Sage Paperless Construction

Version 2021.0

Release Notes

Copyright

Date: 4/12/2021

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INTRODUCTION

We are pleased to announce the release of our newest Sage Paperless Construction version 2021.0.

Sage Paperless Construction version 2021.0 includes all the best of version 2020.0 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 2021.0 is improved efficiencies, better customization capabilities, and an enhanced user experience.

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

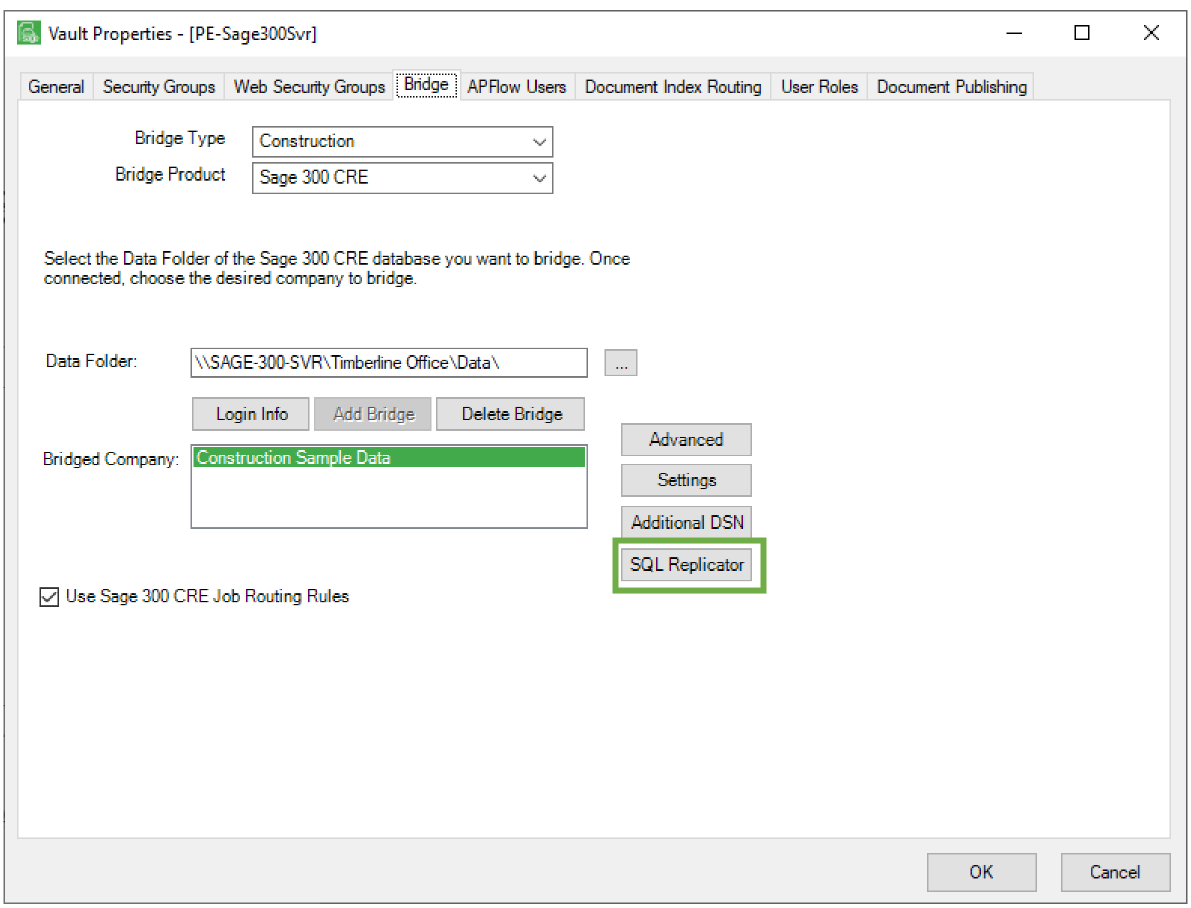
SAGE 300 CONTRACTOR SQL REPLICATOR INTEGRATION

Integration with the Sage 300 CRE SQL Replicator system has been added for Sage 300 CRE customers. There are two very distinct and **very big advantages** given to companies that use the SQL Replicator.

- Pointing the vault to the SQL Replicator database makes your Sage Paperless system 100 times faster than using the Timberline ODBC driver!
- You no longer have to install the Sage 300 CRE client on client PC's that are using Sage Paperless!

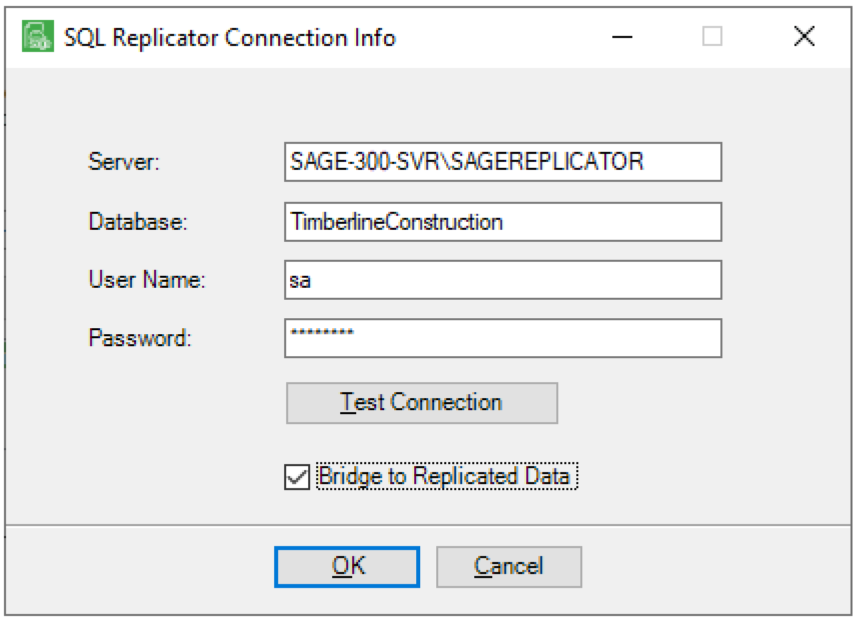
To redirect your connection to the SQL Replicator data, perform the following:

- Pull up the vault properties under Administration -> Vaults. Click on the **Bridge** tab.
- Locate and click on the **SQL Replicator** button as shown below.



Sage 300 Contractor SQL Replicator Integration - Continued

- Fill out the SQL Replicator Connection Info dialog box (shown below) with the following info:
  - **Server** = the name of your SQL Replicator SQL Database Server
  - **Database** = the name of the database containing your Sage 300 CRE data
  - **User Name** = SQL user name used to connect to your SQL server data
  - **Password** = Password for the SQL user

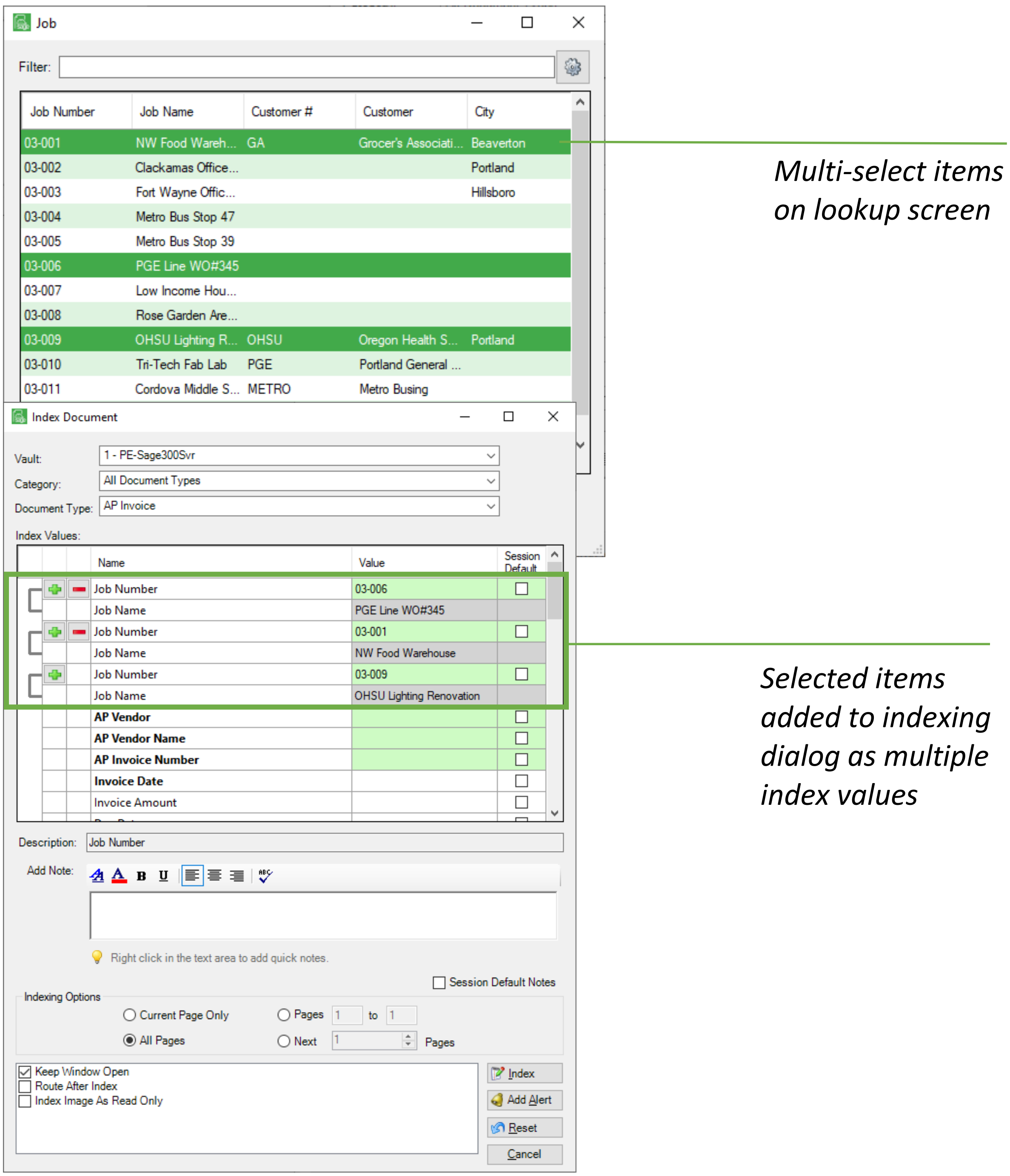


- Once filled out, click the **Test Connection** button to ensure that the information entered is correct and you are able to connect to the SQL Replicator database.
- Check the Bridge to Replicated Data checkbox to point your Sage Paperless system to the SQL Replicator data.

