



# Sage MAS Intelligence - Introducing Dazzling Reports & Brilliant Analysis for Sage MAS 90 and 200

Leanne Lowe – Sage Software

# Presenter



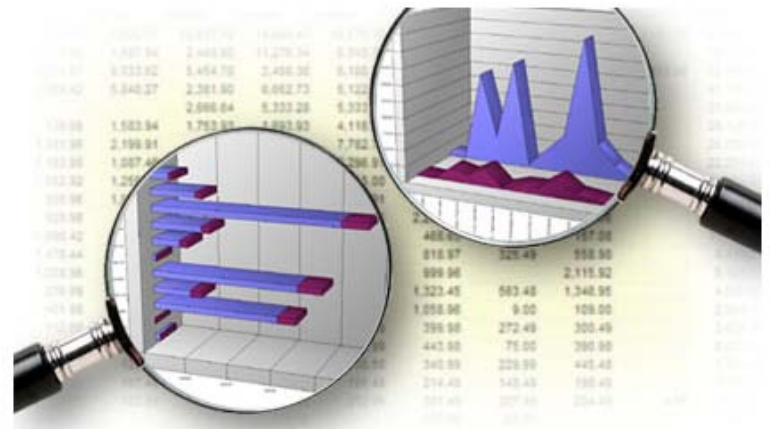
- Leanne Lowe – Sage Software
  - ❖ 12 years experience
  - ❖ Solution consultant for Sage MAS 90 & 200

# Agenda

- What is Sage MAS Intelligence and how does it meet the challenges for each department in your business?
- How does SMI fit into your reporting options?
- Sage MAS Intelligence components
- Demonstration
- Educational resources

# What is Business Intelligence?

- Collecting information for effective business decisions
- Involves
  - ❖ Collecting and retrieving data
  - ❖ Discerning trends, patterns and meanings
  - ❖ Responding to information
- Takes many forms
  - ❖ Verbal questions
  - ❖ Queries
  - ❖ Reports
  - ❖ Dashboards



