Sage Paperless Construction

Version 2022.0

Release Notes

Copyright

Date: 6/15/2022

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INTRODUCTION

We are pleased to announce the release of our newest Sage Paperless Construction version 2022.0.

Sage Paperless Construction version 2022.0 includes all the best of version 2021.2 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 2022.0 is improved efficiencies, better customization capabilities, and an enhanced user experience.

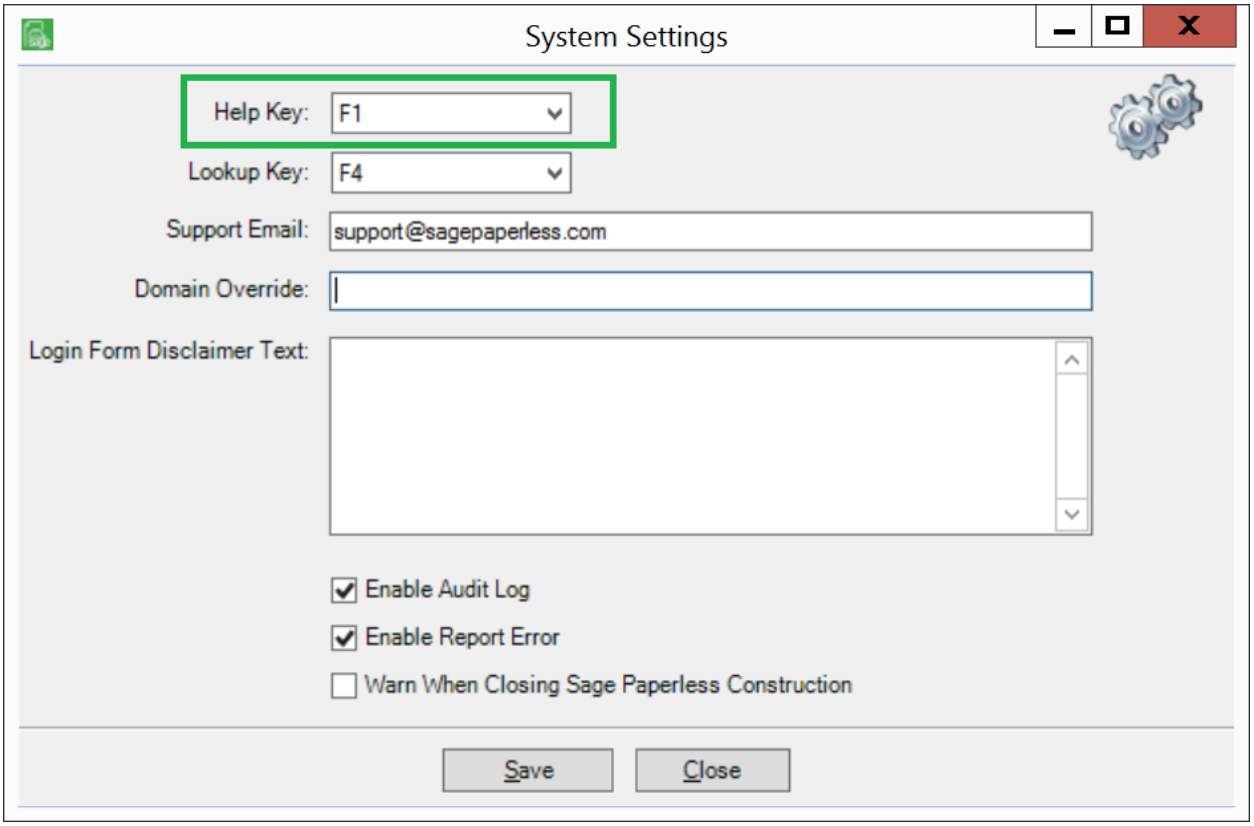
What follows is an assortment of our newest features and enhanced functionalities.

CONTEXT SENSITIVE HELP

Help at your fingertips!

Click **F1** with your cursor on a toolbar icon, on a screen or in a window to systematically open the online help to read more about the layout, a specific feature or a particular function. You can still click **Help** in the ribbon toolbar to access the entire online help. With **F1**, you can quickly access a specific area of help when you need additional information.

