



Sage Intelligence Beyond Financial Reporting

July 19, 2016

Presenter
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2016 DM2 Connections User Conference
July 18 – 20, 2016

DM²
software, inc.

Today's Agenda

Why Do I Care

Connector Module Overview

Modify “Out of the Box” Reports

Create a New Report

Connecting a Database other than Sage 100

Importing & Exporting Reports

Sage Alerts Integration

Questions

Why Do I Care

Sage Intelligence is a full blown Business Intelligence tool

Connects to ANY database with an ODBC connection

Leverages the full power of Excel

Auto Distribution of reports to a shared directory or via email

Can Use Sage Alerts to Generate a Sage Intelligence Report

Active BI Community

Connector Module

The Connector module is the 1st step to creating a new report

Creates & maintains the data links for a new or existing report in the Report Manager Module

Structure of the Connector Module

Connection Type:

the link to a specific type of data source (Sage, CRM, Excel, etc)

Cannot delete any of the connection types listed

Connection:

Holds the connection information to a database – each connection is linked to a specific database

There are no limits to the number of connections for a connection type

Connector Module

Container:

The source of the data can be a database table, view, SQL Query or a join based on multiple tables

Created on a connection & links to the database tables

You can create as many containers as needed OR modify existing containers by creating a copy of the container

Each Report created in Report Manager requires a container

Connector Module

Connection Type

Connection

The screenshot displays the Enterprise MAS 90 4.0 ODBC Driver interface. The left pane shows a tree view of connection types under 'Enterprise'. The right pane shows the 'Sage MAS (Auto Connect)' connection type, which is expanded to show a list of connection expressions. Two expressions are highlighted with red boxes: 'Cost of Sales' and 'GrossProfit'. To the right of the tree, a table displays the configuration for these expressions.

Expression Name	Expression Source	Expression Type
Cost of Sales	QuantityShipped*UnitCost	Excel Formula
GrossProfit	("AR_InvoiceHistoryDetail"."UnitPrice" - "AR_InvoiceH:	SQL Expression

