Sage Paperless Construction

Release Notes

Version 2021.1

Copyright

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INTRODUCTION

We are pleased to announce the release of our newest Sage Paperless Construction version 2021.1.

Sage Paperless Construction version 2021.1 includes all the best of version 2021.0 and takes it to the next level. After listening to our clients, we have responded by improving existing functionality and features. The end result with version 2021.1 is improved efficiencies, better customization capabilities, and an enhanced user experience.

What follows is an assortment of our newest features and enhanced functionalities.

SAGE INTACCT INTEGRATION

We are pleased to announce our full integration with Sage Intacct. This will provide our customers with a full integration path from Sage 100 Contractor or Sage 300 CRE to Sage Intacct.   Process your AP invoices in the APFlow module and index your documents with full data lookups and backfills from your Sage Intacct data.

SPC LIST TYPE IMPROVEMENTS

Historically, custom list types were limited to single column lists (i.e. States, Yes/No, etc.). We have improved upon this function by allowing you to create multi column lists. This is a powerful feature because it allows you to create your own custom lookup tables for data entry lookups, indexing and backfilling.

Once your new multi-column list is setup, you can add your list to Index Types for custom lookup functionality. As shown below, select "List" as your Type, pick your custom list in the List Type drop-down, then pick the column you want returned as the index value.

Use Custom lists to populate index values

Custom list used as a lookup database

CREDIT CARD IMPORTER ENHANCEMENTS

Invoice Date and **Description** fields have been added to the Credit Card Import Template. You will also notice that invoice header fields are listed in green font, and invoice detail fields are listed in bright blue.

INVOICE ENTRY IMPROVEMENTS

In previous versions of APFlow, the **Secondary Vendor Number** was the only field shown on the line entry grid. **Secondary Vendor Name** simply displayed as a description on the entry screen. A side issue with this resulted in users not being able to add Secondary Vendor Name as a criteria for a routing rule. To remedy this, we have added the field to the invoice line grid on the APFlow invoice entry screen. This can be configured by right-clicking on the grid column headers. You can also select Secondary Vendor Name as a routing rule criteria field.

Card Holder and **Credit Card Number** fields have been added to the invoice line coding section to accommodate the data from the credit card importer.
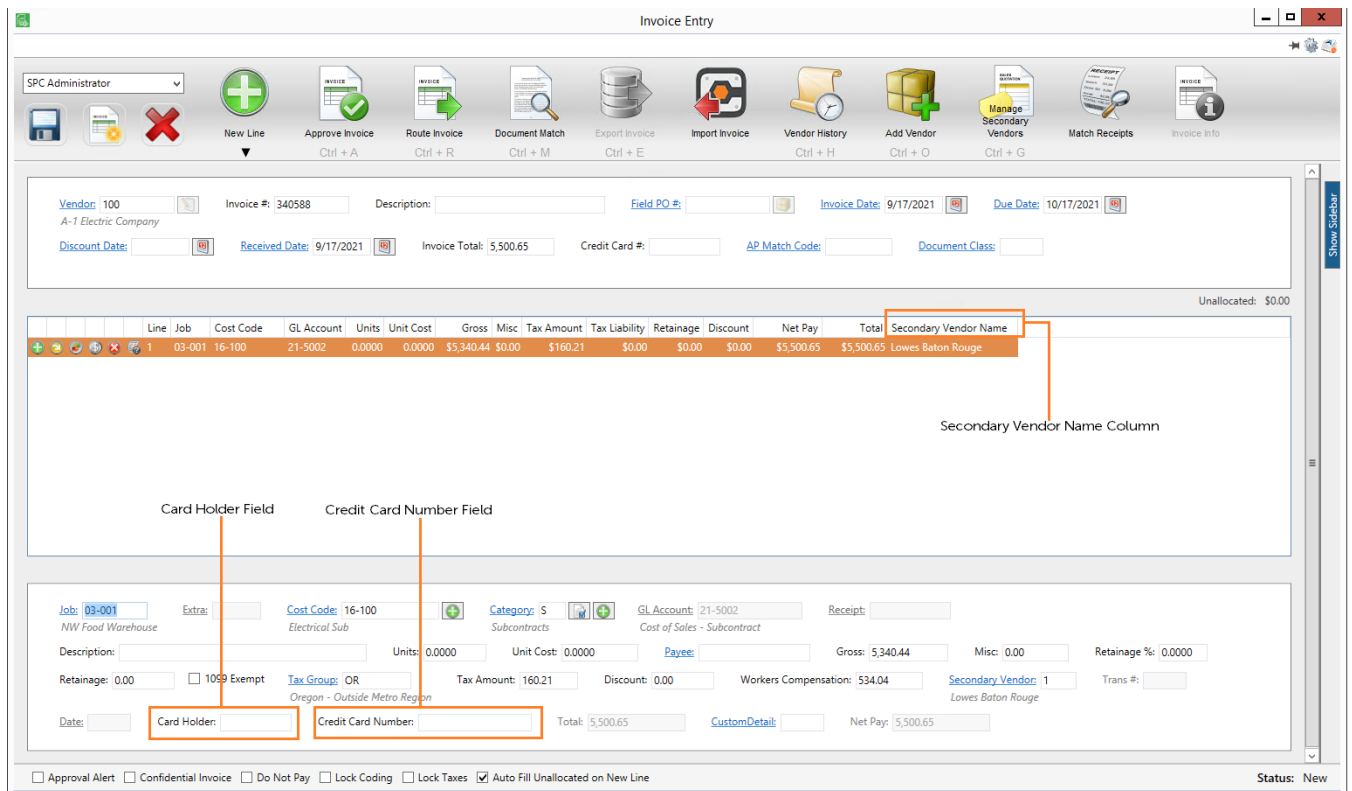
FOLDER WATCH IMPORT IMPROVEMENT

