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SAGE INTELLIGENCE VS “ENTERPRISE” INTELLIGENCE

By now, you’ve probably heard of Sage Intelligence. But lately, you may also be hearing about a newer Sage “Enterprise” Intelligence option. While both products provide business intelligence (BI) reporting tools that work hand-in-hand with Sage 300, each differs a bit in the functionality they provide. In this article, we’ll explore those differences.

Getting the Names Straight

The product names are very similar and for some, it can be confusing. But here’s a snapshot.

[Sage Intelligence](#) pulls real-time financial and operational data from Sage 300 and delivers it in Excel templates which you can easily view and/or customize. The Excel-based interface let’s you slice, dice, and analyze your Sage 300 data in graphs and pivot tables that provide a much more hands-on and visual experience than standard reports can provide.

Similarly, **Sage Enterprise Intelligence** also provides a visual approach to reporting that allows non-technical users to perform advanced slice-and-dice analysis of Sage 300 data. While the product is owned by a third party and licensed to Sage customers through an OEM agreement, first level support is still provided by Sage with higher level support handled directly by the developer.

How Are They Different?

In a nutshell, Sage Enterprise Intelligence offers more advanced features for businesses that really want to dig deep using a broader range of analytical tools for data mining and BI reporting.

In addition, Sage Intelligence is entirely Excel-based. While Sage Enterprise Intelligence offers an optional Excel add-on, it’s primarily web-based. For those unfamiliar with Excel spreadsheets and formulas, the drag-and-drop web-based interface of Sage Enterprise Intelligence may be easier to learn. And because it’s web-based, the application can be accessed from a variety of devices including your desktop, tablet, or mobile device.

It’s also worth noting that depending on your Sage business care plan and the version of Sage 300 you’re running, Sage Intelligence may already be installed on your system and ready to use. In fact, user licenses for Sage Intelligence may already be included in your plan which potentially makes pricing a differentiator between the products.

Which Product is Better?

The short answer is neither one. The reason that Sage offers two different BI solutions is to provide a variety of analytics and reporting options to customers across a wide variety of industries and needs. It shouldn’t be assumed that Sage “Enterprise” Intelligence is better than Sage Intelligence because it’s not. They simply offer a different interface and set of features to accomplish a similar objective - better business insight through more flexible and intelligence reporting.



[Contact us](#) to request a copy of the **feature-to-feature comparison** document.



Sage CRM

Using Interactive Dashboards

Whether you're a salesperson, support rep, manager, or VP, the interactive dashboards in Sage CRM can be a really important tool in helping you leverage CRM data most effectively. In this article, we'll take a look at how to use and customize these powerful dashboards.

What is an Interactive Dashboard?

An interactive dashboard is a highly-customizable workspace that allows you to control and personalize the CRM data that displays onscreen. In short, it provides a snapshot of the CRM information and tasks you use most often so you have quick access and can be effective in your job.

You can create multiple dashboards by either starting with an existing pre-defined template (like sales, management, or support dashboards) or create your own new and unique dashboard layout.

Customizing Gadgets

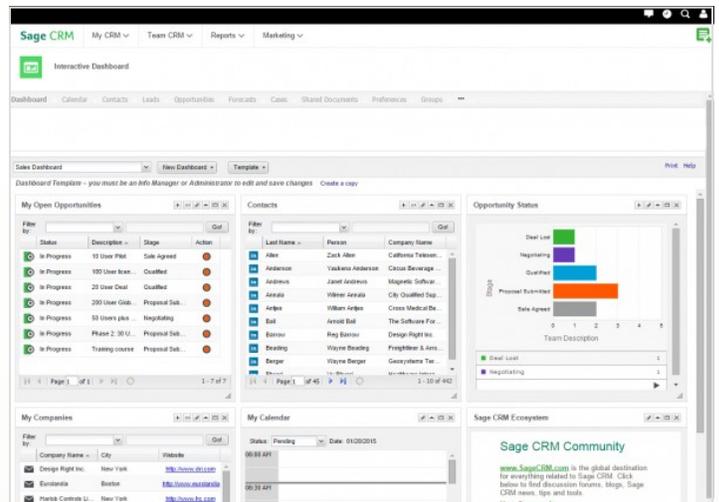
Each dashboard contains a collection of individual gadgets that can display feeds, workflows, and actions that you want to drive from your personalized workspace. You drag and drop these gadgets onto your dashboard to create the customized data display and layout you want.

Standard gadgets are available for things like your calendar and appointments, sales opportunities, support cases, important customer contacts, and more. Not only do these gadgets feed information from Sage CRM, they can also pull information from external websites and even back office accounting data from your Sage 300 system.

You can edit gadget properties and you can even perform tasks from some of them, such as logging a new case or advancing a sales opportunity to the next step.

Getting Started

To access the interactive dashboard, go to [My CRM](#) > [Dashboard](#) where a welcome dashboard is displayed.



Follow these steps to begin creating a new dashboard:

1. Click **New Dashboard** > **Choose Template**
2. Highlight one of the dashboards in the list and click **OK**
3. Give the new dashboard a **Name** and click **OK**
4. Click **New Gadget** > **Choose Template** to add predefined gadgets
5. Click **Edit** (pencil icon) on the **gadget header** to modify an existing gadget, or create your own custom gadget from **New Gadget** > **Create Gadget**

Now you can set this new dashboard as your default, or even copy the dashboard as a starting point for creating another.

This example assumes your system includes either the standard Sage CRM demo data, or at least one dashboard template and one gadget template set up by an Info Manager or System Administrator.

Need Help?

