

### **Introductions**



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**MY FOCUS** 

Principal Solution Consultant, NFP, Hospitality, Healthcare, General Business and Distribution

MY EXPERIENCE

Solution selling, presenting and implementing ERP solutions.



#### **CONTACT INFO**

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MY FOCUS

Manager, CLA Sage Intacct Consultant with a focus on Nonprofits, Schools, Small/Mid-sized Organizations

MY EXPERIENCE

20 years of diverse industry experience in IT Management, Entrepreneurship, and Finance.

## What is the Interactive Custom Report Writer?

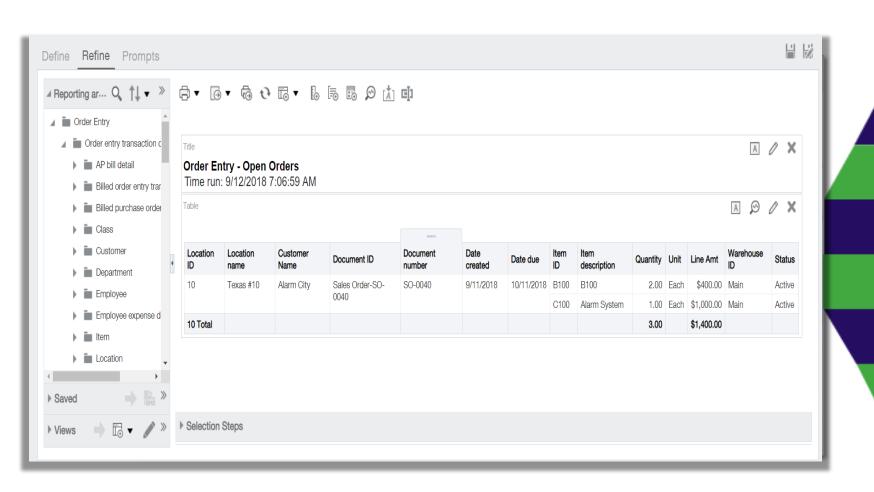


- It's a new report writing tool
- Brings powerful Business Intelligence capabilities to operational reporting
- WYSIWYG
  - A WYSIWYG (pronounced "wiz-ee-wig") editor or program is one that allows a developer to **see** what the end result will look like while the interface or document is being created.
- Enables user to pivot and filter data easily
- Drag-n-Drop columns and fields
- Live Preview
- Grouping, subtotaling, formatting and column calculation
- Export to
  - PDF
  - Excel
  - PowerPoint



#### **Power of the Tool**





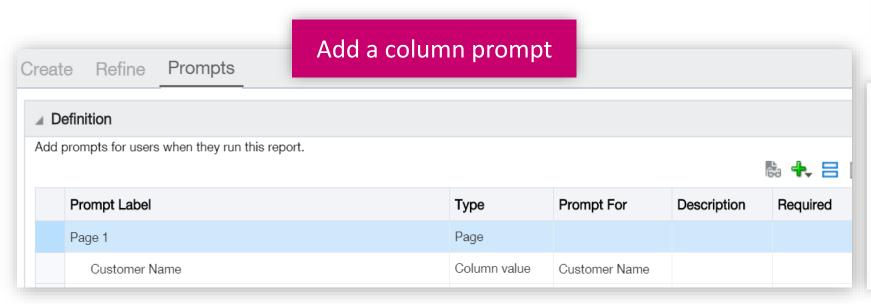
See as you build
Drag and drop
Powerful calculations
Pivot tables!
Export to Excel