Note: If you ever want to return your connection to “Live Data” using the local ODBC driver, simply pull up the SQL Replicator Connection dialog box and uncheck the **Bridge to Replicated Data** checkbox.

MULTI SELECT INDEX VALUES FROM LOOKUP

While indexing documents, you now have the ability to **multi-select** items from the F4 lookup screen to populate index values that are set for multiple values. Simply use the CTRL Click or SHIFT Click method to select the values you want to add to the indexing screen. Once selected, the index values are automatically added as multiple index values on the index dialog box and backfilled.



EMAIL IMPORT FOR OUTLOOK AND GMAIL

You can now set up an import job to watch and import emails from either a Microsoft Outlook or Google Gmail account. Configuration allows you to watch and import from any folder of the configured email account. You can import the entire email with attachments as one document, attachments only as separate documents, or a combination of both. This is a great feature for automatically pulling in AP invoices, contracts, change orders, etc., that are delivered to your company, via email, on a regular basis.

For setup instructions, see Email Import Help

INDEX WEBSITE URL'S

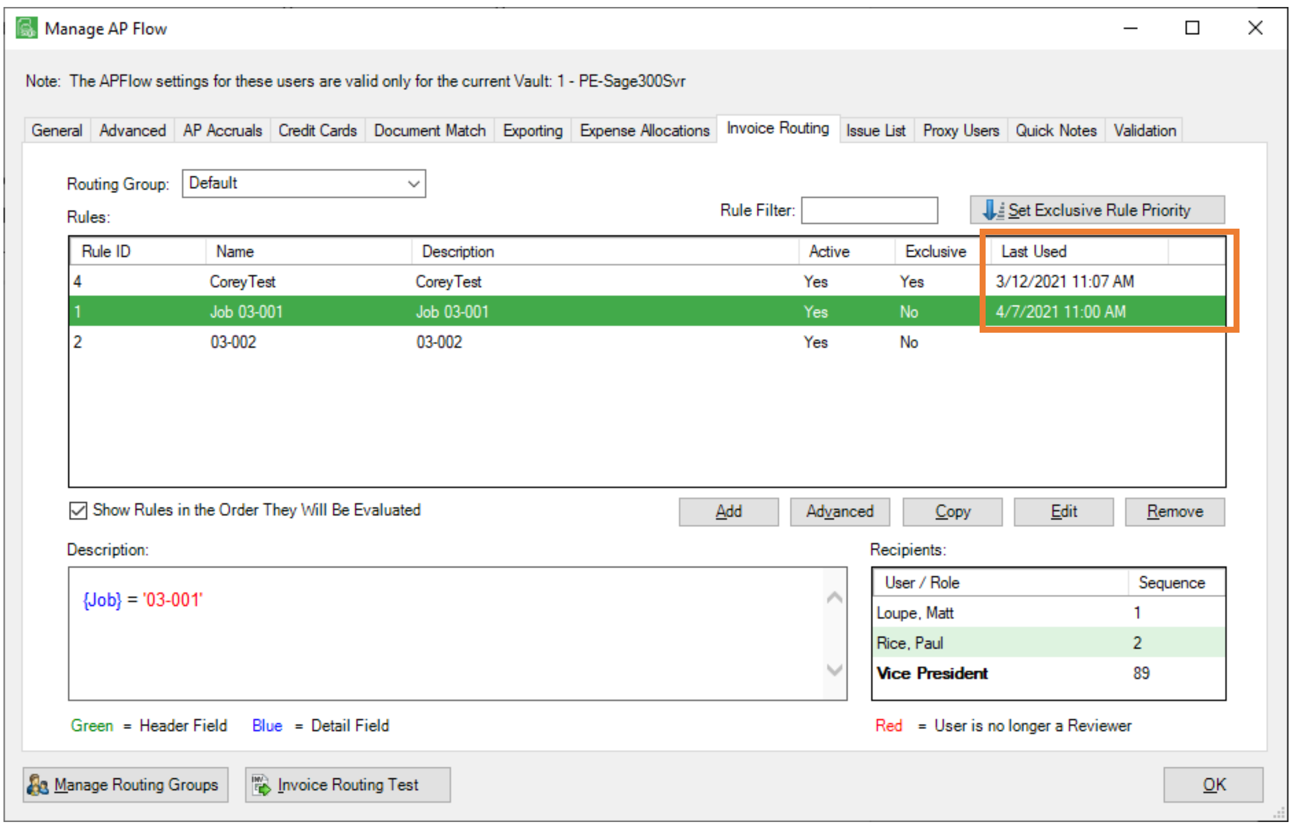
You now have the ability to drag a website URL from your browser to Sage Paperless for indexing. The result will be the display of the website page within the Sage Paperless document viewer. From the viewer, you can navigate the website, or you can click the "Open in Default Browser" button to open the website in the browser configured for the PC you are using.

APFLOW ROUTING RULES

A few new features have been added to the APFlow™ Routing Rule system to make creating and using routing rules easier for APFlow™ personnel:

- **A new "Last Used" date added to the Invoice Routing Rule grid.**

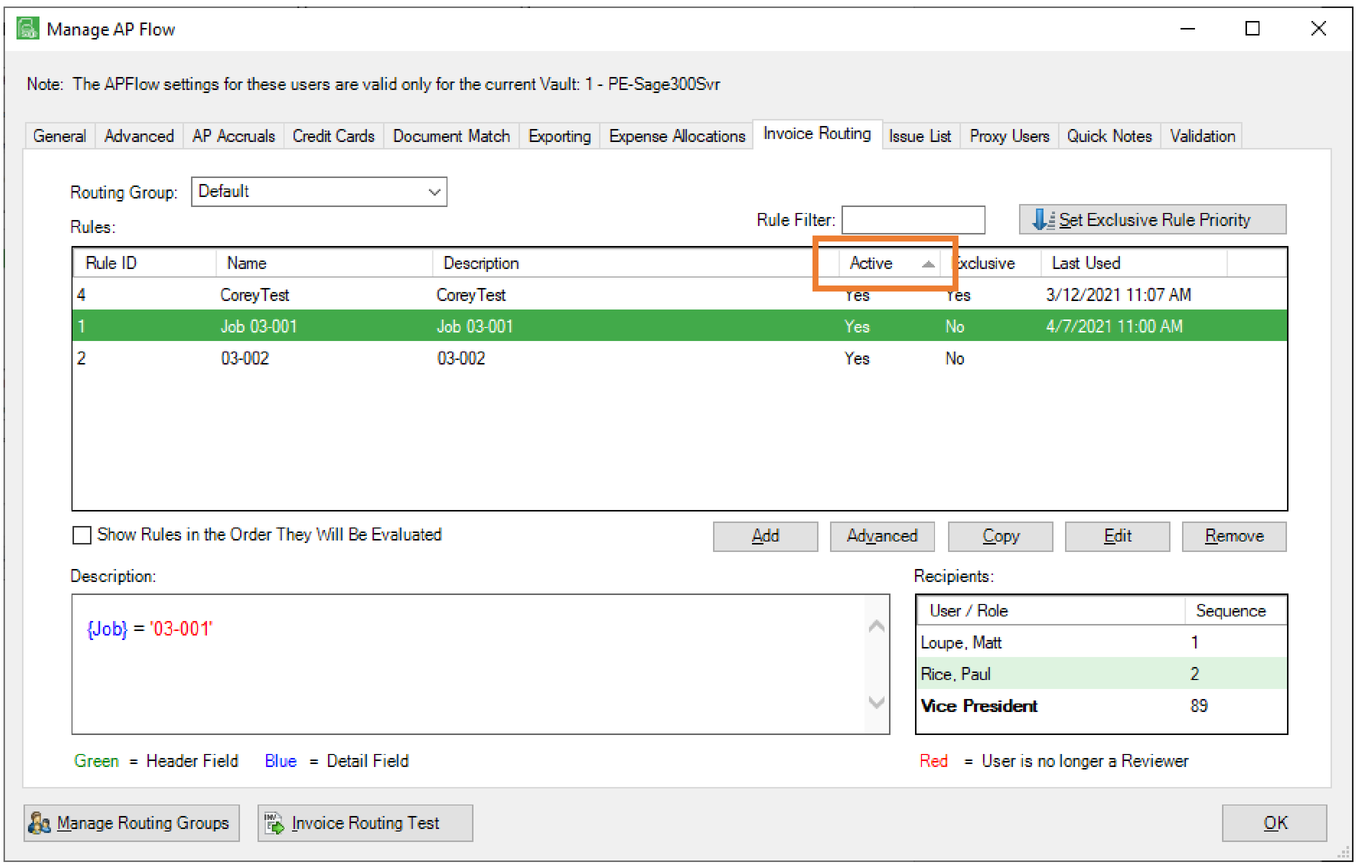
  This will aid system administrators in determining which rules are no longer in use and can be deleted from the system to increase routing speed.



