

# What's New

## Sage UBS version 9.9.5.6

Release Date:  
3<sup>rd</sup> August 2021

### Important Notes

- You will need to disable your Anti-virus before you install the new update as some Anti-virus can interfere and prevent a successful installation.
- After successfully installing the update (whether via Online Update or using the Installer), you must restart your computer for the configuration changes to take effect.

### V9.9.5.6 Updates

The following enhancements are being released:

#### **New Dashboard in Modern View**

#### **Useful Fixes**

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# New Dashboard in Modern View

The system is now updated with improved Dashboard capabilities to provide you better usability in meeting your reporting needs.

## Comparison between Classic and Modern Dashboard

Classic	Modern
<ul style="list-style-type: none"> <li>Maximum reports to view at a time: 2</li> <li>Dashboard layout is static</li> </ul>	<ul style="list-style-type: none"> <li>Maximum reports to view at a time: Up to 6</li> <li>Dashboard layout allows:                             <ul style="list-style-type: none"> <li>to select display layout (2 or 3 in a row)</li> <li>to add / remove / re-position report card</li> <li>to expand report for better visibility</li> <li>to switch report which is under same category in the same card</li> <li>Mouse hover to show detail for the respective bar</li> <li>to cancel the refresh process if user accidentally click on refresh button</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Dashboard reset to default every time when open the application</li> </ul>	<ul style="list-style-type: none"> <li>Last viewed record will be kept and shown</li> </ul>
<ul style="list-style-type: none"> <li>Access right to the reports</li> </ul>	<ul style="list-style-type: none"> <li>Access right to the reports</li> </ul>
<ul style="list-style-type: none"> <li>Other Action(s)                             <ul style="list-style-type: none"> <li>Copy Image</li> <li>Save Image As</li> <li>Print</li> <li>Show point value</li> <li>Zoom / Un-zoom</li> <li>Back to default</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Other Action(s)                             <ul style="list-style-type: none"> <li>Copy Image</li> <li>Save Image As</li> <li>Print</li> <li>Export to Excel</li> </ul> </li> </ul>

## Features / Functions:

The screenshot shows the Sage UBS dashboard interface with several callouts explaining features:

- Expand Chart:** "Click here to expand the chart for better visibility" points to the expand icon on the '12 Months - Chart Revenue' card.
- Refresh Report:** "Click to refresh the selected report" points to the refresh icon on the 'Net Profit - Chart' card.
- Switch Category:** "Click on the dropdown menu to switch the report which is under same category" points to the dropdown menu on the 'Net Profit - Chart' card.
- Other Actions:** "Click here for other actions" points to the actions menu icon on the 'Net Profit - Chart' card.
- Dashboard Layout:** "You can choose whether to view the dashboard with 2 or 3 cards in a row" points to the 'View By:' layout selector.
- Add Report:** "Click here to Add, Remove or Re-position report to be displayed in dashboard" points to the plus icon for adding reports.

The dashboard includes the following components:

- Accounting Dashboard:** A sidebar menu with options like Dashboard, Customers & Sales, Suppliers & Purchases, Banking, Journals, and Shortcuts.
- 12 Months - Chart Revenue:** A bar chart showing revenue from Jan-15 to Dec-15. A callout menu is open showing actions: Remove, Copy, Save Image as, Export to Excel, and Print.
- Net Profit - Chart:** A line chart showing net profit from Jan-15 to Dec-15.
- 12 Months - Chart Cost:** A bar chart showing costs from Jan-15 to Dec-15.
- Debtors with outstanding exceeding 3 months:** A table listing account codes, names, and overdue amounts.

Account Code	Name	Overdue Amount (P3 Months)
3000AD1	Andy Sdn. Bhd.	0.50
3000AD1	Andy Sdn. Bhd.	0.50
3000AD1	Andy Sdn. Bhd.	0.50
3000AD1	Andy Sdn. Bhd.	0.50
3000AD1	Andy Sdn. Bhd.	640.14
3000AD1	Andy Sdn. Bhd.	1,127.42
3000AD1	Andy Sdn. Bhd.	2,120.00
3000AD1	Andy Sdn. Bhd.	2,120.00
3000AD2	Apple Mini Store	343.44
3000AD2	Apple Mini Store	150.73
3000AD2	Apple Mini Store	114.48
3000AD2	Apple Mini Store	451.00
3000AD3	Applegreen Mart Sdn. Bhd.	728.97
3000AD3	Applegreen Mart Sdn. Bhd.	66.66

Now, the new dashboard setting will be by user ID to address the following flexibility:

- different users may be assigned to handle different tasks,
- users can customize dashboard layout based on own preference.

