

# Business Intelligence



# IRIS Exchequer Business Intelligence - turning data into knowledge

Today's operating climate is one of rapidly changing markets and fierce competition

This makes fast access to relevant and accurate information essential to your agility and long-term success. Designed to align with the way you work, the innovative IRIS Exchequer Business Intelligence suite frees managers to concentrate on more critical and strategic tasks.

Business Intelligence does all the work of collating and distributing real time information automatically and directly to your everyday business applications. This equips your decision-makers with solid, easily understood information and delivers detailed reports for departmental or board-level management accounts.

The IRIS Exchequer Business Intelligence suite includes:

- ✔ **Live Microsoft Excel Integration** - real time powerful reporting by linking Microsoft Excel dynamically to the data held within IRIS Exchequer
- ✔ **Sentimail** - automated proactive business alerts to keep you updated on anything and everything of significance
- ✔ **Visual Report Writer** - valuable, flexible and customisable reports in seconds
- ✔ **Microsoft Outlook Dynamic Dashboard** - vital financial and operational data and KPI updates all delivered to one familiar central environment
- ✔ **eBusiness** - trade securely over the Internet
- ✔ **Authoris-e** - electronic authorisation at the touch of a button, from any location
- ✔ **Paperless** - save costs and improve communications
- ✔ **Commitment Accounting** - enhanced budget control

Modules can be adopted individually or purchased as a complete suite, as best suits your business requirements.



“ IRIS Exchequer came very well recommended. The ability to link with Microsoft Excel has proved invaluable. The information we export from the system is crucial for our management reports as the increased visibility allows our operating divisions to become more financially aware.

Butler & Young Group - provides professional, practical advice and support on a wide range of construction projects.

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## Live Microsoft Excel integration - powerful reporting has never been so easy

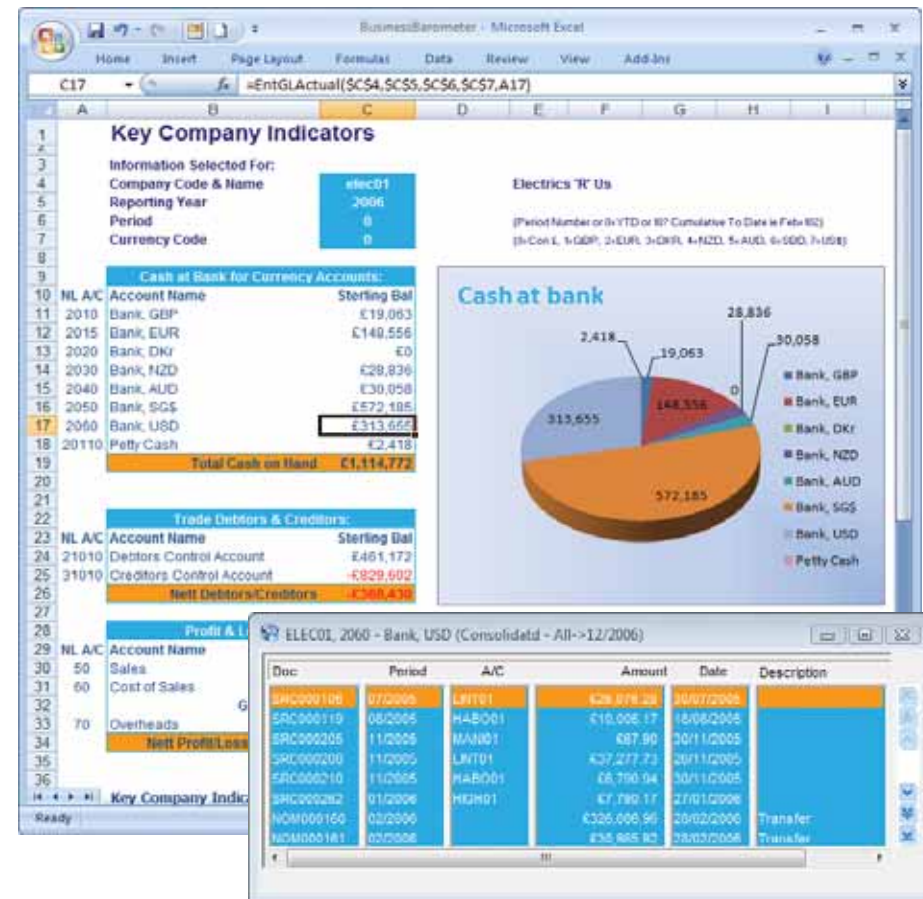
Modern technology links Microsoft Excel dynamically to the rich financial management data held within IRIS Exchequer