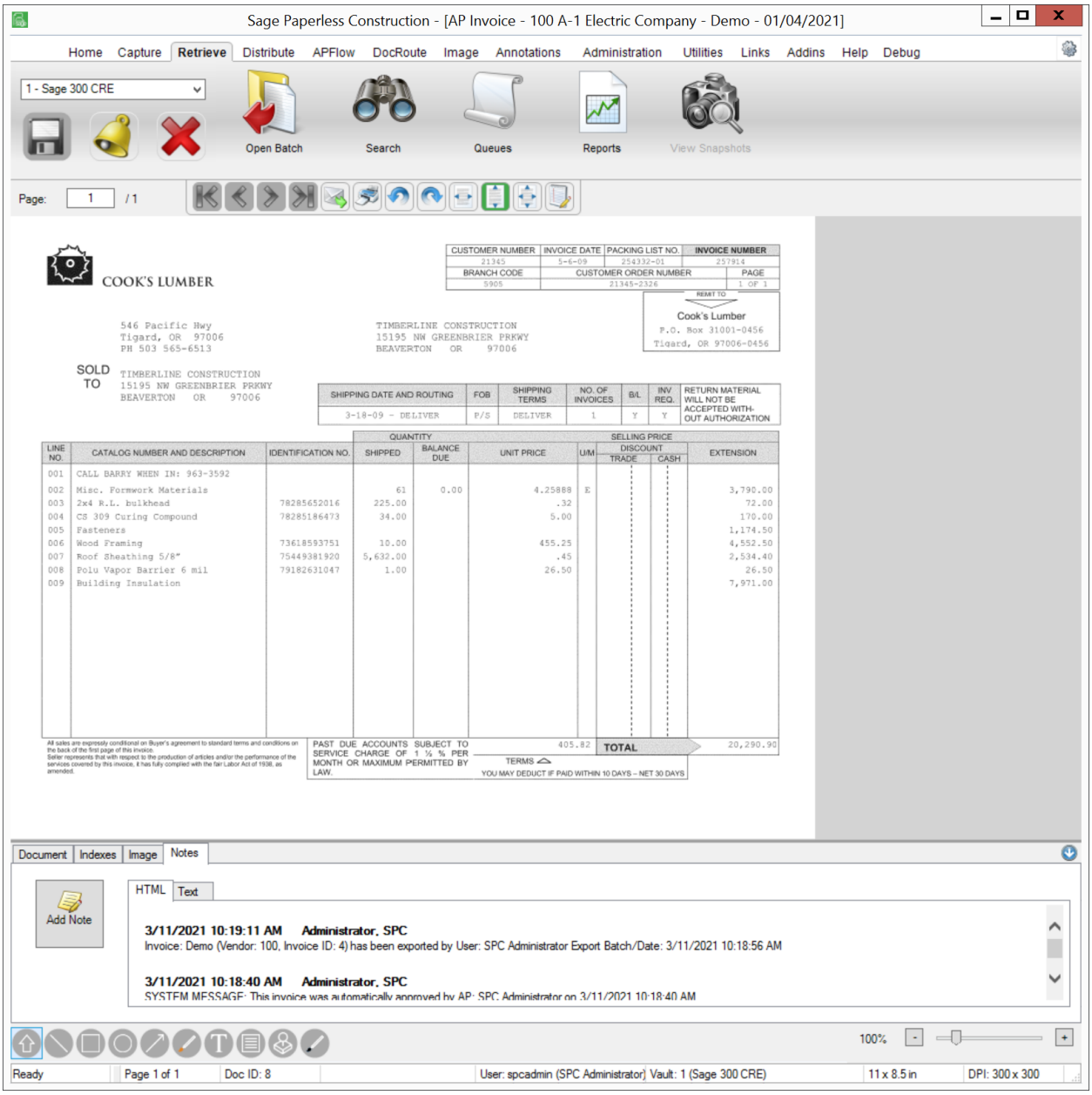
System Administrators can change the default Help Key on the Administration -> System Settings screen as shown below.



DOCUMENT INFO TRAY

Check out the new **Document Info tray** that has been added on all the main viewers in the program when you have a document open. This info tray allows you to quickly add notes or view index values same information that is listed using the **Document Info** button on the **Utilities** ribbon toolbar.

