Getting Started with Sage One Intelligence Reporting Cloud

To enjoy the reporting capabilities of Sage One Intelligence Reporting Cloud, you'll need:

1. A Sage One account.
2. Basic knowledge of accounting.

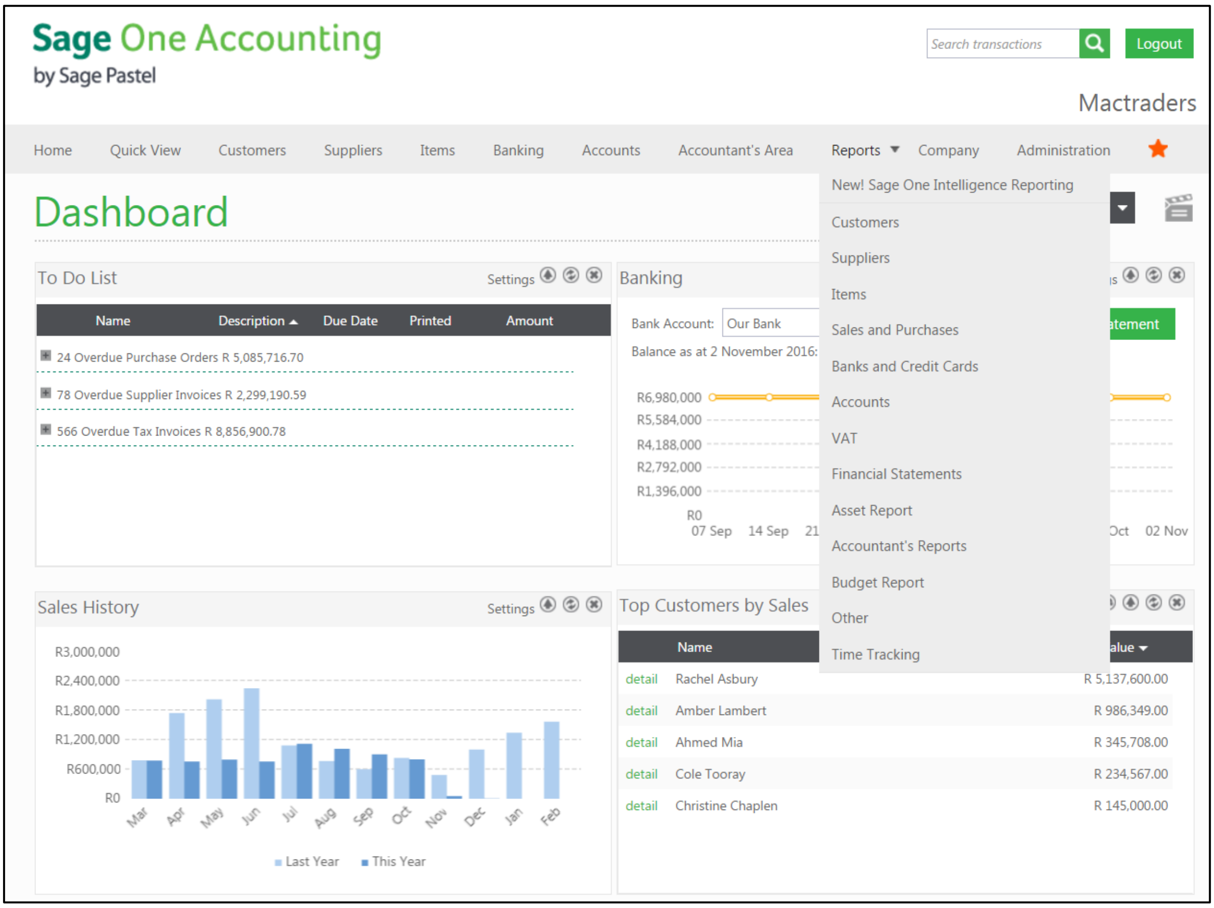
If you'd like to make the most of the reporting and analysis features in Microsoft Excel, you can download reports in an Excel format. To do that you will need:

- A Microsoft account. You might have an account already, check if you do.
- Microsoft Excel 2013 or Microsoft Excel Online (free with your Microsoft Account).
- Basic knowledge of Microsoft Excel formulas.

