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# THE SAGE INTELLIGENCE CHEAT SHEET
## Understanding What's What

With so many Sage 100 customers that have recently begun using Sage Intelligence Reporting or plan to use it soon as a replacement for FRx, we thought it might be helpful to provide an overview of the various Sage Intelligence reporting components. This "cheat sheet" provides a quick reference to the various modules and capabilities.

## The Four Sage Intelligence Modules

The Sage Intelligence reporting suite is made up of four modules as follows:

**Report Viewer** - allows you to view existing Sage Intelligence reports in real-time with the ability to run basic filters and parameters.  The results are delivered in Excel and you can drill down to additional detail with the click of a button.

**Report Manager** - everything the Report Viewer provides, plus the ability to author new reports or edit existing standard reports. You can also set up automatic report distribution (email, intranet, etc.) and control viewing/access through permissions and security settings.

**Report Designer** - provides more options for creating and/or modifying reports using a graphical "drag-and-drop" interface. This module provides maximum control over financial report layouts and also allows you to model your organizational structure using Reporting Trees.

**Connector Module** - this module allows you to connect to multiple databases outside of Sage 100 to consolidate information from other areas of your business. This allows you to merge data from another application/database or perform multi-company consolidations.

## User Licenses Included In Your Plan

If you have a current Sage Business Care Plan, you already have Sage Intelligence user licenses that are included with your Sage 100 system and ready to use. **Silver** plans include 1 license for Report Manager, **Gold** plans include 1 license each for Report Manager and Report Designer, and **Platinum** plans include 3 licenses each for Report Manager and Report Designer.

## Adding Modules and Users

Depending on the size of your company and/or complexity of your reporting needs, you may want more than the modules or number of user licenses included in your Sage Business Care plan. If that's the case, you can add modules and users "a la carte" under a perpetual license model (traditional user/module purchase plus annual maintenance) or as an all-inclusive subscription option. Billed on a monthly basis, the subscription option includes all four modules and unlimited user licenses for the Report Viewer and Manager. The subscription price is determined by the number of companies you need to consolidate/connect to.

### Other Questions and FAQs

Get in touch with questions about pricing or to schedule a demo. Or feel free to download the Sage 100 Intelligence FAQs document that answers some common questions.

IN THIS ISSUE:

- Sage Intelligence Cheat Sheet

- Email Marketing Made Better with Sage CRM

- A Guide to Payroll Options in Sage 100

**UPCOMING EVENTS**

Tools to Automate Expense Management

**Date**: July 13, 2016
**Time:** 2 PM Eastern

Automated Budgeting for Sage 100

**Date**: Aug 17, 2016
**Time:** 2 PM Eastern

Registration & Details

For some companies, email marketing is a one-way street … you send your message and cross your fingers, hoping someone will respond.

But what if they don't? Do you know how many people opened the email or clicked on a link? Do you have the information you need to follow up with a more relevant message? If not, it's time to think about integrating your email marketing effort with the data in Sage CRM.

## Email Marketing is Better with CRM

With the release of Sage CRM 7.3, Sage announced a new integration with MailChimp - a web-based email marketing tool that helps you design emails, send them out, and measure the results.

When you combine MailChimp email software with the data in your Sage CRM system, you transform email marketing from a one-way "blast and pray" to a 2-way conversation with your customers and prospects. That's because all of the information about opens and clicks (and other valuable metrics) are written back to your Sage CRM database.

Now when you pull up those hot prospects you've been pursuing for months, you'll see which contacts are interacting with your email, what products they're interested in, whether they've forwarded your message to a colleague, and even those that opted out (so you don't spend time chasing your tail!). Best of all, the data is sitting right there in the CRM system you're probably using every day anyway.

## Outreach That's More Personal & Timely

With email response data combine with notes from phone conversations and meetings in a single CRM database, you have the insight you'll need to stay in touch with customers and prospects in a way that's more tailored and relevant. You can even create a call list of "hot" prospects based on their email open and click activity to ensure that you follow up in a timely fashion … without ever leaving Sage CRM.

Similarly, you can develop more personalized and effective email communication by merging data from Sage CRM - like account history or previous purchases - into your email.

## Working Better Together

Your email marketing and CRM systems are much like your sales and marketing teams. Each has a defined role in a shared objective for your company. They may touch the same group of people in different ways and at different times, but are most effective when they collaborate and work together.

## Need Help Getting Started?

Get in touch if you need help setting up the integration with MailChimp or getting started with your first email campaign.

Or check out these helpful video tutorials on YouTube:

Integrating MailChimp and Sage CRM
Working with MailChimp and Sage CRM

# A GUIDE TO SAGE 100 PAYROLL OPTIONS

## Understanding Recent Changes and New Products Available

For Sage 100 customers, the payroll landscape has changed a bit over the last few months. In this article, we'll review these changes and take a look at various payroll processing options now available.

## Sage 100 Payroll Module

This option is essentially the traditional Payroll module (and Direct Deposit) that has been available for many years. Working as a built-in component of your Sage 100 system, the payroll module is a good fit for companies that want total control over payroll processing and have the in-house staff and expertise to manage the process. This is also a good option for companies that use job cost tracking.

Recently, Sage implemented a change in pricing to the Sage 100 Payroll module (U.S.) which is now available only as a subscription license and is based on newly-structured payroll pricing tiers. Get in touch if you'd like details about the changes that were made.

## Sage Payroll Services (Cloud)

The newer Sage Payroll Services is available in two options:

**Sage Payroll Essentials** - key your payroll data into the cloud-based application and Sage Payroll Services takes it from there, handling direct deposit and filing all taxes. The payroll processing data will then update Sage 100 through integration. This self-service option is for small companies with up to 10 employees and fairly simple payroll needs.

**Sage Payroll Full Service** - this is full-service outsourced payroll for companies that have complex needs and want access to a dedicated payroll expert to guide them. You also get a wider and more advanced range of payroll options along with expanded GL export capability to reduce or eliminate rekeying of payroll data.

## Sage HRMS

Sage HRMS is a more comprehensive approach to payroll processing because it also offers a full range of Human Resource Management capabilities like recruiting, benefits management, HR compliance reporting, and much more. Similar to the Sage 100 Payroll module option, this solution is for companies that want total control over payroll and have in-house expertise - with the added benefit of HR and payroll integration.

## Payroll Your Way

Outsource payroll processing or manage it in-house? Install software on-premises or run it in the cloud? No matter what you prefer, Sage 100 probably offers an option to meet your needs. Feel free to get in touch with your questions about payroll processing in Sage 100.

## Sage Summit 2016

### More "Big Name" Speakers Announced

In addition to **Sir Richard Branson**, Sage announced a powerful list of featured guests which now includes: **Gwyneth Paltrow** - Oscar®-winning, **Ashton Kutcher** - actor and producer, **Zooey Deschanel** - actress, singer-songwriter, **Robert Herjavec** and **Daymond John** – both businessmen and investors on Shark Tank.

### Annual Summit Client Dinner at Lagunitas Brewing Company

For this year's annual client dinner, RKL eSolutions will be showcasing Sage X3 client **Lagunitas Brewing Company** at their Chicago brewery. Featuring a facility tour, complimentary beer tastings and social hour in the man-cave lounge, with a Gastropub dinner and cupcake dessert bar.

RSVP for Summit using promo code **RKL**.