

Version Comparison: Sapiens.BI PRO versus Basic

Request free trial PRO/Basic version: info@itsapiens.eu

Feature	PRO	Basic
Charts		
Support, help, consultations & live web training	Unlimited	Max 1 hour or 5 support cases annually
Video Tutorials	+	-
Chart Types: Pie, Line, Column,	+	+
Geographic Chart, Area Chart, Horizontal Bar Chart, Combined (3 axes), Funnel, Gauge	+	-
Increase/Decrease Chart Size/Chart Height	+	+
Save Chart as PNG	+	+
Add Chart to Native CRM Dashboard	+	+
Create Sapiens BI Dashboard	+	-
Add Chart to Dashboard for other Role Users	+	-
Number and Date formatting for Reports and Charts	+	-
Drill down from Chart to detailed data (from Chart and from Dashboard)	+	-
Change Chart Colors	+	-
Show grand total number on top of the Chart	+	-
Multi date dimension comparison; e.g. monthly comparison by year	+	+
Report Builder		
More than 100 pre-defined report templates	+	+
Report template builder, adding Custom modules & relationships; many-to-many relation)	+	+
Add custom views/custom tables, adding modules to already created reports	+	-
Add data from history (Change Log /Audit) to the report; Snapshot Reporting	+	-
Combined Report: All activities by User/Customer etc. (Leads + Calls + Meetings, etc) Summary and Detailed Report Types	+	-

Hide/Unhide permission options for Folders and Reports in the Report list	+	-
Report Layout		
Report types: Detailed Report, Detailed with grouped by Summaries, Summary, Pivot/Matrix Report (also known as Crosstab), unlimited levels of groups	+	+
„Aggregate as Column” for crosstab reports (change row to column layout of summarized items – „Grouping and sorting tab”)	+	+
Totals on both sides (Vertical and Horizontal) for Pivot/Matrix Summary	+	-
Detailed report combined with Pivot/Matrix summary	+	-
Multiple group by levels by SAME date field (e.g. month as column, year as row for crosstab report); monthly comparison by year on the chart.	+	+
Select to display Top n Items (e.g. Top 5, top 10 product categories by sales amounts) Detailed info on top first/last grouped items	+	-
Sum, Count, Calculate Average, Identify, which of the columns should be summarized for which grouped level (under „Grouping and Sorting” tab)	+	+
Min / Max value calculation for amounts and dates, date-time fields Count of Unique Values Sum of Unique Values	+	-
Calculating Functions: add/subtract/multiply/divide if..then/add dates/subtract dates Ability to write your own function (manually)	+	-
Calculations on Summarized / Aggregated Values	+	-
Define your own ranges (e.g. 1-1000; 1000-2000; etc) for summaries & charts	+	-
Sorting of the list items by the order identified via Module Builder	+	-
Standard filters for text, picklists, date&time (between, greater than, less than, this/next week, month, etc.), amounts, checkbox checked/unchecked, etc. Filter: „Current user”, for amounts: greater than, less than	+	+
Filters for roles and teams Setting permissions to read-only users for each filter	+	-
Filters on counted/summarized values (e.g. sum or count to be equal/not equal/less/more than 5)	+	-
Allow certain filters for read-only users	+	-
Saving of Collapsed/ Expanded states for report groups and report sections; changed column width saving	+	-
Export as PDF/Excel, Print Report with Chart, Print Report, Print Chart,	+	+

Export as .csv	+	-
Merge Template Report with your Google Sheets	+	-
Add report data to Target Lists (Contacts, Leads, Accounts)	+	-
Sharing (permissions management : view, edit, delete) public for all/for selected users/ for selected groups) for each report	+	+
Report Scheduling via E-mail (PDF / Excel / Link to Report) to registered users, role users Report Filters are run-time for scheduled e-mail	+	+
Report Scheduling via E-mail : manual e-mail address	+	-
Mass edit for Permissions and E-mail Scheduling (for all selected Reports in the list)	+	+
Renaming Labels in the Report	+	+
Adding your own formatted Excel Templates to a Report and Print in PDF/XLS	+	-
Ability to edit functions manually	+	-
Common Filters on Dashboards, Adding Reports (Tables) to Dashboard	+	-

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