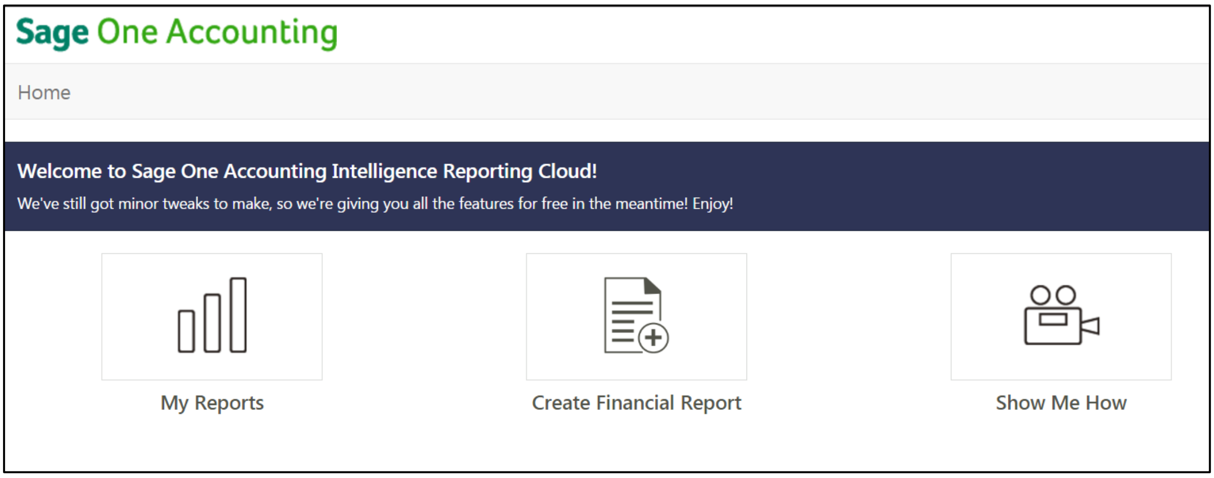
Accessing Intelliigence Reporting

Intelligence Reporting can be accessed within Sage One, from the **Reports tab**:

- Select Sage One Intelligence Reporting:



- This will take you to a new log in screen.
- Enter your Sage One log in credentials, afterwhich you will be taken to the Intelligence Reporting home page:



Features and functions:

My Reports:

Contains all out-the-box and customised report layouts.

Create Financial Reports:

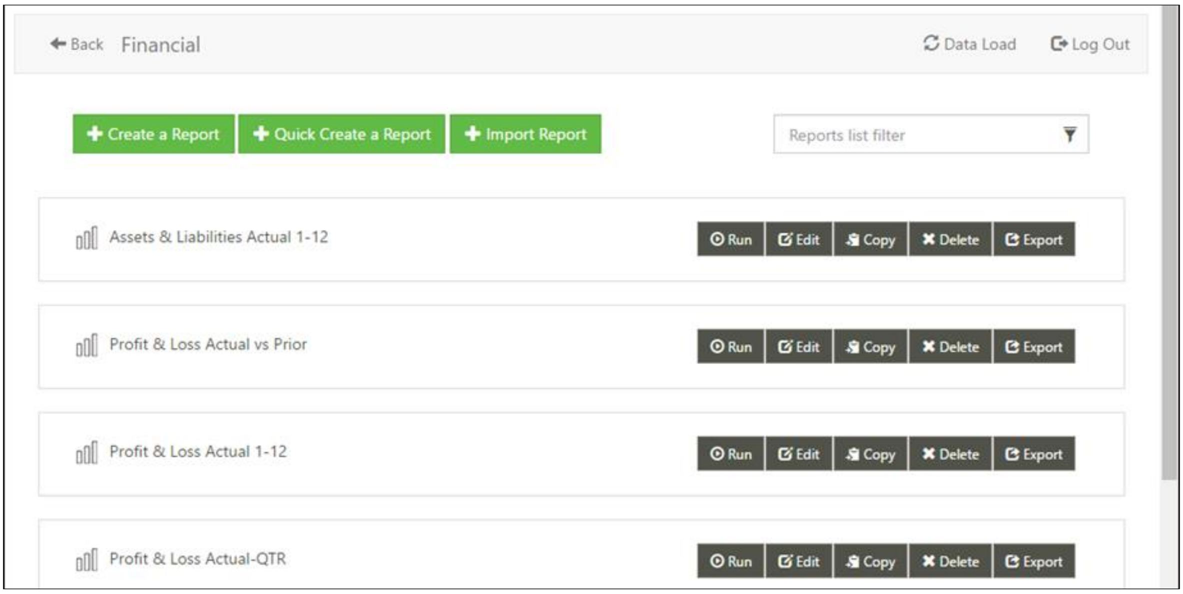
Allows you to create a custom report from scratch using functions and formulae that make the design process simple, all without leaving Sage One.