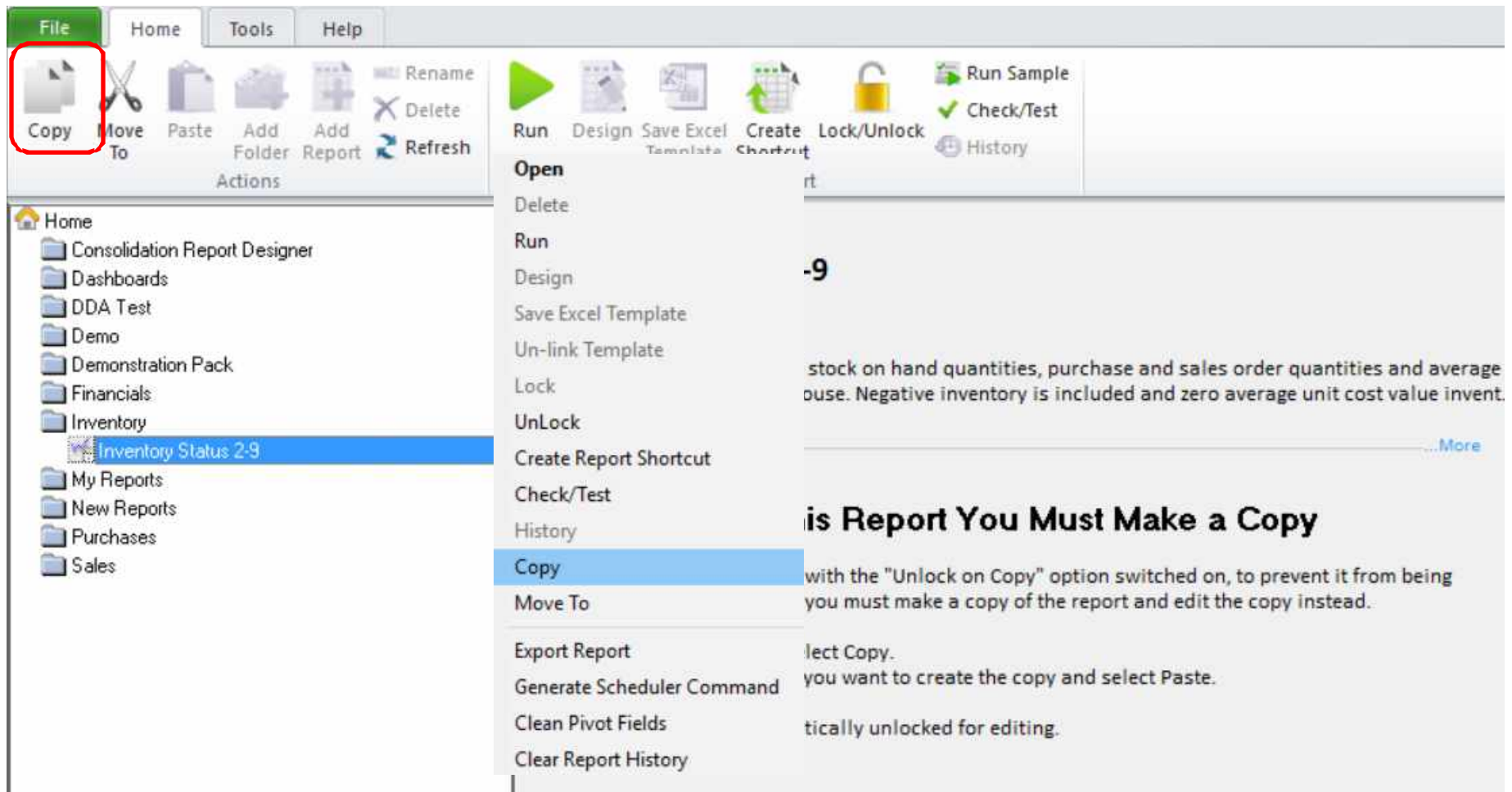
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Modify Existing Reports

To Modify an existing report - you must make a copy of the template



The screenshot shows the software's interface with the 'File' menu open. The 'Copy' option is highlighted in blue. The left sidebar shows a tree view with 'Inventory Status 2-9' selected. The right pane displays a report preview with a warning message: 'is Report You Must Make a Copy' and a note: 'with the "Unlock on Copy" option switched on, to prevent it from being you must make a copy of the report and edit the copy instead.'

