

## Overview of Innovations in Version 2.3

Dear Isabel 6 User,

You know how much we appreciate and benefit from your feedback and opinions. The 10 new features in the new version of Isabel 6 have been developed thanks to a close co-operation with our customers, personal interviews and prototype testing by some clients:

1. REPORTS CREATED IN THE BACKGROUND WHILE YOU CONTINUE TO WORK
2. ENVELOPES FOR EASIER GROUPING OF YOUR PAYMENTS
3. TRANSACTIONS TAB: A LARGER NUMBER OF TRANSACTIONS DISPLAYED
4. PAYMENT SIGNATURES: UP TO 100 PAYMENTS
5. DEFINE YOURSELF HOW YOU WOULD LIKE TO SEE THE ACCOUNT INFO OR TRANSACTIONS DISPLAYED AT THE START
6. SHARING ALL THE COUNTERPARTIES
7. ACCOUNT INFO TAB: ADDITIONAL FILTER
8. ACCOUNT INFO TAB: MORE TRANSACTIONS DISPLAYED
9. ISABEL 6 COMPATIBLE WITH INTERNET EXPLORER 9
10. REVOKING A SEPA DIRECT DEBIT VIA ACCOUNTANCY OR ERP PROGRAMS

### 1. Reports created in the background while you continue to work

*From now on, creating reports on-line in Isabel 6 will be even easier. The report is created in the background, while you continue to work. The principle remains valid even for big reports including a large number of transactions. You are automatically informed when the report is ready.*

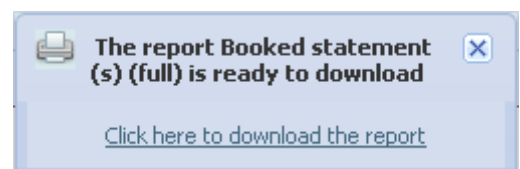
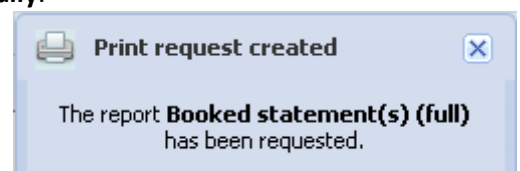
The new version enables you to print a larger number of transactions in your reports, under the Account Info and Transactions tabs. The limit of an on-line report was previously 700 transactions. With the 2.3 version, you can include up to **3,000 transactions in a single report**.

**The function's user-friendliness has also been improved.**

When you create a report, Isabel 6 **prepares it for you in the background, while you continue to work**. When the report is ready to be downloaded, you will be notified **automatically**.