This creates live financial management reports instantly, in a familiar and user-friendly format. Drill-down from totals within a spreadsheet directly to the live source transaction in IRIS Exchequer and even create new transactions and save them directly back into the IRIS Exchequer solution.

This is the essential tool for budgeting, forecasting, cash flow analysis, consolidations, and financial modelling.

### Key benefits

- Reports are simple and quick to design
- Real time reporting across the entire organisation
- Familiar Microsoft Excel operating environment; makes it easier to analyse and interpret business performance
- Security controlled save-back option makes updating data quick and trouble-free
- Greatly reduces the need for manual intervention that is time consuming and prone to errors
- Choose from any database field on document designs



“ IRIS Exchequer has dramatically changed the way we work. Information is easily accessible and user-friendly. We can generate reports at the touch of a button and custom design our own tailored reports to assist in order patterns and product scheduling. We use the live links from IRIS Exchequer to various spreadsheets for sales planning, purchasing and accounts reporting information both current and historical.

Blackmore Vale Dairy - supplier of quality dairy products which are specifically used by many well known food manufacturers, caterers and retailers throughout the UK

## Visual Report Writer - valuable management reports in seconds

The IRIS Exchequer Visual Report Writer module makes it easy to create customised reports far more quickly than using traditional third-party applications

Your users save substantial amounts of time, while receiving all the information they need to manage the organisation and in the most meaningful formats.

What makes this possible is the intelligent data mapping logic which is inbuilt within the Visual Report Writer. This feature, not commonly seen in conventional reporting tools, ensures users spend less time designing reports and more time analysing the data.

### Key benefits

- A fast and flexible tool for creating your own analysis reports, using drag and drop technology
- Live dynamic links with Microsoft Excel and HTML formats, creating up-to-the-minute financial reports, useful for budgeting, forecasting, cash flow analysis, consolidations and financial modelling
- Add reports to user menus for future use
- Extensive drill-down to the underlying data in any report
- Export data in multiple formats, including PDF, XLS, CSV, HTML, DBF
- Create once and schedule forever, when used in conjunction with the IRIS Exchequer Sentimail module

The image displays two overlapping software windows from the IRIS Exchequer Visual Report Writer. The top window, titled 'Print Preview - Stock History Report', shows a table of stock history data. The bottom window, titled 'Sales Invoice Record - SIN007546', shows a detailed view of a sales invoice with a table of stock items and their quantities.

Our Ref	Your Ref	Per/Yr	Date	A/C No.	
<b>ALARMSYS-DOM-1 Domestic Alarm System, Model 1</b>					
SIN00306	SOR00079		09/2006	11/09/2006	WEST01 West Link Security
SIN007546	SOR000337		01/2006	20/01/2006	AFEL01 A F Electrical Limited
SIN007544	SOR000341		01/2006	28/01/2006	LINT01 Linton Alarm Distributon
SIN007548	SOR000344		01/2006	28/01/2006	ROWL01 Rowland Alarms
SIN008361	SOR000366		04/2006	01/04/2006	WEST01 West Link Security
SIN008363	SOR000371		03/2006	27/03/2006	WEST01 West Link Security
SIN007614	SOR000367		03/2006	28/03/2006	SING01 Singapore Alarms Pte Ltd
SIN007615	SOR000389		03/2006	28/03/2006	LINT01 Linton Alarm Distributon
SIN007616	SOR000370		03/2006	28/03/2006	KALB Security Systems Ltd
SIN007658	SOR000379				
SIN007663	SOR000380				
SIN007666	SOR000366				
SIN007646	SOR000363				
SIN007645	SOR000370				

