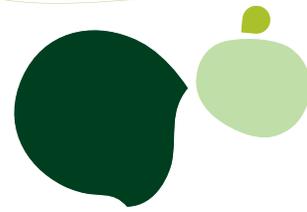# Sage ERP MAS Intelligence FAQs

July 2010

Introduction

As soon as Microsoft® announced a retirement date for FRx®, Sage began researching an alternative solution for our customers. Sage ERP MAS Intelligence was identified as this product. In addition to offering an alternative solution for FRx customers, F9 customers will also receive Intelligence as part of Sage's ongoing effort to provide our customers with superior products and services.

Intelligence offers powerful and easy-to-use graphical financial reporting capabilities to address your needs. Going beyond your General Ledger reporting needs, Intelligence provides Business Intelligence across your entire ERP system, including SageCRM and Sage Abra.

General Product Information

1. **What is Sage ERP MAS Intelligence?**

   Intelligence empowers managers to quickly and easily obtain operations and strategic planning information from their Sage ERP MAS system. Based on the familiar Microsoft Excel® application, Intelligence effortlessly creates reports and analyzes data that is vital to growth and profitability. Managers can spend more time focusing on information analysis and interpretation and less time pulling the data together.

2. **Is Intelligence an alternative solution for FRx and F9 customers?**

   Yes, after extensive research Sage identified Intelligence as the product that is the alternative to FRx and F9. While they have some of the same basic reporting features, there are many advantages of using Intelligence.

3. **How will Sage help migrate current FRx and F9 customers to Intelligence?**

   To help migrate current FRx and F9 customers over to Intelligence, Sage will provide all on-plan Sage ERP MAS 90 and 200 customers with one free Intelligence Report Manager license as an FRx or F9 "trade in." Sage ERP MAS 500 customers will receive four free Report Manager licenses.

   If customers purchased additional FRx and/or F9 licenses and/or modules, they will receive an equivalent product mix.

   For a limited time any current on-plan FRx and F9 customers who did not receive a Intelligence Report Designer and/or Intelligence Connector Module can opt in to receive the Intelligence Report Designer for free and the Intelligence Connector Module for 50% off the regular listed price. However, software maintenance rates still apply.

4. **Will there be any changes to customer's software maintenance?**

   When customers renew their software maintenance, they will no longer see a line item for FRx and/or F9—instead it will be replaced with Intelligence. It's at this point that customers will be encouraged to transition to Intelligence and their software maintenance rate will be adjusted appropriately.

5. **Does Intelligence have exactly the same functionality FRx and F9?**

   Intelligence is similar in its functionality to FRx and F9 with a few differences. Intelligence is based on the familiar Microsoft Excel application, allowing users to get up and running in no time. With ten robust reporting templates shipped standard, customers have their basic reporting needs covered. The templates—comprised of a comprehensive dashboard, operation analysis reports, and several iterations of financial income and balance sheet statements—have been carefully developed and researched to meet a wide range of immediate reporting requirements. Simply run one of the out-of-the-box reports and start slicing and dicing information; it's that easy. Intelligence even goes beyond your General Ledger reporting needs and provides Business Intelligence across your entire ERP system, including SageCRM and Sage Abra with a Connector Module.

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6. When will Sage stop distributing FRx?

The exact date Sage will discontinue shipping FRx is still being discussed. However, Sage will continue support of FRx as part of previous Sage ERP MAS releases, according to the published Supported Versions Policy, available from Sage Online.

7. When will Sage stop distributing F9?

As of October 1, 2010, F9 will no longer be available for purchase. For customers currently using F9, Sage will continue to support it until their software maintenance contract is up for renewal. At that time, if customers choose to continue using F9, they will be supported by Infor Global Solutions not Sage.

8. What is the Intelligence equivalent to FRx and what will customers receive as part of the FRx trade-in?

FRx Product Components	Intelligence Equivalent
FRx Desktop – single user (for Sage ERP MAS 90 FRx Standard Upgrades Customers, who do not own FRx, and Sage ERP MAS 90 SB only. Bundled with new sales)	Report Manager
FRx Desktop w/4 Designers (for Sage ERP MAS 500 Customers)	Report Manager x4
FRx Desktop Additional 3 user pack	Report Manager x3
FRx Dektop Additional Single user	Report Manager
FRx DrillDown Viewer	Report Viewer
FRx Report Launcher	Report Viewer
FRx Professional Upgrade from Desktop (Includes 4 Designers, 4 Report Launchers, 8 Drilldown viewers, WebPort Server (incl.10 WebPort Viewers), and Report Server)	4 Report Manager, Report Designer, 12 Report Viewer, Web Server
Additional FRx Professional Designer (single user)	Report Manager + Report Designer
FRx Report Server Engine	Report Manager
FRx WebPort Server (10 users)	Web Server
10 Additional FRx WebPort Viewers (purchase after the FRx WebPort Server is purchased)	Web Server
FRx Forecaster Single User Server	N/A
FRx Forecaster Five User Server	N/A
FRx Forecaster Single User Add-on	N/A
FRx Report Manager	Report Manager
FRx MultiCurrency Translator	Connector