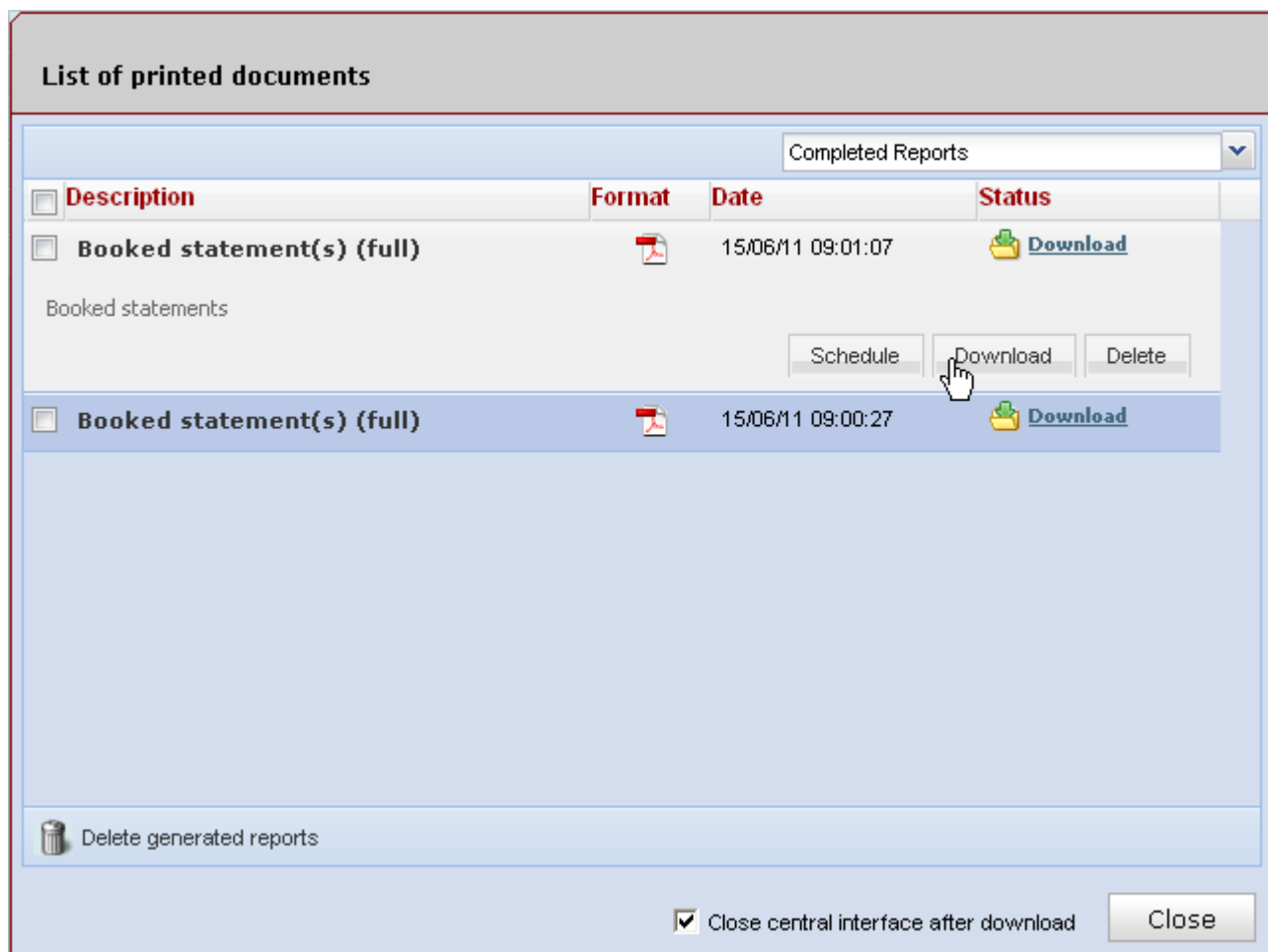
1. If you create a print-out (*Show PDF - Export TXT*), a small screen opens bottom right and notifies you that a print request has been created.
2. A second small screen opens to inform you when your report is ready for downloading.



You can see and manage all your reports via the **Reports Overview** function in the top left menu of each tab.



A list of all your reports is kept up-to-date in the *List of printed documents*. You can download, delete and even programme reports automatically, according to your needs. You can plan ahead the creation of reports: the reports thus programmed will then be run automatically on every working day, at 8 o'clock in the morning, and your report will be waiting for you when you arrive at your desk.

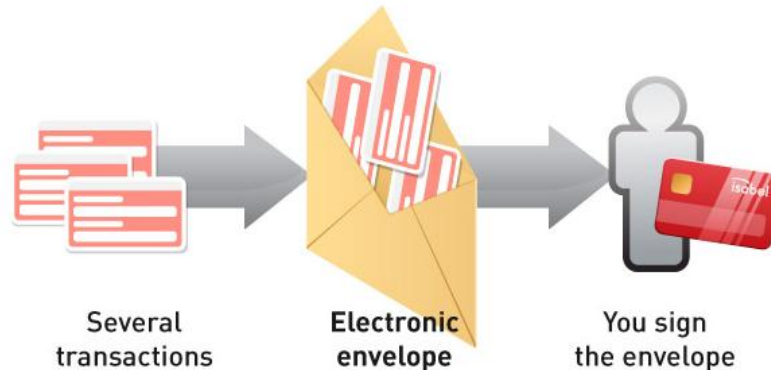


Advice: Please note that the on-line creation of a report containing several thousand transactions can take a certain time. In order to accelerate this function's performance, we would advise you to use it during off-peak hours.