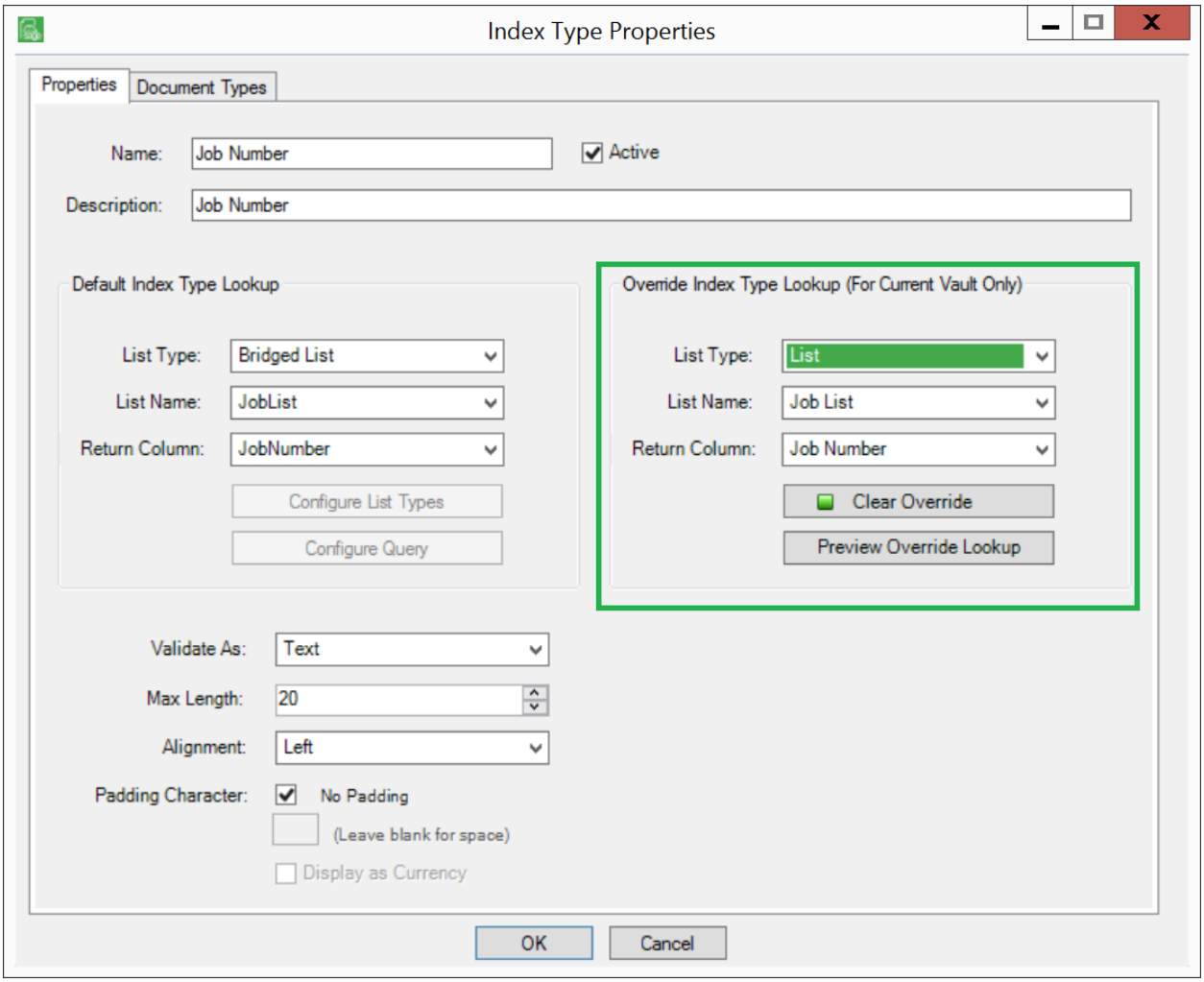
You can keep it open, enlarge it, make it smaller, close it. Sage Paperless remembers the settings so you do not have to. Move through the tabs to view information about the document you have open.