9. What is the Intelligence equivalent to F9 and what will customers receive as part of the F9 trade-in?

F9 Product Components	Intelligence Equivalent
F9 for Win Single User CD Live	1 Report Manager
F9 additional 5 user pack	1 Report Manager + 4 Report Viewer
F9 additional 5 user pack – add-on	1 Report Manager + 4 Report Viewer

10. Intelligence will be available for what versions of the product?
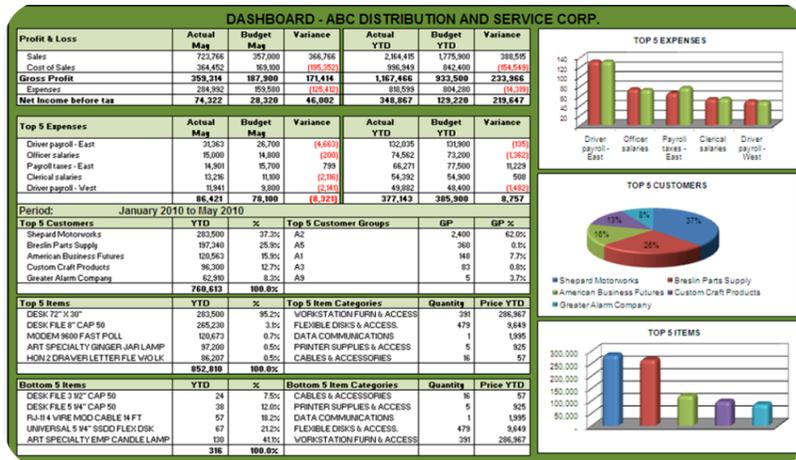
Intelligence will be available for customers on:

- Sage ERP MAS 90 and 200 v4.4
- Sage ERP MAS 90 and 200 Extended Enterprise Suite 1.4
- Sage ERP MAS 500 v7.3

11. What are the system requirements for Intelligence?

Since Intelligence utilizes Excel, Sage ERP MAS customers will need to have Excel 2003 or Excel 2007.
In order to run the Report Designer, customers will need Excel 2007.

12. Is Intelligence one product, or are different types of licenses and modules available?

Intelligence is available at different user levels and for multiple databases. Report Viewer Licenses can run existing reports to get access to real-time information and have some basic filter and change parameter editing capabilities including drill down. Report Manager Licenses have the capabilities of Report Viewer, plus basic ability to create new reports, set up parameters, establish new templates, and more. More powerful report-building capabilities are available in the Report Designer module. For access to unlimited multiple disparate databases and consolidating data from multiple companies, an additional Connector Module is available.

13. What is the Report Viewer License?

The Report Viewer allows basic editing capabilities such as filtering and changing of parameters, and offers drill-down functionality on existing reports and templates.

14. What is Report Manager?

The Report Manager allows the creation of new reports (organizing, creating, editing), as well as to filter and aggregate data. Set permissions and security for reports, and start with a basic set of standard report templates.

15. What is the Report Designer?

The Report Designer expands upon the functionality of the Report Manager to provide simplified "drag and drop" report creation capabilities. Provide impressive reports showing critical business analytics that your management teams can use to enable insightful decision-making at every level.

16. What is the Connector Module?

The Connector Module further simplifies financial managers' day-to-day operational tasks, allowing access to the information they need from multiple sources and consolidation of data from multiple companies. The Connector Module allows for consolidations and connectivity to unlimited ODBC data sources, includes a graphical join tool to simplify database queries, and also includes the Universal Query Engine (UQE) which overcomes the limitations of the ProvideX database.

17. Do I need to be aware of any ODBC reporting limitations or restrictions?

Intelligence has a Universal Query Engine that allows unrestricted access to the ERP database, across all modules, tables, and fields in the database.