While importing documents with the Importer Module, the name of the file you are using will often have the data you want input as an index value. Now you can check the Index File Name checkbox on the index that contains the data you want saved as an index value, as shown below. This will tell the system to use the file name (without the file extension) as the index value indicated.

APFLOW SIDEBAR – EDIT BATCH NAMES

Many times, when documents get imported straight into an APFlow user queue, the batch name may not clearly indicate what the batch of documents represents. Now you can edit the Batch description directly in the Queue grid. Simply hold your mouse pointer over the batch name and the edit icon will appear as shown below.
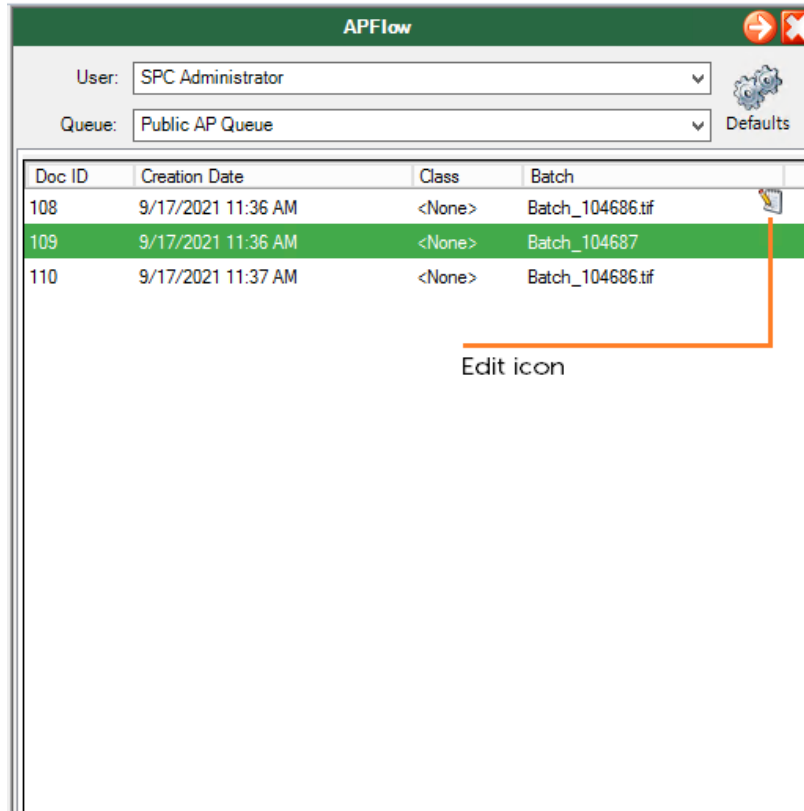
Clicking the edit icon brings up the dialog box shown below. Type in your new description and click the OK button to save.
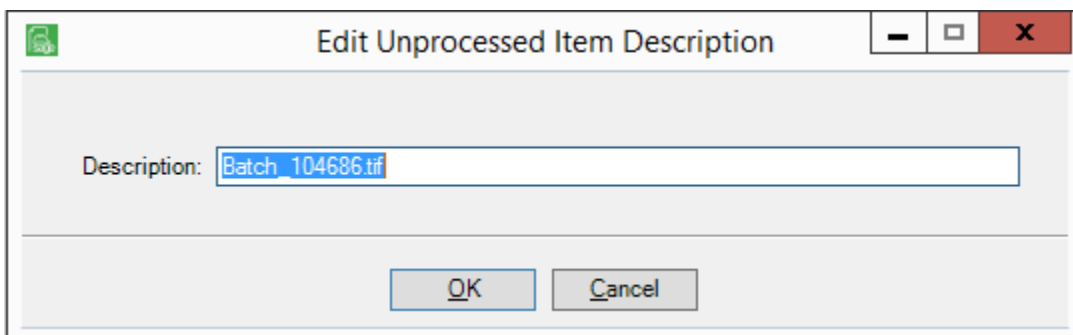
INVOICE SEARCH TOOL – DATE EXPORTED

The **Date Exported** field has been added to the search criteria on the Invoice Search tool.

