Sage 100
ERP

Partner Success

Clients First Makes "the Right Choice" by Embracing Sage 100 ERP Intelligence Reporting

Critical business insights

Clients First Business Solutions, based in Pleasant Hill, CA, focuses on cultivating a true partnership with each of its clients. Sharon Burgos, support consultant, believes that "it is important to take the time to understand our clients' business frustrations. We can then advise them on the best business management system and process improvements to achieve a business' desired outcomes." In its attempts to help an organization reduce costs, improve the customer experience, and optimize day-to-day operational efficiencies; Clients First finds the key to driving a business forward, implementing reporting tools to gain business-critical insights to learn from the past, make timely decisions for the present, and plan for the future.

The primary reporting tools that Clients First used with Sage 100 ERP* included Microsoft FRx® (which was limited to financial reporting only) and SAP® Crystal Reports for Sage 100 ERP. Sage Intelligence now gives them a solution that is Excel based, giving users the ability to manipulate data themselves, particularly for on-the-fly calculations and analysis.

An alternative to FRx

Following the announcement of the retirement of FRx and the Sage endorsement of Sage 100 ERP Intelligence Reporting as the alternative solution, Clients First made a decision to adapt to and embrace the Sage reporting solution. Its decision was supported by the track record of Sage Intelligence in other Sage ERP and accounting environments. Burgos says, "We saw and immediately appreciated the open-ended possibilities to be uncovered with and for our clients through using Intelligence Reporting and dedicated our most highly qualified consultant full time to the Intelligence Reporting project."

Clients First found the implementation of Intelligence Reporting seamless and was able to get up and running quickly with the new reporting tool. With the product's being Excel-based, Burgos believes that "each client's different level of experience with Excel is directly reflected in the Sage Intelligence learning curve. But as the product has matured, the learning curve has been radically lessened," enabling the team to provide timely and expert support and services to their customers.

*Sage 100 ERP was named Sage ERP MAS 90 and 200 when Clients First initially implemented this solution. The product names have been updated in this case study to reflect current naming.

Partner
Clients First Business Solutions

Industry
ERP and Business Intelligence

Primary Location
Pleasant Hill, CA

Number of Locations
2

Number of Employees
21

Systems
Sage 100 ERP
Intelligence Reporting

Challenge

Clients First primarily used Microsoft FRx for financial reporting to provide critical business insights to its clients. When Microsoft announced the retirement of this product, Clients First needed to find a viable alternative.

Solution

Sage 100 ERP Intelligence Reporting provides the ability to quickly and easily obtain the information required for improved reporting across an entire business.

Results

Sage 100 ERP Intelligence Reporting has proven to be an easy-to-learn and viable alternative to FRx, allowing Clients First Business Solutions to offer a reporting solution to its clients that provides flexible financial reporting as well as dashboard reporting across an entire business, thereby impacting positively on the decision-making ability of clients.

Sage 100 ERP Intelligence Reporting

Partner Success

Flexible reporting

Clients First found that the initial Sage Intelligence module has evolved significantly since prior generations with performance being the key focus in the development of the new Report Designer Add-In. Sage Intelligence significantly enhances the reporting and delivery capabilities through adoption of "current technologies," the latest being the use of In-Memory technology in the new Report Designer Add-In, to help clients to quickly create customized financial reports from the ground up in the familiar environment of Microsoft Excel. The newer General Ledger (GL) formulas are easy and utilize the fast In-Memory engine rather than Excel's regular formula processing engine. The Report Designer Add-In also allows users to specify the level of detail they require and then drill down if more detail is needed, greatly enhancing flexibility in reporting.

"The Report Designer Add-In has totally redeemed Sage 100 ERP Intelligence Reporting as a viable alternative for FRx. I think it gives F9 and Biznet some fierce competition. I found it easy to learn and extremely flexible. The best part is you don't have to spend hours reworking reports when a new GL account is added to chart of accounts." says Brigitte Didier, technical support at Clients First Business Solutions.

Beyond financials

Intelligence Reporting encompasses the features and benefits of FRx, but it also goes beyond this by no longer being constrained to financial reporting.

"We saw and immediately appreciated the open-ended possibilities to be uncovered with and for our clients through using Intelligence Reporting and dedicated our most highly qualified consultant full time to the Intelligence project."

—Sharon Burgos
Support Consultant

Out-of-the-box reports include an analysis dashboard, sales, inventory, purchasing, and financial reports, allowing one reporting tool to be leveraged across the entire business to obtain a holistic view of performance. Burgos says that "We are seeing a distinct value-add in the time savings Intelligence Reporting provides when developing business 'dashboards'–an area we are more aggressively exploring."

The right choice

Burgos concludes "Our primary focus with our client base to date has been to improve decision-making capabilities. BI consistently impacts this, so Intelligence Reporting has, without doubt, been the right choice for us."

About Sage Intelligence

Sage 100 ERP Intelligence Reporting provides immediate insight into meaningful information from across your business, delivering automated financial, payroll, and management reports in the familiar environment of Microsoft Excel. The reports can be accessed at any time and are fully customizable with drill-down capabilities, allowing for enhanced collaboration and decision making.

Sage 100 ERP Intelligence Reporting integrates with your Sage 100 ERP software package, pulling real-time data directly from the database, thereby eliminating manual report preparation and repetitive data extracts.

Sage Intelligence is also the Sage BI offering for Sage 50 Accounting-U.S. Edition, Sage 50 Accounting-Canadian Edition, Sage 300 ERP, Sage PFW ERP, Sage ERP X3 (Financial Reporting), Pastel Accounting Evolution, Partner and Xpress, Pastel Payroll, and VIP Payroll, serving over 25,000 users worldwide.

For more information on please go to: www.sageintelligence.com

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About Sage

Sage is leading global supplier of business management software and services for small and midsized businesses. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs more than 13,500 people and supports more than 6 million customers worldwide. For more information about Sage in North America, please visit the company website at www.NA.Sage.com. Follow Sage North America on Facebook: http://www.facebook.com/SageNorthAmerica, and Twitter: http://twitter.com/#!/sagenamerica

About Clients First Technologies

Clients First thinks about more than technology. At Clients First we care about people and their business, which is why we take the time to learn about the nuances of your business. Clients First offices are located across the United States. We are staffed with expertise across multiple industries and have established proven processes to ensure successful project planning and implementation. For more information go to: http://norcalerp.com

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