

# Sage Paperless Construction

## Release Notes

Version 2021.1



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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.

The screenshot shows the "List Type Properties" dialog box. The "Name" field is "My Tool List" and the "Active" checkbox is checked. The "Edit Column Headers" section contains a table with three columns: "Tool #", "Tool Description", and "Purchase Date". The table has three rows of data: "ED-005 Electric Drill 5/15/2021", "HM-009 Hammer 5/21/2021", and "SS-098 Skillsaw 6/1/2021". A red box highlights the "Tool Description" column header, and a red box highlights the "Purchase Date" column header. A red box highlights the "SS-098 Skillsaw 6/1/2021" row. A red box highlights the "Add Column" button. A red box highlights the "Import Rows" button. A red box highlights the "Import Lists From .CSV Files" text. The "Add New Values" section contains a table with three columns: "Tool #", "Tool Description", and "Purchase Date". The "Add Row" button is highlighted with a dashed border. The "Add Column" button is highlighted with a solid border. The "Import Rows" button is highlighted with a solid border. The "Add New Columns" text is highlighted with a solid border. The "Import Lists From .CSV Files" text is highlighted with a solid border. The "OK" and "Cancel" buttons are at the bottom.

Tool #	Tool Description	Purchase Date
ED-005	Electric Drill	5/15/2021
HM-009	Hammer	5/21/2021
SS-098	Skillsaw	6/1/2021

Add New Values:

Tool #	Tool Description	Purchase Date

Add Row Add Column Import Rows

Add New Columns Import Lists From .CSV Files

OK Cancel

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.

Select the data type of this index then click "Next"

Type: List

List Type: My Tool List

Return Column: Tool #

Validate As: Text

Configure Query

< Back   Next >   Cancel

*Use Custom lists to populate index values*

Tool Number

Filter: |

Tool #	Tool Description	Purchase Date
ED-005	Electric Drill	5/15/2021
HM-009	Hammer	5/21/2021
SS-098	Skillsaw	6/1/2021

Showing 3 Results

OK   Cancel

*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**.

**Add Credit Card Template**

Template Properties

Name: American Express Import  Active

[Default Vendor](#):