APFlow Routing Rules - Continued

- **Column sorting added to the APFlow™ Routing Rule grid.**

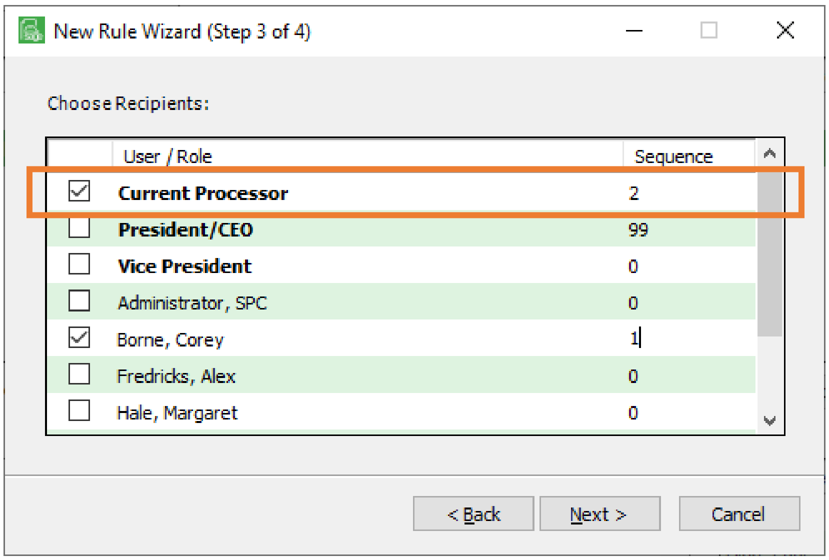
  Simply click on the grid column that you wish to sort by. An indicator (shown below) will appear in the column selected. Click once to sort in ascending order and click again to sort in descending order.



APFlow Routing Rules - Continued

- **Ability to route to the "Current Processor" added to the APFlow™ Invoice Routing Rule configurator.**

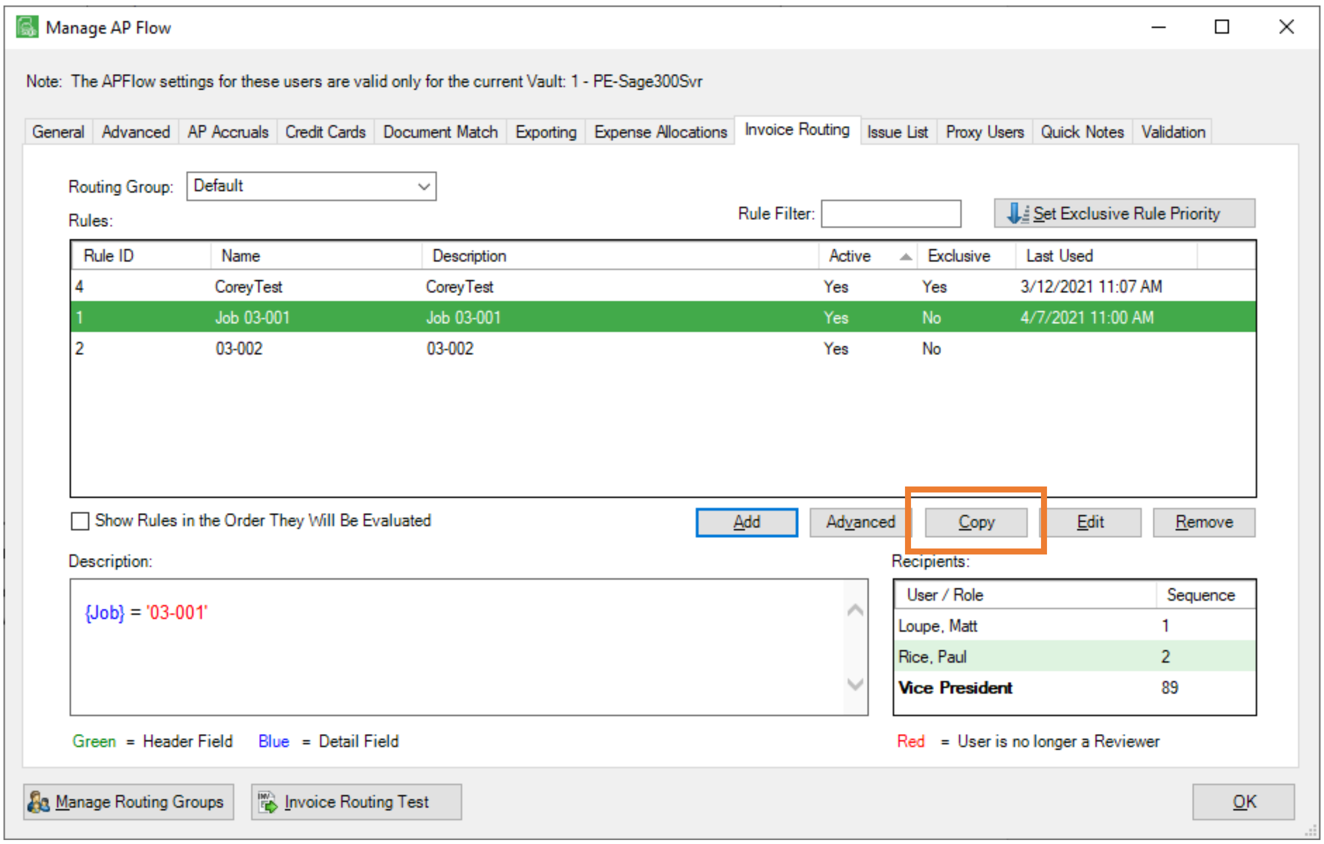
  With this feature, APFlow™ Processors can interject themselves in the workflow of routed invoices at the sequence number they desire.



APFlow Routing Rules - Continued

- **Ability to copy an existing APFlow™ routing rule added to aid in setting up new APFlow™ routing rules where the configurations are very close.**

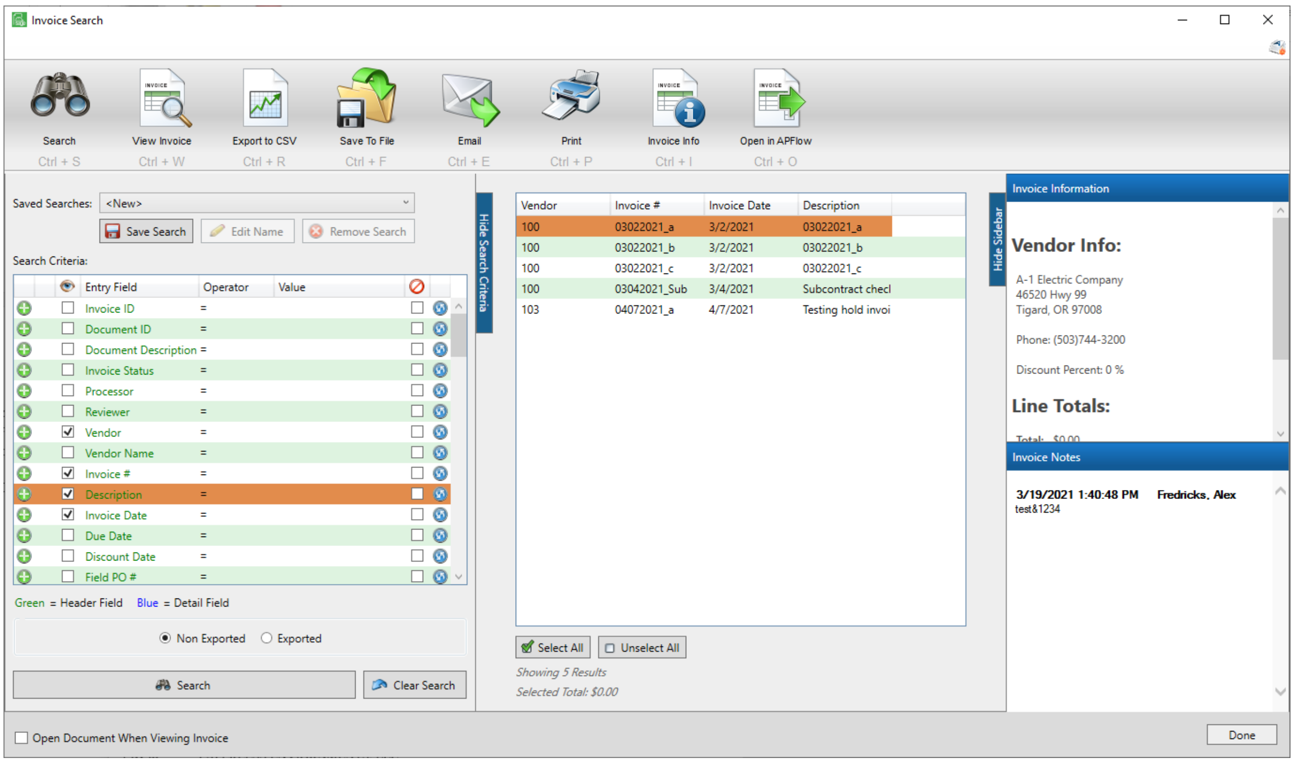
  Simply select the routing rule that you wish to copy from the existing rule grid. Click the Copy button as shown below.



NEW INVOICE SEARCH UTILITY

A new search screen has been added to aid in searching APFlow™ specific data. This has been a **BIG** request from many of our clients for several years. Click the **Invoice Search** button located on the APFlow™ menu to open the Invoice Search Screen.