More info in the [Isabel 6 manual](#)

## 2. Envelopes for easier grouping of your payments

The new version enables you to work with virtual envelopes. This function helps you to sort more easily and to classify your many transactions in Isabel logically. A single envelope can contain several transactions.

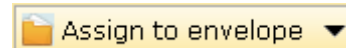


Users who have worked with the earlier version of Isabel (Isabel Business Suite 5.0) are already well aware of the envelope principle. This is how it works: create several transactions and simply group them into a **digital envelope**. This function is highly practical and offers you an overview of all the grouped transactions under the *Transactions* tab. You can therefore henceforth create envelopes which will occupy only a single line on your screen but which can contain hundreds of transactions.

### How to allocate a transaction to an envelope?

In order to allocate a transaction to an envelope, use the **Assign to envelope** button in 3 ways:

1. If you create a payment, via the *Payment wizard*.



**NB:** you cannot create an envelope if you use the *International Payment* or *Domestic Payment* wizard. Eventually, these wizards will disappear. We would advise you always to use the *Payment* wizard.

2. Via the *Upload of files* wizard
3. Under the *Transactions* tab, you can select transactions and drag them into an envelope.

- The envelope is represented by an icon (folder) under the *Transactions* tab. To open or close the envelope, you just have to click on the + or - sign of the *Transactions* tab. That enables you to see



- You can easily add a new transaction to an existing envelope, or remove transactions from an envelope.
- You can gather several transactions into a single envelope. You thus create a virtual group of payments. These payments can depend on different banks and can be signed or not.
- You can sign in a single go more than 20 transactions gathered in an envelope.
- You choose the name that you would like to give to the envelope.

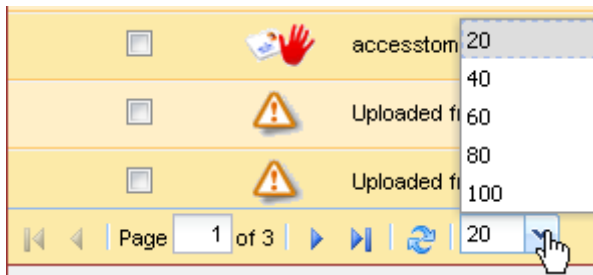
- Filters accelerate the display of the transactions whether or not allocated to an envelope (*Transactions allocated to an envelope/Transactions not allocated to an envelope*).
- The colour of the envelope depends on the transactions that it contains:
  - Green envelope: all the transactions are signed completely
  - Orange envelope: one or more signatures for the transactions contained in the envelope is/are missing
  - Blue envelope: all the transactions are ready to be signed
  - Yellow envelope: all the transactions have the 'to be completed' status
  - Red envelope: all the transactions have an error status
  - Striped envelope: all the transactions have a different status



More info in the [Isabel 6 manual](#)

### 3. Transactions tab: a larger number of transactions displayed

The number of transactions displayed under the *Transactions* tab has been increased from 20 to 100. For memory, an envelope occupies only a single line but it can contain several hundred transactions.



### 4. Payment signatures: up to 100 payments

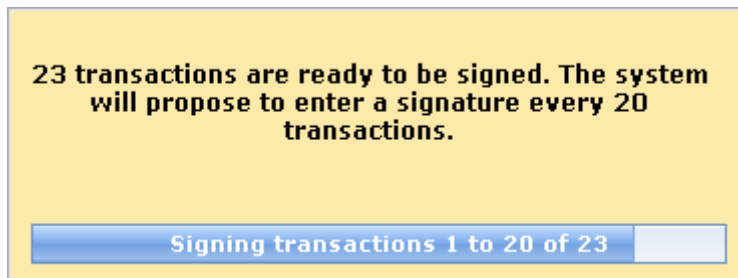
*Up to now you have been able to sign up to 20 transactions in a single go. This limit has been taken to 100 in order to accelerate the selection and signature process.*

