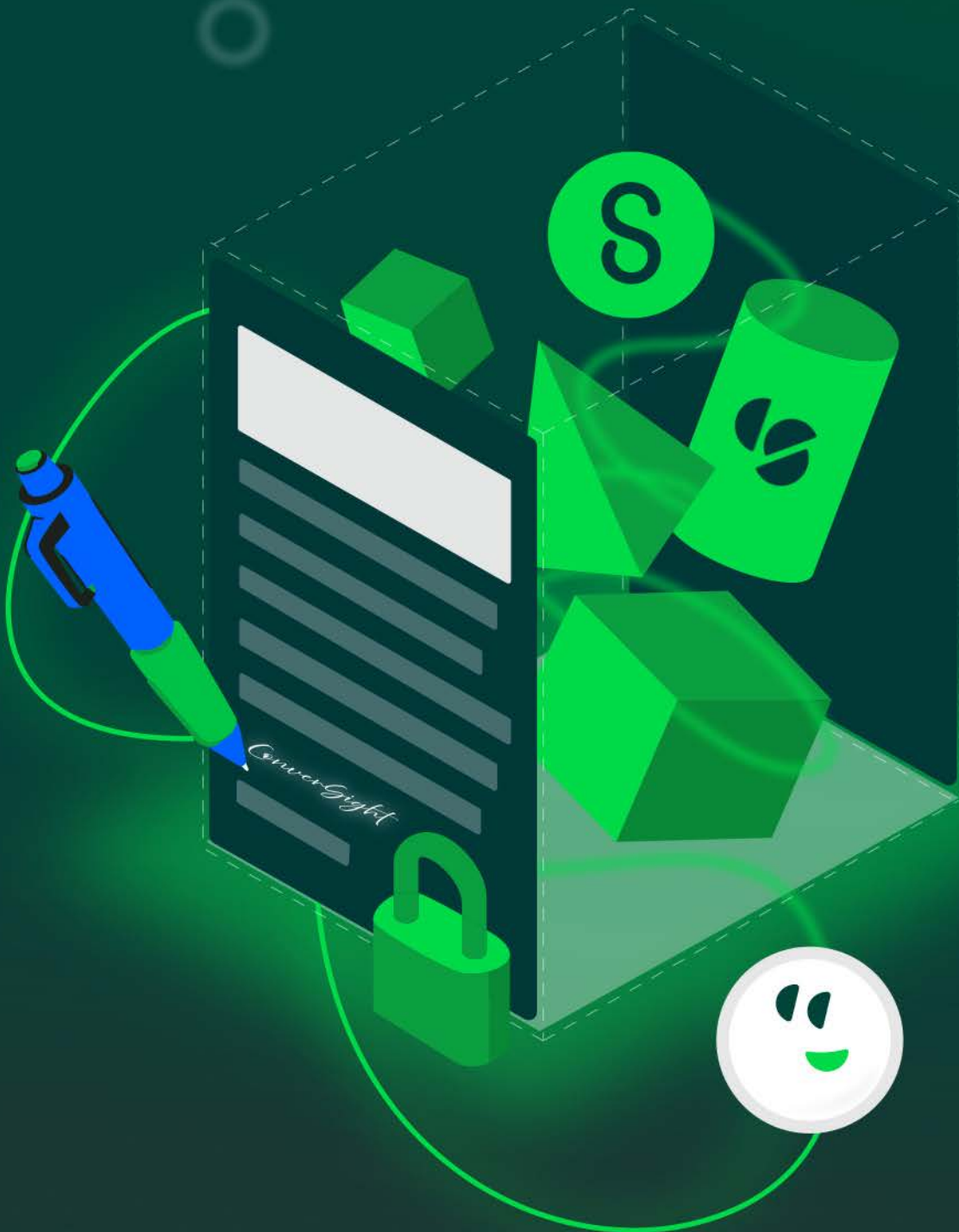




# Agentic AI for Sage

Unified Decision Intelligence bridges the gap between data and action to scale AI