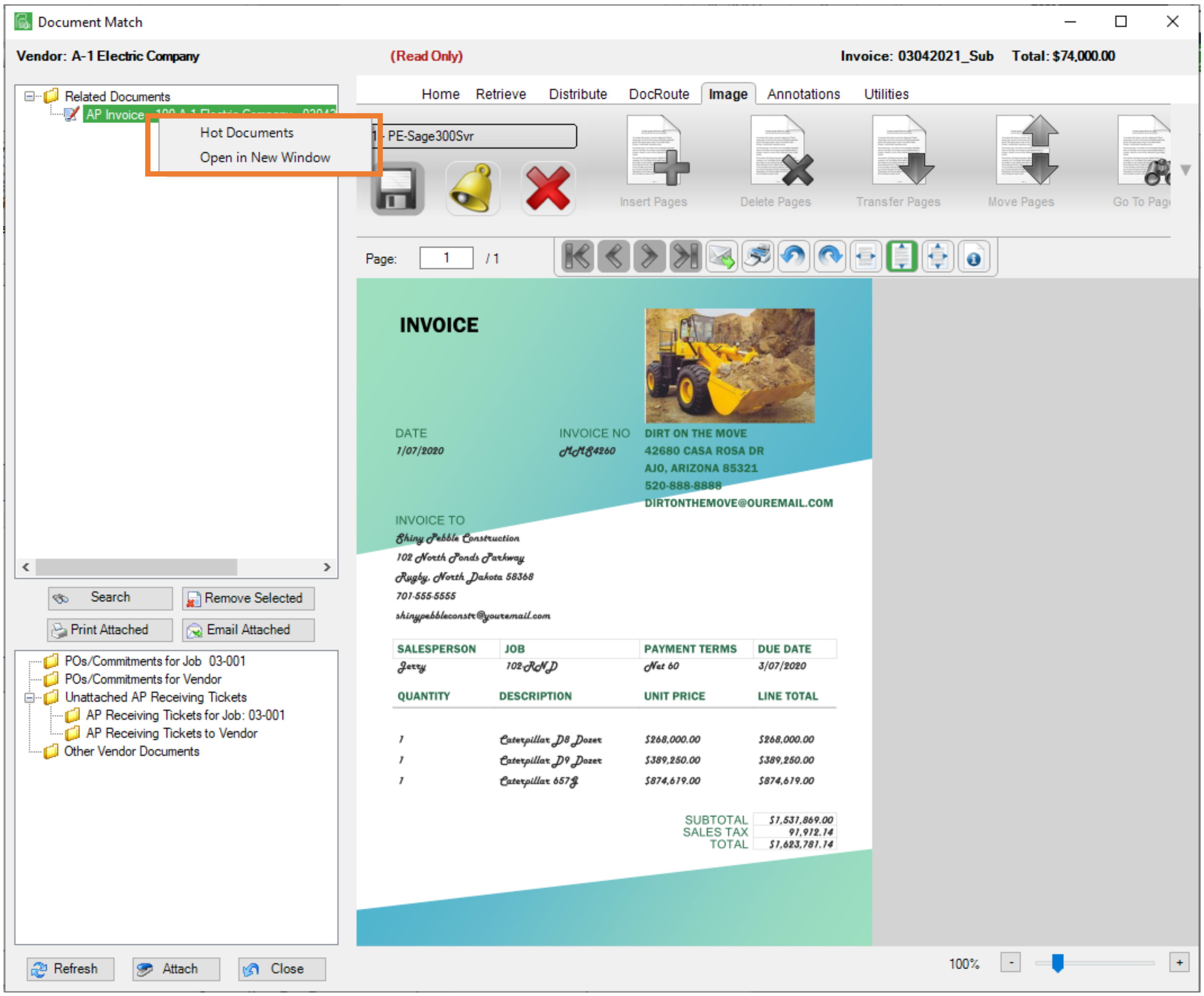
Details of the full Invoice Search functionality can be found here: [APFlow Invoice Search Help]()



- Select any data field associated with an APFlow™ invoice for viewing and or searching
- Enter selection criteria for one value or multiple values of invoice data fields
- Search across multiple data fields
- Perform data comparison searches (=, <, >, <=, >=, <>, LIKE, NOT LIKE)
- Select invoices that are outstanding (Non Exported) or have been exported
- Save search criteria for future use
- Take action on the search results
  - View the invoice found in the search
  - Export the invoice data to a CSV file
  - Save the invoice image to a file
  - Email, Print or DocRoute a copy of the invoice
  - See the Invoice Info screen
  - Open the selected invoice in APFlow™

DOCMATCH QUICK KEYS

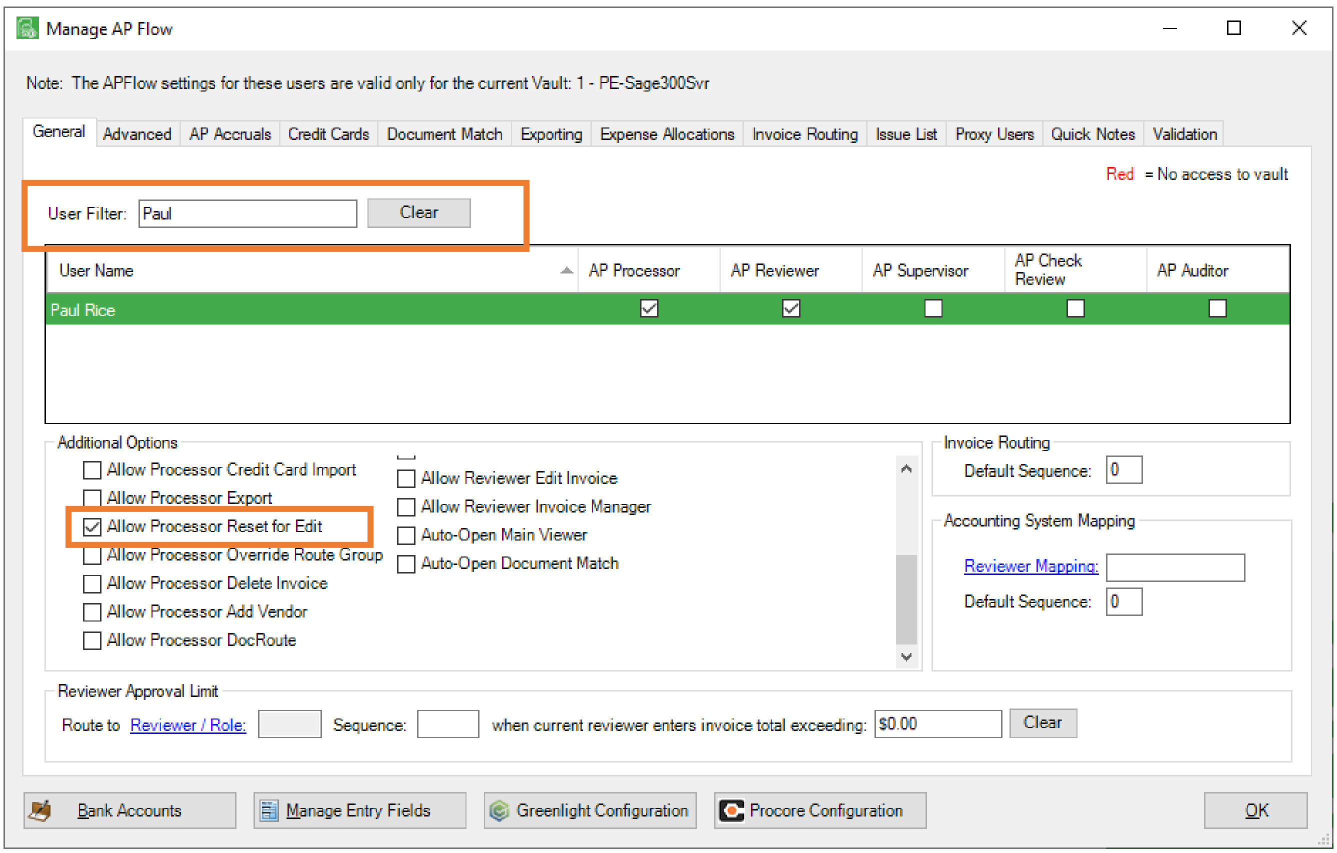
A right click menu has been added to documents shown on the APFlow™ DocMatch screen, which allows the user to mark the document as a “Hot Document” or push the image into a new viewer window.



