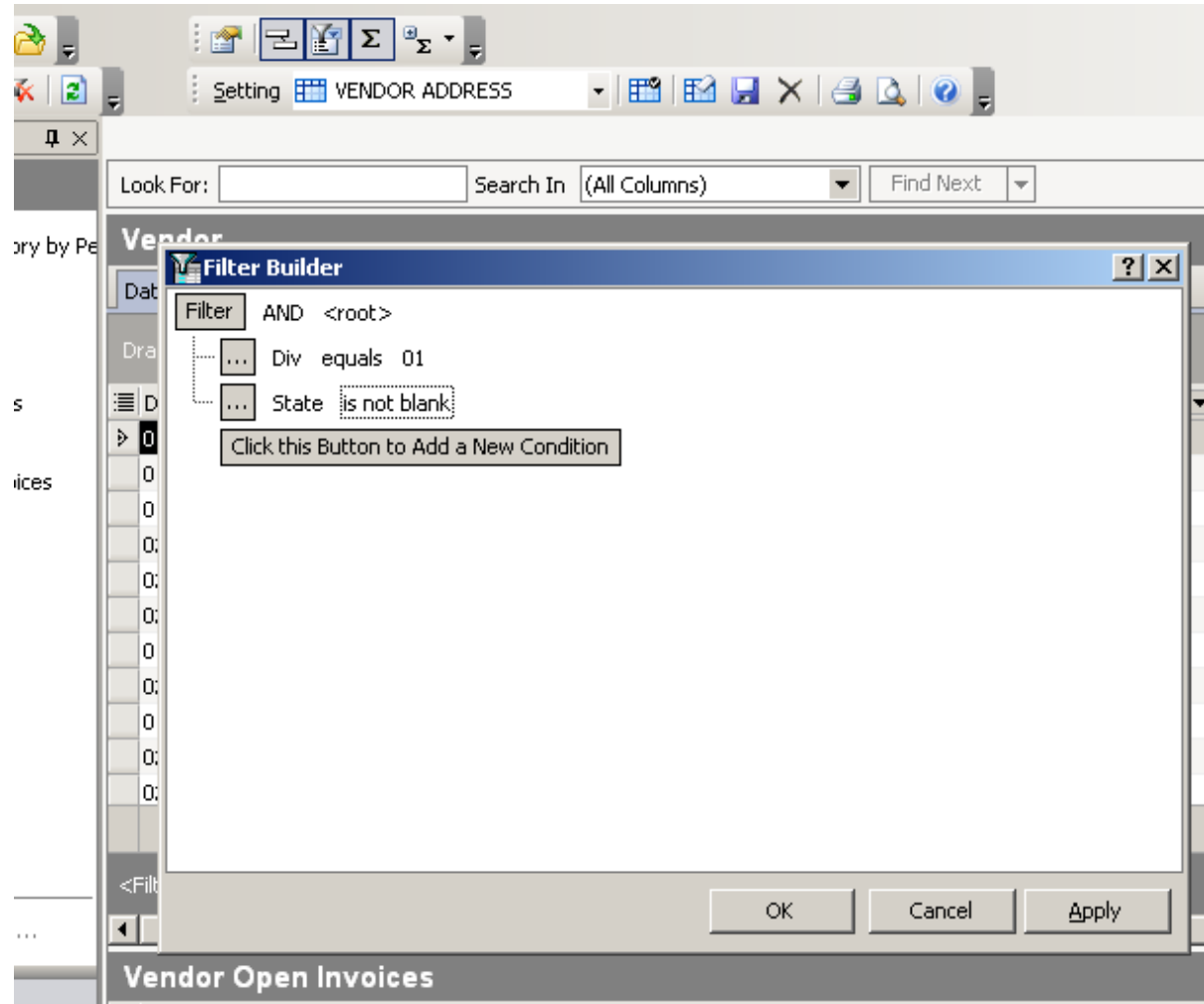
**Vendor Table:**

Div	Vendor	Name	Telephone
01	ANDERS	Anders Auto Repair	(714) 555-300
02	AMEX	American Express Company	(800) 555-660
02	AMERALR	American Alarm Service	(617) 555-550
01	ALLCLIM	Allclimate Maintenance	(714) 555-100
01	AIRWAY	Airway Property	(714) 555-090
02	AIRTRAV	Airport Service Travel	

**Vendor Open Invoices Table:**

Invoice	Name	Invoice Date	Due Date	Di
0001053190	Allclimate Mainten	05/31/2010	06/10/2010	
1053190	Allclimate Mainten	05/31/2010	06/10/2010	

# Filtering Data



# Filtering Data, cont.

The screenshot displays a software application window titled "Vendor" with a "Filter Builder" dialog box open. The dialog box shows a filter rule: "Filter AND <root>" with two conditions: "Div equals 01" and "State is not blank". A button labeled "Click this Button to Add a New Condition" is visible. The background shows a data table with columns for "Div" and "State".