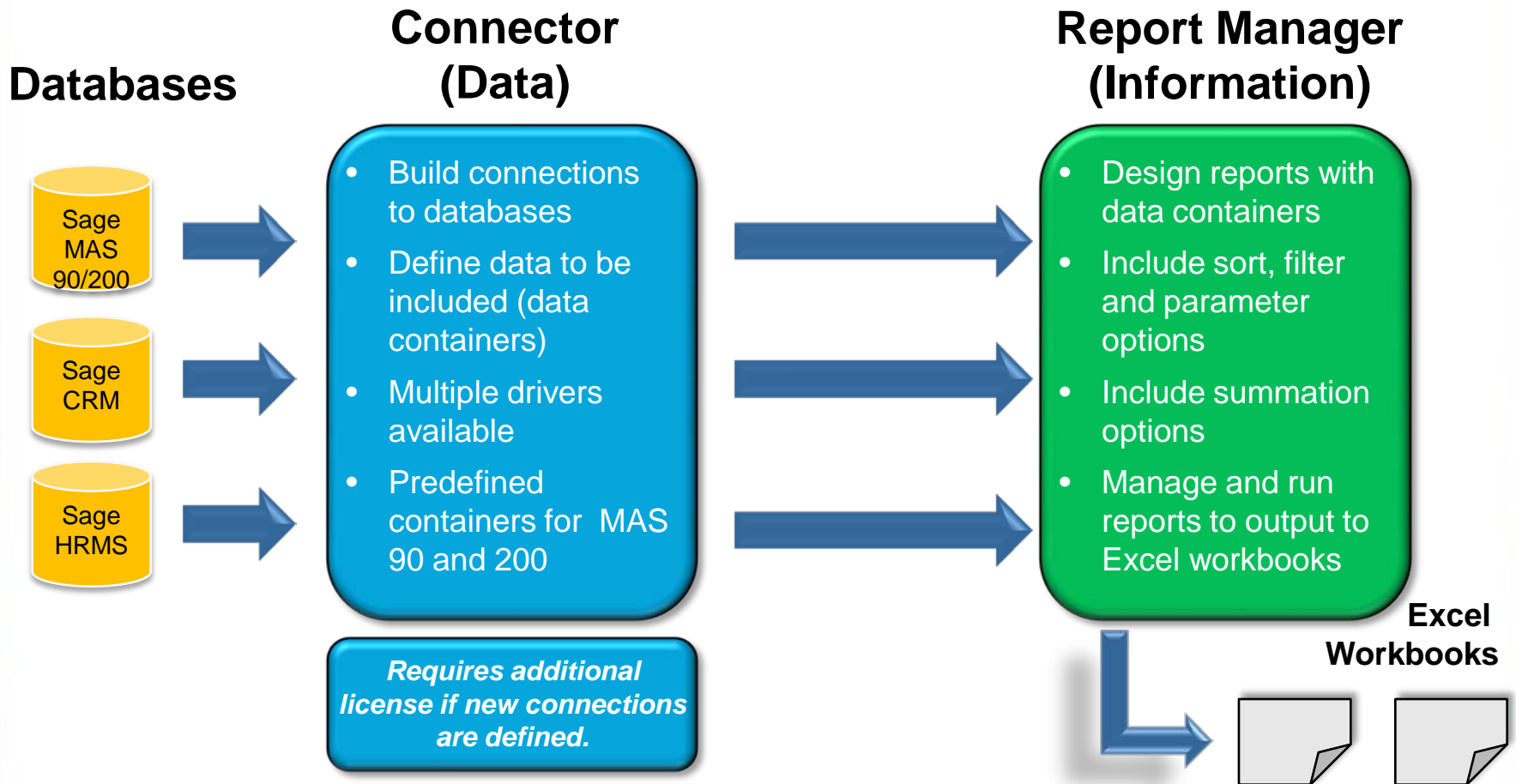
# What is Sage MAS Intelligence?

- A powerful, yet simple and easy to use, reporting tool that empowers financial managers to quickly and easily obtain needed information for operations and strategic planning
- Delivers a suite of pre-formatted report templates
- Centralized, customizable and flexible reporting and analysis capabilities
- Offers **real time** updating of excel spreadsheets and templates, formatted the way you choose from your source ERP system

# Benefits of Sage MAS Intelligence

- Save hours in reporting and preparation time, so you can spend more time focusing on information analysis and interpretation, and less time trying to find data
- Reduce manual workflow
- Reduce errors
- Leverages your MS Excel skills
- Provides data integrity – business decisions are based on timely and accurate information across all functions, from Finance, to Sales and to Procurement
- Leads to ... “single version of the truth”, real time, fact-based decision making base

# Basic Report Design with SMI



# Accounting

- Easily build, analyze and distribute reports
- Reduce month and year end processes – data gathering becomes more efficient, and reports are delivered in a timely manner and generated in seconds
- Reduce the time it takes to train users, as any user can effortlessly create reports and analyze data, utilizing the familiar Microsoft Excel application and out-of-the-box report templates.