Add to menus/dashboards



## **Prompt for User Input**





When a user runs the report, the system prompts them



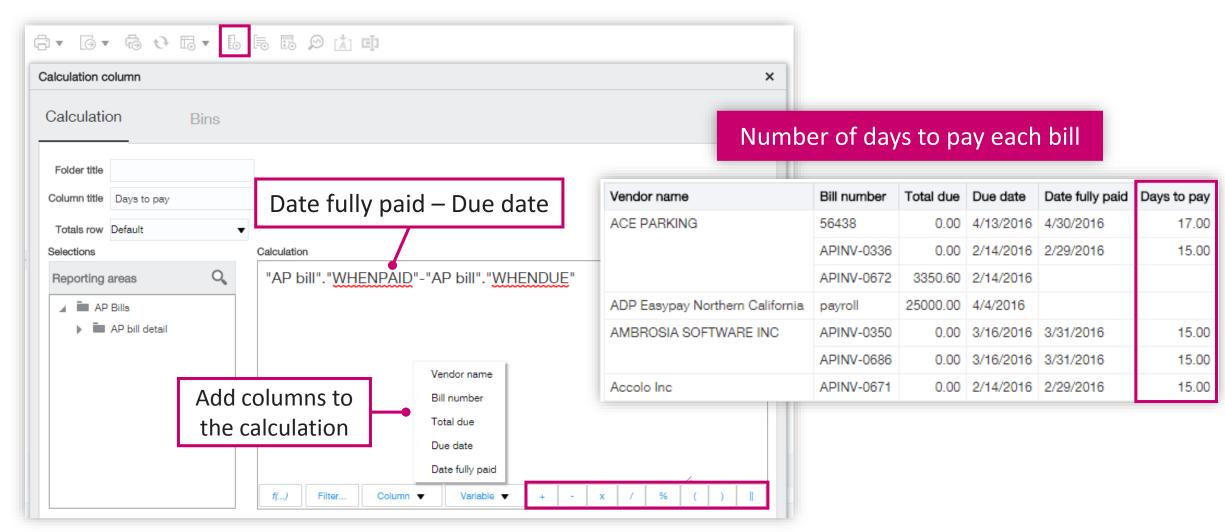
System filters the report

Invoice number	Date	Customer name	Account	Account title	Transaction amount
INV0356	4/11/2015	1st Alerts Inc.	4020	Revenue - Maintenance	2500.00
			4050	Revenue - On Demand Subscription	150000.00
			4060	Revenue - On Demand Support	7500.00
INV0329	1/15/2016	2ND WAVE, INC.	4020	Revenue - Maintenance	2500.00
			4050	Revenue - On Demand Subscription	75000.00
			4060	Revenue - On Demand Support	1875.00



