



# Sage Intelligence for Sage Business Cloud Accounting

## Release Notes

January 2019

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# 1. Introduction

## 1.1. Document Purpose

This document describes the updates made in the January 2019 release of Sage Intelligence for Sage Business Cloud Accounting for the United Kingdom, United States, and Canada regions, and is intended for all Sage Accounting users and advisors in these regions.

## 1.2. Supported Languages

This release of Sage Intelligence supports the following languages:

- English
- French (fr-CA for the Canada region only)

## 1.3. Browser Support

This release of Sage Intelligence has been tested on the following environments:

Browser	Environment	Version
Google Chrome	Windows	71.0.3578.98 (Official Build) (64-bit)
Microsoft Edge	Windows	41.16299.785.0
Safari	Mac	12.0.2(13606.3.4.1.4)

Note: It is strongly advised to access Sage Intelligence using Google Chrome.

## 2. What's New

### 2.1. New Financial Reporting Experience

Sage Intelligence now uses embedded Excel technology to display your financial reports. The reports include a Filters pane, which enables you to update the report parameters from within the report, as well as an option to open reports in their own tabs, enabling you view multiple reports simultaneously.

The screenshot shows the Sage Intelligence interface for a Profit & Loss report. At the top, there's a 'Filters Pane' button and a 'Pop Out Option' button. The main area displays the report title 'Profit & Loss Report for the period ending 31 January 2018'. Below the title, there are filter settings for 'Company' (Sage Intelligence Demo Company UK), 'Year' (2018), and 'Current Period' (4). The report table includes columns for 'Actual Jan', 'Actual YTD Jan', and 'Actual YTD Sep'. The data shows various income and expense items like Sales, Direct Expenses, and Overheads, along with their respective values for each period. At the bottom, there's a note 'Profit & Loss - Current Period' and a copyright notice '© 2019 Sage Software Inc. All Rights Reserved.'

#### 2.1.1. Filters Pane

Your financial reports now include a Filters pane, which enables you to change the report parameters and settings from within the report. When you run out a report, the Filters pane is collapsed, so that more space is available for the report data. Click **More** to expand the pane and view all the available parameters and settings. If you make any changes, click **Calculate** to apply your changes to the report data.

This screenshot shows the same Sage Intelligence interface as above, but with the 'More' button expanded to reveal additional filter options. The expanded pane includes 'Title Period' (Current Period), 'Show Period Number in Column Heading' (unchecked), and 'Hide Zero Rows' (checked). The rest of the interface remains the same, showing the report title and data table.

**Note:** When you select **Show Account Detail**, the **Show Subtotals at Bottom** option appears in the expanded Filter pane.

## 2.1.2. Pop Out Option

You can open any report in a new browser tab by clicking **Pop Out** at the top-right of the report. Once you've popped a report out into its own tab, it remains open while you continue to work in the main Sage Intelligence tab. Pop multiple reports out in to their own tabs for side-by-side comparisons.

	Actual Jan	Actual YTD Jan	Actual YTD Sep
Sales	218 324	1 097 262	1 949 309
Direct Expenses		250 698	609 183
<b>Gross Profit</b>	<b>218 324</b>	<b>846 564</b>	<b>1 340 126</b>
<b>Gross Profit %</b>	<b>100%</b>	<b>77%</b>	<b>69%</b>
Other Income		2 000	2 060
<b>Total Income</b>	<b>218 324</b>	<b>848 564</b>	<b>1 342 186</b>
Overheads	25 438	105 150	209 378
Depreciation	244	975	1 950
<b>Net Profit/(Loss)</b>	<b>192 642</b>	<b>742 439</b>	<b>1 130 858</b>
<b>Net Profit %</b>	<b>88%</b>	<b>68%</b>	<b>58%</b>

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### 3. Removed Features

#### 3.1. Drill Down on Values in Online Reports

From this release of Sage Intelligence, you can no longer drill-down on the values in your online reports. To view the amounts that make up each value, download the report to your desktop Microsoft Excel application, and use the **Drill Down** option in the Task Pane.

## 4. Fixes

The following known issues from previous releases have been resolved in this release of Sage Intelligence:

Issue	Resolution
Power BI dashboards not running when the name contains a full stop (.) character.	Because Power BI dashboards do not run when the name contains a full stop, Sage Intelligence prevents you from saving a dashboard with a full stop in its name, and notifies you to remove the full stop.
Data load fails if the Financial Year End Date is 28 February xxxx.	The data load failed when a company's financial year end date is 28 February for any year. This has been resolved.
Power BI dashboard sheet tabs hidden behind Sage footer bar.	Depending on your screen resolution and browser window zoom, the tabs for each Power BI dashboard sheet were hidden behind the Sage footer bar. This has been resolved so that the tabs are always visible and accessible.
Favourite menu scroll bar scrolling the application as a whole.	The scroll bar on the Favourite Reports side menu was scrolling the whole application. This has been resolved so that it only scrolls the Favourite Reports side menu.

## 5. Known Issues

The following issues have been identified in this release of Sage Intelligence:

Issue	Resolution
If you refresh Sage Intelligence while viewing a report, the system detects it as a new session, and an <b>Existing Session Detected</b> error message appears.	Do not refresh Sage Intelligence while viewing a report. If you do so, and the <b>Existing Session Detected</b> error message appears, close the tab and launch Sage Intelligence again.
If you leave Sage Intelligence idle for more than 15 minutes, reports you run out following the idle period appear blank.	If you leave Sage Intelligence idle for more than 15 minutes, close the tab and launch Sage Intelligence again before you run out reports.
If two users log in to Sage Intelligence simultaneously using the same credentials, the user who logs in last will have access to Sage Intelligence, and the initial user will be logged out.	
Sage Intelligence does not support the copying of report URLs for access on another tab or for sharing.	To share a report, download it as an Excel workbook or PDF.
In the <b>Add a Set of Rows</b> dialog box, when you click on a column header's Filter icon in the Available Rows grid, the context menu does not appear.	Scroll through the grid for the ledger account you want to add.