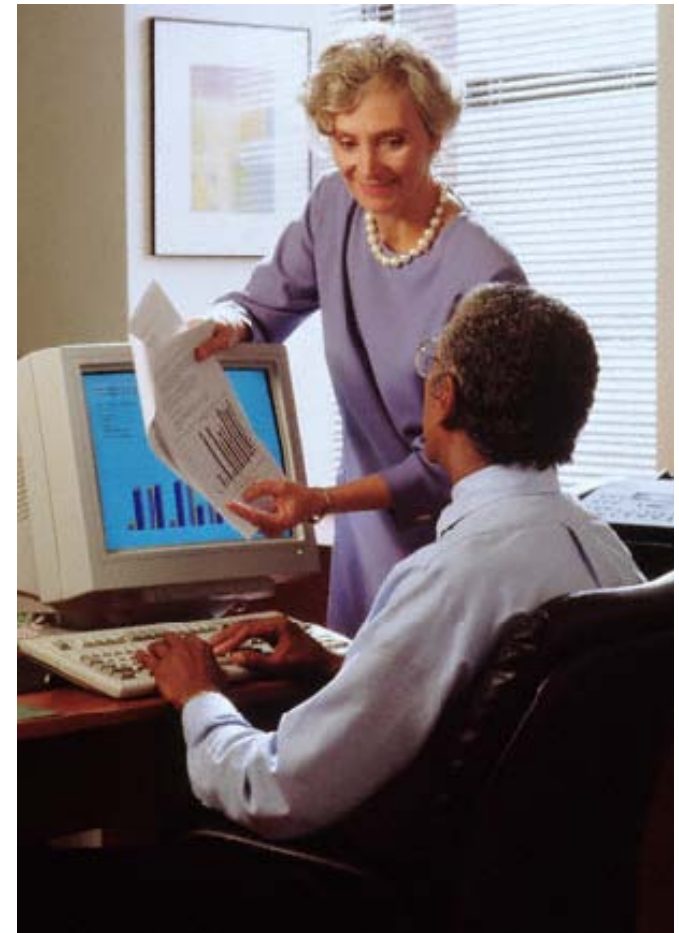
# Sales Team

- Complete Sales Analysis:
  - ❖ How are my sales trending based on different analysis points?
  - ❖ Which sales representatives are performing well in the west territory? Who is my top sales representative overall?
  - ❖ How are sales this month compared to same month last year?
  - ❖ Who are my top customers and what are they buying?



# Management

- Insight into overall financial situation – the bottom line:
  - ❖ Managing risk: How much of our assets remain after we cover our liabilities?
  - ❖ Profitability: How much are we earning?
- Planning and execution – hold your teams accountable to planning goals:
  - ❖ Budgeting: What are our anticipated revenues for the next coming year?
  - ❖ Scorecard: How are we doing on the established expectations for the year?
- Real time view of the company's financial status at any time – high level and summarized across business units and companies in a single report



# Sage MAS Intelligence: One of Many Reporting Options

## Crystal Reports

- Ability to design custom reports
- All standard module reports
- Ability to customize standard reports
- Can export to Excel
- Single company

## Business Insights Explorer/Reporter

- Can use crystal wizard to build report
- Used in all modules
- Export view to Excel
- Single company

## FRx

- Design reports in FRx
- Allows for access to all G/L data with drilldown
- General Ledger data only
- Export data to Excel
- Multi-company reporting

## Sage MAS Intelligence

- Allows for simple report design and Excel analysis
- Consolidations and reporting beyond the G/L
- Multi-database reporting
- Data Analytics (Cubes) - future
- Included with MAS

# Sage MAS Intelligence - Components and Icons



## ➤ **Report Manager**

- ❖ Edit and copy reports and create new reports and define report options
- ❖ Sort, filter and aggregate data
- ❖ Categorize reports into folders



## ➤ **Report Viewer**

- ❖ Real time report execution with drill down capabilities
- ❖ Change report parameters but cannot edit templates



## ➤ **Security Manager**

- ❖ Control access to reports, modules, etc.

# Sage MAS Intelligence - Components and Icons



## ➤ **Connector**


- ❖ Connects to any ODBC-compliant data source
- ❖ Real time financial and non-financial consolidations eg, multi-company consolidations
- ❖ Establish and maintain data links for customized reports
- ❖ Add fields or other data to an unlimited number of containers
- ❖ Report Manager provides access to the reports

## ➤ **Report Designer**

- ❖ Excel add in
- ❖ Generate financial statements from predefined lists in seconds
- ❖ Create and edit financial layouts using a drag and drop graphical interface - giving you total report design flexibility
- ❖ Multi-company consolidations for GL data only

# Report Designer

- Create new and edit existing financial reports using drag and drop functionality
- Includes predefined financial report templates
- Delivers pre-defined financial formulas with support for new formula creation
- Provides “what if” analysis
- Currently available for financial and consolidated financial reports
- Requires Excel 2007