Stock Code	Qty	Description	Line Total	VAT	STATUS
ALARMSYS-DOM-1	5	Domestic Alarm System, Model 1	1,204.74	S	View Only
ALARMSYS-DOM-3	6	Domestic Alarm System, Model 3	3,190.26	S	View Only
ALARMSYS-DOM-4	10	Domestic Alarm System, Model 4	8,612.01	S	View Only
ALARMSYS-DOM-5	2	Domestic Alarm System, Model 5	3,058.70	S	View Only



“The reports we have access to now are at least 3 times more relevant and valid than we had before, but it takes only half of the time to produce them. Overall, the key business information we draw from the system takes only 20% of the time it used to take via the old software, as the information is now readily available at my fingertips. We therefore, have greater control of the business as a result of improved reporting.”

Dovetail - one of the UK's leading furniture dealerships, focused on innovation and expertise to create value

## Microsoft Outlook Dynamic Dashboard - essential information in a familiar environment

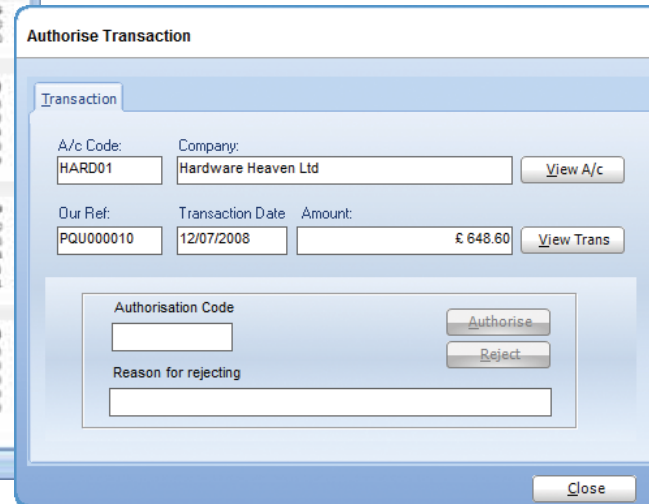
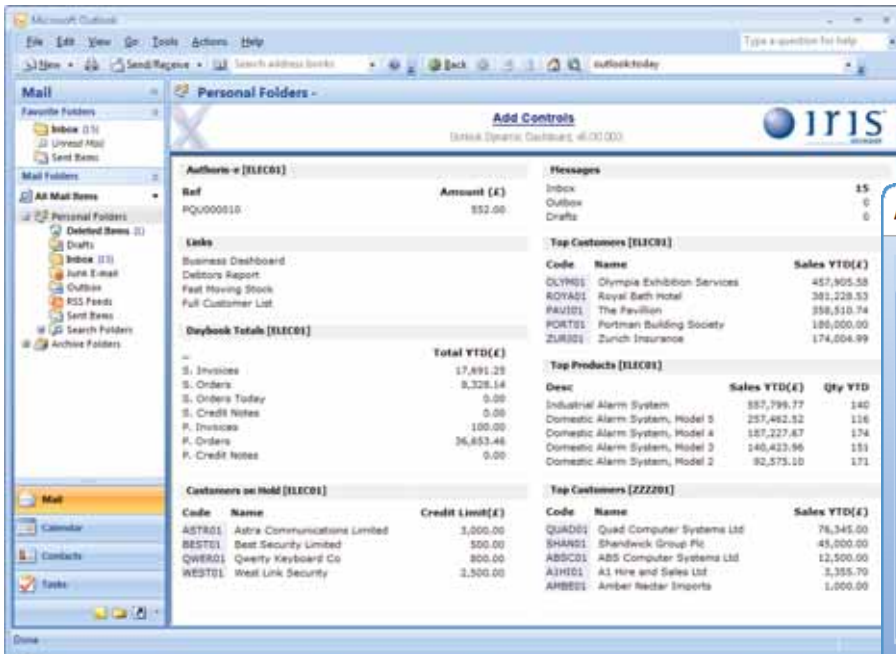
With a presence on over 450 million desktops, Microsoft Outlook is by far the most widely used email application in the world

With these users in mind, IRIS Exchequer offers its Microsoft Outlook Dynamic Dashboard. This insightful tool has the ability to deliver financial data, key performance indicator updates and operational reports all to one familiar, central environment - Microsoft Outlook.