OVERRIDE INDEX TYPE LOOKUPS

We have added the ability to override the default index type lookups on a vault by vault basis. This is helpful when a customer has multiple vaults and desires to have a different lookup from one vault to another.

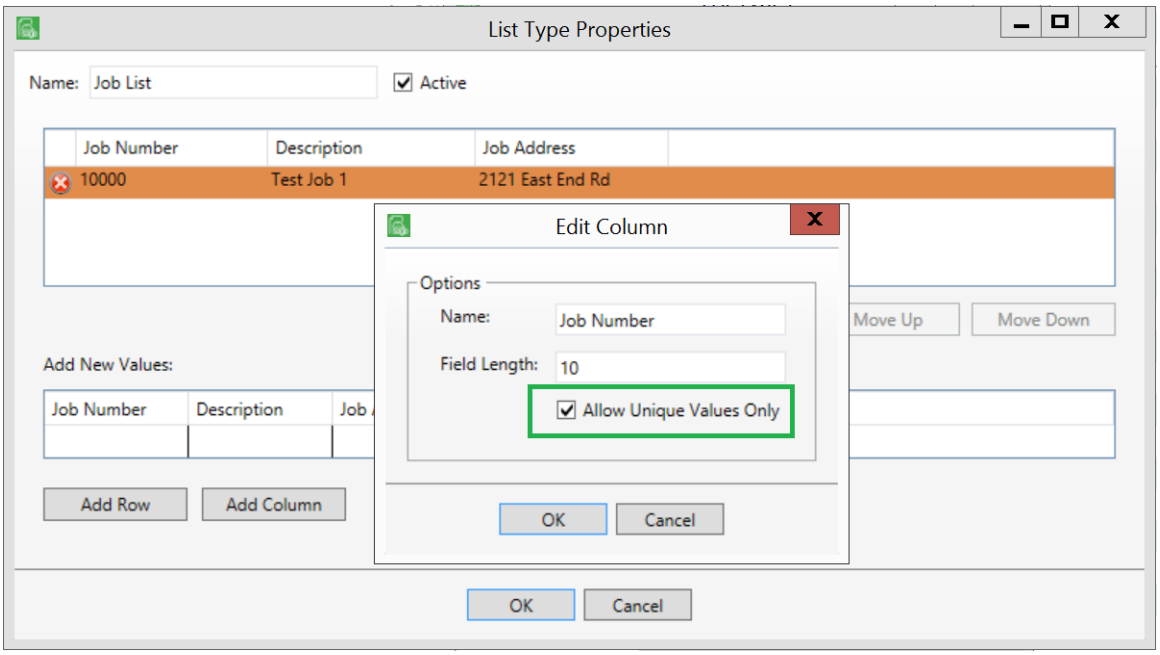
Administrators can choose another Bridged List, internal user defined list or a query list to serve as the “override” for the configured vault.



