

Sage 300

Construction and Real Estate

Sage Document Management

Release Notes

Version 13.1

**This version of the software
has been retired**

sage

This is a publication of Sage Software, Inc.

Version 13.1

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Before You Begin

Read the Supporting Documentation Before You Install

In addition to reading this document, read the following supporting documentation before you install:

- The [Document Management User's Guide](#) includes installation instructions, system requirements, and contact information.
- The [Installation Checklist](#) contains a brief description of the steps involved in upgrading your software.

You can access a [complete library of supported product documents](#).

To learn more about this release, see [Knowledgebase article KB1310](#).

Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**
- From your browser, visit <https://sageu.csod.com/>

Contact your business partner for local training.

Technical Assistance

Depending on your Sage Service Plan, you may be able to take advantage of the services shown in the following chart. Please keep in mind, our response times can be longer during peak times.

Type of question	Recommendation	Response time goals	How to reach us
How-to or step-by-step instruction	Sage Knowledgebase Find answers to your questions and subscribe to articles.	Available 24/7	Sage Customer Portal Log on and click "Knowledgebase"
Quick inquiry	Live Chat Chat online with a customer support analyst.	No waiting	Sage Support Live Chat page Enter your name, email address, product, & question
Complex, but not urgent	Online Support Request Submit your questions through a web form for our customer support analysts to contact you.	Within 2 hours	Sage Customer Portal Log on and click "Cases"
Complex and/or urgent	Customer Support Call Center Work with one of our customer support analysts over the phone.	3 minutes or less	800-551-8307

Hours

Live Chat: Monday through Friday from 6 AM to 3 PM Pacific time, with the same exceptions as telephone support (see below).

Telephone Support and Online Support Request: Monday through Friday from 6 AM to 5 PM Pacific Time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific Time (closed for staff meetings)
- Standard United States holidays

Upgrading your service plan

If you would like to renew a service plan or upgrade your service plan (such as to add telephone support), please call **800-858-7098**.

Submitting enhancement requests

We want to hear your suggestions for improving the software. To send us your comments, select **Help > Sage on the Web > Submit Enhancement Requests**.

General Topics

For more information, see [Knowledgebase article KB1310](#).



CAUTION: If you install DocuVault on a server with the Windows Server 2012 operating system (64 bit), DocuVault printer and native file functionality will only be available on Document Management client workstations with a 64-bit operating system.

Upgrade Information for Document Management

You must install one or more of the following products before you install Document Management:

- Sage 300 Construction and Real Estate 13.1
- Sage Estimating 13.1

Upgrade Path

You must upgrade to Document Management 9.7, 9.8, or 12.1 in order to install 13.1.

If you are upgrading from 9.5 or 9.6, install 9.8 before installing 13.1. You should already have set up Document Management security.

If you are using a version earlier than 9.4, you must first upgrade to 9.4, then to 9.8, then to 13.1.

If you are upgrading from 9.4.1 or earlier, you must set up security in Desktop after you have installed 9.8, and BEFORE installing 13.1. See **Chapter 6: Document Management Security** in the Document Management [Document Management User's Guide](#) before you begin the upgrade process.



IMPORTANT: Before you install Document Management, check with your business partner to ensure you have the latest updates of Sage 300 Construction and Real Estate.

Activation Code

If you are using a version earlier than 9.6, a new activation code is required for installing 9.6.1 or later, due to major enhancements to the DocuVault and Document Management in 9.6. Without the new activation code, you cannot complete the installation. You will have received an order confirmation for the upgrade which contains a new activation code number (also called activation key) for use with Document Management 9.6.1 or later.

New in This Release

Support for new operating systems

Version 13.1 is able to be installed on computers with the Windows 8 or Windows Server 2012 operating systems.

For a complete list of supported operating systems, see chapter 3 of the [Document Management User's Guide](#).

Known Issues

AP Invoice Batches Locked During Accounting Install

During the Accounting installation, AP invoice batches that are in the Document Management Scan queue will be locked. These batches are then automatically moved from the Scan queue to DocuVault during the installation of DocuVault 12.1. If you want to send these batches to an Inbox prior to the upgrade, you must complete that action before installing Sage 300 Construction and Real Estate.

RAM Limitation on Computers with DocuVault

You can not install more than 64G of RAM on a computer where DocuVault is installed. See [Knowledgebase article KB533995](#) for more information.

Avoid Installing IIS on a Domain Controller

Document Management and DocuVault require that Internet Information Service (IIS) be installed and active on the DocuVault and Accounting servers if they are separate.

For security and performance reasons, [Microsoft recommends that you avoid installing IIS on a domain controller](#). Domain controllers that include IIS, such as Windows Small Business Servers, may require custom configuration to work with DV and DM.

To avoid these issues, we recommend that you do not install DocuVault or Document Management on a Windows Small Business Server or domain controller.

Learn more about IIS in the [Document Management User's Guide](#).