This means that you can incorporate valuable IRIS Exchequer features into your everyday work without changing your daily routines.

### Key benefits

- View real time key performance indicators instantly from within Microsoft Outlook
- Drill-down to underlying data directly from Microsoft Outlook
- Directly access important reports
- See at a glance important business information, such as your top customers, most popular products, problem debtors...
- Remotely approve transactions including purchase requisitions and orders from within Microsoft Outlook in conjunction with the IRIS Exchequer Authoris-e module



Some of our reports are run automatically which means they are sitting in my inbox when I arrive each morning!

Metrow Foods - a specialist manufacturer and distributor of packaged frozen foods



## Authoris-e - paperless authorisation for today's world

Authoris-e applies advanced technology to allow managers and key decision-makers to approve and authorise transactions via email at the touch of a button, from any location

It provides essential support to introduce a comprehensive yet convenient and streamlined authorisation process. When users enter a purchase requisition or order which exceeds their limit, they select the 'authorise' option. An email with an image of the transaction attached is sent to the appropriate person, who can approve it by replying with an authorisation code.

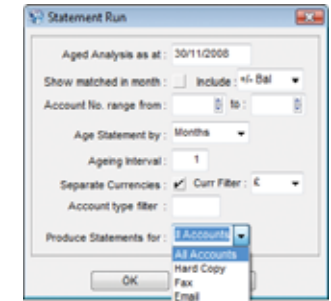
### Key benefits

- Remote viewing and approval of transactions using unique alerts and automation technology
- View all relevant information needed for every decision
- Comprehensive, flexible and easy to use
- Complete audit trail of the authorisation process
- Option to authorise transactions via Microsoft Outlook Dynamic Dashboard

## Paperless - reduce costs and improve communications

The IRIS Exchequer Paperless module helps to reduce the costs involved in using and storing paper and lowers your carbon footprint

Importantly, it also saves time by enabling you to send all of your accounting documents and reports in a secure read-only format, by fax or email, at the click of a button.



### Key benefits

- Save time and money on stationery, postage and administration on essential paperwork such as orders, invoices and statements by sending electronically
- Improve cash flow with more effective credit control, as reminders with supporting documentation can be sent promptly and easily
- Use default settings for customers and suppliers to enable regular savings in costs and time when sending statements and remittances
- Improve both internal and external communication
- Distribute reports via email or fax, as best suits the needs of your business and partners

“The issuing of purchase order numbers through the Paperless module and Authoris-e has eradicated what was a very time-consuming manual task, which often resulted in the order remaining stagnant because a manager was not available to authorise it. Now employees can create an order and send it to a manager for authorisation electronically, reducing the volume of paper in the office. Authoris-e will also electronically re-route the purchase order to another manager for authorisation if the first manager is unavailable. This makes the authorisation process much quicker and easier than it was before.”

Halo Leisure Trust - a charitable trust formed to run Herefordshire's leisure facilities

## Sentimail - automating the delivery of information

IRIS Exchequer's Sentimail module enables you to focus on the task in hand, knowing that proactive business alerts will reliably keep you updated on anything and everything of significance within your organisation

Sentimail automatically sends messages via email and SMS (text messages) to the desktop, laptop or PDA of key staff and external stakeholders.

The wealth of data held within IRIS Exchequer is transformed into meaningful alerts about significant events or tasks requiring urgent attention, along with reports on all your key performance indicators.

### Key benefits

- Proactive, reliable business alerts to keep you in tune with all areas of your organisation
- Facilitates a rapid response to changing circumstances
- Manage your entire business by exception
- Email alerts easily set up on all parts of the business that are key to you
- Schedule important reports to employees and key partners, including your top customers or suppliers
- Eliminates dependence on manual processes to warn organisations of potentially costly problems

The arrival of vital inventory, a prompt to a sales professional to chase an order while with the customer, a notification to your key customer that an urgent delivery is on its way, copy invoices sent automatically and directly as a reminder to all overdue customers - Sentimail covers critical business events such as these and more to keep your organisation running smoothly.



