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Sage Intelligence Reporting Changes in 2015

Intelligence Reporting in Sage 100 ERP 2015 includes a number of changes and new features that give you more control over financial reporting. In particular, functionality of the **Report Designer Layout Generator** was combined with the **Report Designer Add-in**, providing powerful new options for creating financial reports customized to your needs. Let's take a look.

New Financial Report Designer

As mentioned, the new Financial Report Designer merges functionality of two previously separate components of Sage Intelligence Reporting. The result is more options and flexibility in creating new reports and layouts customized to your specific needs.

In addition, the interface of the report designer has been totally redesigned and modernized making it easier to use and navigate. Plus, the redesign boasts more than just good looks - a vast improvement in performance through powerful In-Memory Technology makes your reports faster and more responsive than ever.



Report Layout Screen in the New Financial Report Designer

More Options, More Control

The new Financial Report Designer gives you two methods to create financial reports depending on how comfortable you are using basic and advanced functions of Microsoft Excel. For those that aren't "experts" in Excel, the **Layout Generator** is an easy-to-use option that automates the design and generation of quick and simple financial report layouts. Essentially, you start with a pre-built standard layout and then use the **Manage Layouts** option to modify and customize the settings.

More advanced Excel "gurus" will probably leverage the power and flexibility of the new **Task Pane** (previously known as the Report Designer Add-in) which greatly enhances the reporting experience. Through Excel, you can access data from the Sage 100 General Ledger and then simply drag in **data lists**, **formulas**, or **reporting trees** from the Task Pane on the right hand side of the Excel window - your report layout will update results instantaneously.

Other Notable Changes and Enhancements

A collection of other enhancements were added to Intelligence Reporting in Sage 100 ERP 2015 including a new **Missing Accounts** feature which helps you quickly and easily detect accounts that are missing from your reports. In addition, you have more **flexibility for recipients** of your reports by sending along the calculated formulas so they can see how the results were derived and what parameters can be made to give them the results they are looking for.

Want to Learn More?

Download the [What's New in Sage 100 ERP 2015 Intelligence Reporting Guide](#)

Go to the [Sage Intelligence YouTube Channel](#) for a series of video demonstrations



SPOTLIGHT: SAGE CRM

In the Cloud vs. In the Office

With [2 editions of Sage CRM](#) available - **Sage CRM Cloud** and **Sage CRM On-Premises** - it can be a challenge determining which option is the best fit for your business. In this article, we'll compare the two versions to help you understand the most important differences.

Up-Front Software Cost and IT Support

Sage CRM Cloud is ideal for companies that want to get up and running quickly or have limited IT resources. Since the software runs "in the cloud," you don't have to worry about software installation, server management, product updates, or database backups.

By comparison, **Sage CRM On-Premise** is a traditional implementation that requires Sage CRM software purchase (ownership) and installation on properly-configured servers that you maintain and update.

Regardless of whether you're evaluating a car, house, or software application, there's a similar "rent vs. own" consideration. So while Sage CRM On-Premise comes with higher up-front costs for the software purchase (and new server if required), the cost of ownership over time can often be lower than Sage CRM Cloud where the monthly payments (rent) will continue for as long as you use the software.

Customization and Integration Options

Sage CRM On-Premise provides **advanced customization** that allows you to modify the software screens, workflow, and behavior so that it conforms to your specific business processes and works exactly the way you need it to.

With Sage CRM Cloud, you can configure settings and other software options. But your ability to customize the software to your specific industry or workflow is more limited.

With Sage CRM On-Premise, you also have the flexibility to integrate with other software applications you might be using to run your business like Microsoft Exchange Server, a computer telephony system for customer support, an

online store, or any other 3rd party applications. Sage CRM Cloud doesn't offer that level of custom integration.

Sage 100 ERP Integration

Because the benefits of a tightly integrated ERP and CRM system are numerous and well-documented, the level of integration with Sage 100 ERP is perhaps a "make or break" difference for many customers.

One of the most important aspects of Sage CRM On-Premise is the real-time, **bi-directional synchronization** of data to and from Sage 100 ERP. That means data entered or edited in *either* system automatically updates the other. That also means your staff sees the same accurate and consistent information about customers, contacts, quotes, orders, and accounting details regardless of whether they're using Sage 100 ERP or Sage CRM On-Premise.

By contrast, Sage CRM Cloud offers **one-way synchronization** of orders, contacts, and 2 years of invoice information in one direction from Sage 100 ERP. Accounting information pushed over from Sage 100 is not editable in Sage CRM.

Software Features

For many companies, product features are an important consideration. In the case of Sage CRM Cloud versus On-Premise, it's not a factor. Both editions offer nearly identical functionality for sales, marketing, customer service, and mobile access.

So What's the Difference?

For most, choosing Sage CRM On-Premise offers control, technology ownership, customization, and integration flexibility. On the other hand, choosing Sage CRM Cloud delivers powerful CRM software that's up and running quickly and without the need for ongoing IT support.

Rest assured no matter what edition you choose, you won't be locked in because you can migrate between cloud-based Sage CRM and on-premise Sage CRM at any time!

NEW CORE ACCOUNTING FEATURES

The Most Popular Enhancements Requested by Customers

You've probably heard by now ... the newest release of Sage 100 ERP includes over 60 enhancements that were submitted and voted on by customers like you using the [Sage 100 Ideas Portal](#). Let's look at the most popular core financial features added as a result of your feedback.

Expanded Vendor Names

We'll start with the most popular request generating [over 240 votes](#) on the ideas website - the length of the vendor name field has been expanded to 50 characters. Some of the customer comments included having to write checks by hand because Sage 100 would cut off the vendor name and sometimes checks would be returned as a result. The new 50-character length is 10 more than industry standard.

Reverse Journal Entry

The ability to more quickly and easily reverse journal entries generated over 70 votes. A new one-click automatic journal reversal feature eliminates the previously time-consuming and painful process of manually reversing the error in Sage 100 ERP. The reversal is written to General Journal Entry, along with a journal comment, where you can review the entries prior to updating and creating a complete audit trail.

Default "Print Full Comments"

Another popular request with over 100 votes is a new checkbox default to **Print Full Comments** in journals and registers. According to user comments, Sage 100 customers would print journals or registers only to discover they hadn't selected the "Print Full Comments" checkbox. They then had to take time to go back and re-run the reports. With this new feature in Sage 100 ERP 2015, your most recent option selections will roll forward as your new default settings.

Out of Balance Notification on GL Detail Report

For many customers, the General Ledger Detail Report is your audit tool for making certain everything is posted correctly by account. With the new out of balance notification that's prominently displayed on the report, you can easily spot - at a glance - potential issues. Any errors are called out in bold print right next to the report totals. This feature has also been added to the General Ledger Detail by Source Report in Product Update 1 for Sage 100 ERP 2015.

Get the Whole Scoop

With over 60 customer-requested enhancements, we've only scratched the surface featuring some of the most popular requests. Feel free to [contact us](#) for a copy of the release guide for Sage 100 ERP 2015 to get full details. Or get in touch if you need help with an upgrade.

Has Your Maintenance Plan Lapsed?

Reinstate and Save 40% in August

If your Sage 100 ERP maintenance has lapsed and you're currently "off plan", you may be eligible to reinstate your plan for 40% off.

A current and active maintenance plan provides you with product support, access to online knowledgebase resources, the ability to purchase new modules or user licenses, and all product updates or version upgrades.

If eligible, you'll save 40% on reinstatement in August 2015. By September, the incentive drops to 25%.



[Contact Us for details or eligibility requirements](#)

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