

sage 100 Evolution Intelligence Reporting

GL ACCOUNTS DELIVERS ON CUSTOMER EXPECTATIONS,

thanks to Sage 100 Evolution Intelligence Reporting

Geraldine was writing database views and exporting them to Excel, until her clients requested specific reports from her. This inspired her to revisit Intelligence Reporting, which has since made her life so much easier.



Accountant

GL Accounts

Industry

Business Consulting

Location

South Africa

System

Sage 100 Evolution

Moving from database views

Geraldine Lobel has been a Sage certified Business Partner for twelve years. Her company, GL Accounts provides implementation services, training, support and customisation for ten Sage products, which includes Sage 100 Evolution, Sage One and Sage Intelligence. Her customers range from start up to medium-size businesses from different industries. She was introduced to Sage Intelligence Reporting ten years ago, however she only recently started to use it to create reports for her clients. For the most part, she has been writing database views and exporting these to Microsoft® Excel®, however some of the requests she received for reports led her to explore Intelligence Reporting once again. She found that the basics of what the clients were looking for in terms of reporting were already available in Intelligence Reporting, so she didn't have to create reports from scratch.

She has also had requests for custom reports, which she found to have been easier to create using Intelligence Reporting. For example, one of her clients requested an Inventory Age Analysis report, which would have been very complicated for her to write because of the way the tables are written in Sage 100 Evolution. Fortunately, an Inventory Master report comes standard with Intelligence Reporting and all she had to do is make minor tweaks to it to provide her client with the report that they need. She was able to take what's available in the report and build on it, creating the report in an hour as opposed to spending days writing database views! It's definitely made her life so much easier!

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Saving customers time and money

With Intelligence Reporting delivering reports in Excel, it makes customisations so much easier, as Geraldine explains "Once you know what you're doing, it's very easy!". She has also used the Management Pack, which she only needs to run out for her customers. She definitely recommends Intelligence Reporting to customers who are looking for Management Packs, Sales Analysis reports, etc. because all they need to do is run them out.

When asked what she would give Intelligence Reporting out of ten, Geraldine boldly exclaimed, "A ten—based on the Inventory Age Analysis reports. I wouldn't have been able to create the Inventory Age Analysis without Intelligence Reporting. I don't think many people could write that report."

As a Business Partner, she says that Intelligence Reporting empowers her to be able to provide her clients with quick and reliable solutions to their reporting challenges. Going back to the Inventory Age Analysis report, she says that she may not have been able to provide this report to her client as quickly as she did without Intelligence Reporting. She also says it has saved her customers time and additional expenses.

"I wouldn't have been able to create the Inventory Age Analysis report without Intelligence Reporting."

- Geraldine Lobel, Owner, GL Accounts