NEW REPORTS

Five new reports have been added to the Sage Paperless Construction system.

Application Server Log – Errors and issues occurring on the application server were previously only viewable for the Server Dashboard utility. This report provides this information when working with our support team or for your own monitoring purposes.

Document Index Statistics – This report is our response to customers who want to view statistics related to users and the quantity of documents being indexed. In this report, customers will have a breakdown of document quantity by user for a specific vault or date range. It also provides the ability to drill in on a user to identify which documents they indexed.

Invoice History by GL Account – Customers have requested the ability to track invoices that are coded against specific GL accounts so they can track their spending over a designated period of time.

Invoices Reset for Edit – This report provides information about invoices that have been Reset for Edit during a certain time period. This will provide the ability to monitor which invoices are being adjusted after export to your accounting software. Customers have different processes and reasons for editing after export, but this report may be used to identify process errors or highlight invoice entries which need to be adjusted in the accounting system also.

Proxy Rights Audit – This report provides a listing of users who are proxies for other users in APFlow or DocRoute. The report data can identify potential security issues or identify proxy relationships that are needed but do not currently exist.

PROCORE INTEGRATION ENHANCEMENTS

We have enhanced our Procore integration to allow you to import purchase orders and subcontract documents for automatic indexing into your Sage Paperless system in addition to importing invoice into your APFlow module.
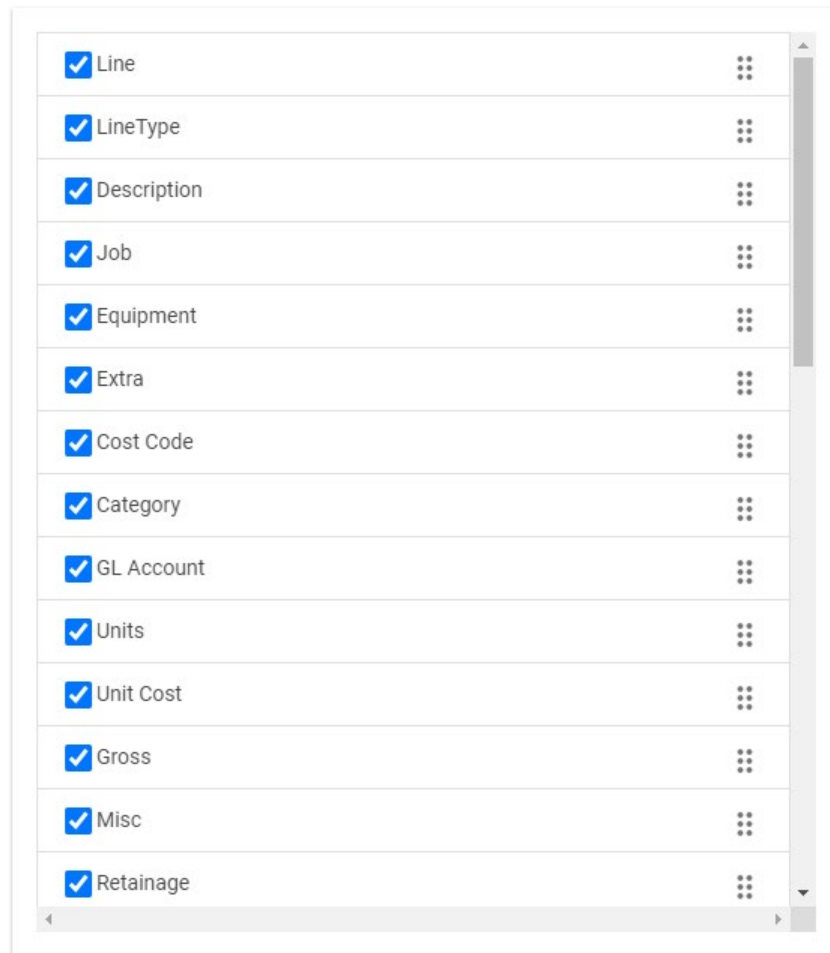
EPORTAL INVOICE REVIEW - ENHANCEMENT

Custom columns are now available in ePortal Invoice Review. This means that you can configure ePortal to display additional columns, including custom fields. Users can also arrange the columns in any order they desire.

Click the ⚙ button located just above the search field on the invoice detail screen.

- Check off the columns you would like to display
- Uncheck columns you want to remove
- Drag columns up or down to change the display order by holding your mouse down on the six dots located at the right side of the column entry

Edit Column Visibility

☑ Line	⠿
☑ LineType	⠿
☑ Description	⠿
☑ Job	⠿
☑ Equipment	⠿
☑ Extra	⠿
☑ Cost Code	⠿
☑ Category	⠿
☑ GL Account	⠿
☑ Units	⠿
☑ Unit Cost	⠿
☑ Gross	⠿
☑ Misc	⠿
☑ Retainage	⠿

17/40 selected

CANCEL   SAVE