1. Specify first the number of transactions that you would like to see displayed under the *Transactions* tab.

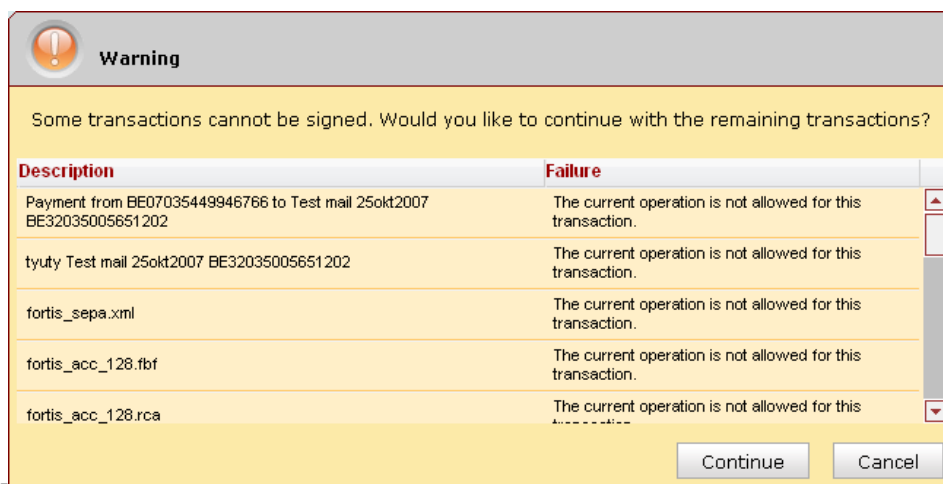


2. Select the transactions to be signed (maximum 100 per page) and click on **Sign**.

- The usual signature screen opens. Bottom right, a small screen indicates the number of transactions that you are going to sign. You have to **reintroduce your signature after every 20 transactions**. The number of transactions still to be signed is displayed in the status bar.



If your selection contains transactions that cannot yet be signed, Isabel will automatically inform you.



More info in the [Isabel 6 manual](#)

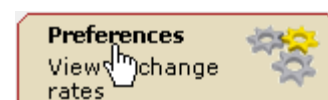
## 5. Define yourself how you would like to see the Account Info or Transactions displayed at the start

*You can determine how your account information and transactions have to be displayed when you start Isabel 6. In the previous versions, you had to change the standard filter at the start each time before being able to change the first page (in order to see the files to be signed, for example).*

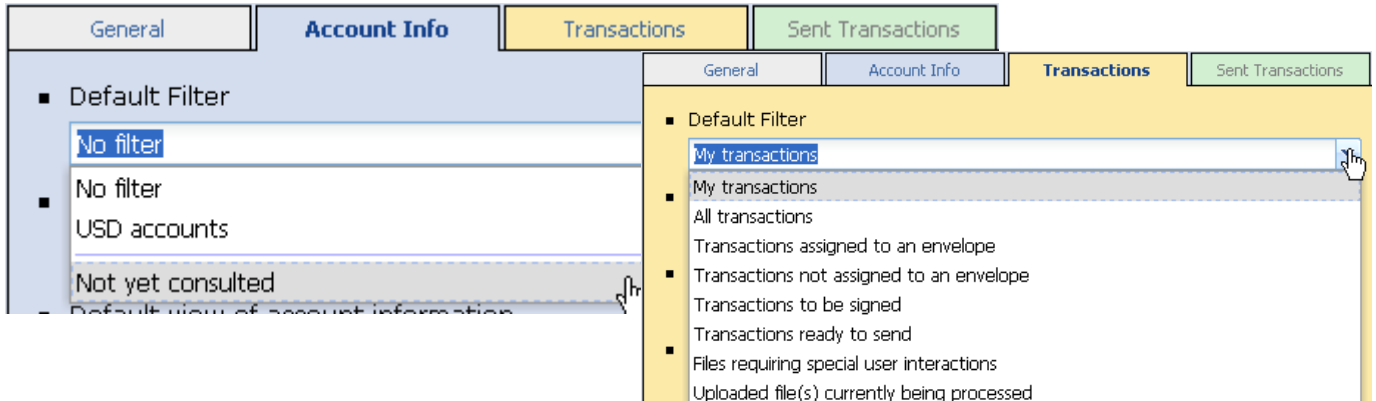
You can from now on save a standard filter that applies to the *Account Info* and *Transactions* tabs.

