

# Sage 50 Intelligence Reporting is a smart choice for small business



## Sage Accountants Network Member

Craig Juta, Principal

## Industry

Report Writing and Consulting

## Company

Intelligence

## Location

Edmonton, Alberta

## Number of locations

Three

## System

Sage 50 Intelligence Reporting  
Sage 50 Accounting

To successfully compete in a crowded marketplace, organizations need access to not only facts and figures but also actionable business intelligence. It is not enough to know what monthly revenues are, or even how they compare year over year. Today's successful organizations need information that helps them make informed, timely, and strategic decisions.

No one knows this truth better than Craig Juta, principal at Intelligence and a Sage Intelligence specialist. His practice focuses on delivering customized business intelligence tools to companies across the United States and Canada. "Traditionally, it has been very difficult for businesses to obtain a holistic view of their operations," he says. "Data may be held in multiple applications or databases, and bringing that data together to form a complete picture requires more time or expertise than most businesses have available. What I aim to do is to allow my clients to see their operations in a way that adds strategic value."

## Critical Business Information

Enter Sage 50 Accounting—Canadian Edition\* Intelligence Reporting, a Microsoft® Excel®-based reporting solution that integrates with Sage 50. It eliminates the traditional reporting obstacles, allowing users to quickly generate dynamic real-time reports. By pulling information directly from Sage 50 and potentially other databases, Sage 50 Intelligence Reporting gives users the ability to create dynamic reports that can be drilled down into for more detail, and the ability to see results in different ways for further insight.

## More Than Just the Big Picture

Juta recently deployed Sage 50 Intelligence Reporting for an equipment rental company headquartered in British Columbia. The company uses Sage 50 Quantum Accounting and a specialized rental management application. Each database holds vital business data, but before Sage 50 Intelligence Reporting, the company had no easy way to bring this data together.

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## Challenge

Intelligence Reporting tools are often too costly and complex to be of real value to small business owners.

## Solution

Sage 50 Intelligence Reporting delivers spreadsheet-based reporting within Sage 50 at a realistic price point. The included standard reports, company dashboard, and familiar Excel® interface all help speed company return on investment.

## Results

Ability to combine data from multiple databases gives companies access to much needed business intelligence and metrics. Users have the ability to configure the reports and dashboards to best meet their needs.

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Principal, Intelligence

“Like many small business owners, my client wanted to manage the business better,” Juta explains. “They had many questions that were not that easy to answer. For example, questions regarding the performance by store location—the number of rentals, the profitability of an individual piece of equipment, or a product line, or location.”

Juta configured Intelligence Reporting to draw data from both software applications, producing a management dashboard that displays continuously updated key business indicators such as Top Customers, Average Revenue Per Hour, Utilization by Location, Number of Repairs, and Net Profit Margin. In addition, the reports are able to deliver the details behind the metrics, and all are fully customized for the company.

#### Identify Anomalies

Often, what the data does not show is as valuable as what it does. By configuring exception logic into the reports, Juta’s client can quickly detect anomalies, outliers, and errors in the data. “For example, they track the odometer reading of the equipment before and after each rental,” Juta explains. “A report picks up errant readings such as an ending reading that is lower than the beginning. The software also helps to identify changes in customer buying patterns, such as a drop in rental business from a large client.”

#### Rapid Return on Investment

With 16 included standard reports and an intuitive spreadsheet-style interface, Juta says that most Intelligence Reporting customers are able to master the delivered software quickly and begin realizing the benefits—resulting in a rapid return on investment. Others appreciate the skills and expertise of someone like Juta, whose experience and training allow him to customize the reports to monitor data in ways that they may not have considered. “Most people quickly see the value in knowing their best-selling items or their gross profit by customer, but the ability to identify bottlenecks in production or identify a break-even point are critical as well—and not easy to obtain without this kind of tool,” Juta says.

The benefits that clients are experiencing with Intelligence Reporting are tangible and significant. “The equipment rental company is able to make strategic capital expenditure decisions based on utilization data, repair cost data, and product profitability data,” says Juta. “Smart decisions help to increase efficiency and productivity and drive higher revenues. We estimate a savings on interest expense and an increase in revenue upward of \$1,000 per month as a result.”

In addition, the company is using the data it has uncovered to optimize its inventory holdings and strategically move equipment between locations in response to changes in demand. As a result of these changes, the client is expected to free nearly \$3,000 per month in capital expenditure costs and increase sales by over \$200 per month.

Juta concludes, “Sage 50 Intelligence Reporting is an exciting product. It puts a tremendous amount of power and flexibility into the hands of small business owners at a very attractive price.”

For more information about Sage in North America, please visit the company website at [NA.Sage.com](http://NA.Sage.com). Follow Sage North America on Facebook, [Facebook.com/SageNorthAmerica](https://Facebook.com/SageNorthAmerica), and Twitter, [Twitter.com/SageNAmerica](https://Twitter.com/SageNAmerica).

\*Sage 50 Accounting—Canadian Edition was named Sage Simply Accounting when Craig Juta initially implemented this solution. The product names have been updated in this case study to reflect current naming.

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