“Sentimail gives us the ability to keep our sales staff much better informed. Easy access to information is what gives you the edge and IRIS Exchequer facilitates that for us from an accounting perspective.”

Nu-trel Group - UK leader in the development, manufacture and marketing of fertilisers and associated products for agriculture, horticulture, forestry, amenities and landscaping

## Form Designer - eliminate reliance on pre-printed stationery

The IRIS Exchequer Form Designer enables you to customise documents including your invoices, statements and orders

This means you build your company identity while cutting the costs involved in buying and storing pre-printed stationery.

Included with the IRIS Exchequer product as standard, this innovative module allows you to design and layout your documents to suit your requirements with speed and ease.

### Key benefits

- Design professional looking documents in minutes
- No special IT developer skills required
- Customise all of your documents including invoices, statements, remittance advices etc for different audiences
- Actively meet customer and supplier requirements

## eBusiness - now any business can become a true online business

With ever-increasing eCommerce requirements, the IRIS Exchequer eBusiness module is a popular choice for any company or not-for-profit organisation wishing to trade electronically

### Key benefits

- Makes it easier for any organisation to trade securely over the Internet and run an eCommerce operation
- Cuts time and effort in exchanging data, including purchase orders and sales invoices between organisations, using industry standard extendable mark up language (XML) technology
- Easy exchange of data between other business systems and web-based applications alike, including shopping carts
- Automatically receive orders from online stores and telesales



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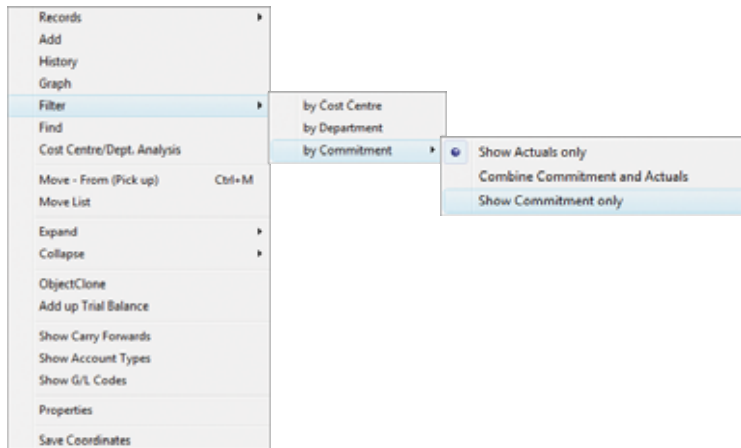
The use of IRIS Exchequer's Paperless technology saves the company at least £5,000 annually. The investment in IRIS Exchequer has been the best IT decision Claremont & May has ever made. The ease of use combined with automated picking lists has enabled productivity and accuracy to improve by 50%.

Claremont & May - leading European manufacturer of home fragrance products and decorative home accessories

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## Commitment Accounting - keeps budgets on track throughout the year

The IRIS Exchequer Commitment Accounting module is essential for all organisations in the local government, education and public sectors and manages all your budgetary commitments simply and securely



### Key benefits

- Full integration with the Sales & Purchase Order Processing module
- Update, track and control the committed costs within the General Ledger
- Provide over budget checks at order entry stage
- Save valuable time for other important business activities

## Find out more today

The IRIS Exchequer Business Intelligence suite works in perfect harmony with each other and with other IRIS Exchequer modules to save time, money and resources while increasing efficiency and profitability

