

# Sage 500 ERP

## Business Insights Explorer

Business Insights Explorer is one of the most convenient ways to navigate your business. It brings ad hoc inquiry, drill-down, and drill-around analysis up to a whole new level. Turn your data into knowledge that you can act on by using powerful sorting, grouping, and filtering capabilities that you personalize to your specific needs and role within your company.

This easy-to-use inquiry and analysis application optimizes your daily decision-making tasks in the most critical areas of your business. A streamlined grid interface spans multiple data elements in one view, including contacts, general ledger transactions, balances, payments, invoices, sales orders, purchase orders, work orders, projects, and many, many more. Change views for the same customer, plus drill down to the transaction level and access customer maintenance for edits without having to go to other modules in your Sage 500 ERP (formerly Sage ERP MAS 500) system. What's more, you can launch your familiar Sage 500 ERP tasks directly from within Business Insights Explorer and find the information you're looking for without losing your place. This 360-degree view gives you the ability to quickly access timely, up-to-the-minute business information. The result favorably impacts your bottom line and your long-term success through more accurate decision-making and enhanced customer satisfaction.

Business Insights Explorer provides you with a better way to access and understand your data—offering you a powerful, intuitive reporting tool—and you don't have to be a programmer to use it! First-time users can start right away. More importantly Business Insights Explorer is great for analyzing “what-if” scenarios that can keep you awake at night. Who are the top customers for each of your salespeople? What products do they buy? How many new customers did you gain last month? And, because of the depth of functionality, Business Insights Explorer continues to grow with you and your business far into the future.

The screenshot displays the Sage 500 ERP Business Insights Explorer interface. The top window shows a 'Customers' grid with columns for Customer, Credit Limit, Balance, Highest Bal, Highest Bal Date, Avg Days Past Due, Avg Days To Pay, Salesperson, Avg Invc Amt, Past Terms, and Closed To. Below this, an 'Open Orders' grid is visible with columns for Sales Order, SO Amt, SO Date, Status, Customer, Shipped, Open Amt, D Hold, Hold Reason, Contact, Natl Acc, Order Total, Trade Disc, Freight, and Sales Tax. The interface includes a navigation pane on the left with options like 'Open Quotes', 'Open Orders', 'Open Invoices', etc.

### BENEFITS

- Get timely access to key business information in a format that is easy to read and understand.
- Easily apply query, reporting, and statistical analysis to make faster and better decisions for your future—this afternoon or next year.
- Quickly assess the state of your business; monitor a new product's acceptance rate or the impact that a competitor's promo is having on your sales.
- Share information with other in your organization in a meaningful way.
- Use intuitive grid-based view of key entity and transaction-level data for more precise tracking and resolution.
- Easily drill around into original records and change views for at-your-fingertips access to invoices and transactions.
- Save views containing customized preferences and predefined filters for future use and navigation.
- Gain quick access to key system tasks for the displayed entity with powerful task launch options.
- Enable a wide range of sorting, grouping, and reorganizing functionality with easy-to-use customization and personalization features.
- Export all data or just the data in the customized view to Excel, Word templates, or PDF for quick reporting or further analysis.

With just a few clicks, Business Insights Explorer delivers quick and easy data inquiries, drill-downs, answers to “what-if” scenarios, and last-minute must-have executive requests.



“Sage 500 ERP is more than just an incredibly good general ledger package. It’s the engine that serves as the foundation for our entire system.”

Scott Summerhays  
President  
Summerhays Music Center

## Sage 500 ERP | Business Insights Explorer

### Features

#### Easy-to-Use Interface

Business Insights Explorer provides a single, user-friendly interface that gives you quick access to crucial information and related data—all the way down to the individual transaction.

#### Quickly Preview Key Information

View key information about a specific entity, such as a customer and related transaction information, including invoices and orders, in a single view using the Preview option. Apply filters to any view, displaying data according to your preference.

#### Access Sage 500 ERP Tasks

Use Manage view to launch familiar Sage 500 ERP tasks from the Business Insights Explorer screen. When you’re finished with that task, just close the Sage 500 ERP screen to return to where you were in Business Insights Explorer.

#### A Single Point of Access for Related Data

The Explore option allows you to perform extensive drill-down and drill-around investigations into related data records. You can easily click on another selection in the primary grid, and the secondary grid shows related data. Click on specific data to further drill into that entry. When changing views, context is passed as a filter from the original view to a new view.

#### Efficient Search

If you’re looking for a particular entry, simply type a specific clue (such as “\$825.50”) into the Look For field. Then, you can easily narrow the search by a selection in the Search field. This save you time scrolling and scanning through lines of information.

#### Convenient Access to Task Management Functions

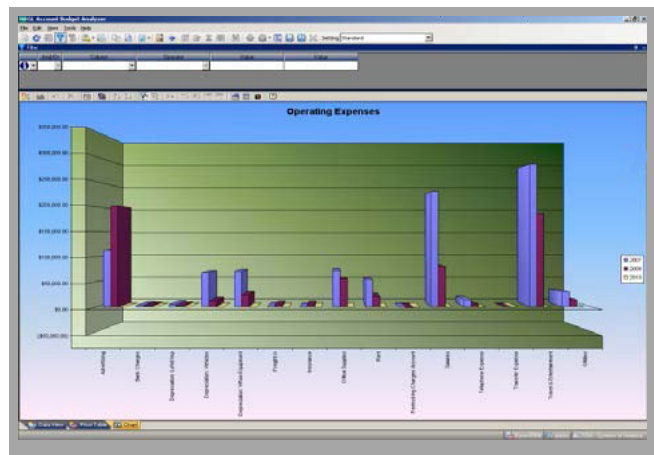
Task Management options provide an easy way for you to quickly access key tasks for the displayed view, including customer information update and order creation capabilities.

#### Robust Customization and Personalization

Convenient view filtering capabilities enable you to sort, group, reorganize, and rename columns within the grid, as well as save and share personalized views. You also can create custom views and link them in with standard shipping views included in the base product. These custom views can pull information from other systems including different database formats.

#### Microsoft® Office Integration

A simple right-click can export your data to predefined Word templates, plus Excel®, Access®, XML or PDF files. Easily create mail-merge documents based on the filtered data being viewed, or, export the data in a view to Excel for additional analysis or as a quick report.



● Business Insights Explorer provides one-click access to related Business Insights Analyzer views, for complex “what if” analysis and charting capabilities.

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