Show Me How:

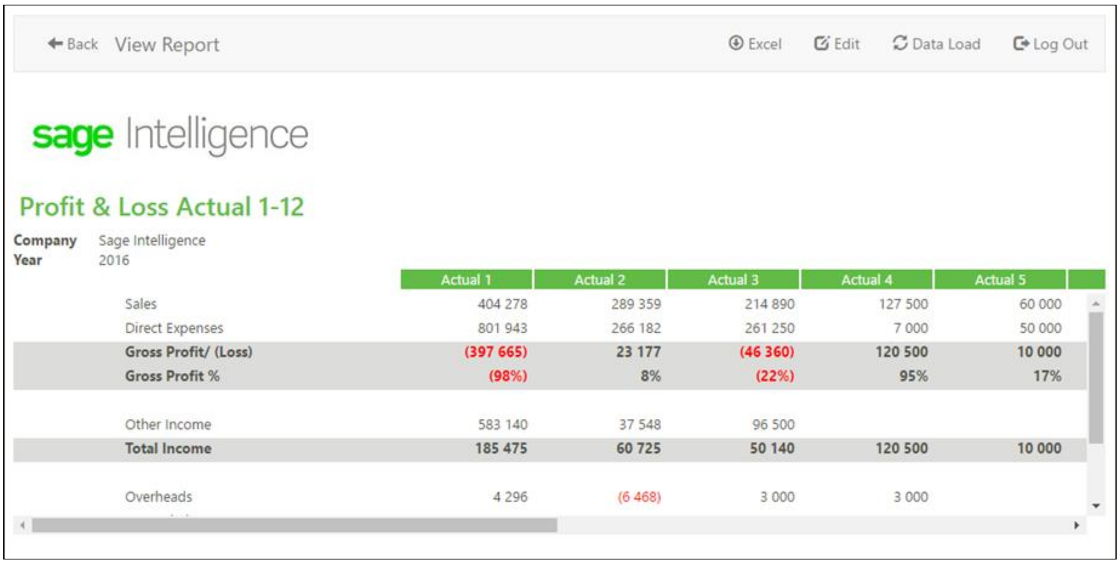
A library of step-by-step videos to help you make the most of the software.

Running Reports

1. To run the ready-to-use reports select My Reports>Financial**.**
2. The financial report folder will open and a list of will be available.
3. Select a report that you'd like to run and click the **Run** button.



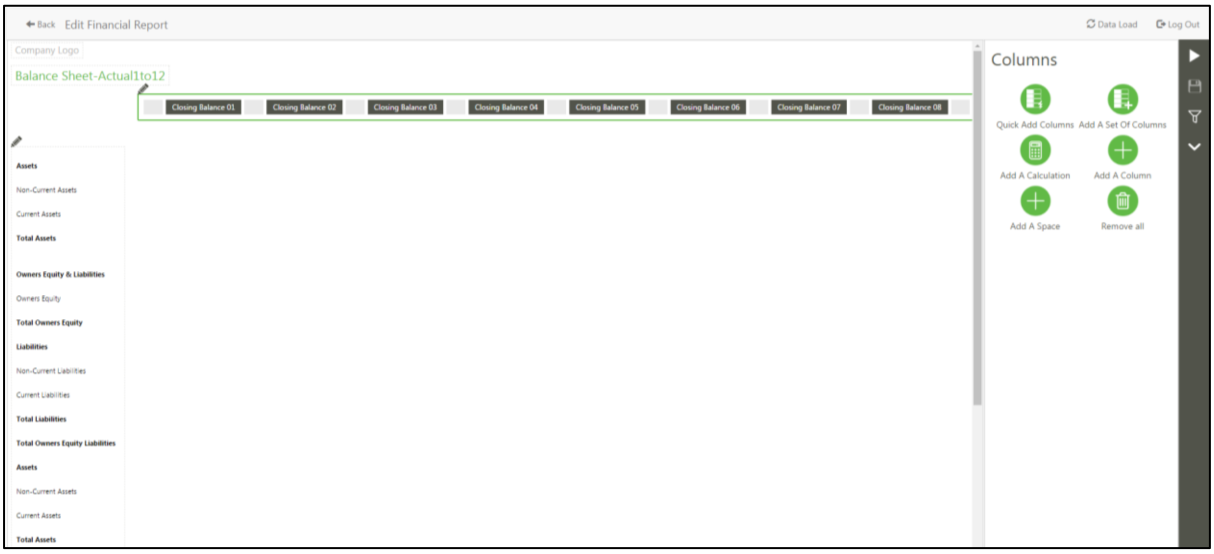
4. Select the parameters you'd like to base your report on, click **OK**. An online report will be generated.