# Table of Contents

<b>1. Agentic AI for Sage ERP Systems</b>	02
<b>2. Sage ERP Systems Today</b>	02
<b>3. Challenges ERP Users Face</b>	03
<b>4. What Sage ERP Systems Lack the Most</b>	04
<b>5. Agentic AI in ERP System</b>	04
<b>6. ConverseSight: Unified AI Platform</b>	05
<b>7. Agentic AI for Sage with ConverseSight</b>	05
7.1 The Value of Embedded Intelligence	06
7.2 Core Capabilities	07
7.2.1 Pre-Configured Storyboards for Sage	07
7.2.2 Seamless Integration with Sage	08
7.2.3 AI Reporting and Insights	08
7.2.4 Athena – The AI Agent	09
7.2.5 AI Demand Forecasting and Supply	10
7.2.6 Rapid Deployment and Time-to-Value	10
<b>8. Why ConverseSight for Sage Customers</b>	11
8.1 The Future of ERP is Agentic	12



# I. Agentic AI for Sage ERP Systems

Enterprise Resource Planning (ERP) systems such as Sage have become foundational to supply chain organizations, managing critical operations across finance, sales, and operations. While ERP systems effectively capture and organize vast amounts of business data, a growing gap has emerged between **data visibility and time-to-action**. Organizations today are not struggling with a lack of data—they are struggling to extract meaningful insights and take timely action from it. Traditional ERP reporting also remains largely manual, fragmented, and reactive, limiting the ability of leaders to respond quickly to changing business conditions.

This gap has led to the rise of **Agentic AI**, the new generation of intelligence that goes actively analyses data, detects patterns, and delivers action autonomously.

**ConverSight's Agentic AI for Sage** addresses this challenge by bringing unified AI capabilities directly into Sage ERP environments. It enables supply chain organizations to rapidly gain the full value of their data without complex implementation or heavy reliance on technical teams.

Learn how Agentic AI is transforming Sage in real-world scenarios: <https://conversight.ai/webinar/agentic-ai-sage-100-300-analytics/>

## 2. Sage ERP Systems Today

Sage ERP systems serve as the backbone of modern business operations for mid-sized organizations. They manage and integrate core functional areas such as:

- 🌱 Finance
- 🌱 Sales
- 🌱 Supply Chain

Sage platforms ensure data consistency and process efficiency, acting as a single source of truth for transactional information. While Sage is highly effective as a system of record, it is not inherently designed to function as a system of intelligence.

### Explosion of Data, Lack of Insight

Modern businesses generate unprecedented volumes of transactional and operational data daily. From sales transactions and financial records to inventory movements and supplier interactions, Sage continuously captures a rich stream of information.

Despite this abundance of data, organizations often struggle to convert it into meaningful, actionable insights. Key challenges include:

- 🌱 **Data silos across modules:** Information is often scattered across finance, sales, and supply chain modules, making it difficult to get a unified view of performance.
- 🌱 **Delayed and manual reporting:** Extracting insights typically requires exporting data and building reports manually, slowing decision-making.

- 🟢 **Reactive insights:** Most reporting focuses on historical performance, offering limited visibility into emerging trends or future risks.

This disconnect between data availability and actionable insights creates a barrier to effective decision-making. Leaders are often forced to rely on incomplete or outdated information, limiting their ability to respond to market changes, operational disruptions, or emerging opportunities.

### 3. Challenges ERP Users Face

Even with the critical role Sage plays in business operations, many organizations continue to face limitations in extracting full value from their ERP data. These challenges slow decision-making and prevent teams from operating with agility and confidence.

#### Manual Reporting & Spreadsheet Dependency

Many Sage users still rely on exporting ERP data into spreadsheets for analysis and reporting. While flexible, this approach is time-intensive and prone to human error. Teams spend significant effort consolidating data, validating numbers, and building multiple report versions, leaving little time for deriving insights.

#### Fragmented Analytics

Analytics in Sage environments are often fragmented across finance, sales, and operations. Each department maintains its own reports and metrics, leading to disconnected insights. Without integration, leaders cannot easily correlate performance across functions—such as linking sales trends to cash flow or inventory levels—resulting in incomplete or suboptimal decisions.

#### Limited Predictive & Prescriptive Capabilities

Sage ERP primarily reports on historical data. While this is important for performance tracking, it does not support forward-looking decisions. Organizations lack the ability to:

- 🟢 Anticipate trends
- 🟢 Identify emerging risks
- 🟢 Receive recommendations on next best actions

Without predictive and prescriptive capabilities, businesses remain reactive rather than proactive.

#### High Dependency on Technical Skills

Accessing meaningful insights from Sage data often requires business intelligence tools and technical expertise to create and maintain reports. This dependency on IT or data teams can lead to delays and bottlenecks, limiting self-service, data-driven decision-making for business users.