#### **Add a Calculation Column**

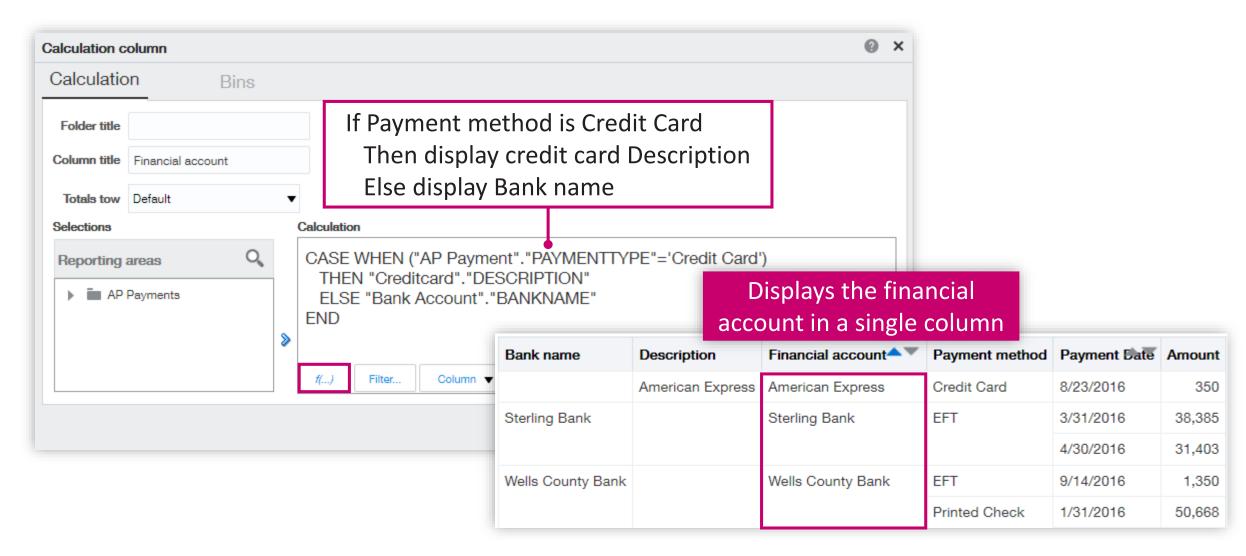






#### **Use Functions in Calculations**

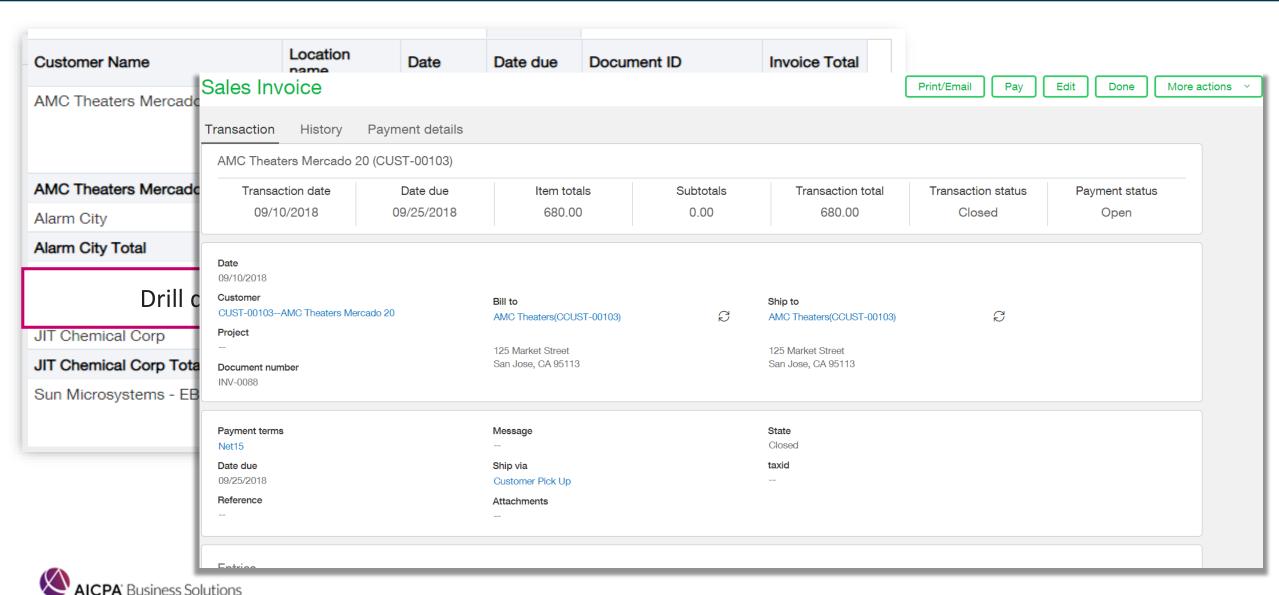






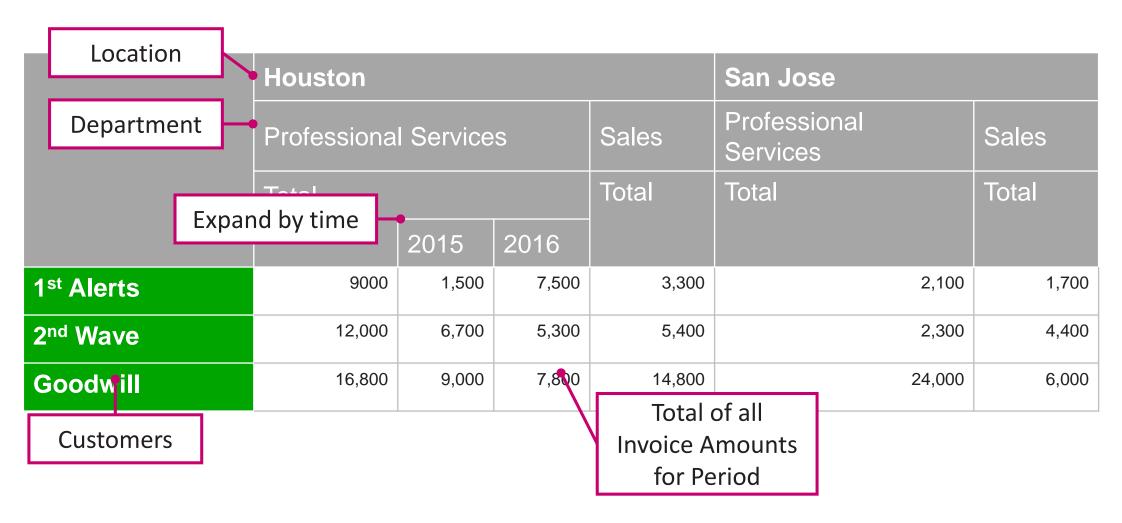
#### **Drill down to Source Document**





#### **Pivot Tables and Time Hierarchies**











#### **General Questions**



- How do I get access to the new Interactive Custom Report Writer?
  - There are two ways the Interactive Custom Report Writer can be purchased. Please contact your Account manager for the details.
  - • Interactive Custom Report Writer: With this module your company has access to the full capabilities of the new report writer and can enable users to create, edit, delete and run reports.
  - Interactive Custom Report Writer Run Only: With this module your company can leverage partners or SIG to create reports for you. With this lower cost option, you can only enable users to View and Run reports.
- Will the current Custom Report Writer be available after the new one is released?
  - Yes, the current Custom Report Writer will continue to be available for the foreseeable future.
- Is Custom Report Writer easy to implement?
  - · Yes. No implementation or implementation costs are required.
- Can I make a copy of a standard report and then add fields, filters, etc.?
  - We currently don't have a way to edit standard reports. But, you can replicate many of the standard report in the new Interactive Custom Report Writer.



#### **Users and Permissions**



- What user roles are available, and are the number of users unlimited?
  - There are no limits on the number of users for the Interactive Custom Report Writer.
  - Business Users Add, edit, delete and run reports
  - Employee Users Only run reports
  - • Project Manager Add, edit, delete and run reports
  - Platform Only run reports
  - CRM No need for either
  - · · Warehouse Add, edit, delete and run reports
  - XML Only run reports
- What permissions will I need to access the Interactive Custom Report Writer?
  - The Interactive Custom Report Writer has its own set of permissions.
- How are permissions handled for reports?
  - When reports are created or viewed, data is presented based on object permissions as with the current Custom Report Writer.
- Are there report-specific permissions? Will I be able to control who can access individual reports?
  - Yes. You will be able to control access to individual reports.



## Comparison



- How will performance compare to the old report writer?
  - Creating reports using the Interactive Custom Report Writer is much quicker than the current customer report writer, and we expect report generation to be somewhat quicker than is experienced today.
- Will I be able to edit or move my current custom reports into the new Interactive Custom Report Writer?