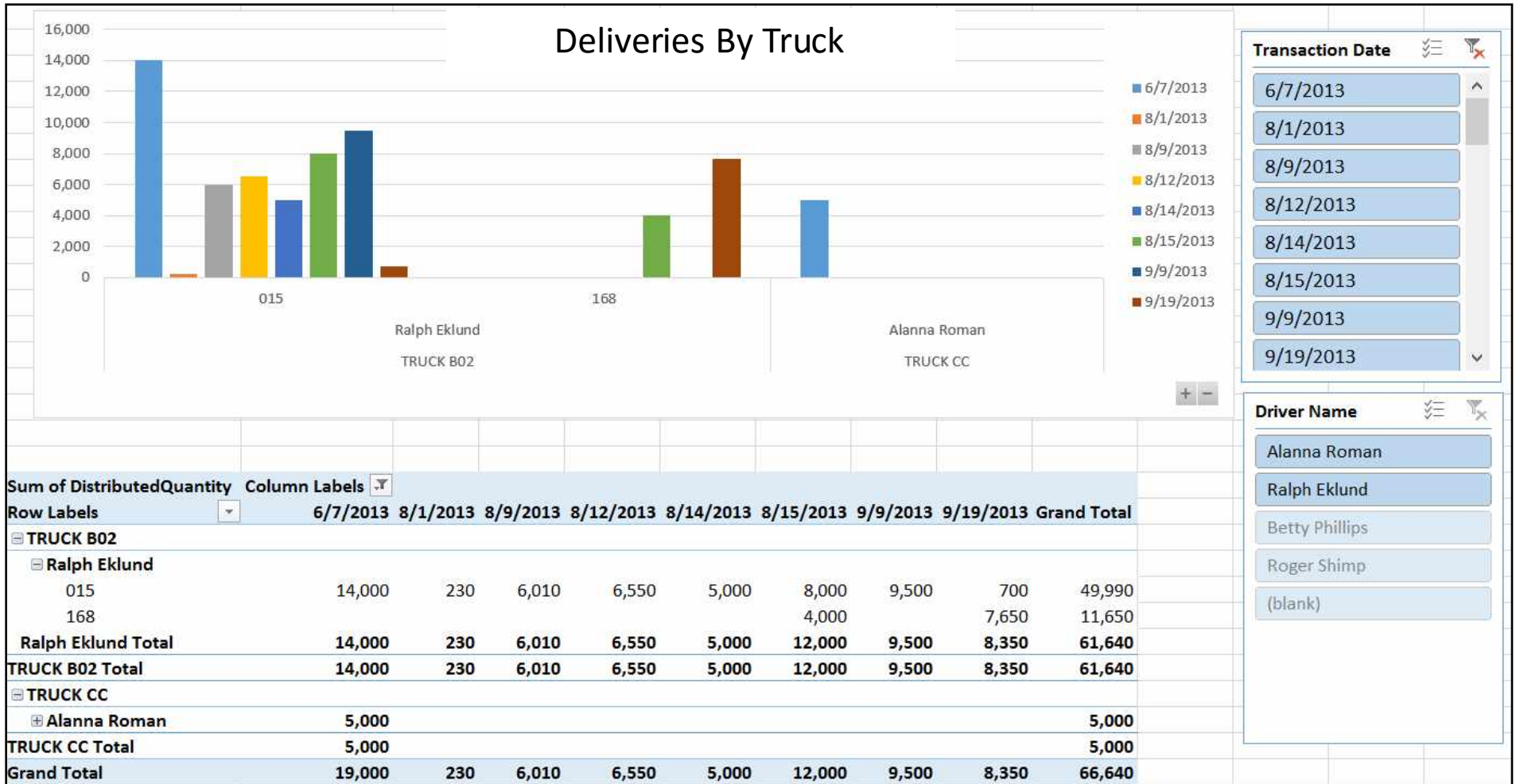
Modify Existing Reports

Paste the Report into another folder to unlock it

The screenshot shows the Consolidation Report Designer software interface. The top menu bar includes 'File', 'Home', 'Tools', and 'Help'. Below the menu bar is a ribbon with various icons. The 'Run' icon, which is a green play button, is highlighted with a red square. Other icons include Copy, Move To, Paste, Add Folder, Add Report, Rename, Delete, Refresh, Design, Save Excel Template, Create Shortcut, Lock/Unlock, Run Sample, Check/Test, and History. The main workspace is divided into three panes: a left pane showing a folder tree with 'My Reports' selected and 'Copy of Inventory Status 2-9' highlighted; a top-right pane with tabs for 'Properties', 'Columns', 'Filters', 'Parameters', 'Sort Fields', and 'Aggrega Filters'; and a bottom-right pane showing a table of columns and their aggregate functions.

Name	Aggregate Function
ItemCode	
ItemCodeDesc	
ItemCode_Desc	
ProductLine	
ItemType	ales order qu
ItemTypeDesc	
ItemType_Desc	
ProductType	
ProductTypeDesc	
ProductType_Desc	
DefaultWarehouseCode	
WarehouseCode	
WarehouseDesc	
BinLocation	
ProcurementType	
InventoryCycle	
...	

Create a New Report



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Create a New Report

Connector Module:

- Create a New Connection

- Create a Container

- Add Expressions

Report Manager Module:

- Add Report

- Select Container

- Select the Data to include (Columns)

- Add Filters and or Parameters

- Run Report to Excel

Excel:

- Design Report

Create a Report from “Other” databases

Sage Intelligence allows you to create a report from data stored in another database.