Column Delimiter: Comma Skip first: 0 lines

Text Delimiter: None

Charges:  Negative  Positive

Credits:  Negative  Positive

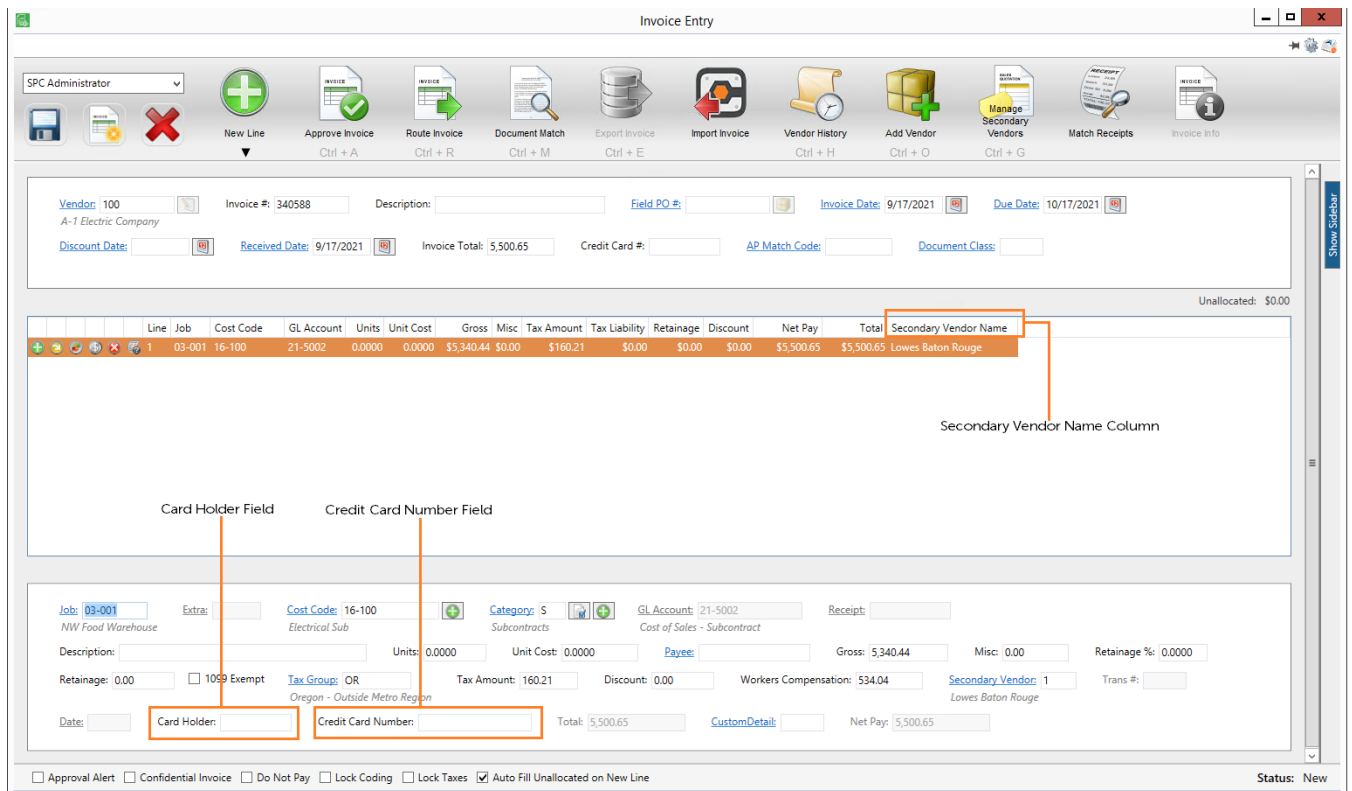
Field Name	Enter Column Position
<b>Transaction Date</b>	
Transaction ID	
<b>Transaction Amount</b>	
<b>Transaction Name</b>	
Line Note (Memo)	
Credit Card Number	
Vendor	
Invoice #	
Credit	
<b>Invoice Date</b>	
<b>Description</b>	
Property	
SC Line	
Subcontract	

Green = Header Field Blue = Detail Field **Bold** = Required

# 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

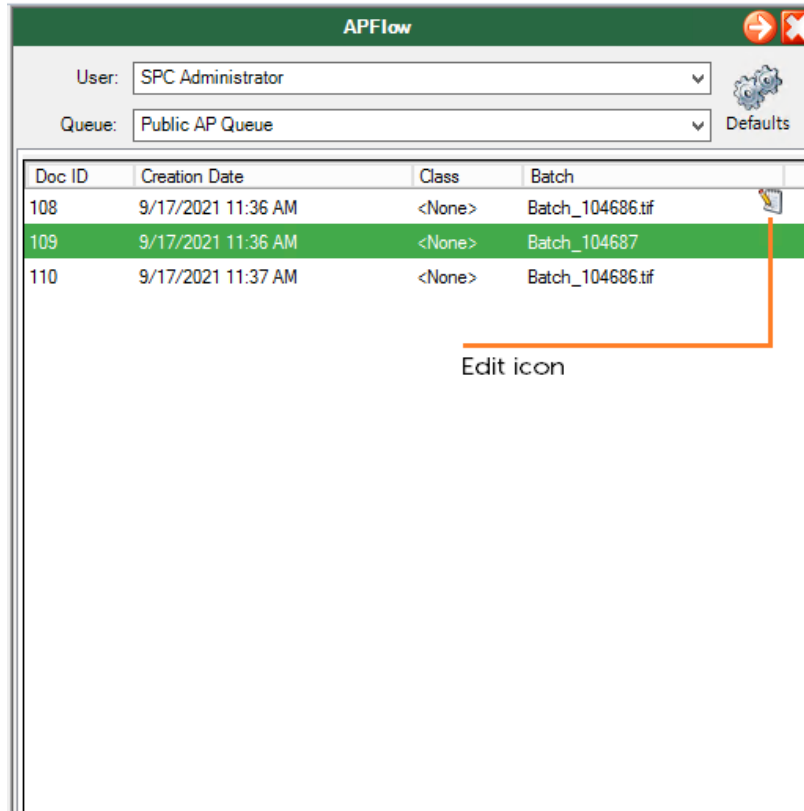
While importing documents with the Importer Module, the name of the file you are using will often have the data you want input as an index value. Now you can check the Index File Name checkbox on the index that contains the data you want saved as an index value, as shown below. This will tell the system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