Setting | VENDOR ADDRESS

Look For: Search In (All Columns) Find Next

Vendor

Filter Builder

Filter AND <root>

- Div equals 01
- State is not blank

Click this Button to Add a New Condition

OK Cancel Apply

Vendor Open Invoices

# Saving Report – Off BIE Data

SAP (Vendor) Preview - MAS 90 Business Insights Explorer

File View Insert Format Go Tools

100%

Margins Left: 0.5" Top: 1" Right: 0.5" Bottom: 1" Header: 0.5" Footer: 0.5"

### Vendor

Div	Vendor	Name	Telephone	Address 1	Address 2	Address 3	City	State	Zip Code	Country
01	UPS	United Post Office Service		P.O. Box 8890			Santa Ana	CA	92711	
01	UNITED	United Computers		4498 Ruby Lane			Dallas	TX	75285	
01	POSTMST	U.S. Postmaster	(714) 555-7659	19890 Adams Bouleva			Costa Mesa	CA	92626	
02	TOUCHWA	Touche Waterhouse & Compan		Newport Center Drive			Newport Be.	CA	92660	
02	TELCOMM	Tel-comm Communications	(415) 555-6985	4356 Grand Avenue			Oakland	CA	94612	
02	CONSULT	Tax Consultants, Inc.		12205 Emerald Street			Garden Gro	CA	92845	USA
01	STEV	Stevens Supply	(408) 555-6781	P.O. Box 40-a			Santa Clara	CA	95052	
02	EQUAL	State Board Of Equalization		P.O. Box 8871			Sacramento	CA	95853	
01	SOCALGA	Southern California Gas Co.	(714) 555-0098	P.O. Box 987			Rosemead	CA	91771	
02	LEARNER	Roger W. Learner	(714) 555-1478	7721 24th Street	Suite 125		Corona Del I	CA	92626	
02	PACTEL	Pacific Telephone	(714) 555-1478	3214 East 14th Street			Santa Ana	CA	92714-2214	
02	OFFICE	OfficeMax	(949) 555-9999	85 Technology			Irvine	CA	92618	USA
02	MUTLIF	Mutual Life Companv		P.O. Box 66541			Orange	CA	92668-0002	

Page: 1 of 2 Pages Paper Size: 8.5" x 11" Status: Ready

# Grouping Data

The screenshot displays the Sage MAS 90 Business Insights Explorer - Customer interface. The main window title is "sage MAS 90 Business Insights Explorer - Customer". The menu bar includes File, Edit, View, Data, Preview, Explore, Tasks, Tools, and Help. The toolbar contains various icons for navigation and data manipulation. The "Navigation Pane" on the left shows a "Preview" section with several options, including "Customer Sales History by Per", "Customer Contacts", "Customer Memos", "Customer Payments", "History Invoices", "Open Invoices", "Repetitive Invoices", "Sales Orders", "Open RMAs", and "RMA History". The main area shows a "Customer" data grid with columns for Div, Customer, Name, State, and Current Balance. The data is grouped by State, with "State : CA (10 Items)" and "State : WI (6 Items)" visible. The "Filter Builder" is located at the bottom right.

Look For:  Search In (All Columns) Find Next

**Customer**

Data Grid Chart

State ^

Div	Customer	Name	State	Current Balance
State : CA (10 Items)				
02	ALLENAP	Allen's Appliance Repair	CA	\$645.51
02	AMERCON	American Concrete Service	CA	\$13,743.80
02	ATOZ	A To Z Carpet Supply	CA	\$8,732.40
02	AUTOOCR	Autocraft Accessories	CA	\$23,954.02
02	BAYPYRO	Bay Pyrotronics Corp.	CA	\$16,644.94
02	CAPRI	Capri Sailing Ships	CA	\$56,169.33
02	CUSTOM	Custom Craft Products	CA	\$19,446.43
02	GREALAR	Greater Alarm Company	CA	\$825.50
02	JELCO	Jelco Packing	CA	\$5,055.91
02	ORANGE	Orange Door & Window Co.	CA	\$263.37
State : WI (6 Items)				
01	ABF	American Business Futures	WI	\$5,732.36
01	AVNET	Avnet Processing Corp	WI	\$7,377.37

Select Preview Setting... <Filter is Empty> Filter Builder...