We will create a Sage intelligence Report from an Excel Spreadsheet that has Vendor Details

A	B	C	D	E	F	G	H	I	J	K	L	M
VEND	NAME	Shortname	ADDR3	City	State	zip	PHONE1	FAXNUM	SALUTATION	FIRSTNAME	LASTNAME	CONTACT
FIL100	Fildes Fitness Equipment Mfg. Ltd.	Fildes Fit	4895 Edward Ave.	Kansas City	MO	59782	8165553341	8165553340	Mr.	Jim	Fildes	Mr. Jim Fildes
GRA100	Gray Gun Manufacturing	Gray Gun M	348 Worthington St. E.	Houston	TX	67182	7135554799	7135553201	Mr.	Mitchel	Gray	Mr. Mitchel Gray
LIT100	LitvakTents	LitvakTent	24 Barbara Cres.	Houston	TX	67183	7135551254	7135552541	Ms.	Alina	Litvak	Ms. Alina Litvak
AND100	Anderson's Alpine Outfitters	Anderson's	6412 Erables Ave	Austin	TX	78767	7135559192	7135559980	Mrs.	Barb	Anderson	Mrs. Barb Anderson
CIO100	Cioran Hockey Equipment Wholesale	Cioran Hoc	220 Spinnaker Dr	Tulsa	OK	74105	9185553398	9185552879	Mr.	Jason	Cioran	Mr. Jason Cioran
FIT100	Fitness Equipment Plus	Fitness Eq	6 Cudmore Ln.	Sacramento	CA	93721	9165551422	9165552625	Mr.	Darcy	Hagerman	Mr. Darcy Hagerman
FRA100	Franztastic Fishing Supplies	Franztasti	8227 Dunant Road	Cleveland	OH	31986	2165553997	2165556893	Mr.	Gary	Franz	Mr. Gary Franz
HAM100	Hamp's Hunting Supplies	Hamp's Hun	9343 B3 St. NW	Fairbanks	AK	79172	9165559821	9165556060	Mr.	Dean	Hamp	Mr. Dean Hamp
ROC100	Rocha Camp Supplies	Rocha Camp	6358 5e Ave.	Eureka	CA	95616	2155553200	2165559845	Mr.	Luis	Rocha	Mr. Luis Rocha
SKI100	Skis Are Us	Skis Are U	2487 Candace St	Eureka	CA	95617	4155559830	4155559496	Ms	Kathy	Valenta	Ms Kathy Valenta
YOU100	Your Camping Needs	Your Campi	50 Laval Dr	Seattle	WA	98102	5035551779	5035556721	Mrs.	Tracey	Stewart	Mrs. Tracey Stewart

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Import Reports

You can export reports from Report Manager and archive for safe keeping or import to another Sage Intelligence System