## 4. What Sage ERP Systems Lack the Most

To fully support modern decision-making, Sage systems need capabilities that go beyond traditional ERP functionality:

- 🟢 **Intelligence Layer (Not Just Data Layer):** Sage stores and processes data but does not automatically generate actionable insights.
- 🟢 **Contextual Decision Support:** Limited ability to understand why changes occur or what actions to take.
- 🟢 **Unified Cross-Functional View:** No single integrated view across revenue, profitability, cash flow, and operations.
- 🟢 **Natural Interaction with Data:** Users cannot easily query data in simple, conversational ways.
- 🟢 **Autonomous Insight Generation:** Sage does not proactively detect anomalies, risks, or opportunities, leaving manual discovery to the user.

## 5. Agentic AI in ERP System

### What is Agentic AI?

Agentic AI refers to intelligent systems that operate autonomously, continuously analyzing data, identifying patterns, and delivering insights without requiring constant human input.

### Why Agentic AI Matters for ERP

Agentic AI introduces a fundamental shift in how organizations interact with and derive value from their ERP systems. Rather than serving as passive repositories of transactional data, ERP platforms can now become active participants in the decision-making process.

At its core, Agentic AI enables ERP to evolve from:

*System of Record* → *System of Intelligence*

This transformation is critical. While traditional ERP systems capture and organize what has already happened, Agentic AI continuously analyzes that data, identifies patterns, and surfaces insights in real time—without requiring manual intervention.

By embedding AI directly into the operational data layer, organizations can:

- 🟢 **Make faster, more informed decisions:** AI insights are delivered in real time, enabling leaders to respond quickly to changing conditions
- 🟢 **Reduce cognitive load on teams:** Instead of manually searching for answers, users are guided by AI-generated insights, anomalies, and recommendations

- 🌱 **Continuously optimize operations:** AI agents monitor business performance around the clock, identifying inefficiencies, risks, and opportunities as they emerge

Importantly, Agentic AI does not just enhance reporting—it redefines it. Insights are no longer static outputs but dynamic, continuously evolving signals that guide business actions.

## 6. ConverSight: Unified AI Platform

ConverSight is a unified AI platform to bring intelligence to operational ERP systems. ConverSight connects directly with existing ERP data and workflows to deliver real-time, actionable insights, seamlessly connecting data across business functions and transforming it into real-time, actionable insights.

Unlike traditional analytics tools that require extensive setup and ongoing management, ConverSight is designed for immediate usability and rapid value. ConverSight AI agents for Sage consolidate data from across the organization into a single, intuitive environment—enabling users to move from fragmented data to a cohesive, enterprise-wide view of performance.

Explore how ConverSight integrates directly with Sage: <https://conversight.ai/erp/sage/>

## 7. Agentic AI for Sage with ConverSight

ConverSight's Unified Decision Intelligence Platform redefines how organizations adopt and scale AI within their ERP environments. Instead of requiring complex, resource-intensive implementations, ConverSight AI agents are pre-configured for Sage ERP systems including Sage 100, Sage 300, Sage X3, and Sage Intacct. This approach removes traditional barriers to analytics adoption—such as data modeling, dashboard development, and technical dependencies—allowing organizations to rapidly activate AI directly within their existing ERP workflows.

By simplifying deployment and focusing on immediate usability, ConverSight enables businesses to transition quickly from data accumulation to value realization. Organizations are no longer required to invest months in building analytic infrastructure—they can begin generating insights and driving decisions within with AI in days.

ConverSight transforms ERP's from a passive data repository into an active intelligence engine embedded within daily operations.

**Inventory Analysis Reveals \$49.99 Million in Slow/Non-Moving Stock at Main Plant**

The MOTOR segment has 71 items valued at \$3.8 million, with 15 items non-moving, totaling \$582.01k in slow/non-moving inventory. The PUMP segment has 79 items valued at \$6.08 million, with 21 items non-moving, totaling \$1.66 million in slow/non-moving inventory. Overall, 7046 items worth \$14.72 million are non-moving. The main plant's total inventory is valued at \$76.31 million, with \$49.99 million considered slow-moving and non-moving.