MANAGE APFLOW SCREEN IMPROVEMENTS

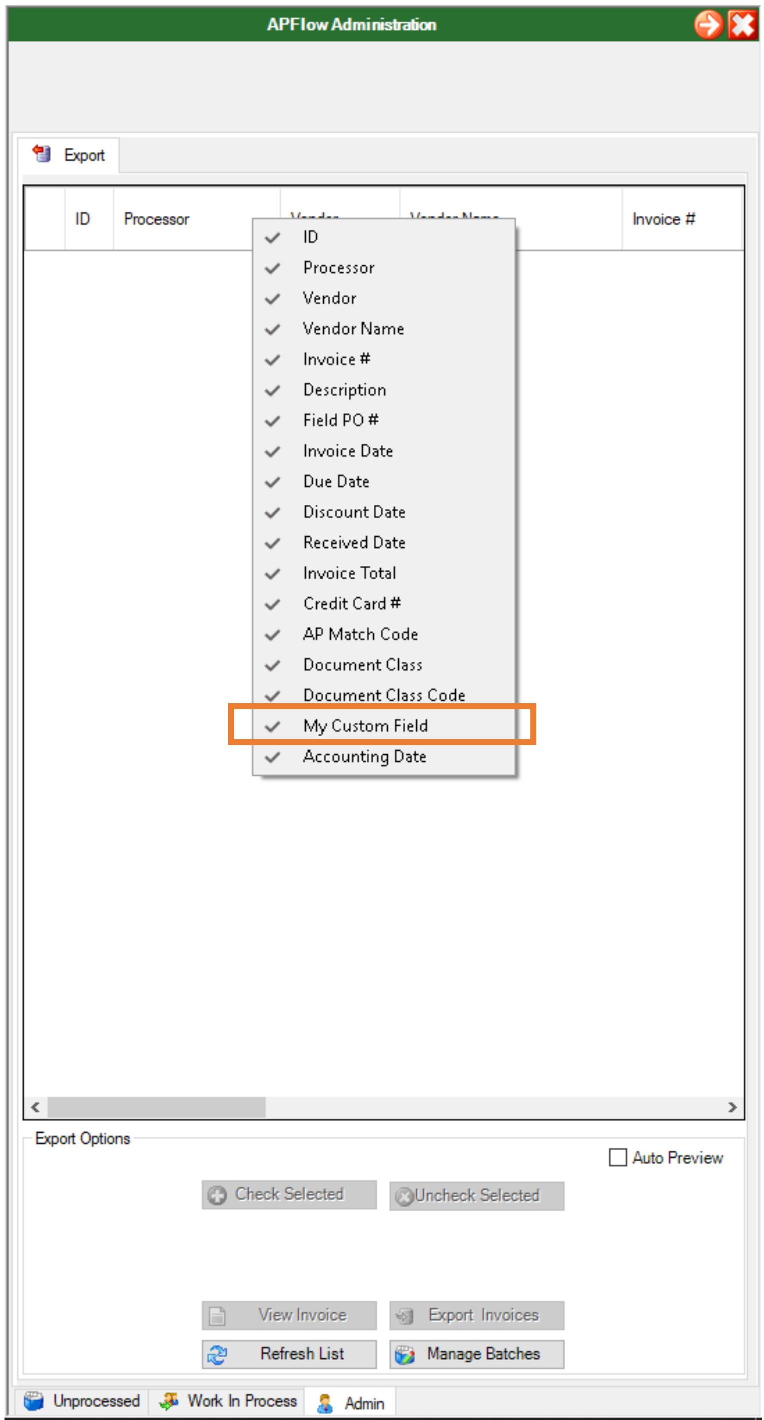
A new **User Filter** has been added to the General Tab on the Manage APFlow™ screen to make finding an APFlow™ user easier in long lists of users.

- An additional option for "**Allow Processor Reset for Edit**" has been added, which will determine if a processor can reset a previously exported invoice to "edit mode."



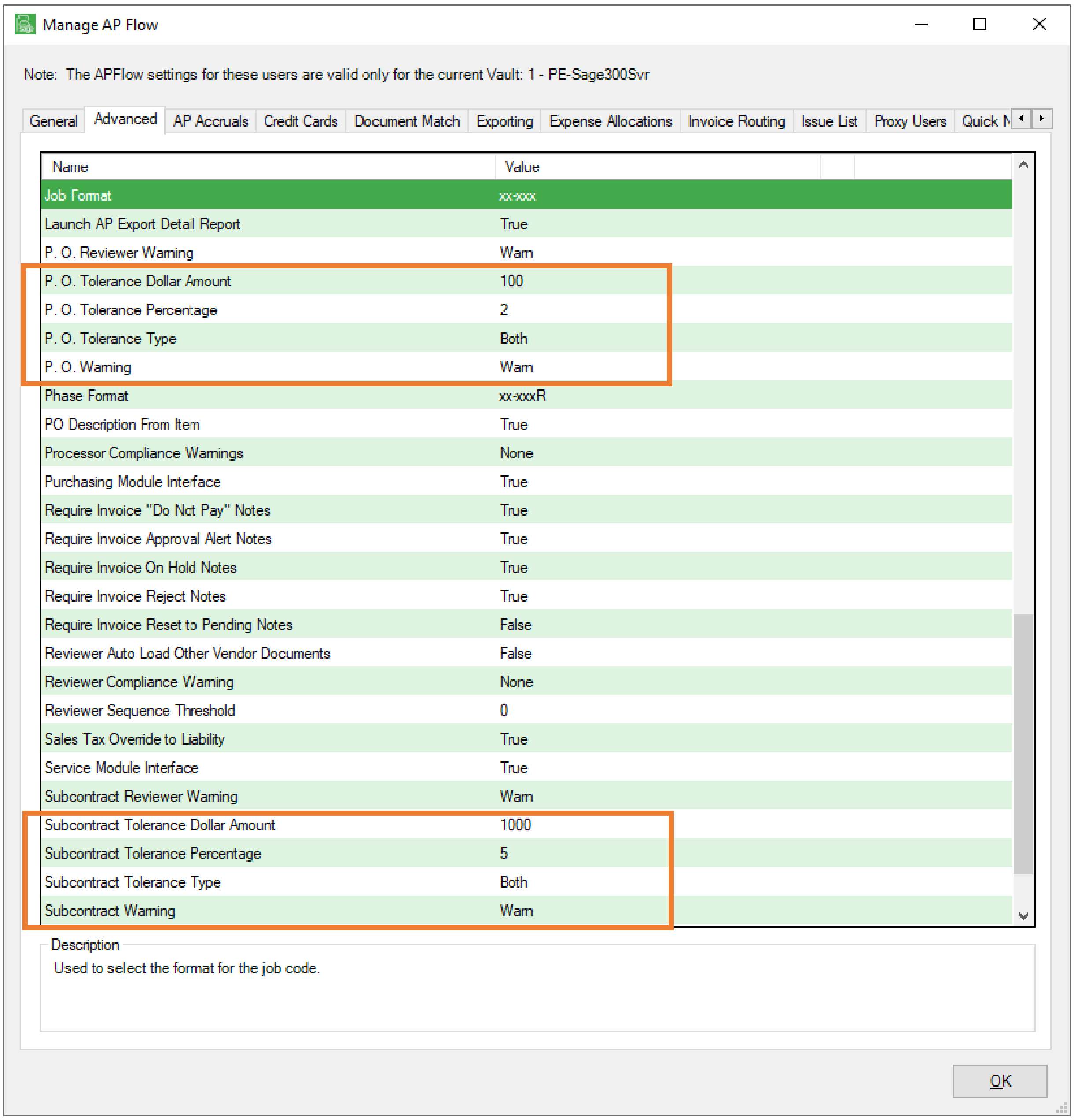
APFLOW EXPORT SCREEN CUSTOM COLUMNS

The ability to display all default header as well as custom header fields in the APFlow™ Export grid has been added. Access your grid column options by right clicking on the grid header as shown below. The grid settings are saved on a user by user basis.



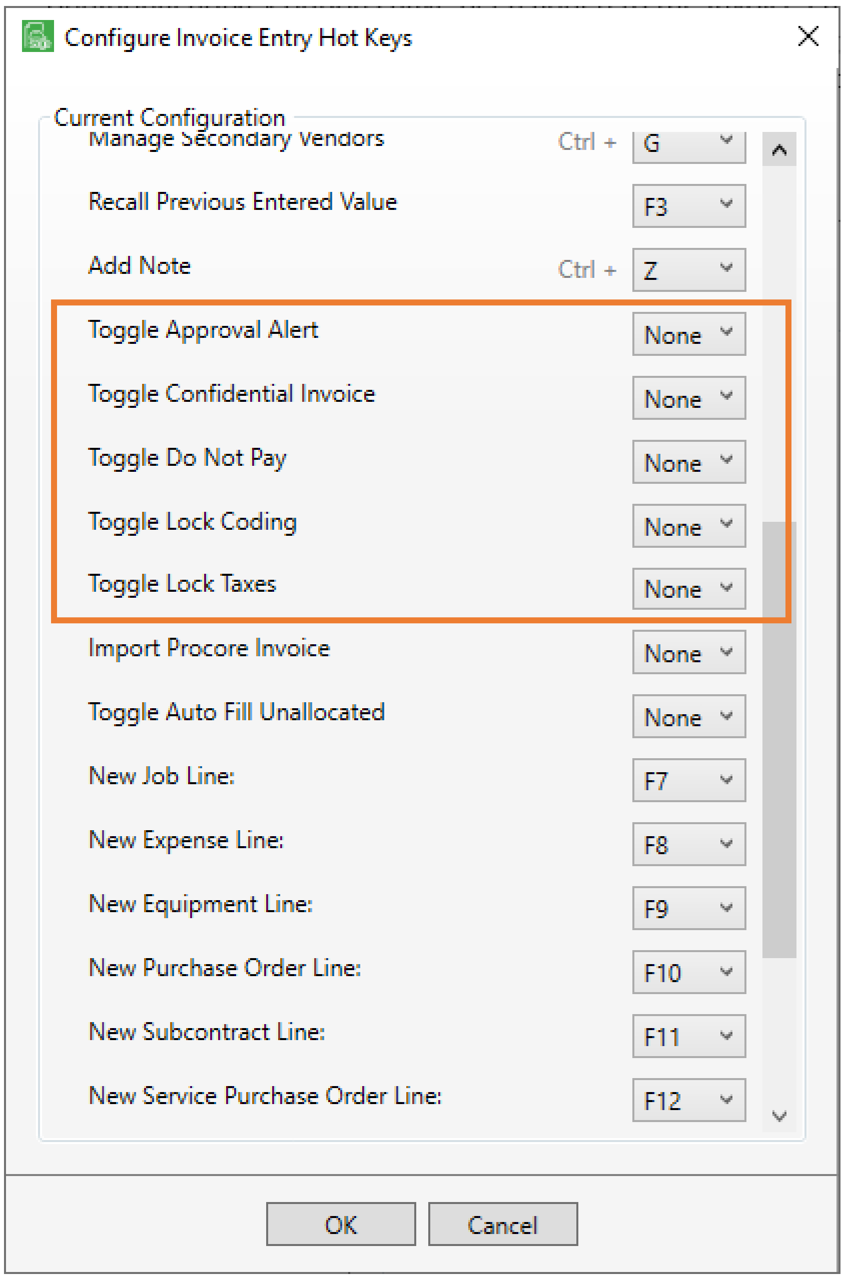
PO AND SUBCONTRACT TOLERANCE VALIDATION

New Advanced settings have been added to APFlow™ that allow you to set validation warnings for either a dollar amount overage or a percentage overage for PO or Subcontract lines. This setting can be set for dollar amount, percentage or both. For instance, you can set the system to warn or error if the purchase order is > $100 or > 2% more than budgeted. These settings can be found on the Advanced tab of the Manage APFlow™ screen, as shown below.



