



Sage Intelligence for Sage Business Cloud Accounting

Release Notes

February 2019

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1. Introduction

1.1. Document Purpose

This document describes the updates made in the February 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	72.0.3626.109
Google Chrome	Mac	72.0.3626.109
Microsoft Edge	Windows	44.17763.1.0
Mozilla Firefox	Windows	65.0.1
Safari	Mac	12.0.3

Note: We strongly advise that you use Google Chrome to access Sage Intelligence.

2. What's New

2.1. Management Packs

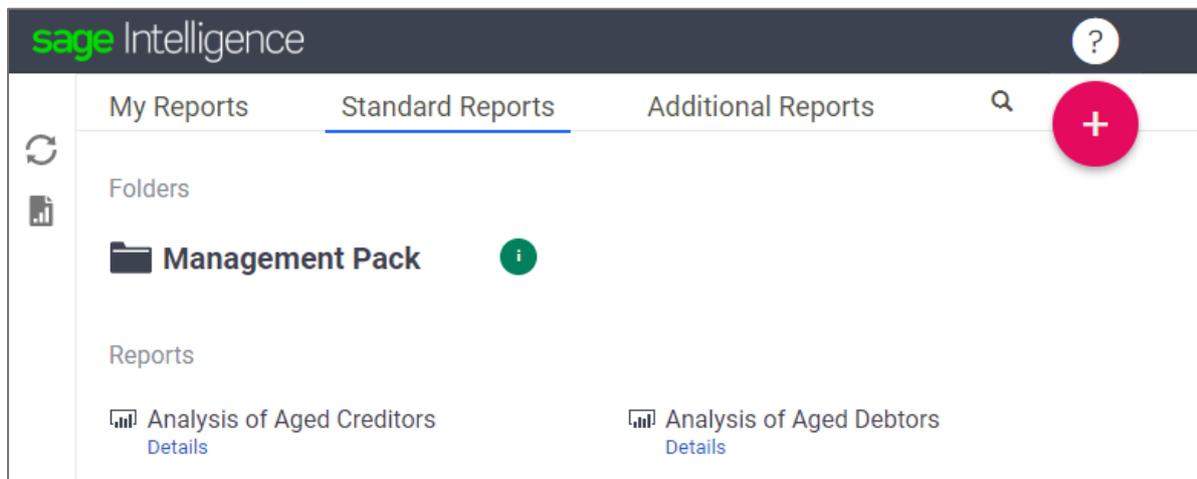
Sage Intelligence now enables you to generate management packs, which include multiple reports and text pages. Management packs help you regularly analyze your financial position, helping you make informed business decisions.

Each management pack includes the following:

- **Cover Page:** The first page of a management pack includes key details about the information in the pack, including the company, fiscal year, and month for which the pack was run.
- **Report Pages:** Each report linked to the pack appears on a separate page.
- **Notes Page:** The notes enable you to add comments and insights into the report data.

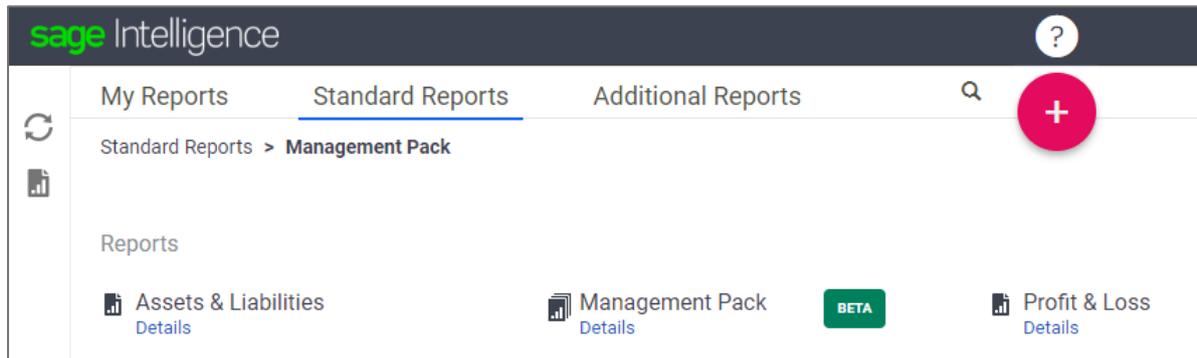
2.1.1. The Standard Management Pack

Sage Intelligence has prepared a ready-to-use management pack that provides a monthly analysis of your financials. You'll find it in the new **Management Pack** folder on the **Standard Reports** page.



Tip: Hover your mouse over the information icon to the right of the folder to access video tutorials for working with this new feature.

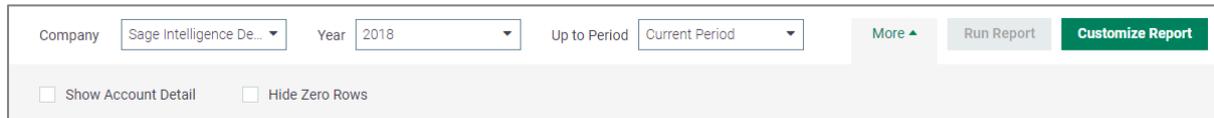
The folder includes the management pack, which you can identify by its unique icon (📁), and custom reports that are linked to the pack. Click the name of the management pack to run it out.



Note: The first release of management packs is a BETA release, and we'd love to hear what you think of it. Click the BETA icon to the right of the management pack to send us your feedback.