10/15/2025 10:13 pm

Of the 71 items in MOTOR segment which is valued at \$ 3.8 Million, 15 items are considered as non moving. The total value of slow moving and non moving inventory is \$ 582.01 k,

ITEM ID	SEGMENT	ITEM DE...	ONHAN...	EXCESS I...
500023914	MOTOR	MTR 375MG...	\$55,111.72	\$55,111.72
AL-3015112	MOTOR	MTR 375MG...	\$22,715.64	\$45,431.28
500023900	MOTOR	MTR 375MG...	\$53,819.32	\$53,819.32
C332482	MOTOR	MTR 375MS...	\$16,140.20	\$0.00
C332447	MOTOR	MTR 375MS...	\$15,505.61	\$0.00

Count: 51

10/15/2025 1:46 am

A total of 7046 items, with a combined value of \$ 14.72 Million, are currently classified as non-moving.

Legend: None, PUMP, MOTOR, TRANSFORMER, TRANSFRMR, SEAL, SENSOR, GASSEP

## 7.1 The Value of Embedded Intelligence

At its core, QuickStart Agentic AI for Sage is designed to bridge the gap between data availability and decision-making effectiveness.

Rather than relying on static reports, organizations gain access to a continuous stream of intelligence that is:

- 🌱 **Timely:** Real-time visibility into performance across business functions
- 🌱 **Predictive:** Early identification of trends, risks, and emerging opportunities
- 🌱 **Actionable:** Insights that directly inform decisions and next steps

This shift enables leaders to move beyond hindsight-driven analysis toward forward-looking, outcome-oriented decision-making.

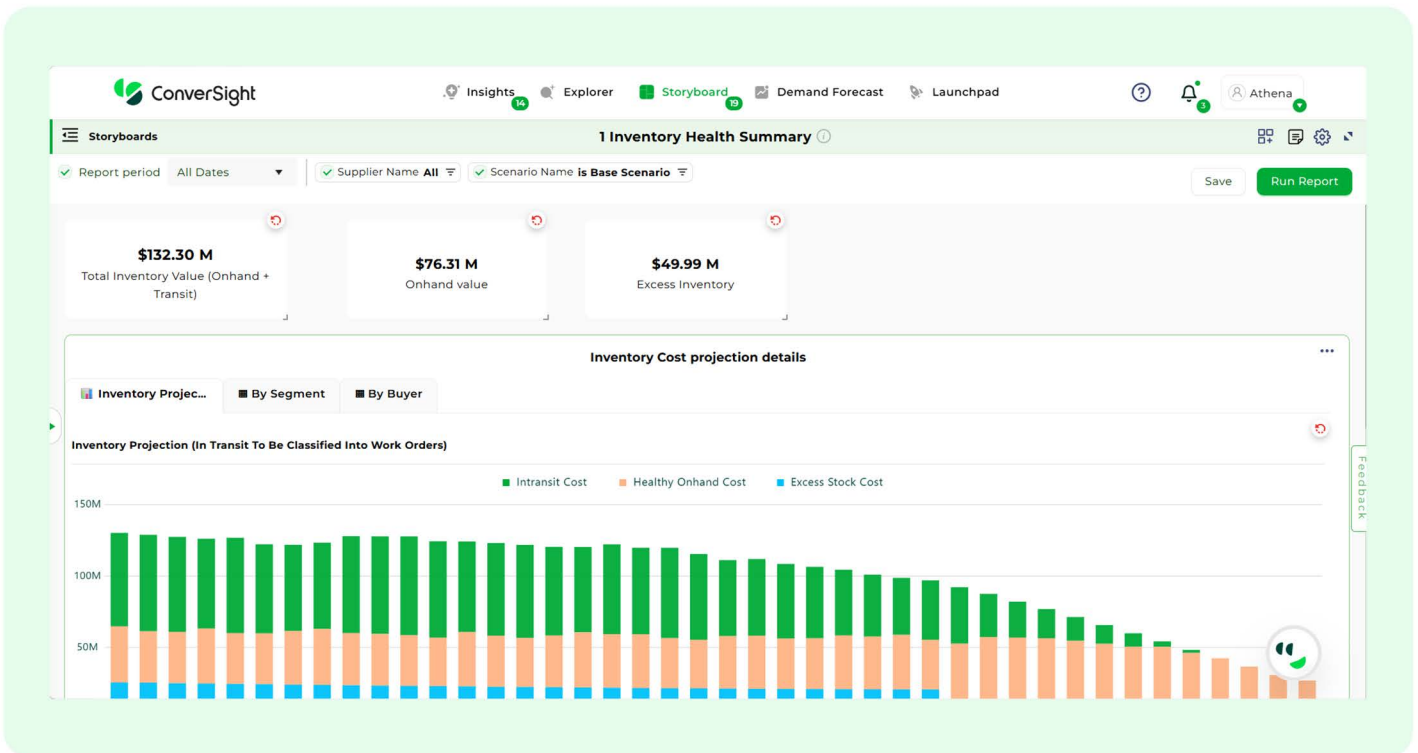


## 7.2 Core Capabilities

ConverSight enhances Sage by introducing AI agents that simplify data access, accelerates reporting, and delivers deeper visibility across business functions. ConverSight's UDI platform combines pre-configured analytics with embedded AI to help organizations move from fragmented data to unified, real-time decision-making with AI agents built specifically for Sage

