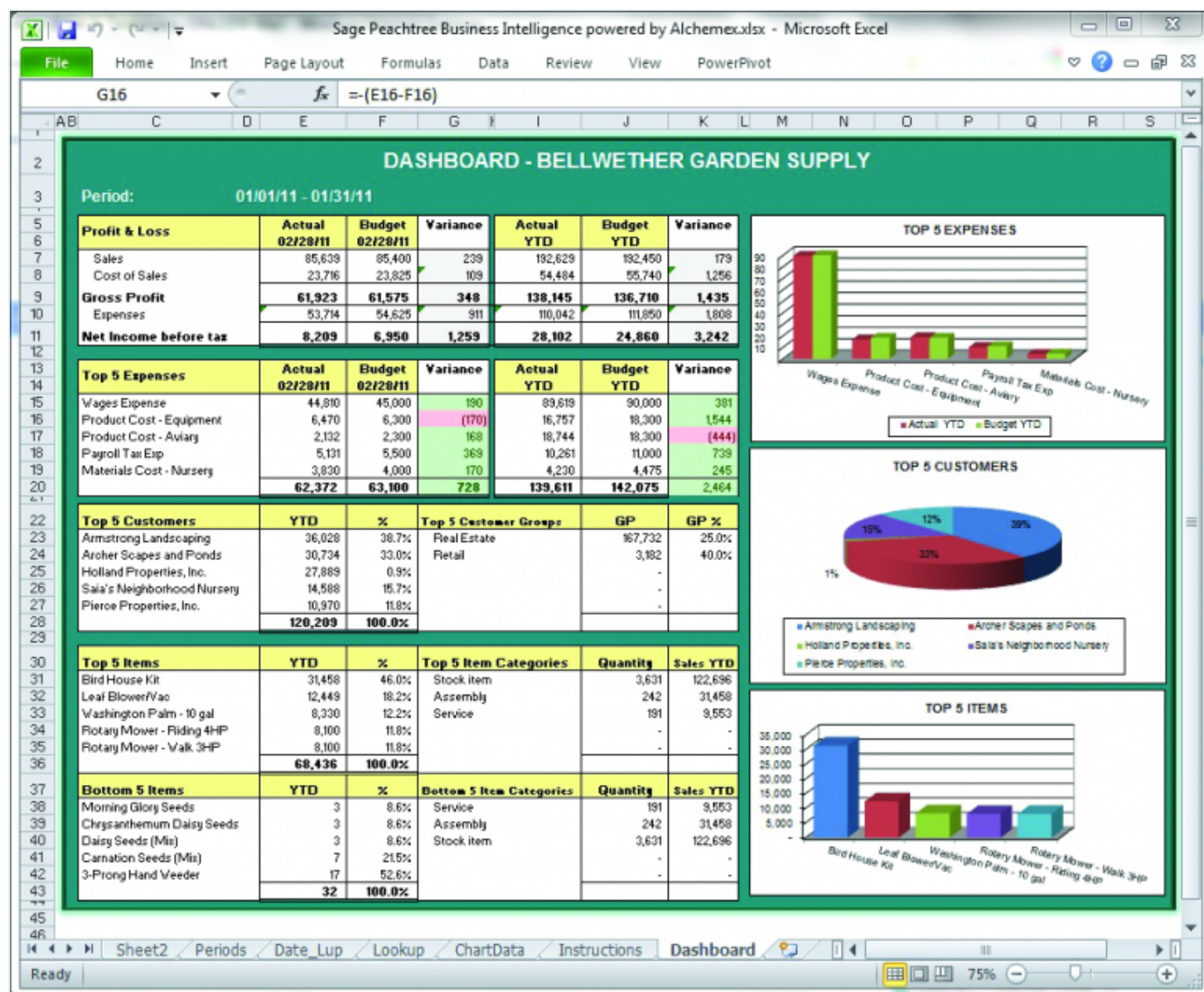


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Brian Tankersley • Sep. 05, 2014



The larger an organization gets, the harder it is to separate the truly important information from the routine and mundane details that seem to consume our daily lives. Too often, the most important information is obscured by the volume of transactions flowing through our business management systems. Although tools like alerts and reports can show all of the transactions that meet pre-defined criteria, many potential opportunities may be lost in the flood of transactions that meet

static selection criteria. Business Intelligence systems seek to supplement these

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offerings. Alchemex solutions have been previously announced for many Sage products, including Sage Simply Accounting, Sage ERP MAS, Sage ERP Accpac, and Sage ERP X3. This proven solution is now available as part of Sage Peachtree 2012. Sage Peachtree Business Intelligence is a tool that permits users to create custom, interactive reports in Microsoft Excel, which are dynamically linked into their business management system databases. These Excel-based reports can be configured to offer users the ability to directly access the underlying transactions (e.g. drill down) from within the Excel-based application. These interactive reports can be configured to present key performance indicators such as budgets, actual results, customer information, and purchasing data stored in any ODBC-compliant database to provide an excellent overall picture of a company's financial and non-financial performance.

While the majority of the key performance indicator (KPI) information comes out of the accounting information systems, some of the information will come from sources such as customer relationship management (CRM) systems, point of sale (POS) systems, and other operational tracking and management tools. End users also generally request the ability to "drill down" to obtain a report that shows the supporting details of the underlying transactions, and also like the ability to use "drag and drop" techniques to create new views and comparisons of data using the Pivot Tables in Excel.

Although it has been possible to create dashboard reporting in Excel for some time, the challenges and security concerns some IT departments have with using direct database connection tools like ODBC drivers have limited its adoption. Additionally, the complexities of dealing directly with an application's database instead of relying on preformatted, tested standard reports in an accounting system mean that only the most technical users who make time to create the proper links and test the results will be successful. As such, dashboard reporting in small businesses, while possible,

has lagged behind its implementation in the enterprise reporting and analysis

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related transaction processing systems into consultative partnerships with clients to provide real-time strategic information for managing a company's business. When combined with traditional reporting tools like Crystal Reports for Sage Peachtree, exception reports/alerts, and workflow status tracking, Sage Peachtree 2012 provides a very compelling suite of tools for creating advanced custom reporting for today's small and mid-sized businesses. n

*Figure 1 Caption: A Dashboard Report in Excel created with Sage Peachtree Business Intelligence*

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