[Get in touch](#) if you need some help setting up, using, or customizing your Sage CRM Interactive Dashboards.



SAGE HRMS

Managing ACA Reporting Requirements

Even five years after it was passed into law, the Affordable Care Act (ACA) continues to be one of the top concerns for employers - and for good reason. The ACA is one of the most comprehensive laws impacting employee benefits in decades. In this article, we provide a few tips that should help you prepare for the new reporting requirements.

Learn Your Compliance Basics

One of the most important things you can do is learn the ACA compliance basics. Getting a feel for employee thresholds, required forms, and [reporting deadlines](#) can help you avoid costly mistakes and fines.

In a nutshell, the ACA requires that all businesses with 50 or more full-time equivalent employees (FTE) provide health insurance to at least 95% of their FTEs (and dependents up to age 26), or pay a fee.

[This article](#) posted on the Society for Human Resource Management (SHRM) provides a nice overview of the reporting requirements and tips for what's ahead.

Am I Subject to ACA Requirements?

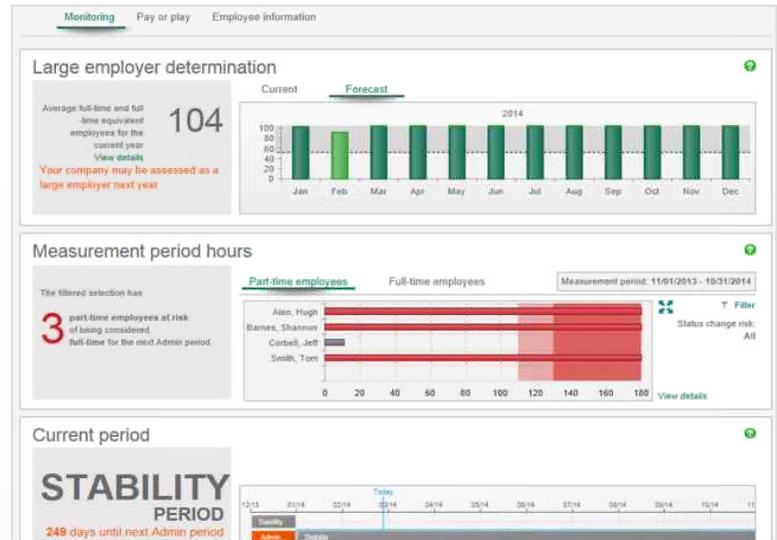
With all the confusion surrounding the new law, you may be struggling to fully understand how the ACA affects you, your employees, and your business.

That's where [My Workforce Analyzer](#) might help. This add-on component for Sage HRMS tracks and analyzes the **HR data that's already in your system** to help you make informed decisions regarding employee healthcare and ACA requirements.

This unique tool works by monitoring your employee hours and coverage to help you determine if you qualify as a large employer, and what your obligations are under the ACA.

The "Pay or Play" Decision

In some cases, employers who are required to provide employee health coverage under ACA requirements might



instead opt to pay the fine for noncompliance if it's more cost effective to do so. The interactive dashboards and analytics of My Workforce Analyzer help you evaluate this "Pay or Play" option and make an informed decision.

Stop the Struggle

If you don't want to waste another minute struggling to understand the complex ACA requirements and trade-offs, it might be time to take advantage of My Workforce Analyzer. To learn more, check out these resources:

[Download the Feature Sheet \(PDF\)](#)

[Review Frequently-Asked Questions](#)

Getting Started

Previously a separately-priced component for Sage HRMS, My Workforce Analyzer is now included free for customers on a Sage Business Care Gold or Platinum plan. Simply [contact us](#) for a new install code and serial number to enter into Sage HRMS. Customers on a Silver plan can still purchase My Workforce Analyzer separately.

Product Update for Sage 300

The release of Product Update 1 (PU1) for Sage 300 version 2016 introduced some interesting enhancements to the new **Sage 300c** platform including the following:

- 120+ new web screens for Operations including Inventory Control, Order Entry, and Purchase Orders
- Improved Homepage with more customization options
- New operational KPI widgets for inventory performance, activity trends, and top salespeople
- More web screens for financials including GL, AP, and AR
- All web screens now available in Spanish

PU1 also contains various program fixes for the core product as well including [My Workforce Analyzer](#) free (previously a separately priced module for Sage HRMS) to customers on a Sage Business Care Gold or Platinum plan.

Library of Free Reports for Sage 300 Intelligence

Did you know that there's a continuously-updated library of free additional reports available for Sage 300 Intelligence?

In fact, a new [Report Utility](#) has been created that allows you to browse these available reports and easily import them into your Sage Intelligence Report Manager module. The utility detects the Sage accounting system that you're running, does a check against reports that are already in your Report Manager, and displays new reports available from the library that you don't already have.

You can install the utility in 3 simple steps or learn more about how it works in the [FAQ Section](#).



[Created based on customer feedback](#), new reports are continuously added to the library that you can access on a regular basis without having to wait for the next software update and/or upgrade your entire system.

[Browse Available Reports >](#)

Sage Summit 2016

More “Big Name” Speakers Announced

In addition to Sir Richard Branson who was announced as the first “big name” speaker at Sage Summit 2016, Sage recently announced that others from the world of business and entertainment will round out the list of featured guests which now includes:

Gwyneth Paltrow - Oscar®-winning

Ashton Kutcher - actor and producer

Zoey Deschanel - actress, singer-songwriter

Robert Herjavec – businessman and investor on Shark Tank

Daymond John - businessman and investor on Shark Tank

[Get Details or Register Now >](#)

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