### 7.2.1. Pre-Configured Storyboards for Sage

ConverSight provides 15 pre-configured storyboards purpose-built for Sage, eliminating the need for custom dashboard development. These storyboards are designed to deliver immediate, role-based visibility across sales, finance, and supply chain functions. Sales storyboards provide insights into revenue summaries, trends, detailed transactions, profitability, and sales team performance. Finance storyboards offer visibility into aging, balance sheets, profit and loss statements, cash flow, and executive summaries. Supply chain storyboards focus on inventory details, outstanding supply, sales orders, and spend analysis. Together, these pre-built views enable users to quickly answer critical business questions and move from data to insight without additional configuration.

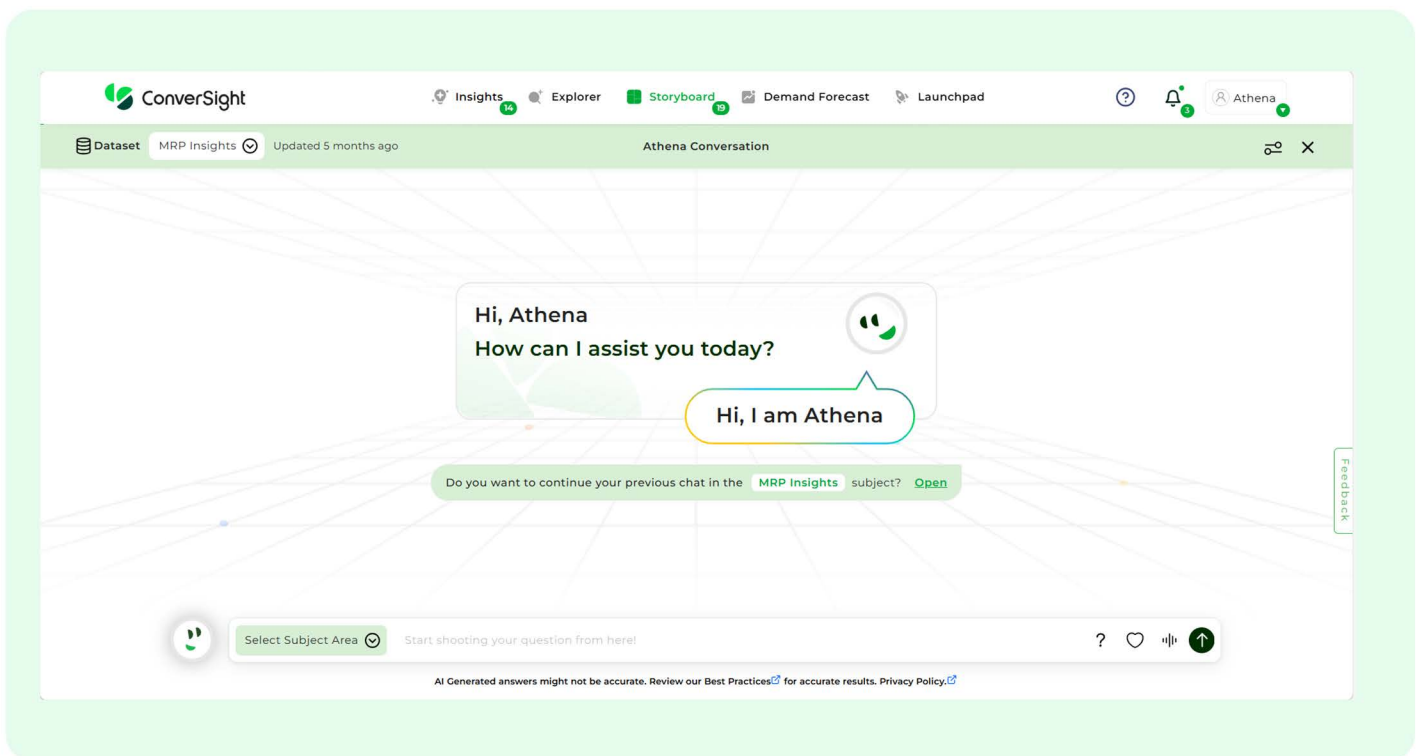


## 7.2.2 Seamless Integration with Sage

ConverSight is designed for seamless integration with Sage environments, allowing organizations to activate advanced analytics without disrupting existing systems. By connecting directly to Sage data structures, the platform eliminates the need for complex data migrations or reimplementations. This ensures that businesses can leverage their current ERP investment while enhancing it with a modern AI layer, reducing both implementation time and operational risk.

## 7.2.3 AI Reporting and Insights

ConverSight transforms traditional reporting by embedding AI directly into the analytics process. Instead of relying on manual report creation and interpretation, the platform automatically analyzes data to detect trends, identify anomalies, and highlight key performance drivers. This approach shifts reporting from a static and retrospective activity to a dynamic and continuous insight-generation process, enabling organizations to uncover meaningful patterns and respond more effectively to changing business conditions.