If your company already has the report setting done, the same security will be applied in new dashboard  
 Note: both Classic and Modern share the same setting.

**User Defined KPI** ✕

By User ID User ID: ADMIN

Description	Pin 0	Pin 1	Pin 2	Pin 3	Pin 4	ADMIN
▶ Profit and Lost for 12 months - Chart	✓	✓	✓	✓	✓	✓
Cost for 12 months - Chart	✓	✓	✓	✓	✓	✓
Revenue for 12 months - Chart	✓	✓	✓	✓	✓	✓
Expenses for 12 months - Chart	✓	✓	✓	✓	✓	✓
Net Profit for 12 months - Chart	✓	✓	✓	✓	✓	✓
Top 10 overdue supplier	✓	✓	✓	✓	✓	✓
Top 10 overdue customer	✓	✓	✓	✓	✓	✓
6 months AR Aging - Chart	✓	✓	✓	✓	✓	✓
12 months AR Aging	✓	✓	✓	✓	✓	✓
Debtors with outstanding exceeding 3 months	✓	✓	✓	✓	✓	✓
Customer Outstanding Analysis	✓	✓	✓	✓	✓	✓
Monthly Collection by Agent (Period 1 - 6)	✓	✓	✓	✓	✓	✓
Monthly Collection by Agent (Period 7 - 12)	✓	✓	✓	✓	✓	✓

Print... Mark All Unmark All Exit

For reports where the user has no right to view, the label “You do not have permission to view this report” will be shown.

12 Months - Chart

Profit and Loss ▼

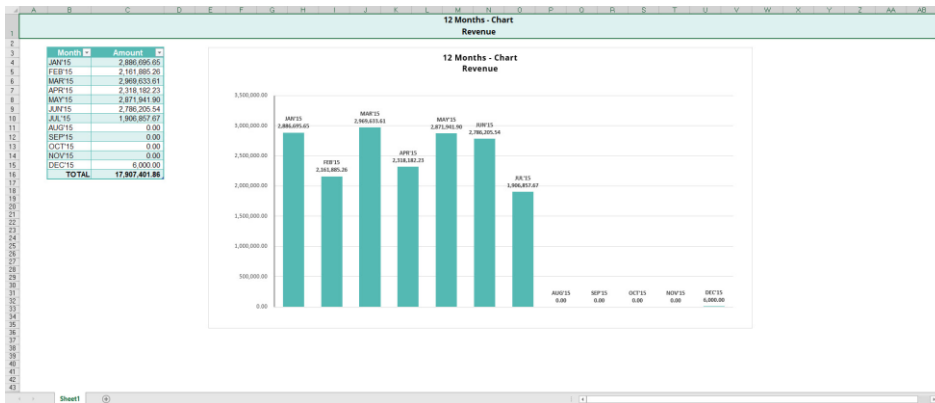
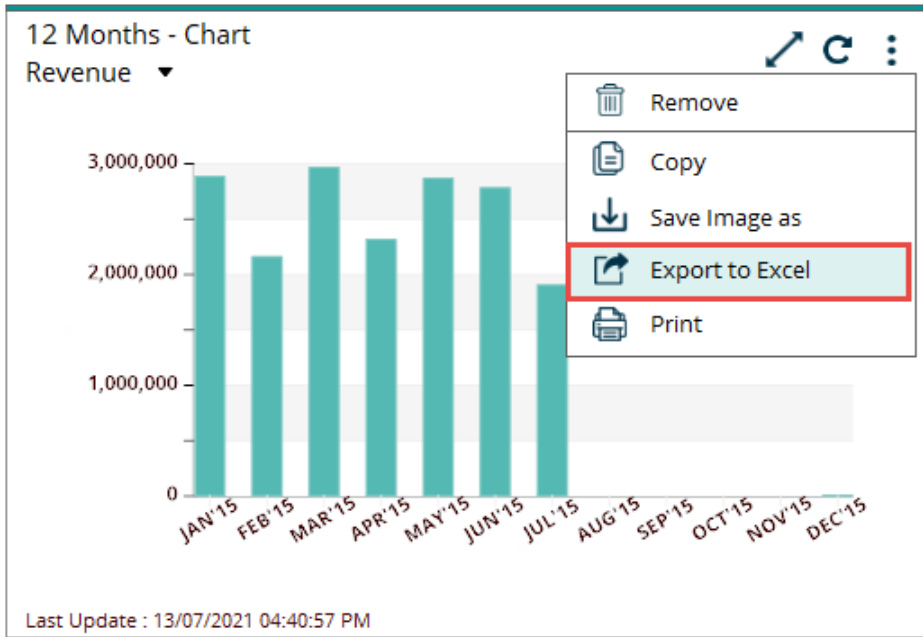
You do not have permission to view this report.