  - Existing reports need to be maintained through the current Custom Report Writer. However, if you wish to enhance your reports by leveraging the new Interactive Custom Report Writer functionality, you may recreate the report in the new tool.



#### **New Features**



- Will I be able to create more complex calculated columns?
  - Yes. Interactive Custom Report Writer offers a wide array of sophisticated options for generating calculated columns.

    Calculated columns can include functions and formulas.
- Is there a list of all the system fields and their field names for the report writer?
  - Though there is no list, objects are grouped into meaningful "Reporting Areas", and there is a Search feature to make it much easier to quickly find the field you need for a report.
- Will I be able to create pivot table reports?
  - Yes. Pivot tables are one of the many report formats.
- Will I be able to show periods in columns based on a transaction date?
  - Yes. Using time hierarchy and pivot table functionality you can view (and drill down) data across time.



#### Can I?



- Will it be possible to add reports to menus?
  - Yes. You can add and remove new reports onto application menus.
- Will I be able to memorize reports?
  - Yes. You can to memorize reports.
- Will it be possible to add reports to dashboards?
  - Yes. You can add new reports to dashboards.
- Will I be able schedule and email reports?
  - Yes. The reports are scheduled and distributed in the same way that current custom reports are.
- Will I be able to export reports to Microsoft Excel spreadsheets?
  - Yes. Export to Microsoft Excel spreadsheets is available when you are creating the report or once it's been created from the report list screen.
- Will formulas/calculations be included when I export to Microsoft Excel spreadsheets?
  - No. Only report data will be exported to Microsoft Excel spreadsheets.
- Will I be able to include custom fields in my reports?
  - Yes. You can include Custom fields in your reports.



## **Interactive Custom Report Writer Positioning**



## Two different types of buyers:

In-House Power User

## Report Builder

- Build reports quickly and easily –
  visual, easy field selection, drag and drop,
  formatting, and subtotals, permissions
- Address complex needs math functions, case and if statements, rolling sums, trend analysis, and more
- Create interactivity chain reports together, eliminate need for spreadsheets

No In-House Power User

## **Report Consumer**

- Interactive analysis filter, sort, select and move columns, and pivot
- Understand meaning drill-down, summary and detail views, move between related reports
- Share or export report view PDF or Excel for further data integration BI analysis



## **Next steps**



- ✓ The slides and recorded link will be emailed to you by September 13
- ✓ Subscribe by 9/30 and receive a 20 percent discount on the Interactive Custom Report Writer
- ✓ For questions, call or email Jocie Dye at 267-419-1141 or jocie.dye@CLAconnect.com







# Thank you!