## 7.2.4 Athena – The AI Agent

At the core of the ConverSight platform is Athena, an AI agent that continuously monitors, analyzes, and interprets business data.

Athena operates as an always-on intelligence, continuously analyzing data in the background without requiring manual queries or intervention. Users can actively engage with Athena, having natural conversations to get answers to their most pressing questions. And tell Athena to take action when desired. This shifts the experience from search-driven analysis to agentic AI, making data exploration intuitive and actionable.

- 🌱 **Detects trends and anomalies** by continuously scanning data patterns across the business.
- 🌱 **Identifies risks and opportunities** before they become visible through traditional reporting.
- 🌱 **Delivers contextual insights** that explain not just what is happening, but why it matters, and what to do next.

Rather than requiring users to navigate dashboards or build reports, Athena proactively surfaces the most relevant insights—ensuring that decision-makers are always informed and prepared to act.

The screenshot displays a dashboard with several key metrics and detailed views:

- Total Purchase Orders:** 14 (All purchase orders)
- Delayed Orders:** 11 (Orders with delays)
- Calls In Queue:** 2 (Scheduled supplier calls)
- Active Calls:** 1 (Calls in progress)

The **Delayed Orders** section shows a list of four orders:

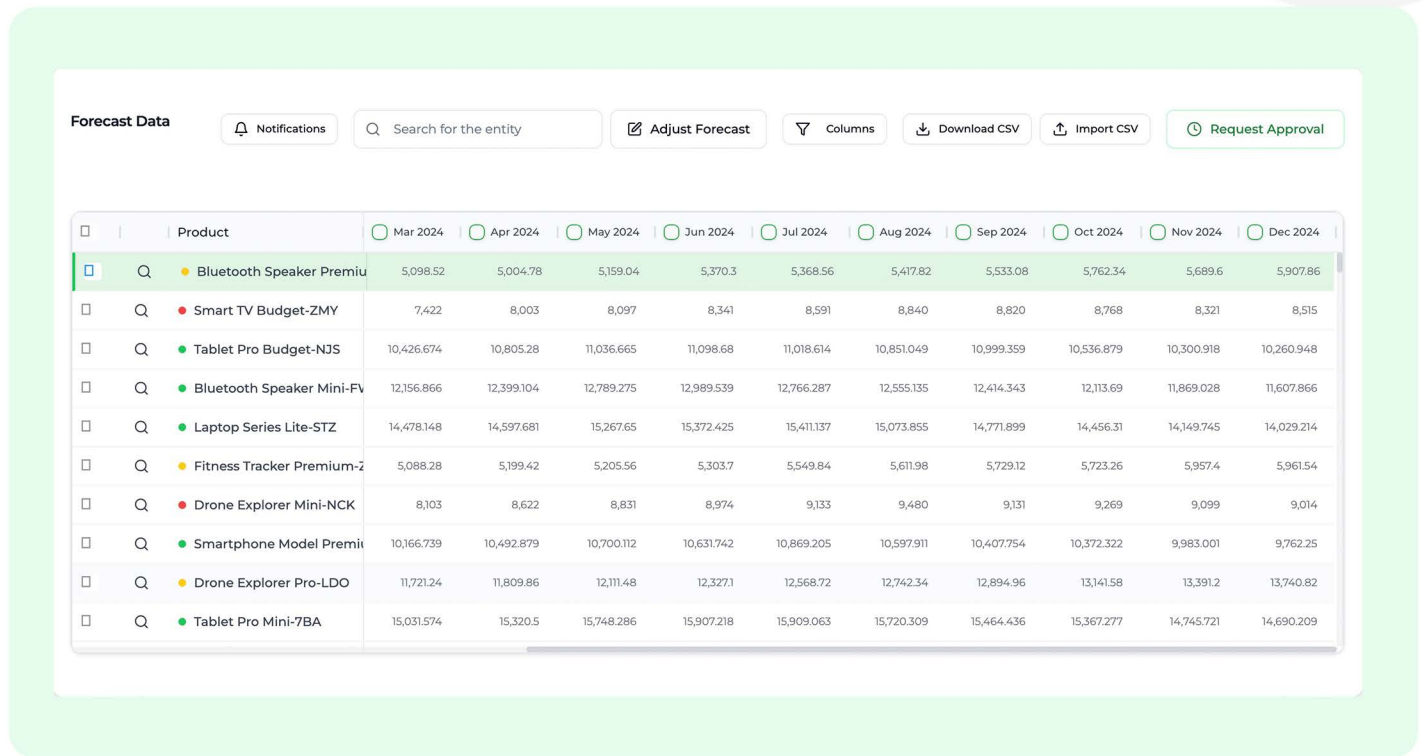
Order ID	Supplier	Total Amount	Expected Delivery	Delay	Status
PO-2025-0001	TechParts Global	\$26,000	Apr 4, 2025	5 days	Delayed
PO-2025-0002	Acme Electronics	\$6,600	Apr 5, 2025	3 days	Delayed
PO-2025-0003	Global Components Ltd	\$15,999.8	Apr 25, 2025		Delayed
PO-2025-0004	Premier Manufacturing	\$13,248.75	Apr 6, 2025		Delayed