Makes financial report  
design simple,  
flexible and fast

# Sage MAS Intelligence - What Ships with Sage ERP MAS90/200 v4.4?

- **1- User License for SMI Report Manager access**
  - ❖ Run shipped reports
  - ❖ Customize reports
  - ❖ Design new reports from included containers
- **Standard reports (customizable)**
  - ❖ Dashboard Analysis (Sales related)
  - ❖ Financial Reports (General Ledger)
  - ❖ Financial Trend Analysis
  - ❖ General Ledger Transaction Details
  - ❖ Sales Order and Customer Sales Reports
  - ❖ Inventory Management
  - ❖ Purchase Order reports, including vendor purchases

# Sage MAS Intelligence - What is available with Sage ERP MAS90/200 v4.4

Additional licenses and module sold separately

- Report Manager licenses
- Connector licenses
- Report Designer

# Demonstration - Report Manager and Excel

## SALES TREND ANALYSIS

Doc Type	All
Item Location	All
Item (Multi-Level)	All
Sales Rep	All

Line Total Excl	Column Labels	
Row Labels	2009	2010
MTH 01 (Jan)	324.8	6092.3
MTH 02 (Feb)	1417.8	1890.
MTH 03 (Mar)		6665.1
MTH 04 (Apr)		8363.3
MTH 05 (May)	2553.8	10989.1
MTH 06 (Jun)		1539.1
MTH 08 (Aug)	2553.8	
MTH 09 (Sep)	7828.8	
MTH 10 (Oct)	1276.4	
MTH 12 (Dec)	2555.2	
<b>Grand Total</b>	<b>18510.5</b>	<b>35538.9</b>



# Demonstration - Report Designer

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# Summary: Product Demo (Part 1)

## Financial Reporting

- Auto generate Income Statement & Balance Sheet reports using predefined GAAP layouts out of the box
- Drill down to detailed ledger transactions
- Caters for segmented GL's, column based reporting, consolidations
- Layouts are totally flexible and customizable within Excel

# Summary: Product Demo (Part 2)

## Customer Sales

- Freely customize and change transactional data by dragging and dropping elements into your layout using standard Excel pivot tables
- Analyze sales in any combination/order of item, salesperson, customer and other fields including optional and user defined
- Easily create your own views on the fly: i.e. top 10 customers, top 5 items, by branch, by department, by region, by salesperson, etc. using Excel graphs

# Summary: Product Demo (Part 3)

## Report Designer

- Draw from real time financial data to give you total flexibility in creating a nicely laid out report, formatted the way you choose, in an easy to use graphical interface
- 'What If' analysis tools allow you to change a set of values and see the impact it has on the rest of your data

# Promotional Pricing

20% off SMI Report Designer  
or Report Connector through  
April 15<sup>th</sup>, 2011.

# Resources

- Training (<http://www.sageu.com>)
  - ❖ Sage MAS Intelligence JumpStart
  - ❖ Sage MAS Intelligence Intermediate Report Design
  - ❖ Sage MAS Intelligence Advanced Report Design
  - ❖ Sage MAS Intelligence Essentials
  - ❖ Excel on Steroids

# Summary

## ➤ Sage MAS Intelligence...

- ❖ Integrates into your existing ERP software and includes a single FREE user license
- ❖ Consolidations of financial and non-financial data (unlimited number of companies with the Connector license)
- ❖ Access to all tables and all fields as well as other databases and systems such as CRM, HR etc.
- ❖ Drill down functionality, (predefined and configurable)

# Questions?

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# Next Webinar

## Monthly Webinar Series - Held Third Tuesday of each month

- ◆ Sage – Business Insights Explorer
  - ❖ Day: Tuesday, April 19, 2011
  - ❖ Register at: [www.bkdtechnologies.com/events](http://www.bkdtechnologies.com/events)

# BKD Technologies Help Desk

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