	Actual 1	Actual 2	Actual 3	Actual 4	Actual 5
Sales	404 278	289 359	214 890	127 500	60 000
Direct Expenses	801 943	266 182	261 250	7 000	50 000
Gross Profit/ (Loss)	**(397 665)**	**23 177**	**(46 360)**	**120 500**	**10 000**
Gross Profit %	**(98%)**	**8%**	**(22%)**	**95%**	**17%**
Other Income	583 140	37 548	96 500		
Total Income	**185 475**	**60 725**	**50 140**	**120 500**	**10 000**
Overheads	4 296	(6 468)	3 000	3 000	

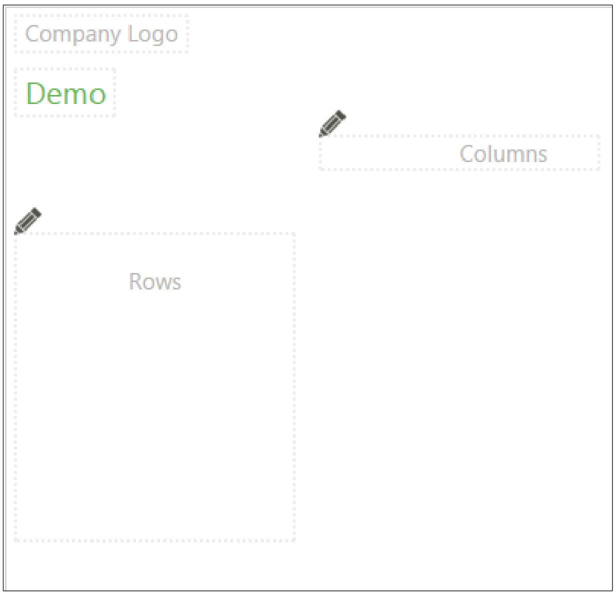
Creating a financial report

1. To create a financial report, select **Create Financial Report** on the home page.
2. A pop up box will prompt you to give your report a name. This is the name that will appear in the "My Reports" menu.
3. You will then be taken through to the Online Report Designer. This screen houses all the tools you need to create a financial report.



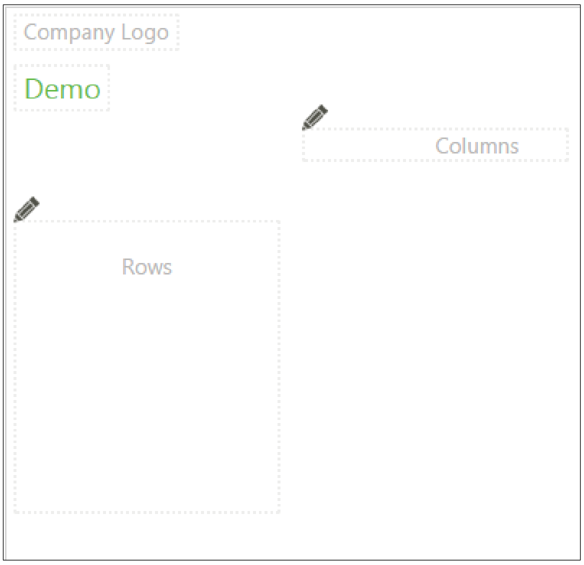
Adding a logo to your report

You can add your company logo in the top left corner of your report by clicking on the area labelled "**Company Logo**".