Contact your account admin to get access.

Last Update : 12/07/2021 03:49:39 PM

**Other Action – Export to Excel**

User can now export the chart information to Excel for analysis purpose.

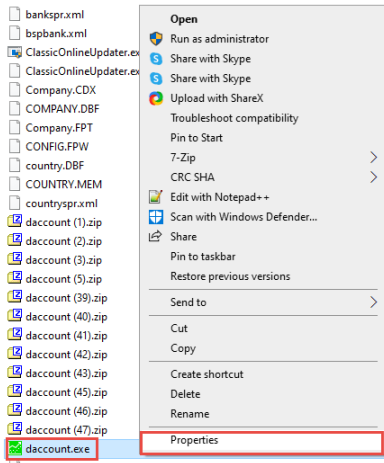


**Important Note:**

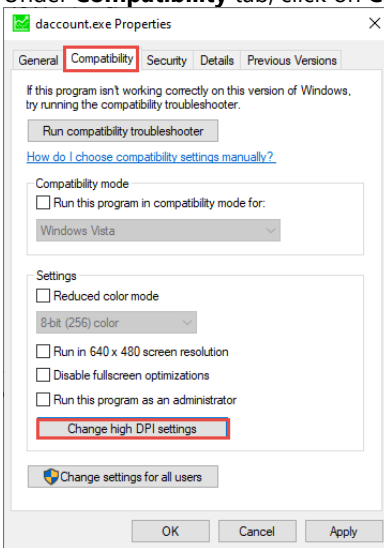
For optimal use of the Dashboard function, please set Windows scale and layout setting to 100%.

After upgraded to v9.9.5.6, system will by default help you to do the following setting to achieve optimal usage. If for any reason the setting is not updated accordingly during the upgrade process, you may follow steps below to manually set for both Accounting & Billing and Inventory & Billing .exe files.

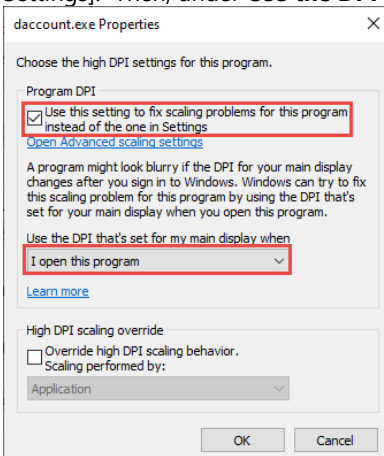
1. Go to **UBSACC2015** and **UBSVSTK2015** folder...Right click on the .exe file (example shown here is daccount.exe) ...Select **Properties**



2. Under **Compatibility** tab, click on **Change high DPI settings** button



3. Please tick on the checkbox for [Use this setting to fix scaling problems for this program instead of the one in Settings]. Then, under **Use the DPI that's set for my main display when**, select option **I open this program**.



## Useful Fixes

No	Case ID	Brief Description
1	SAA1- 2094	<p><b>Issue:</b></p> <ul style="list-style-type: none"><li>Transaction with tax code ETS (using SST Field 18c tax method) is not captured and show in SST Return</li></ul> <p><b>Resolve:</b></p> <ul style="list-style-type: none"><li>The taxable amount will now be captured and display correctly in SST Return, field 18c</li></ul>
2	SAA1- 2102	<p><b>Issue:</b></p> <ul style="list-style-type: none"><li>Invoice reference number with special character which not supported by Windows are not able to send email from system.</li></ul> <p><b>Resolve:</b></p> <ul style="list-style-type: none"><li>UBS will now be converting the file name with special character to the character which supported by Windows. You can now enjoy the email feature without issue.</li></ul>

\*\*\*\*\* End \*\*\*\*\*