Importing a report

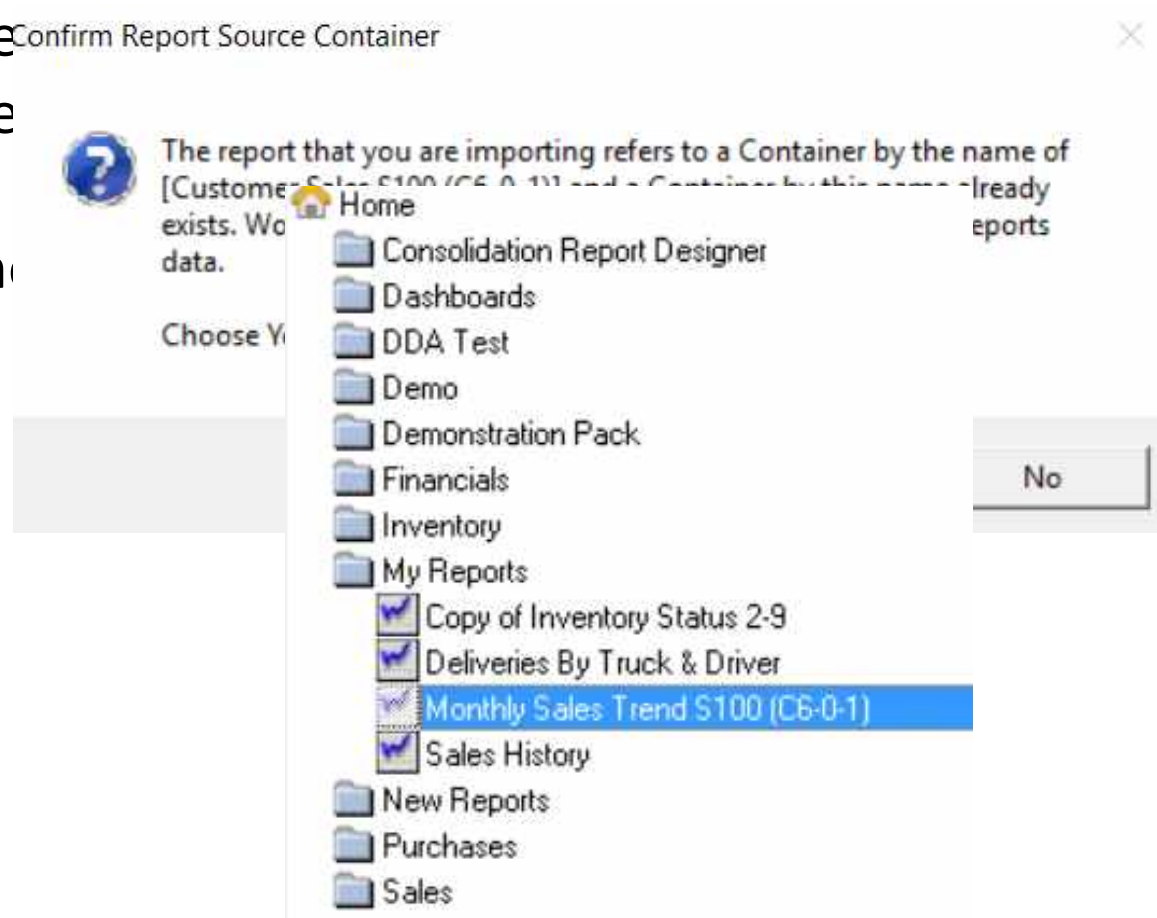
- Open Report Manager
report to be imported
function

You need to specify
destination.

Report Name	Monthly Sales Trend S100 (C6-0-1)
Created by Company	Alchemex Test2
Report Container Source	Customer Sales S100 (C6-0-1)
Creation Time	2015/10/14 11:56:24 AM
Original Template Name	Monthly Sales Trend S100 (C6-0-1).xltm
Template File Size (bytes)	90532
Original Connection Name	Template Store
Original Connection Type	MAS 90 4.0 ODBC Driver
<hr/>	
Target Connection	Sage MAS (Auto Connect)
Target Connection Type	
Report Destination	My Reports
<input type="button" value="Import"/> <input type="button" value="Cancel"/>	

Import Reports

The import process may display the following message if the container name has been modified the last time you imported the report.



Import Reports

Free Reports are available for import on the Sage Intelligence
Free Reports - Sage 100 Intelligence Reporting

Select a report from the list below:

Sage 100 Standard & Advanced Reports

 Purchase Order
Receipts S100 (C37-0-1)


+


 Purchases Dashboard
S100 (C39-0-1)

 Outstanding Quotations
by State S100 (C16-0-1)

+

 Sales Rep Report S100
(C20-0-1)

 Monthly Sales Trend
S100 (C6-0-1)

 Purchase Order Report
S100 (C43-0-1)

 Financial Report
Designer Current Period
S100 (C44-0-1)

 Outstanding Sales
Orders by State S100 (C15-
0-1)

 Lost Customers in Last
12 Months S100 (C14-0-1)

