



Sage Business Cloud Accounting

Sage Intelligence Release Notes

31 07 2018

1.0 Introduction

1.1 Document Purpose

This document has been created to clearly articulate updates made to the Sage Intelligence for Accounting product.

1.2 Intended Audience

This document will be of interest to users and advisors of Sage Accounting in the **United States, United Kingdom and Canada** regions.

Sage Intelligence supports the following languages for Sage Accounting:

- English
- FR-CA – Only for the Canada region

1.3 Project purpose

This project was undertaken to complete the following new features:

- New User Interface on landing pages
- Additional Reports

1.4 Tested Environments

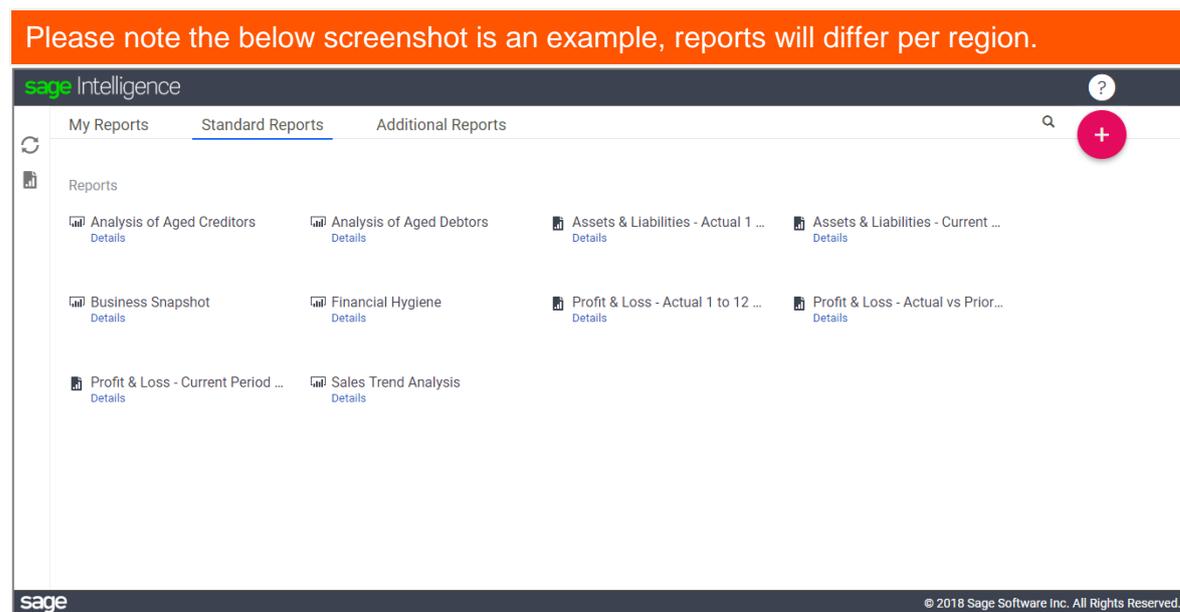
Browser	Version
Chrome (Windows Environment)	68.0.344.106
Edge (Windows Environment)	41.16299.547.0
Safari (Mac Environment)	11.1 (13605.1.33.1.2)

2.0 What is New?

2.1 User interface

With this release we have not only given Sage Intelligence a new coat of paint, we have also redefined the screen flows, making the software even more intuitive and easy to use.

When you have successfully signed into Sage Intelligence, you will see a brand new clean slick design.



2.1.1 Data load

The data load icon has been moved to the left menu and will make it easy for you to identify when your data load is in progress, when data load is successful and when data load has failed

