

# Sage Pastel Partner Version 14 Intelligence Reporting



## Revolutionize your reporting!



To make **effective decisions**, you need to see an accurate and detailed picture of your business and customers.

The new release of Sage Pastel Partner Version 14 Intelligence Reporting (previously called the Business Intelligence Centre) aims to improve your experience by providing you with an **extensive and flexible** financial reporting solution.

Intelligence Reporting accesses the information already contained in Sage Pastel Partner and gives you a **secure environment** to run reports. It has user-friendly features that help **manage the learning curve**, like intuitive drag-and-drop tools that make it simple to design reports, and you are able to do this and more in the familiar environment of Microsoft® Excel®.

Sage Pastel Partner Version 14 Intelligence Reporting introduces a fresh user friendly design backed by the powerful Sage Intelligence Report Designer **In-Memory technology**, allowing for **improved performance** and usability. You will be able to **take full control** of all your financial report design layouts and remove the complexity of designing financial reports inside Excel with the new **Report Designer**.

Use drag-and-drop Excel formulas to make financial reporting easier and more direct. **Control** how your accounts rollup with maximum flexibility, establish reporting groups, and reporting trees to view your organization in many different ways.

Intelligence Reporting can now **automate** the reporting process to **streamline** your efforts, resulting in greater efficiency. Not only can you run reports at the click of a button, you can also schedule them to run at the most optimum time of day, for example during off-peak hours, and then **automatically distribute** them in the required format to those who need to see them.

Sage Pastel Partner Intelligence Reporting is the answer to spreadsheet chaos. You will get the latest information when you want it, presented in the way that makes sense to your business. And, best of all, you get it in Excel which means you can **control, edit, and analyze** and send it far and wide in a program you already know how to use.

### Benefits

- Reduce manual, repetitive work
- Efficiently view, shape, analyze, and distribute reports in a familiar Excel format
- Use drag-and-drop formulas to easily create and manage financial reporting.
- Develop in-depth financial, operational, customer, and vendor reports.
- Access the information that you need to make better business decisions
- Automate your reporting process to run reports at the most optimum time of the day.

“Intelligence Reporting saves me nearly an entire month each calendar year. I would not hesitate to recommend this to anyone.”

Grant Olivier,  
Mazars Moores Rowland

# Sage Pastel Partner Intelligence Reporting

---

## Features and functionality

### Report Designer

- The Report Designer gives you two methods to create and control your financial reports depending on your Excel knowledge.
- The Report Designer enhances your Excel experience and offers you maximum control and flexibility over your financial report layouts.
- For financial reporting only, you are required to have Microsoft Excel 2007 and above.
- Quickly and easily report on large data volumes using formulas inside Excel which interact with the Sage Intelligence In-Memory engine to allow for fast and flexible financial reporting experience.

### Layout Generator

- Customize your reports according to your unique business requirements.
- Use the demonstration reports as a base or create your report from scratch in the familiar interface of Microsoft Excel. Once initially set up there is no further demand on your time.
- Eliminate time-consuming manual reporting processes
- Design reports once and use often. They'll always be refreshed with the latest data.
- Predefined layouts are available for Income Statement, Balance Sheet, and Trial Balance.

### Connector

- Access and consolidate your information from multiple sources.
- Allow for multicompany consolidations and the creation of new reports on any part of your Sage Pastel Partner system.

### Report Manager

- Edit and customize your standard report templates and save them for future use.
- Create new reports to suit your business requirements.
- Sort, drill down, and aggregate your data.
- Set permissions and security for your relevant reports to determine who can view and access which reports.

### Automated Report Distribution

- Schedule reports to run during off-peak hours and distribute through email for timely delivery no matter where recipients are located.
- Improve your workflow and speed up your business processes.
- In a variety of standard formats, send reports to a file, publish to an FTP site, and send by email.
- Choose the reports you want to distribute, who will receive them, and customize each email format using your existing MS Outlook profile and address book.

## About The Sage Group plc

We provide small and medium-sized organisations with a range of easy-to-use, secure and efficient business management software and services-from accounting and payroll, to enterprise resource planning, customer relationship management and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia and Brazil.

For further information please visit: <http://www.sage.com>

---

For more info, visit: [sage.com](http://www.sage.com)