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SAGE 300 ERP INTELLIGENCE REPORTING

Answers to Your Frequently-Asked Questions (FAQs)

The popularity of business intelligence (BI) reporting has been on the rise - and for good reason. The graphs, charts, and number-crunching power that BI tools provide help you get the upper hand on all that data stored in your ERP system so you can make “intelligent” business decisions.

Many of you have already made, or are planning to make, a transition from the older **Financial Reporter (FR)** over to the new **Sage Intelligence Reporting** in Sage 300 ERP (Accpac). So here’s a look at some of the frequently-asked questions about Sage Intelligence.

What Is Sage Intelligence Reporting?

It’s an Excel-based reporting tool that pulls data from across your entire Sage 300 ERP system (any module) into a single location so you can slice, dice, and analyze the numbers in familiar spreadsheet environment.

Resource: [Sage 300 Intelligence Brochure](#)

How Does it Compare to FR?

When it comes to financial reporting, Sage Intelligence is comparable to Financial Reporter (FR) in functionality. But as the name suggests, FR is designed primarily for financial reporting on numbers in your GL.

Sage Intelligence, however, looks across your entire system so you can run Excel-based graphical reports on sales, inventory, customers, non-financial data, and so much more.

Do I Need to Build All New Reports?

No - Sage 300 Intelligence Reporting comes with a number of ready-to-use reports for finance, inventory, products, customers, sales, and more.

You can use the standard reports ‘as is’ to get up and running quickly for immediate insight into your business. Or customize these pre-built templates to your liking.

Resource: [Sage 300 Standard Reports](#)

Can I Convert My Existing FR Reports?

While FR report specifications are not natively compatible with Sage Intelligence, a guide is available that walks you through the process of converting FR specs into Sage Intelligence Financial Report layouts.

Resource: [FR to Sage Intelligence Conversion](#)

Does Sage Intelligence Work with Microsoft® Excel® 2003?

No - Sage Intelligence only works with Excel 2007 or higher because it uses embedded XML files, the Excel ribbon, and other functionality that’s not supported in version 2003.

Where Can I Learn More?

If you want to do some digging around and get to know Sage Intelligence a little better, head over to the **Sage 300 Intelligence Online Community** where you’ll find instructional videos, recorded webcasts, user guides, a discussion forum, and a wealth of helpful resources to set you in the right direction.

[Sage 300 Intelligence Online Community](#)



Got More Questions?

Contact us with questions about Sage Intelligence or to discuss your specific reporting needs.

Calling All Customers! Share Your Ideas



Did you know that Sage 300 ERP (Accpac) has an **Ideas Portal** where customers can submit ideas and new feature requests directly to Sage product management?

The Ideas Portal allows you to submit new ideas, vote on existing ideas from fellow customers, review new features that are planned for upcoming releases, and collectively help to shape the future of your Sage 300 ERP software.

As of the publishing of this newsletter, the Sage 300 Ideas Portal has over 1,700 new ideas, 18,000 votes on existing ideas, and 2,400 comments from customers like you.

Let Your Voice be Heard:

[Visit the Sage 300 Ideas Portal Now!](#)

Sage 300 ERP 2014

Product Update 3 (PU3) Now Available

Product Update 3 for Sage 300 ERP 2014 is now available for download. In addition to the bug fixes that are typically included in product updates, PU3 also includes a number of new features and enhancements in Accounts Receivable, Accounts Payable, Purchase Orders, and Inventory Control.

In particular, a new **Optimize Inventory** screen helps you calculate optimal inventory levels based on your sales and automatically updates item reorder quantities. Also, new options related to the Optimize Inventory screen have been added to other screens including an **Optimizer** tab on the Options screen and a **Seasonal** option on the Items screen.

[Review the Full Release Notes for Product Update 3](#)

[Review All Available Sage 300 Product Updates](#)

Windows Server 2003 R2 Support Ending July 14, 2015

As a reminder, [Microsoft has announced](#) they will no longer support Windows Server 2003 R2 beginning **July 14, 2015**.

Now is the time to start planning an upgrade to a supported version of Microsoft Windows.



[Contact Us](#) if you are still running Sage 300 ERP (Accpac) on Window Server 2003 R2 and want to discuss migration options.



This year [Sage Summit](#) is headed to New Orleans for the annual gathering of Sage customers and partners which will take place **July 27 - 30, 2015**.

Recently-announced "Featured Speakers" Include:

- Tony Hawk - Entrepreneur and Pro Skateboarder
- Chad Hurley - Co-founder of YouTube
- Jane Seymour - Award-winning Actress
- Matthew Weiner - Executive Producer of Mad Men

Sage 300 Sessions and Agenda

Sage has also published conference sessions, product lessons, and deep-dive learning opportunities broken out by product categories. Click below to see what's in store for you at Sage Summit 2015:

[Browse Sage 300 \(Accpac\) Product Sessions >>>](#)

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