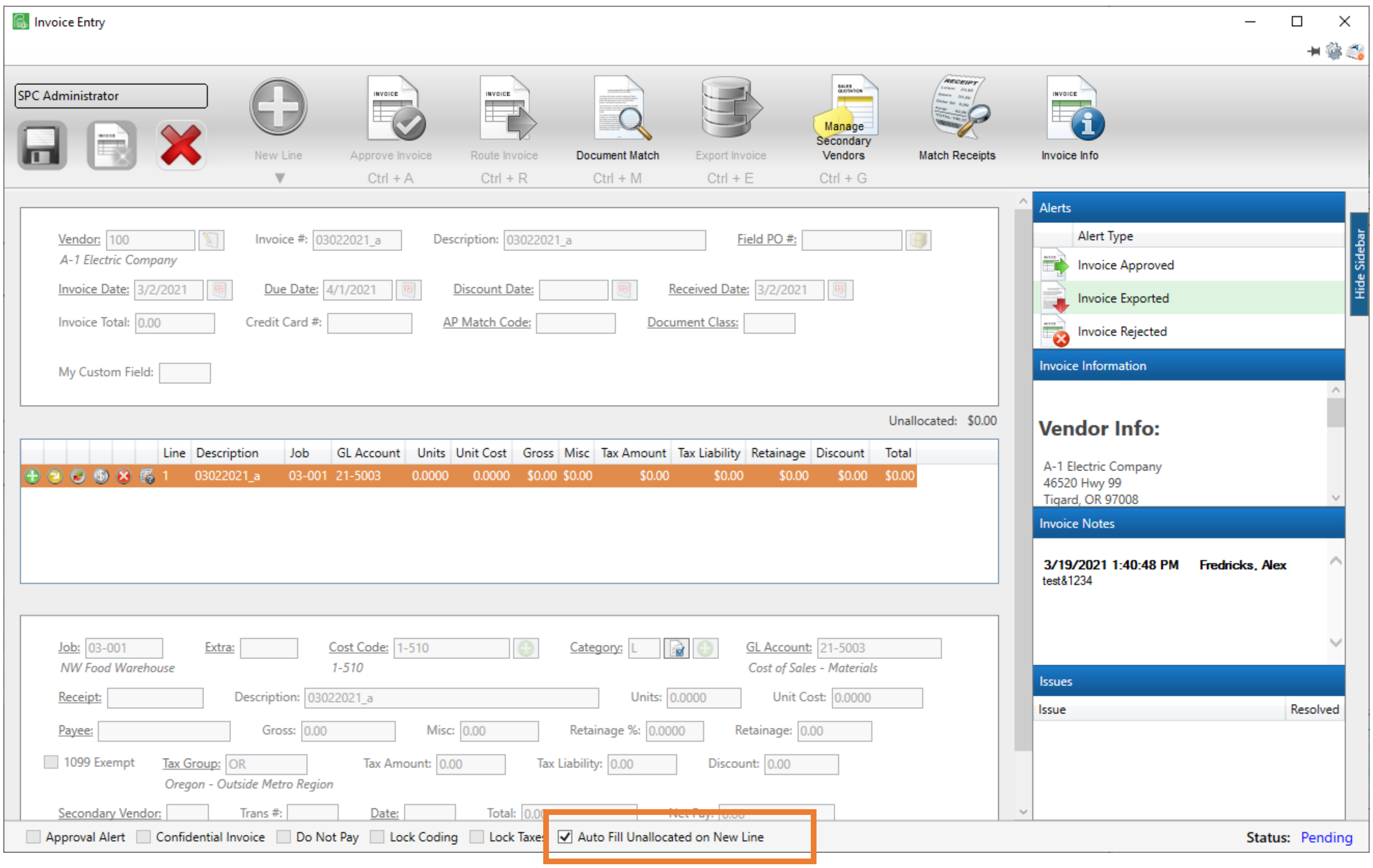
NEW CONFIGURE INVOICE HOT KEYS

Additional hotkey options have been added to the Invoice Entry Hot Key configuration to allow toggling of the Approval Alert, Confidential Invoice, Do Not Pay, Lock Coding and Lock Taxes options on an invoice. Access the hotkey configuration by clicking the  button at the upper right-hand corner of the invoice entry screen.



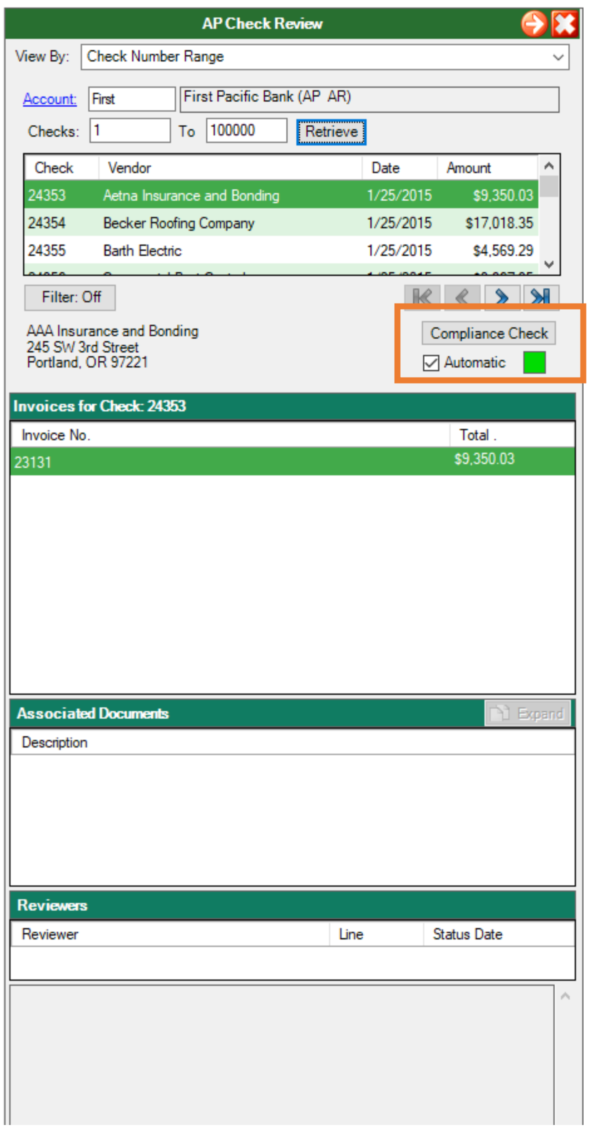
UNALLOCATED INVOICE AMOUNT AUTO FILL

The unallocated invoice amount auto-fill option has been moved from a vault (companywide) setting to an individual processor setting. This setting can now be found at the bottom of the invoice entry screen. Turn the feature on by checking the box and off by unchecking the box.



NEW AP CHECK REVIEW COMPLIANCE CHECKING

Compliance checking has been added to the Check Review module. You already have compliance checking while you are entering a new invoice. But, shouldn't you check compliance again before the check goes out the door? Now you can. On the Check Review sidebar, you will find a new button labeled "Compliance Check" as shown below. Compliance can be checked on the individual invoice that is currently chosen in the grid by clicking the "Compliance Check" button, or you can automatically have compliance checked every time you select an invoice by checking the "Automatic" checkbox located below the Compliance Check button. If the vendor and invoice pass the compliance check, the colored square turns green. If the compliance check fails, the square is turned red and the compliance warning dialog box is shown.



NEW INTEGRATIONS

A new integration with Procore® allows the import of subcontractor invoices into the APFlow module for further routing and approval. When invoices reach the Approved status in Procore®, you have the option to manually or automatically import them into APFlow™. In addition, you can configure Sage Paperless to update Procore® with payment information once the invoice is paid in your accounting system.

See Procore Configuration Help for further information.