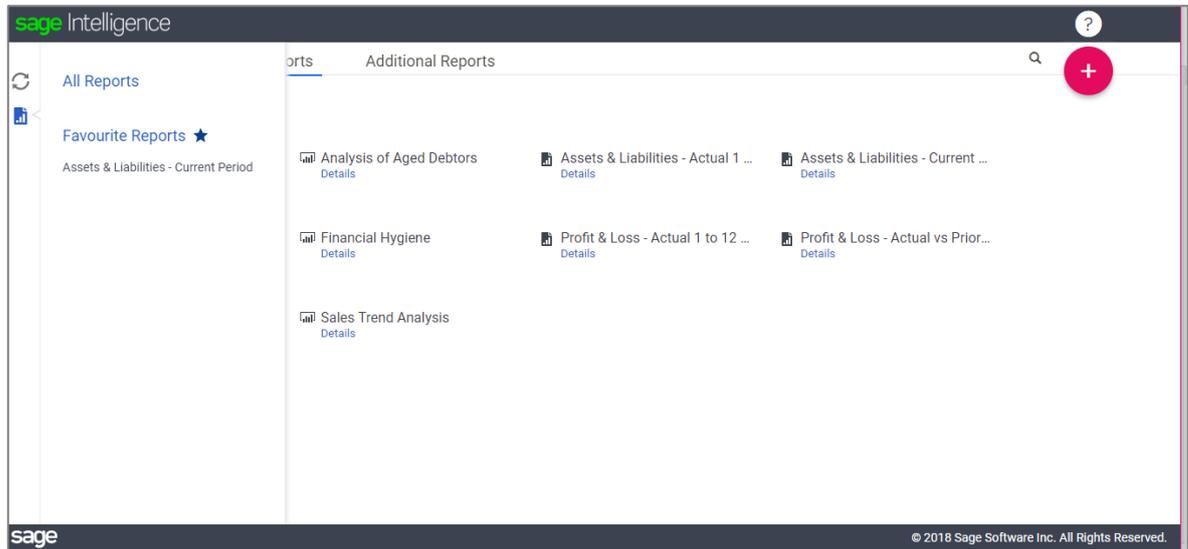
2.1.2 Favourites

Do you have a report that you run out a lot? You can now check it as a favourite report. Simply click on the Favourite from the respective report's Details tile



This will make it much easier to navigate to the reports of your choice when you need them.

You can view and run your favourited reports by hovering over the report icon, which will expand the left menu.



2.1.3 Report Details

When you land on your Sage Intelligence report screen, the interface has been transformed into a clean and calm interface. Running a report is as simple as clicking on the title. If you would like additional details on a report, such as the description or when it was last run, click on the Details link. Details will also provide actions which can be applied to the report, such as run, copy, and add to favourites.

2.1.4 Additional Reports

As you are aware, Sage Intelligence strives to give you the latest in reporting technology and reports. The additional reports feature provides a quick and easy way to release reports to you as soon as they are written, without having to wait for a new build of Sage Intelligence to be released. Keep a close eye on this tab in the menu strip for some great value add reports, which will be updated at frequent intervals.

To get you started, we have added 5 new reports to additional reports:

Overdue Customers: Flag customers who are currently overdue and owe you cash. With this report, you're also provided with the contact information for these customers so that you can follow up with them as soon as possible—thereby helping your cashflow.

Top Customers: Get a dynamic view into your top customers. This report empowers you with a map visual and a detailed page that gives you even more insight into your best customers. You also get an interactive slicer that allows you to further filter the report.

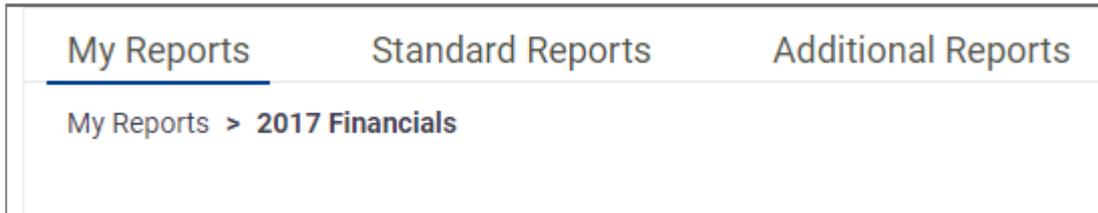
Purchase Analysis: Gain actionable insights into where, and from who, you're purchasing your goods and services. This report helps you better manage your purchasing by empowering you with a detailed look into where you spend your cash.

Stock Movement: Gain deeper insights into the quantity and the value of stock you've purchased or sold in a given period. This report gives you a view of your opening and closing stock amounts, empowering you to identify whether you're overstocked or understocked.

Cash Book Analysis: Get an accurate view of the cash you've received and paid out from your bank accounts. With this report, you're able to drill-down into the individual transactions that have taken place on a particular day or get a better view by transaction type.

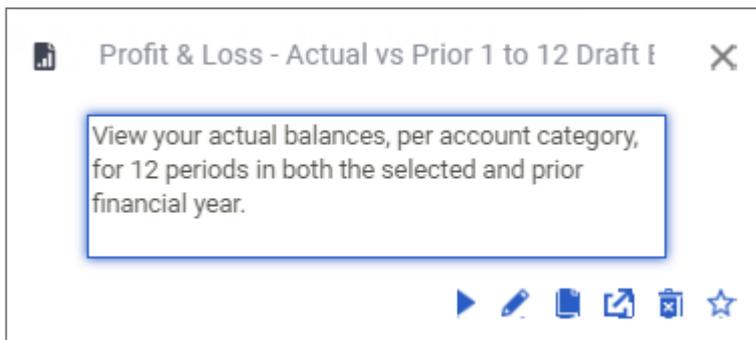
2.1.5 Page navigation

Navigation has been made simpler with the redesign of breadcrumbs when you delve into a report folder. This will help you easily file reports into folders that make logical sense. Below is an example using "2017 financials" as an example of a potential folder name.



2.1.6 Editing a "My Report" name & Description

Customising a report name and description has never been easier as it can now be done whilst still in your report library page. Simply expand the Details menu and click on the respective report's name or description to start editing its content.



3.0 Known Issues

3.1 PowerBI reports: English only

It is acknowledged that the content of PowerBI reports are only in English.

3.2 Close button dysfunctional when editing a report name or description

When the edit fields are enabled, the report close button is not functioning as expected. The user can edit the name and description, and clicks on the Close button on the Details tile, the name and description will still update.