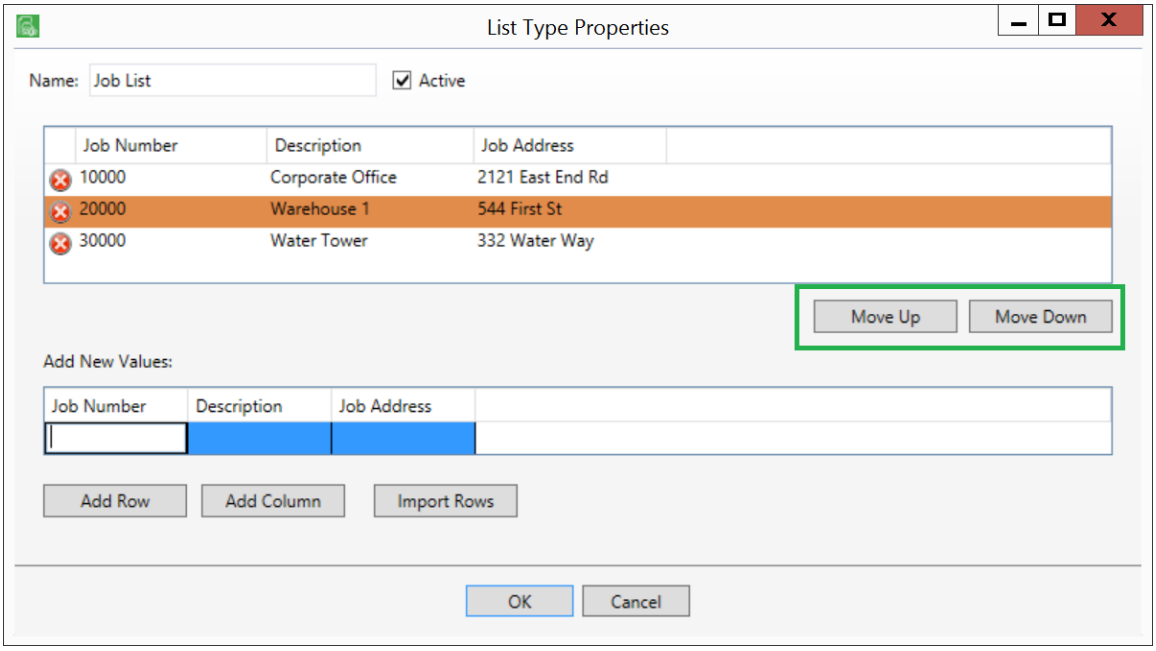
CUSTOM LIST ADDITIONS

We continue to enhance the Sage Paperless user defined list functionality in this newest release.

You can now restrict columns to allow unique values only to ensure data integrity.

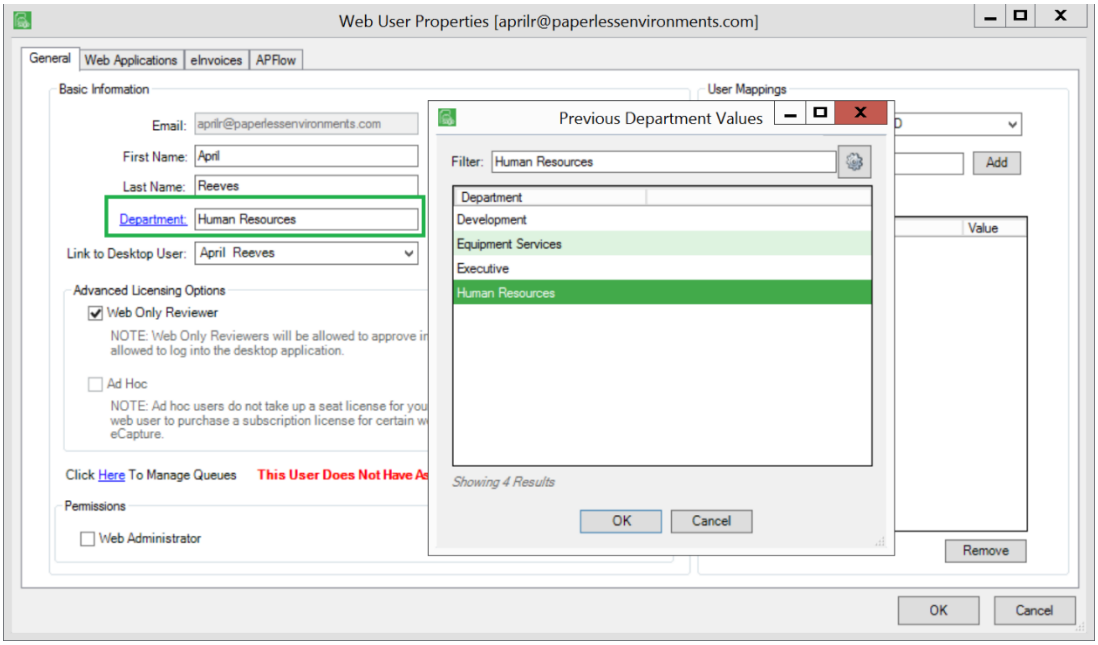


You can also organize your lists by reordering values.