The screenshot shows the 'Source Properties' dialog box. The 'Name' field is 'PO's', 'Source Type' is 'Folder Watch', and the 'Folder' is '\\PE-FILESERVER\Accounting\Purchase Orders'. The 'Also Search Sub Folders' checkbox is checked. The 'Include Index Values (Optional)' section is expanded, showing a 'Category' of 'All Document Types' and a 'Document Type' of 'Purchase Order'. Below this is a table of 'Index Values' with columns for Name, Value, Derive From Path, and Index File Name. The 'PO Number' row is highlighted with an orange border, and the 'Index File Name' checkbox is checked. The 'Description' field is 'Purchase Order Number'. The 'OK' and 'Cancel' buttons are at the bottom right.

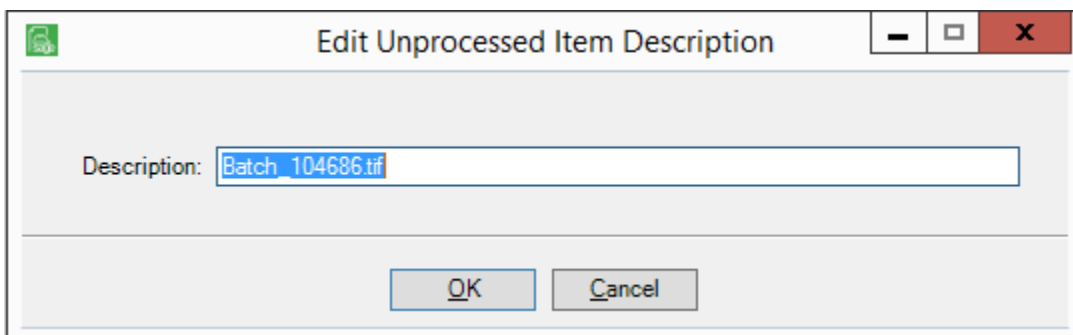
	Name	Value	Derive From Path	Index File Name
	<b>PO Number</b>	<Index File Name>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<b>AP Vendor</b>		<input type="checkbox"/>	<input type="checkbox"/>
	<b>AP Vendor Name</b>		<input type="checkbox"/>	<input type="checkbox"/>
	PO Date		<input type="checkbox"/>	<input type="checkbox"/>
	PO Amount		<input type="checkbox"/>	<input type="checkbox"/>
	Description		<input type="checkbox"/>	<input type="checkbox"/>
+	Job Number		<input type="checkbox"/>	<input type="checkbox"/>
+	Job Name		<input type="checkbox"/>	<input type="checkbox"/>
+	Job Date		<input type="checkbox"/>	<input type="checkbox"/>

## 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.

The screenshot displays the 'Invoice Search' application window. The interface includes a toolbar with icons for Search, View Invoice, Export to CSV, Save To File, Email, Print, Invoice Info, and Open in APFlow. Below the toolbar, there are sections for 'Saved Searches', 'Search Criteria', and a results table. The 'Search Criteria' section shows a list of fields with checkboxes and operators. The 'Date Exported' field is highlighted with an orange box. The results table shows four entries, with the 'Date Exported' column also highlighted with an orange box.