+

 Financial Ratio Reports
S100 (C17-0-1)

 Sales Flash Report
S100 (C37-0-1)

 AP Vendor Purchases
S100 (C40-0-1)

 Fast Moving Items S100
(C7-0-1)

 AR Salesperson
Commission Invoice Paid
Report

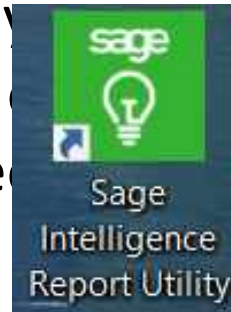
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Import Reports

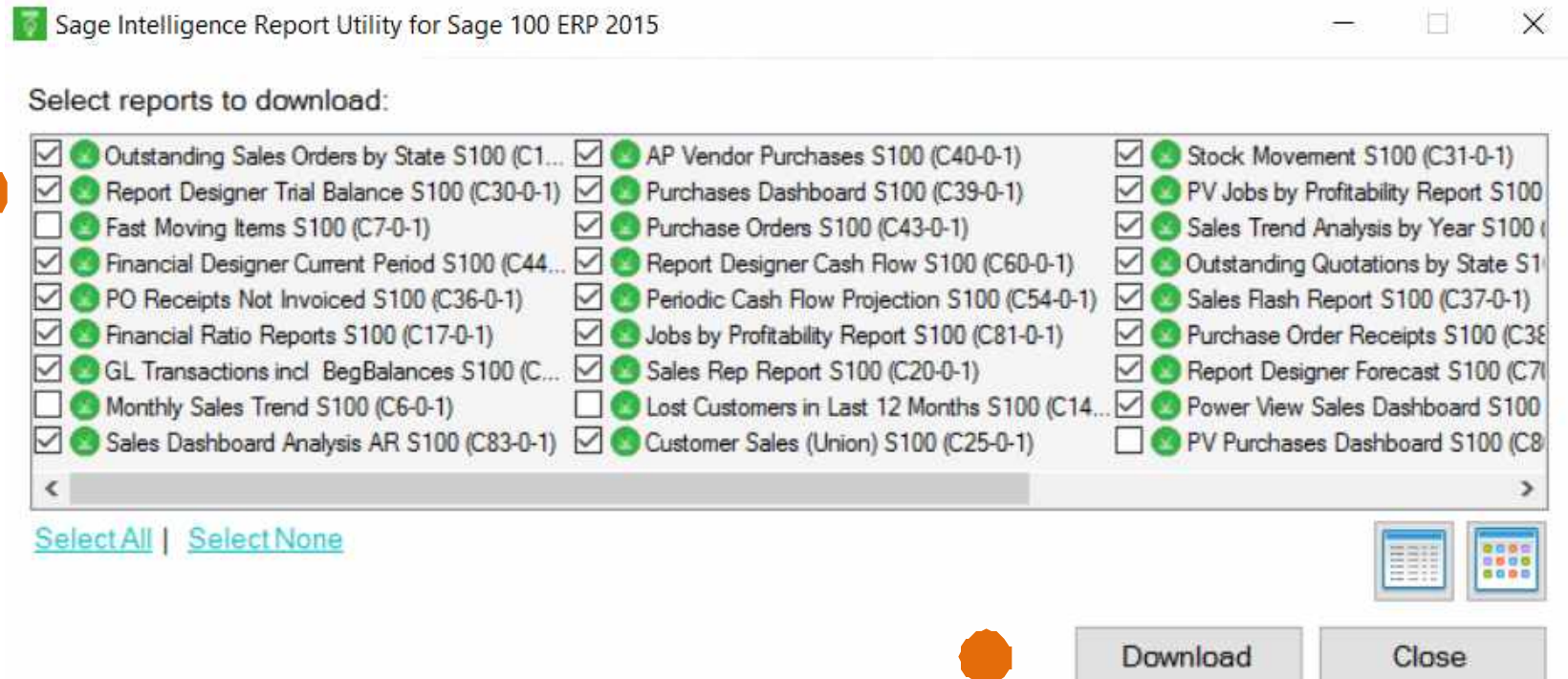
v2016 introduces a feature called the Report Utility