2.1.2. Management Pack Filters Pane

Management packs run out using a saved set of filter values. In the Filters pane above the pack, you can adjust the filter values, including the company, fiscal year, and periods to be shown in the reports.



When you run out a pack, 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, including:

- **Show Account Detail:** Includes the accounts in each account category in the reports, rather than only showing the account categories.
- **Hide Zero Rows:** Removes zero balance accounts from the reports.
- **Show Subtotals at Bottom:** Shows the account category subtotals at the bottom of each category, rather than at the top. This option only appears when you have selected **Show Account Detail**.

If you make any changes, click **Run Report** to apply your changes to the report data. To save these values as the defaults used when you run out the pack, in the toolbar above the Filters pane, click **Save**.

If you'd like to change the reports linked to the pack, click **Customize Report**, as described in *Management Pack Customization Options*.

2.1.3. Management Pack Toolbar

The toolbar above the Filters pane provides options for returning to the folder in which the management pack is saved, saving the pack, popping it out in to a separate tab, or downloading it to Microsoft Word.



- **Back:** Takes you back to the folder in which the management pack is saved.
- **Save:** Saves your filter values as the defaults used when you run out the management pack.
- **Save As:** Saves a copy of the management pack to your **My Reports** page, so that you can change the linked reports without impacting the original pack. The standard management pack cannot be edited, so use this option to make a copy of it if you'd like to change the reports linked to the pack. When you make a copy of the standard management pack, the Notes section is removed, leaving space for you to add your own comments and observations when you download the pack to Word.
- **Pop Out:** Pops the management pack out in to its own tab, without a Filters pane. The management pack will remain available in the new tab while you continue to work in the main Sage Intelligence tab. Pop multiple packs out in to their own tabs for side-by-side comparisons.
- **Microsoft Word:** Downloads the management pack as a Word document. In Word, you can format and customize the look and feel of the pack, as well as add your own notes and comments.

2.1.4. Management Pack Customization Options

You can change the reports linked to a management pack to any include any of your Sage Intelligence reports. In the Filters pane, click **Customize Report** to view the reports currently linked to the pack. Each report appears in its own report box.

The screenshot shows the Sage Intelligence interface with three report boxes. Each box is titled 'FINANCIAL REPORT' and has a close button (X) in the top right corner. The first box has 'Report Title' set to 'Profit & Loss' and a 'Browse' button. The second box has 'Report Title' set to 'Assets & Liabilities' and a 'Browse' button. The third box has an empty 'Report Title' field and a 'Browse' button. A 'Save & Run' button is located in the top right corner of the interface.

- To unlink a report from the management pack, click the **X** in the top-right corner of the report box.
- To link a new report to the management pack, scroll to the first blank report box, and click **Browse**. The **Link a Report** dialog box appears, listing all the available reports. Reports already linked to the pack appear greyed out at the top of the list. Use the **Search** box to find a specific report. Once you have selected a report, click **Link**.

The 'Link a Report' dialog box is shown with a search bar at the top. Below the search bar is a list of reports. The first two reports, 'Assets & Liabilities' and 'Profit & Loss', are greyed out. The remaining reports are: 'Assets & Liabilities - Actual 1 to 12', 'Assets & Liabilities - Current Period', 'Monthly Profit & Loss', 'Profit & Loss - Actual 1 to 12', 'Profit & Loss - Actual 1 to 12 & YTD', 'Profit & Loss - Actual vs Prior 1 to 12', 'Profit & Loss - Current Period & YTD', and 'Sales vs Budget'. At the bottom of the dialog box are 'Cancel' and 'Link' buttons.

When you've made all the necessary changes, click **Save & Run** to save the changes and run out the management pack.

Note: The standard management pack cannot be edited. If you change the reports linked to this pack, you will be prompted to save a copy of your changes when you click **Save & Run**.

We recommend that you only link reports that include a maximum of twelve columns, including spacers. This is because when the management pack is run, the width of the report columns is reduced to fit the report on to a single landscape page. A report with more than twelve columns might appear condensed and difficult to read.

When your report includes twelve or more columns, the values in the report will be rounded as follows:

Before Rounding	After Rounding
0	0
12	12
136	136
1567	1.6k
12890	12.9K
134798	134.8k
1678344	1.7M
67567890	67.6M
123456789	123.5M
1456789565	1.5B

If a report has more than sixteen columns, the rows are extended to double height.

Tip: If you need to include more than twelve columns in a report, we recommend that you split the report into multiple reports, and then pop them out to view them side-by-side.

3. Removed Features

No features have been removed from this release.

4. Fixes

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

Issue	Resolution
Language detection	Sage Intelligence's system language is only determined by the user's locale as specified on the Sage Business Cloud Accounting system.
User interface updates	User interface elements are now responding correctly when a financial report. We've also changed certain cursor types in different areas within Sage Intelligence to help you to know which actions are expected from you.
Special character support in report names	Updates have been made to ensure that only supported characters are allowed in report names.

5. Known Issues

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

Issue	Resolution
Report pop out shows an error message when in private mode in Microsoft Edge and Safari.	Please use standard mode in Microsoft Edge and Safari, or use an alternate browser. For the best experience, we strongly recommend that you use Google Chrome to access Sage Intelligence.
French users only: If the “up to period” field is left blank when running out a report, it will default to current period.	Please select the period up to which you would like to run the report. To see the entire financial year, select period 12.