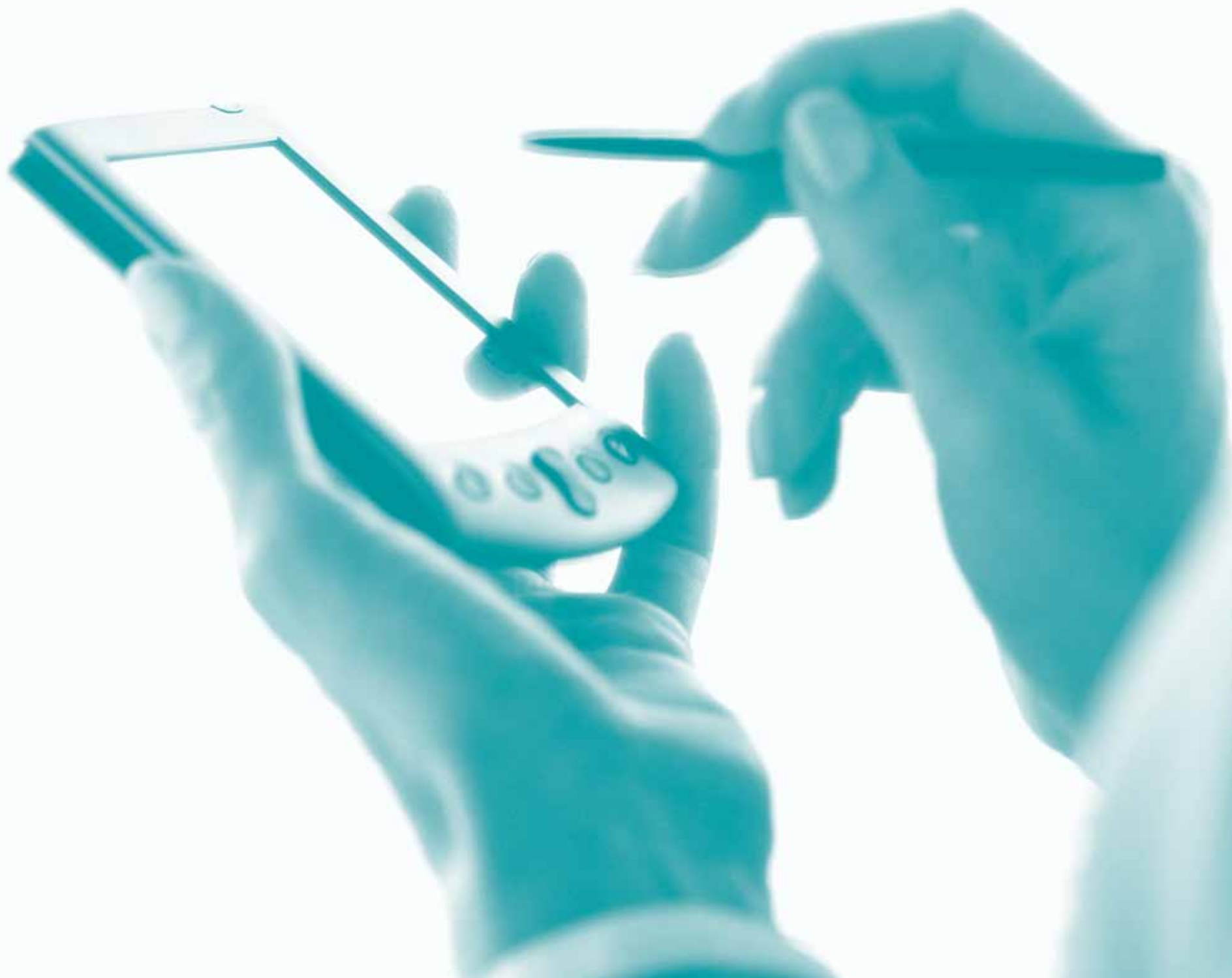
You and your teams will achieve more with less effort and be free to focus on the strategic initiatives which take your organisation forwards.

For more information on the value which IRIS Exchequer Business Intelligence could bring to your organisation, please contact us.



“ We take full advantage of the Commitment Accounting module. It allows individual budgets to be set against each department and provides full visibility of project costs by taking into account not only invoices that have already been paid, but what has been allocated and is yet to be invoiced. ”

Yarborough School - Lincoln's business and enterprise specialist school



[www.iris.co.uk/exchequer](http://www.iris.co.uk/exchequer)

