Sage ERP MAS I Intelligence Cheat Sheet

How to Explain Sage ERP MAS Intelligence

In 70 words	Sage ERP MAS Intelligence seamlessly integrates into your Sage ERP MAS solution and is 100% Microsoft Excel®-based for easy report design, distribution, and consumption. It allows you to spend more time focusing on information analysis and interpretation, giving you real-time access to a consolidated view of information when and where you want it in a format of your choice, and less time pulling the data together.
FRx replacement	No longer is simple General Ledger reporting enough; customers need more. Sage ERP MAS Intelligence is the ideal candidate for FRx® replacement to take customers from simple financial reporting to reporting and analyzing their entire ERP solution. Customers who purchased FRx licenses in the past will receive the same number of Intelligence license(s) and/or modules, giving them comparable functionality. Intelligence is integrated with Sage ERP MAS, Sage ERP Accpac, Sage Simply Accounting, and Sage Peachtree because of its proven track record of over 22,000 installs worldwide and a renewal rate in excess of 90%.

Free License

Sage ERP MAS 90 and 200 v4.4 and v1.4. support plan customers qualify for:
- One FREE Report Manager license and a Security Manager.

Sage ERP MAS 500 v7.3 support plan customers qualify for:
- Four FREE Report Manager licenses and a Security Manager.

What Does the FREE Report Manager Allow a User to Do?

Limitations of the FREE Report Designer for Sage ERP MAS 90 and 200 (limitations not applicable for Sage ERP MAS 500):
- It does not allow you to import reports or schedule reports.
- To override the limitations of the free license, the client will need to purchase either an additional Report Manager or a Connector module.

Save time producing reports	Users receive a set of ten standard report templates. • Run reports automatically and/or on demand. • Run, edit, and customize standard report templates (financial reports, dashboards, financial trend analysis, general ledger, sales, purchases, and inventory transactional reports) and save them for future use.
Create new reports	New reports can be built from the existing data containers provided with the standard report templates.
Deliver reports easily	Report output can be emailed to chosen recipient lists, saved as HTML for intranet/Internet distribution, or automatically saved to a file server location.

Establishing Clients' Needs

• How many people in the company need access to real-time reports through Intelligence? • How many people need to edit and create reports? • How many people need access to run reports only, such as for analysis and collaboration?	Number of people determines the number of licenses required: • Report Manager license • Report Viewer license
• Do you need to consolidate, connect to other databases, and/or create additional reports beyond the standard reports?	• Connector Module
Financial Reports • Are you an FRx user? • Do you want a more graphical-based, intuitive reporting solution for financials?	• Report Designer Module

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Licensing and Editions

- Intelligence licensing is not concurrent and is linked to a user's name and workstation.

- Report Viewer and Report Manager are sold as individual licenses, so each user will need to have a license to access these tools.

- Connector Module and Report Designer are modules. Once purchased, anyone with a Report Manager license can access these modules because of they are "Site Licenses" (unless they have been restricted through security mechanisms).

License Name	Type	Price	Functionality	Typical User / Business Need
Report Viewer	Workstation	$250 U.S.	The most widely deployed license used due to its functionality and cost. • Run predefined reports in real time • Results are presented in familiar Excel format, including the ability to drill down dynamically • You can edit parameter prompts at run time Limitations: Edits to preexisting reports can only be made permanent through the Report Manager.	Users just wanting to run reports for access to data. • CEO/president Requires no training if user is familiar with Excel.
Report Manager	Workstation	$1,000 U.S.	Includes all the Report Viewer functionality plus allows you to copy, edit, and save reports and create new reports. • Add or change report columns, report filters, and report parameters • Sort, drill down, and aggregate data • Save your changes made in your Excel output to your report • Schedule, file, publish, and distribute your reports You can access the Report Viewer from within the Report Manager.	Users wanting to run reports, then edit/customize and save their changes to the report layout in Excel for future use. • Financial manager/ sales manager/buyer and operations manager
Connector	Site License	$2,000 U.S.	• Unlimited connectivity to data. • Multicompany consolidations • Connectivity to unlimited ODBC data sources including unrestricted access to the ERP database, across all tables, fields, and modules, for example SageCRM, Sage Abra, and Sage FAS	Users wanting to access information from multiple sources, consolidate data from multiple companies. • IT manager/financial manager/business partner/ consultant
Report Designer	Site License	$1,000 U.S.	An Excel add-in that allows a user to easily create and edit financial statements using a graphical "drag and drop" interface. • Ships with predefined Excel layouts for Income Statement, Balance Sheet, and Trial Balance • For financial reporting only • Prerequisite: MS Excel 2007 or above	Users wanting to easily create and edit their financial statements in Excel. • Financial director/manager

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