Changing the title of the report

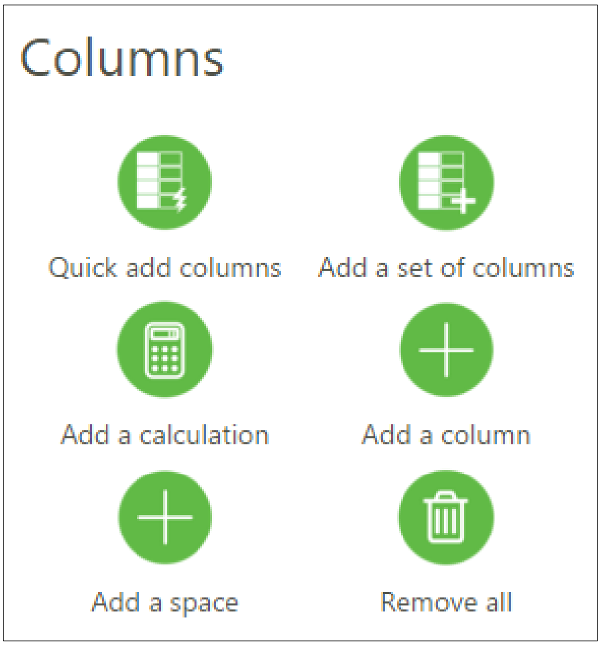
If at any time a user would like to change the title of the report, simply click on the title and type in the new name.



Note: The new name will only appear here, it will not change in the My Reports listing.

Inserting columns into your report

The Online Report Designer Task Pane gives you a couple of options for adding columns. Columns are the line items that run vertically in your report, for example: Actuals, Prior, Budget.

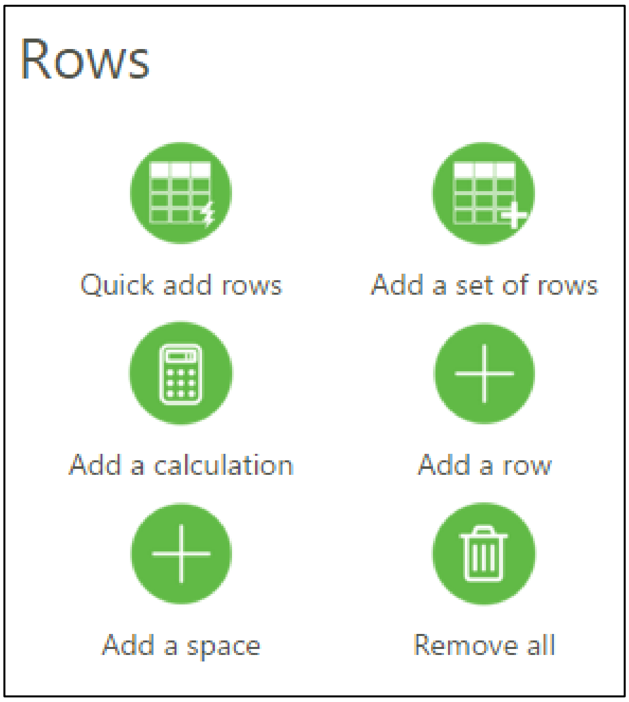


There are a couple of different ways to add columns depending on your reporting requirements:

- **Quick add columns:** This option gives the quick and easy option to add a collection of columns that have already been pre-defined. Best practice would be to use this option when you already have a collection of columns in mind for the report you would like to create.
- **Add a set of columns:** This option allows users to choose from available columns. To select a column, simple click on it and it will be automatically added to the preview pane at the top.
- **Add a column:** This option is available if you would like to add one column at a time. Recommended if you know the exact column you need to see and want full control and customizing ability.
- **Add a calculation:** Use this when you need a calculated column.
- Add a space: When you click on this it will insert a space column into the report to make your report easier to read.
- **Remove all:** Removes all the columns in the report.

Inserting rows into your report

The Online Report Designer Task Pane gives you a couple of options for adding rows. Use the rows menu to select a method of inserting rows into the report. Rows are the line items that run horizontally in the report.



There are a couple of different ways to add rows depending on your reporting requirements:

- **Quick add rows:** This option gives a quick and easy option to add a collection of rows that have already been pre-defined. Best practice would be to use this option when you already have a collection of rows in mind for the report you would like to create.
- **Add a set of rows:** This option lets you search the General ledger for accounts/account categories to add into the report. This option is recommended when you need full control over what accounts you want to add. To make it easier to find the specific account, users can use the search options to search by accounts, account category or account category group. With search, users will notice that the options in the boxes below decrease to match your search.
- **Add a row:** This option is available if you would like to add one row at a time. It's recommended if you know the exact rows that you want to see and want full control and customising ability.