Vendor Name	Invoice #	Date Exported
Bronson Signs	165132	12/11/2020 12:07:11 PM
A-1 Electric Company Inc	151321	2/19/2021 5:54:13 AM
Hanson Plumbing & Irrigation	97977	2/17/2021 5:34:35 PM
A-1 Electric Company	Demo	3/11/2021 10:18:56 AM

## 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<sup>®</sup> 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.

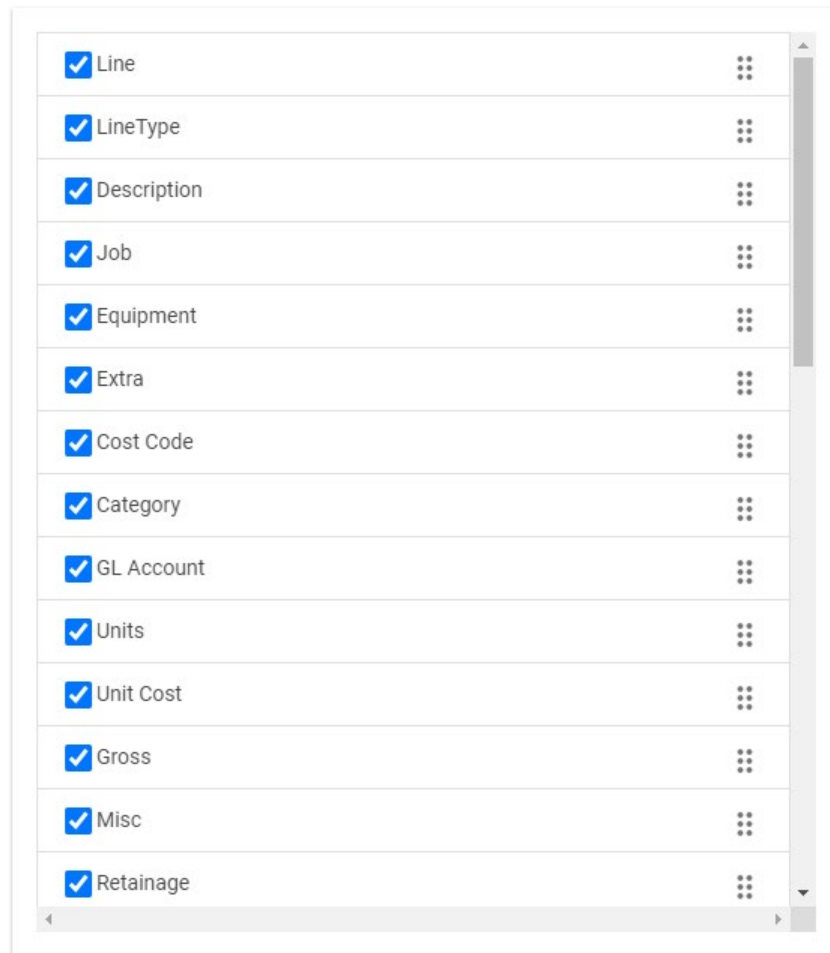
## EPORTAL INVOICE REVIEW - ENHANCEMENT

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



<input checked="" type="checkbox"/>	Line	⋮
<input checked="" type="checkbox"/>	LineType	⋮
<input checked="" type="checkbox"/>	Description	⋮
<input checked="" type="checkbox"/>	Job	⋮
<input checked="" type="checkbox"/>	Equipment	⋮
<input checked="" type="checkbox"/>	Extra	⋮
<input checked="" type="checkbox"/>	Cost Code	⋮
<input checked="" type="checkbox"/>	Category	⋮
<input checked="" type="checkbox"/>	GL Account	⋮
<input checked="" type="checkbox"/>	Units	⋮
<input checked="" type="checkbox"/>	Unit Cost	⋮
<input checked="" type="checkbox"/>	Gross	⋮
<input checked="" type="checkbox"/>	Misc	⋮
<input checked="" type="checkbox"/>	Retainage	⋮

17/40 selected

CANCEL SAVE