# Summarizing Data

The screenshot displays the Sage MAS 90 Business Insights Explorer interface. The main window shows a data grid for 'Customer Sales History by Period'. The grid is filtered by 'State : CA (10 Items)'. The columns are 'Div', 'Customer', 'Name', 'State', and 'Current Balance'. The data rows show various customers and their current balances. A context menu is open over the 'Current Balance' column, showing options: None, Sum, Min, Max, Count, and Average. The 'Sum' option is highlighted. The 'Customer Sales History by Period' section at the bottom shows a table with columns for 'Fiscal Year', 'Fiscal Period', 'Dollars Sold', and 'Cost of Goods Sold'. The data row shows '2009' for Fiscal Year, '12' for Fiscal Period, '\$14,424.75' for Dollars Sold, and '\$0.00' for Cost of Goods Sold.

Div	Customer	Name	State	Current Balance
State : CA (10 Items)				
02	ALLENAP	Allen's Appliance Repair	CA	\$645.51
02	AMERCON	American Concrete Service	CA	\$13,743.80
02	ATOZ	A To Z Carpet Supply	CA	\$8,732.40
02	AUTOCR	Autocraft Accessories	CA	\$23,954.02
02	BAYPYRO	Bay Pyrotronics Corp.	CA	\$16,644.94
02	CAPRI	Capri Sailing Ships	CA	\$56,169.33
02	CUSTOM	Custom Craft Products	CA	\$19,446.43
02	GREALAR	Greater Alarm Company	CA	\$825.50
02	JELCO	Jelco Packing	CA	\$5,055.91
02	ORANGE	Orange Door & Window Co.	CA	\$263.37
State : WI (6 Items)				

Fiscal Year	Fiscal Period	Dollars Sold	Cost of Goods Sold
2009	12	\$14,424.75	\$0.00

# Aging by State



Customer					
Data Grid		Chart			
State <input type="button" value="▲"/> <input type="button" value="▼"/>					
Div	Customer	Name	State	Current Balance	
02	AMERCON	American Concrete Service	CA	\$13,743.80	
02	ATOZ	A To Z Carpet Supply	CA	\$8,732.40	
02	AUTOCR	Autocraft Accessories	CA	\$23,954.02	
02	BAYPYRO	Bay Pyrotronics Corp.	CA	\$16,644.94	
02	CAPRI	Capri Sailing Ships	CA	\$56,169.33	
02	CUSTOM	Custom Craft Products	CA	\$19,446.43	
02	GREALAR	Greater Alarm Company	CA	\$825.50	
02	JELCO	Jelco Packing	CA	\$5,055.91	
02	ORANGE	Orange Door & Window Co.	CA	\$263.37	
<b>CA Total</b>				<b>\$145,481.21</b>	
▶ <input type="button" value="−"/> State : WI (6 Items)					
01	ABF	American Business Futures	WI	\$5,732.36	
01	AVNET	Avnet Processing Corp	WI	\$7,377.37	
01	HILLSB	Hillsboro Service Center	WI	\$2,902.86	
01	RSSUPPL	R & S Supply Corp.	WI	\$7,086.74	
01	SHEPARD	Shepard Motorworks	WI	\$513,339.95	
01	BRESLIN	Breslin Parts Supply	WI	\$11,828.26	
<b>WI Total</b>				<b>\$548,267.54</b>	
<b>Combined Total</b>				<b>\$693,748.75</b>	

# Charting BIE Data



**Customer**

Data Grid | **Chart**

Chart Title:

Chart Type:

Data Points per Page:  
8

3D Chart

Series:

- Current Balance
- Aging 1
- Aging 2
- Aging 3
- Aging 4
- Credit Limit

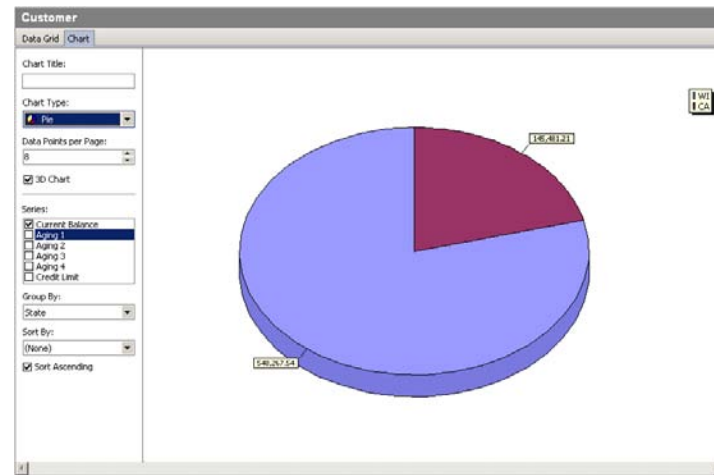
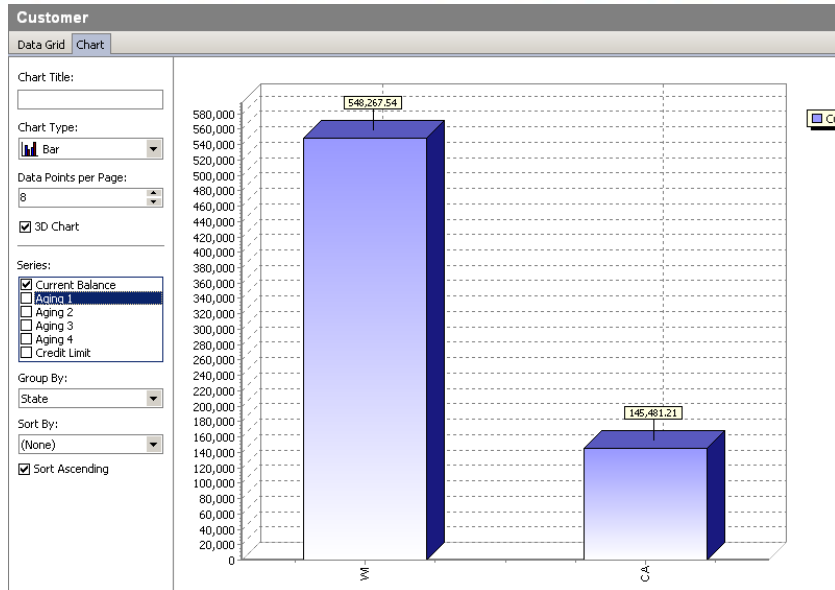
Group By:  
(Totals)

Sort By:  
(None)

Sort Ascending

A large, empty 3D rectangular box representing the chart area, with a light gray background and a thin black border. It is currently blank, showing no data points or axes.

# Customer Aging by State Chart



# Opening Tasks



sage MAS 90 Business Insights Explorer - Sales Orders

File Edit View Data Preview Explore Tasks Tools Help

Back [Navigation Icons]

Setting Standard [Navigation Icons]

Navigation Pane

**Preview**

- Line Items
- Backorders
- Backordered Line Items
- Quotes
- Master Orders
- Repeating Orders
- History Orders
- History Invoices

**Sales Orders**

Data Grid Chart

Drag a column header here to group by that column

Order	Order Date	Type	Div	Customer	Bill To Name	Status	Salesper
0000156	05/15/2010	Standard	02	ATOZ	A To Z Carpet Supply	New	Ginny He
0000104	04/20/2010	Standard	02	ATOZ	A To Z Carpet Supply	Open	Ginny He

Context Menu:

- Drill Into Preview
- Open Preview
- Preview
- Explore
- Tasks
  - Customer Maintenance
  - Enter Sales Orders
  - Enter S/O Invoices
  - Enter S/O Shipping Invoices
  - Enter RMAs
- Filter by Selection
- Copy Ctrl+C
- Select All Ctrl+A

[X] [V] (Div = 02) and (Customer = ATOZ)

Select Preview Setting...



# Next Webinar



Monthly Webinar Series - Held Third Tuesday of each month

## ◆ Sage

- Day: Tuesday, May 17, 2011
- Register By: March 16, 2011
- Register at: [www.bkdtechnologies.com/events](http://www.bkdtechnologies.com/events)

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- ◆ Monday - Friday, 8 a.m. - 5 p.m.  
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Thank You!

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