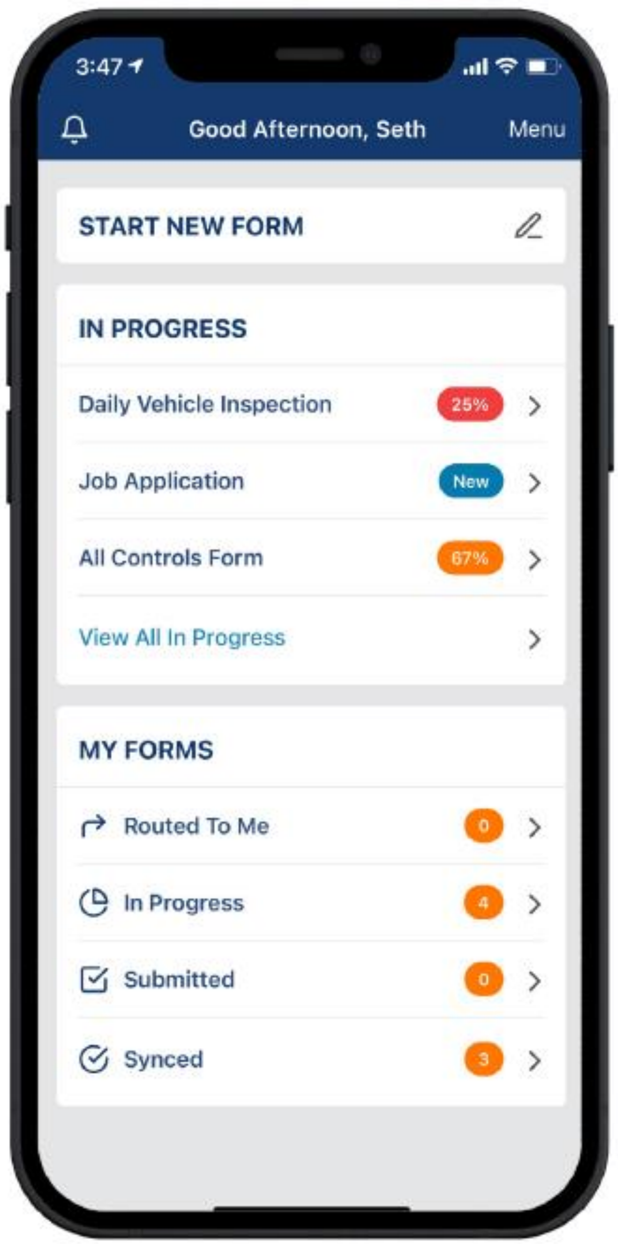
Introducing advanced compliance tracking with Greenlight Compliance Manager. APFlow™ allows you to connect with Greenlight Compliance Manager during the AP Invoice entry phase as well as compliance checking from the Check Review module.

See Greenlight Configuration Help for further details.

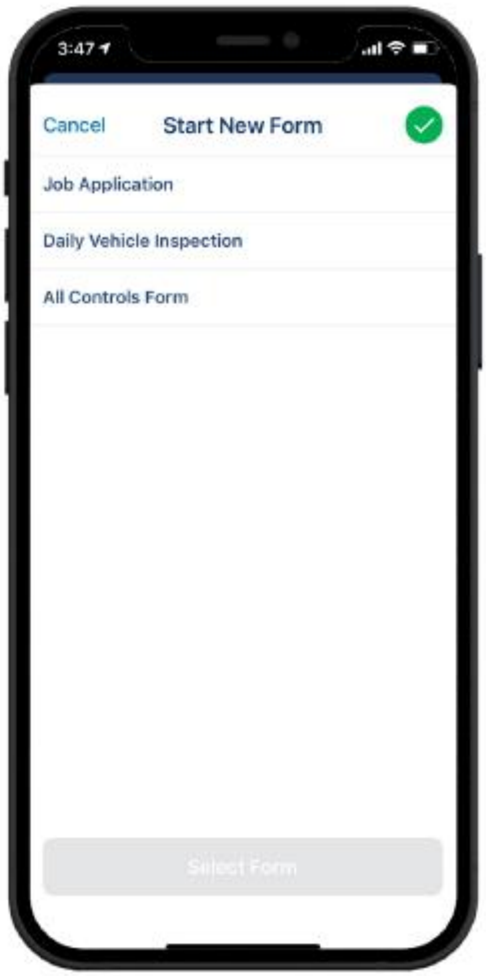
NEW EFORMS FOR IPHONE APP

eForms users have been able to access eForms from both tablets as well as from a browser through ePortal. Many customers have asked for the ability to have an app for use on a smartphone. Well, now you have it. Sage Paperless eForms for the iPhone app.

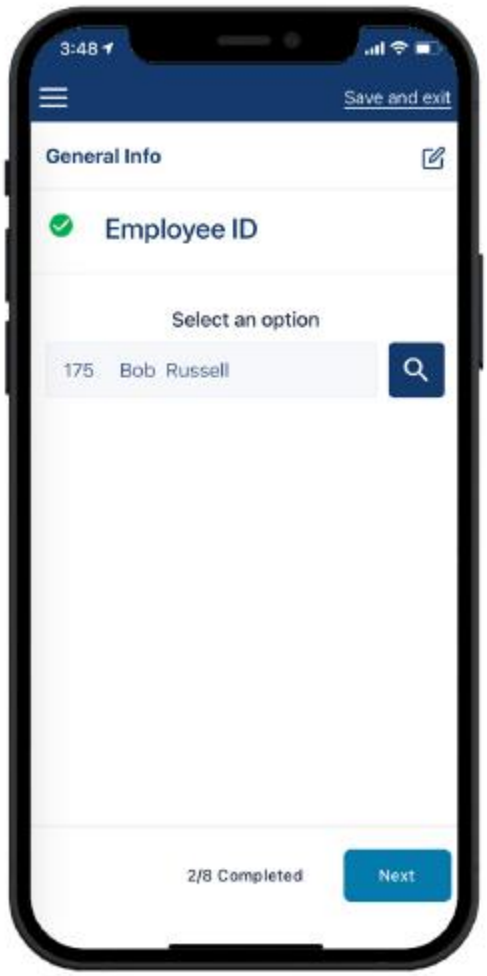
Specifically designed to work on the smaller screens of an iPhone, users are first presented with a newly designed dashboard where you can start a new form, see forms that are in progress, open forms routed to you from other users, or vie w the history of forms submitted back to your Sage Paperless system.



eForms For iPhone App - Continued

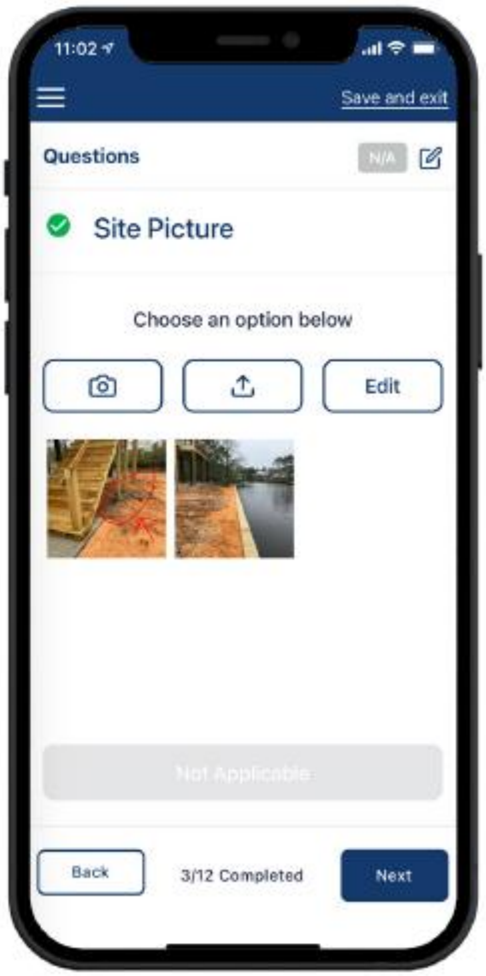


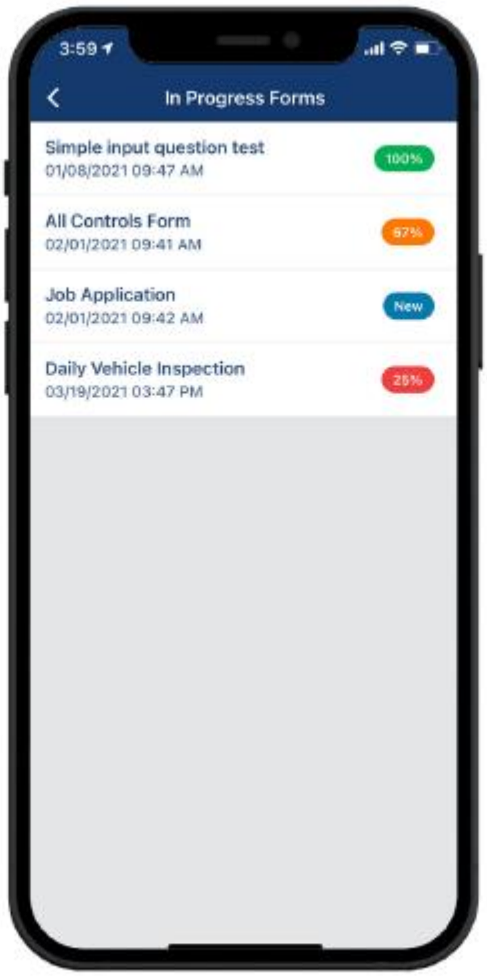
Easily access your form library from the Start New Form screen.