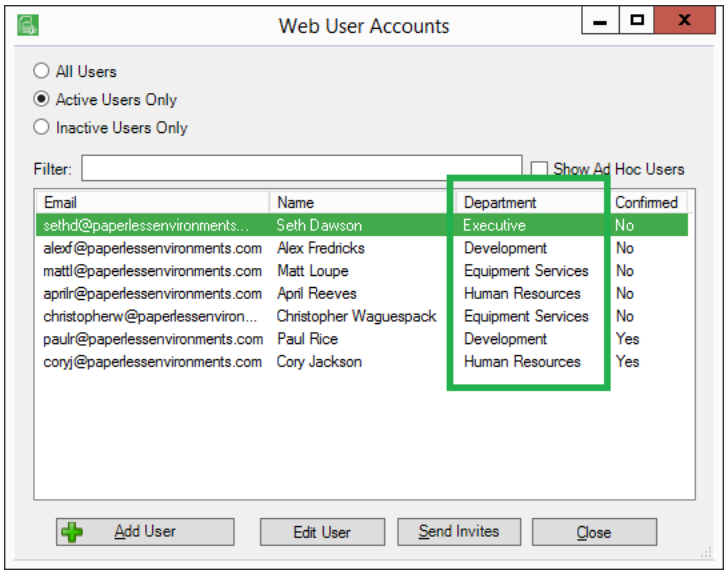


WEB USER DEPARTMENT FIELD

A new **Department** field has been added to the Web User Properties screen to allow you to classify your Sage Paperless web users any way you want. To add a department, enter it in the **Department** field. To check out values that were added previously, click the **Department** field label to display the **Previous Department Values** dialog box or simply click your lookup key in the **Department** field.

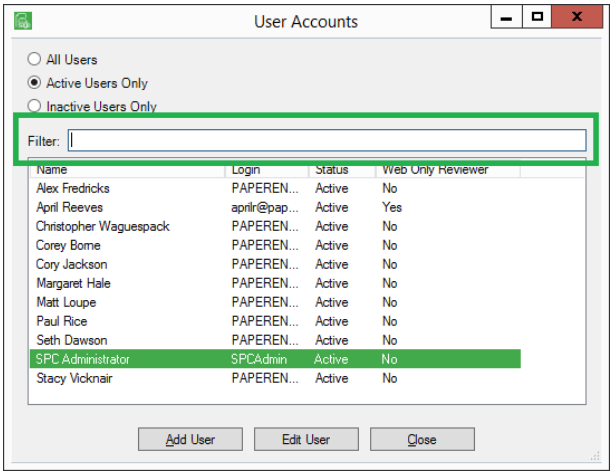


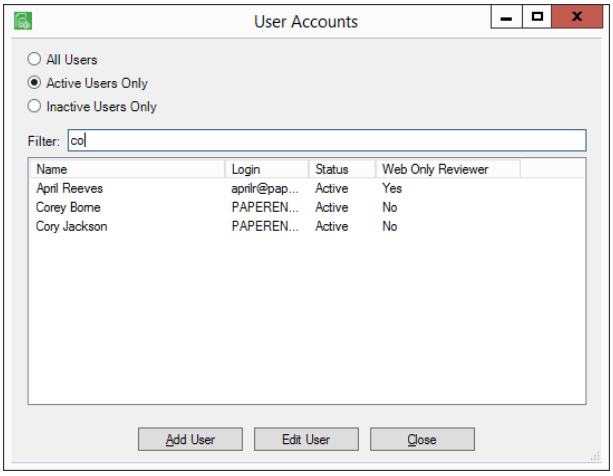
Use this field to filter your Web User lookup list as shown below.