### Configuring a filter for the Account Info or Transactions tab

- On the main screen, choose **Preferences**. Then click of the **Account Info** or **Transactions** tab.



- Choose the *Not yet consulted* filter in order to see the accounts that you have not yet examined. Several standard filters are proposed for the Transactions tab.



- Re-start Isabel 6 in order to see the result of the changes. The filter that you have defined is run when the program starts.

## 6. Sharing all the counterparties

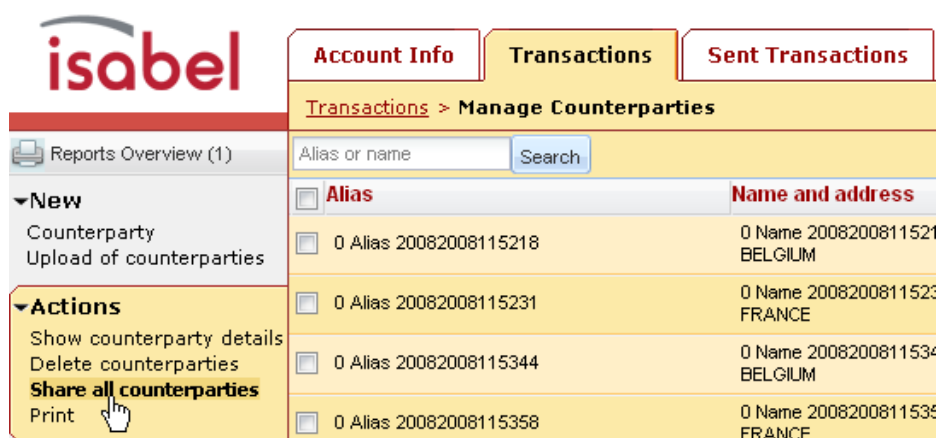
*This function enables you to share all the counterparties with colleagues in the context of the existing eBanking contract. Until now, you could share counterparties with colleagues only at the time of their creation or their importation.*

When migrating from Isabel Business Suite 5.0 to Isabel 6, we noticed that:

- Users were forgetting to share counterparties at the time of their creation or importation
- Problems were arising when adding a new bank

How to share counterparties later on?

Under the **Transactions** tab - **Counterparties** (Managing menu)- choose **Share all counterparties** (Actions menu).



Note : the optional MultiSign module must be activated if you want to share all beneficiaries. Sharing beneficiaries is only possible within the same profile.

## 7. Account Info tab: additional filter



A new filter - *Not yet consulted* – has been added. It enables you to see the accounts that have been updated but not yet consulted. These accounts are displayed in bold in the Account Info list

## 8. Account Info tab: more transactions displayed

Until recently you could display up to 700 transactions in the Account Info screen. This has been increased to 2500. This solution is valid for booked transactions as well as for intraday statements.

## 9. Isabel 6 compatible with Internet Explorer 9

This new version of Isabel 6 is compatible with **Internet Explorer 9 (32-bit version)**. The 64-bit versions are not supported.



## 10. Revoking a SEPA direct debit via accountancy or ERP programs

Customers who load European direct debits into Isabel 6 (SEPA direct debit) via their accountancy or ERP system can from now also load revocations of those European direct debits ('reversal messages').

## Isabel 6 Tips & Tricks Newsletter

In order to receive practical advice on a regular basis that will help you to use Isabel 6 with even greater efficacy, subscribe to our [monthly newsletter](#).

Isabel 6 is constantly evolving. If you have any other ideas for improvement, please send them to [customervoice@isabel.eu](mailto:customervoice@isabel.eu)