The **Athena Agent Activity** section shows a call log for PO-2025-0003:

- Call ID:** PO-2025-0003
- Supplier:** Global Components Ltd
- Start Time:** 9:15 PM
- Agent:** Jordan Rodriguez
- Status:** In Progress

## 7.2.5 AI Demand Forecasting and Supply Insights

ConverSight enhances supply chain and operational decision-making by applying AI to analyze patterns across sales, inventory, and order data. By identifying trends and relationships within this data, the platform helps organizations anticipate demand fluctuations, detect potential supply gaps, and improve planning accuracy. This enables a more proactive approach to managing inventory and operations, reducing risk and improving overall efficiency.



The screenshot displays the 'Forecast Data' interface. At the top, there are several controls: a 'Notifications' bell icon, a search bar labeled 'Search for the entity', an 'Adjust Forecast' button with a pencil icon, a 'Columns' dropdown menu, a 'Download CSV' button with a download icon, an 'Import CSV' button with an upload icon, and a 'Request Approval' button with a clock icon. Below these controls is a table with the following structure:

Product	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024
Bluetooth Speaker Premium	5,098.52	5,004.78	5,159.04	5,370.3	5,368.56	5,417.82	5,533.08	5,762.34	5,689.6	5,907.86
Smart TV Budget-ZMY	7,422	8,003	8,097	8,341	8,591	8,840	8,820	8,768	8,321	8,515
Tablet Pro Budget-NJS	10,426.674	10,805.28	11,036.665	11,098.68	11,018.614	10,851.049	10,999.359	10,536.879	10,300.918	10,260.948
Bluetooth Speaker Mini-FV	12,156.866	12,399.104	12,789.275	12,989.539	12,766.287	12,555.135	12,414.343	12,113.69	11,869.028	11,607.866
Laptop Series Lite-STZ	14,478.148	14,597.681	15,267.65	15,372.425	15,411.137	15,073.855	14,771.899	14,456.31	14,149.745	14,029.214
Fitness Tracker Premium-Z	5,088.28	5,199.42	5,205.56	5,303.7	5,549.84	5,611.98	5,729.12	5,723.26	5,957.4	5,961.54
Drone Explorer Mini-NCK	8,103	8,622	8,831	8,974	9,133	9,480	9,131	9,269	9,099	9,014
Smartphone Model Premit	10,166.739	10,492.879	10,700.112	10,631.742	10,869.205	10,597.911	10,407.754	10,372.322	9,983.001	9,762.25
Drone Explorer Pro-LDO	11,721.24	11,809.86	12,111.48	12,327.1	12,568.72	12,742.34	12,894.96	13,141.58	13,391.2	13,740.82
Tablet Pro Mini-7BA	15,031.574	15,320.5	15,748.286	15,907.218	15,909.063	15,720.309	15,464.436	15,367.277	14,745.721	14,690.209