Once started, the interactive wizard walks you through each question of the form.

eForms For iPhone App - Continued



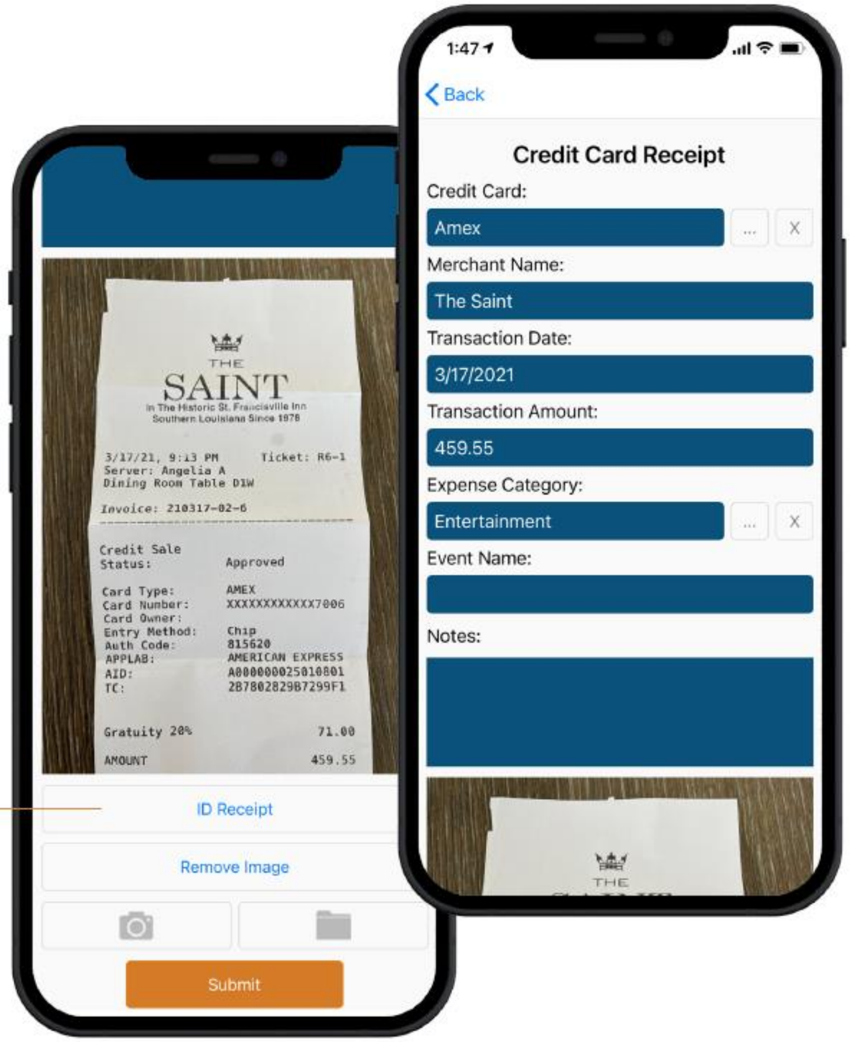


Take pictures or upload from your camera roll. Markup pictures to highlight important areas.

Easily access forms that are "in progress."

NEW ECAPTURE ADVANCED RECEIPT OCR

Users of eCapture Advanced now have the ability to OCR the captured credit card receipt for basic information (merchant, date and amount).

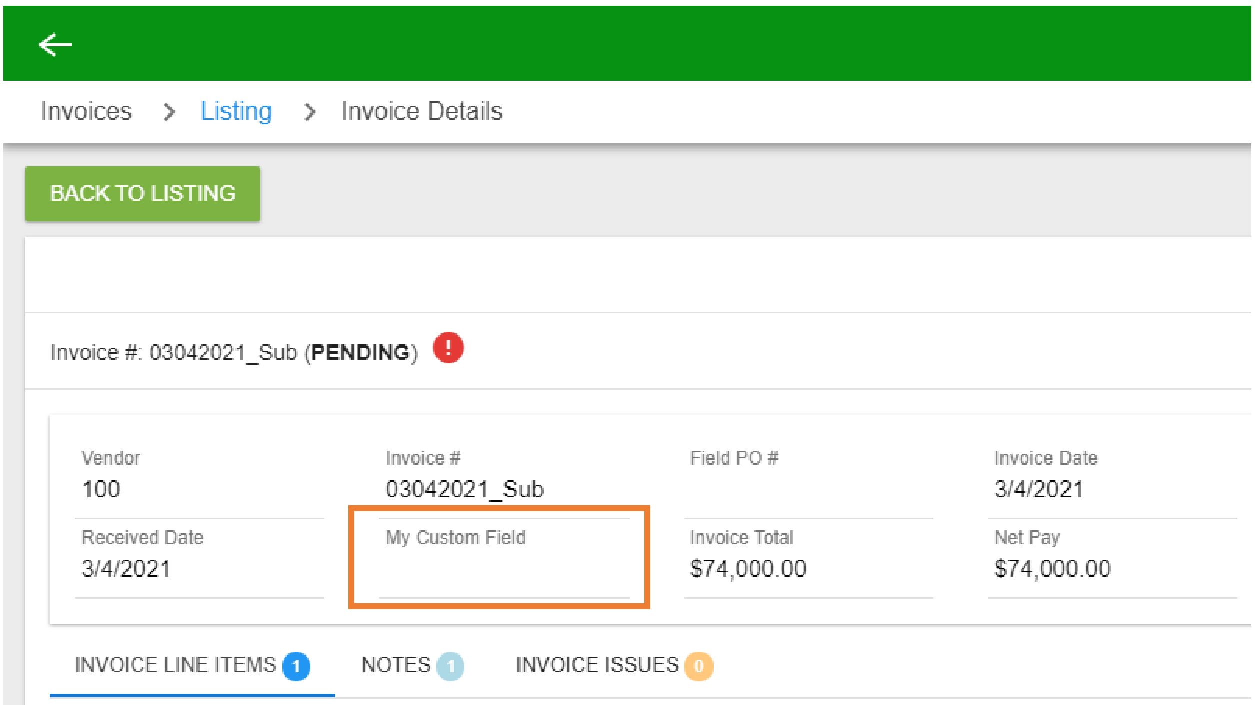


Click "ID Receipt" to OCR image to retrieve the merchant, date and amount.

EPORTAL INVOICE REVIEW UPGRADES

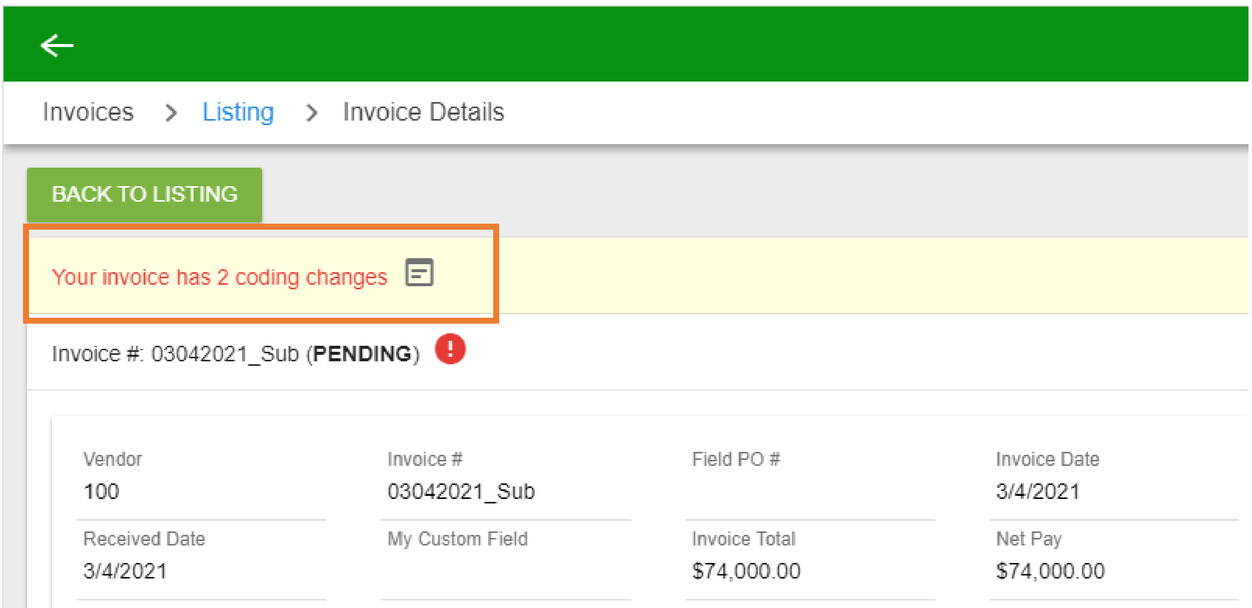
Many advancements have been made to the backend of the ePortal Invoice Review system to make it much faster

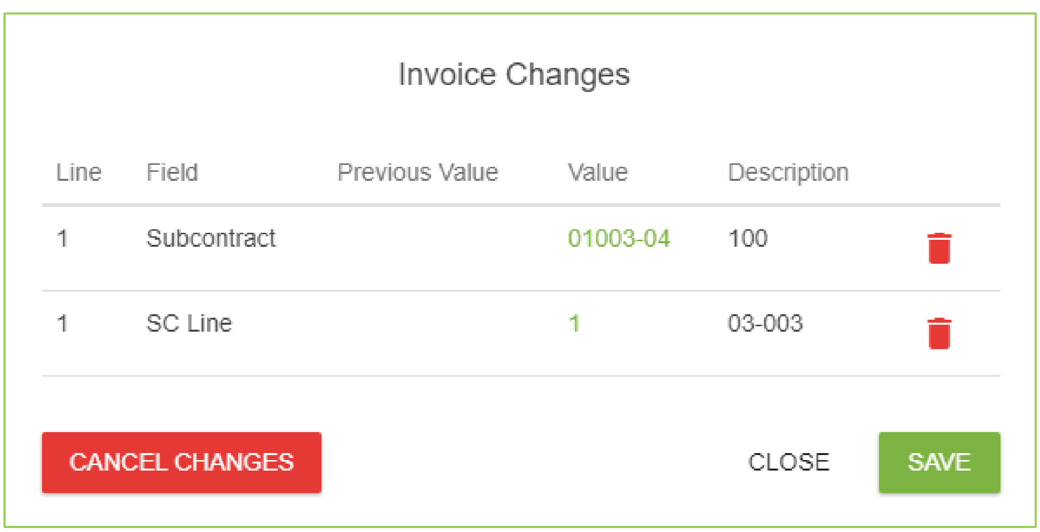
- Invoice custom fields are now displaying



ePortal Invoice Review Upgrades - Continued

- Changes to an invoice will appear in an Invoice Change dialog box where the user can cancel individual changes or all changes at once before saving the invoice.





ePortal Invoice Review Upgrades - Continued

- Invoice line details now have descriptions beneath coding items.