- The **Report Utility** will allow you to select the reports you would like to download, and automatically imports them to your Report Manager module.
- The Report Utility is a tool that you can download from the Sage community website, which will allow you to automatically import any of the additional free Sage Intelligence reports.
Download the report



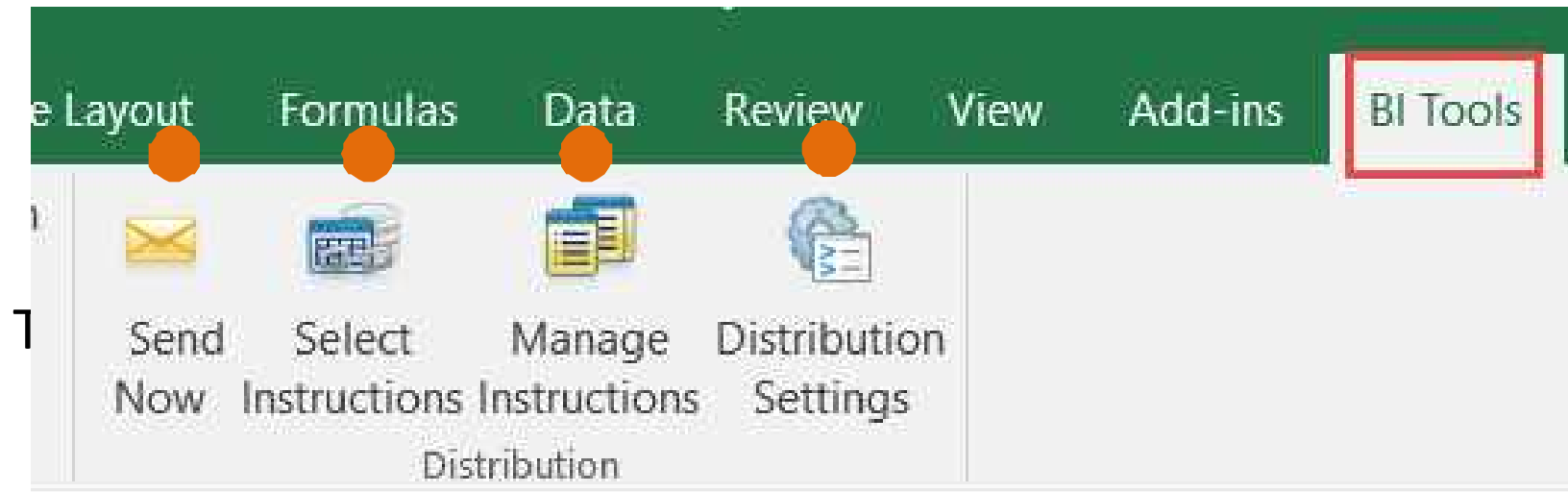
Import Reports

- The Report utility does a check against the reports in your Report Manager. Any reports that you do not have in your Report



Distribution

Intelligence provides a multi featured Distribution Excel Add-in allowing a user to define several distribution options for your reports



Integrate with Sage Alerts

Sage Alerts & Workflow (SAW) can generate any Sage Intelligence (SI) report by using the “Actions” module in Sage Alerts & Workflow to “call” the Sage Intelligence program and have Alerts & Workflow specify which report to run and what parameter values (if any) are to be passed from Alerts & Workflow into the report.

Miscellaneous

Link to Download the Report Utility

<https://www.sageintelligence.com/report-utility/sage-100>

Link for Sage Intelligence Community Forum

<http://www.sageintelligencecommunity.com/group>

Report Writing Training

DM2U Classes

<http://wp.dm2.com/register-dm2-university-class/>



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Follow-up questions?
E-mail DM2 at: sales@dm2.com