## 7.2.6 Rapid Deployment and Time-to-Value

ConverSight's QuickStart approach is designed to accelerate implementation and reduce complexity. With pre-configured models and minimal setup requirements, organizations can deploy the solution quickly and begin realizing value in a short timeframe. This rapid deployment model enables businesses to transition from manual reporting to AI without the delays and costs typically associated with traditional analytics projects.

## 8. Why ConverSight for Sage Customers

ConverSight is purpose-built to enhance ERP environments by embedding Agentic AI directly into ERP workflows. Beyond traditional reporting, ConverSight transforms Sage into a system of intelligence, enabling organizations to act faster, reduce operational costs, and uncover opportunities to drive revenue. By leveraging AI agents, users gain continuous guidance, predictive insights, and automated decision support across supply chain.

### Key Impacts

- 🌱 **Purpose-Built for Sage:** Designed specifically for Sage, ensuring seamless alignment with existing data structures, workflows, and reporting needs, while leveraging ERP data for proactive decision guidance.
- 🌱 **Agentic AI Drives Actionable Workflows:** Unlike traditional analytics tools, ConverSight's AI agents continuously monitor Sage data, detect anomalies, surface opportunities, and provide actionable recommendations—empowering users to make faster, smarter decisions across supply chain.
- 🌱 **No Heavy Customization Required:** Pre-configured AI models and storyboards reduce setup time, eliminating complex development while immediately embedding intelligent automation into daily workflows.
- 🌱 **Unified AI, Analytics, and Automation Platform:** Combines analytics, AI, and workflow automation in a single platform—replacing fragmented tools and enabling Sage users to move from insight to action seamlessly.
- 🌱 **Seamless Integration:** Connects directly to Sage systems without disrupting existing processes, preserving current investments while enhancing ERP capabilities with AI decision support.
- 🌱 **Rapid Deployment and Time-to-Value:** QuickStart implementation enables organizations to go live quickly, embedding AI workflows that save time and operational costs from day one.
- 🌱 **Empowers Business Users:** With Athena, users can interact naturally—just like a conversation with a human—and receive instant, actionable insights without any complex queries. The platform is designed to be intuitive and easily accessible, enabling non-technical users to understand and act on data effortlessly.



## 8.1 The Future of ERP is Agentic

As organizations navigate increasing data complexity and rapidly changing business conditions, ERP systems must evolve beyond their traditional role as systems of record. While platforms like Sage provide a strong operational foundation, the next phase of transformation requires the ability to turn data into timely intelligence that takes action.

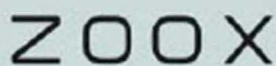
ConverSight addresses this need by introducing an AI layer that enables organizations to move from reactive reporting to proactive decision-making. By combining real-time visibility, automated insights, and intuitive access to data, it empowers teams across finance, sales, and operations to make faster, more informed decisions with confidence.

In doing so, ConverSight not only enhances the value of existing ERP investments but also positions organizations to operate more efficiently, adapt more quickly, and maintain a sustainable competitive advantage in an increasingly data-driven world.

See how quickly you can activate AI for Sage: <https://conversight.ai/request-demo>



## Join our customers who have accelerated growth with ConverSight



### About ConverSight

ConverSight is the category creator in Unified Decision Intelligence. Bringing together generative AI and advanced analytics without the traditional complexity of data science in one unified platform, so businesses can make better decisions. ConverSight's unified decision intelligence platform provides AI-powered instant custom reporting, demand forecasting, and inventory optimization using seamlessly integrated data from Acumatica and other business tools. ConverSight is an Acumatica partner, working closely with Acumatica Value Added Resellers (VARs), like at Net at Work, DSD, and Practical Software. ConverSight was named a Gartner Cool Vendor, Supply & Demand Chain Executive (SDCE) Top Software and Technology Solution 2024, and winner of the 2024 AI Breakthrough Award. Connect with ConverSight on LinkedIn, Instagram, Facebook, Youtube, tune in to the Data Insights Podcast, or visit [www.conversight.ai](http://www.conversight.ai) to learn more.