18. What does the FREE user with Intelligence allow a user to do?

Each client will get a one User License for the Report Manager, which allows a user to:

- Author new reports (organizing, creating, editing), as well as filter and aggregate data based on existing data containers.
- Run, edit, and clone the standard report templates for management (financial reports, dashboards, financial trend analysis), as well as general ledger, sales, purchases, and inventory transactional reports.
- Set permissions/security on all reports.
- Connection to one ERP company database at a time (if running two or more companies, user can redirect to relevant company connection).

The "free" version provides basic functionality. Please note the following capabilities:

- Optional Import/Export functionality requires the purchase of an additional Report Manager License, the Designer Module, or Connector Module
- Optional Report Scheduling requires the purchase of an additional Report Manager Licence, the Designer Module, or Connector Module
- Connections to other types of databases or more than one Sage ERP MAS company database at a time requires the purchase of a Connector Module

19. Will on-plan and new customers automatically receive Intelligence?

New and current Sage ERP MAS 90 and 200 customers will receive a single user Report Manager license for 4.4 as an on-plan benefit. New and current Sage ERP MAS 500 customers will receive four single user Report Manager licenses for 7.3 as an on-plan benefit.

20. Did Sage develop Intelligence? Is it the same product as Sage ERP Accpac Intelligence, or Sage Simply Intelligence?

Yes. Intelligence is powered by Alchemex and is the same solution used for Sage ERP Accpac Intelligence and Sage Simply Intelligence. Sage will provide support to customers and Business Partners, and training is available from Sage University.

21. How do I get my copy of Intelligence? What do I receive?

As a certified Sage ERP MAS Business Partner you should have received a full version of Intelligence, consisting of one Report Manager, one Report Viewer, one Report Designer, and one Connector license. Sage ERP MAS 500 Business Partners you will receive a full version of Intelligence, consisting of four Report Manager, one Report Viewer, one Report Designer, and one Connector license. If you did not receive an email notifying you how to download your copy of Intelligence, please contact your Partner Advocate.

22. Where can I get additional product information on Intelligence?

You, customers, and prospects can access customer-facing product information on the Sage ERP MAS Intelligence website. For partner-specific information including sales tools, positioning documents, and marketing materials, please visit the Sage ERP MAS Intelligence Launch Campaign Kit on the Partner Marketing Resource Center. The Campaign Kit is located under the Marketing Materials menu. Information can also be found on the Partner File Center (PFC).

Sales Model and Pricing

Intelligence is sold through a mixed sales model of user licenses and add-on modules. This model offers optimal flexibility and allows customers to add additional Intelligence licenses and databases as their needs change and their business grows.

23. Will Business Partners receive tier credit for Intelligence sales?

Yes, tier credit will apply to Intelligence sales.

24. What is the Business Partner margin for Intelligence sales?

Intelligence product margin is up to 30%, and M&S margin is up to 20%.

25. If customers want to purchase additional license and/or modules, what will the cost be?

- **Report Manager Licenses $1,000 U.S.**
  - Author new reports (organize, create, edit)
  - Filter and aggregate data
  - Set permissions/security for reports
  - Per user/workstation

- **Report Viewer Licenses $250 U.S.**
  - Basic editing capabilities (filter/change parameters)
  - Drill-down functionality on existing reports and templates
  - For staff members who do not need to create new reports
  - Per user/workstation

- **Connector Module $2,000 U.S.**
  - Simplifies day-to-day operational tasks of financial managers
  - Access information from multiple sources
  - Consolidation of data from multiple companies
  - Allows for connectivity to unlimited ODBC data sources

- **Report Designer Module $1,000 U.S.**
  - Support business strategy and decision making
  - Advanced analysis of trends and what-if scenarios
  - Utilize built-in Microsoft Excel PivotTables® to provide an easy-to-use, drag-and-drop design system

Training and Certification

26. Is Business Partner certification required for Intelligence?

While a separate certification is not required, all Sage ERP MAS Business Partners are strongly encouraged to take the Intelligence class in order to be knowledgeable about the product. Included in the training is how to implement and support Intelligence. The training and specialist track is available on Sage Partner University: www.sageu.com/partner

27. What type of training is available for Intelligence?

Intelligence training is currently available for both customers and partners. Initial training courses will include:

- Getting started course (Free)—Anytime Learning
- Jumpstart/Introduction course (Free)—Online Instructor Led Training
- Intermediate course—Online Instructor Led Training
- Advanced course—Online Instructor Led Training

Please refer to Sage Partner University for a complete list of courses designed to help get you up and running quickly.

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