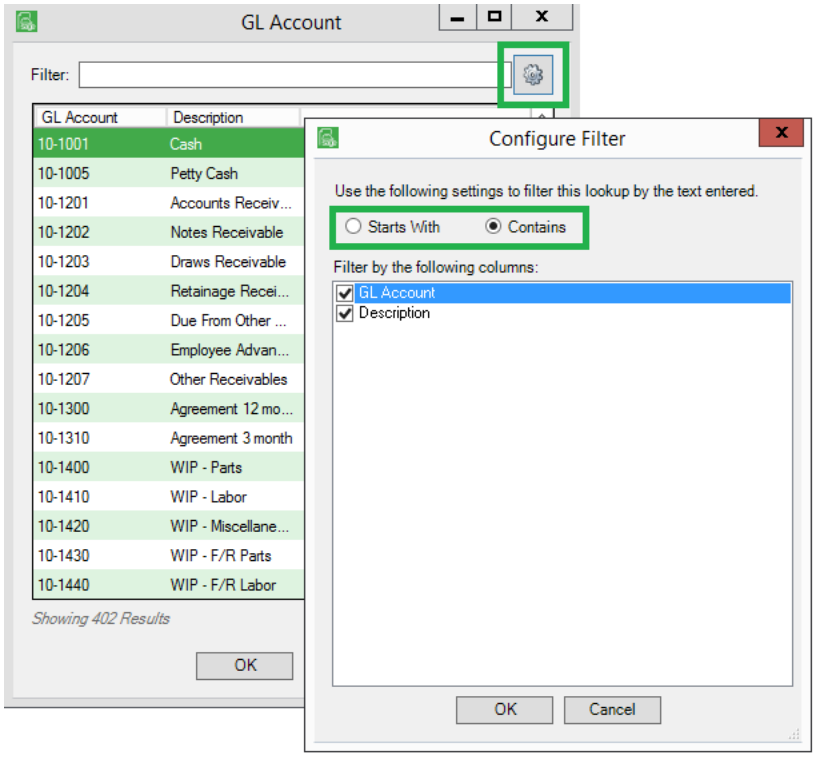
ADMINISTRATIVE LIST FILTERING

A new **Filter** field allows you to *instantly* filter the lookup list rather than having to scroll through lengthy lists to find the value you are looking for. The filtering occurs across all columns of the list so find your value in any column.





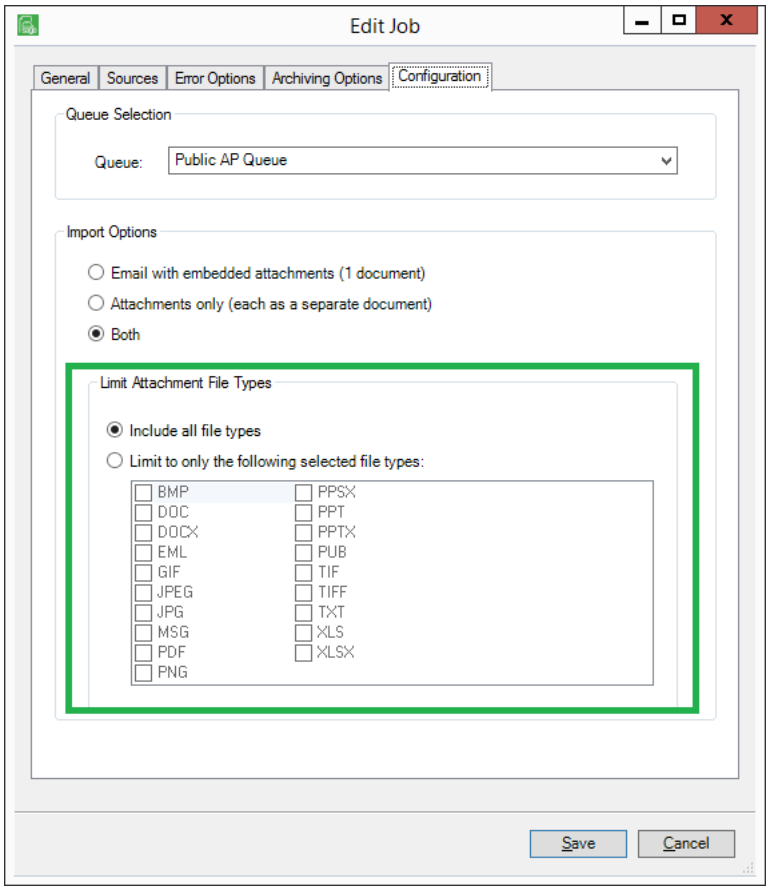
For lookup lists associated with your accounting system, users can configure which columns to include in the filtering by clicking the gear icon in the upper right hand corner of the lookup list. You can also select if the filtered results **Start With** or **Contains** the text entered.



EMAIL IMPORTER ENHANCEMENTS

Filter Out File Types

The Importer **Email Import** job for both Outlook and Gmail now include functionality to systematically exclude file types. This configuration will help you target the types of documents your email importer is looking for and weed out and email signatures that may also be found on any incoming emails.

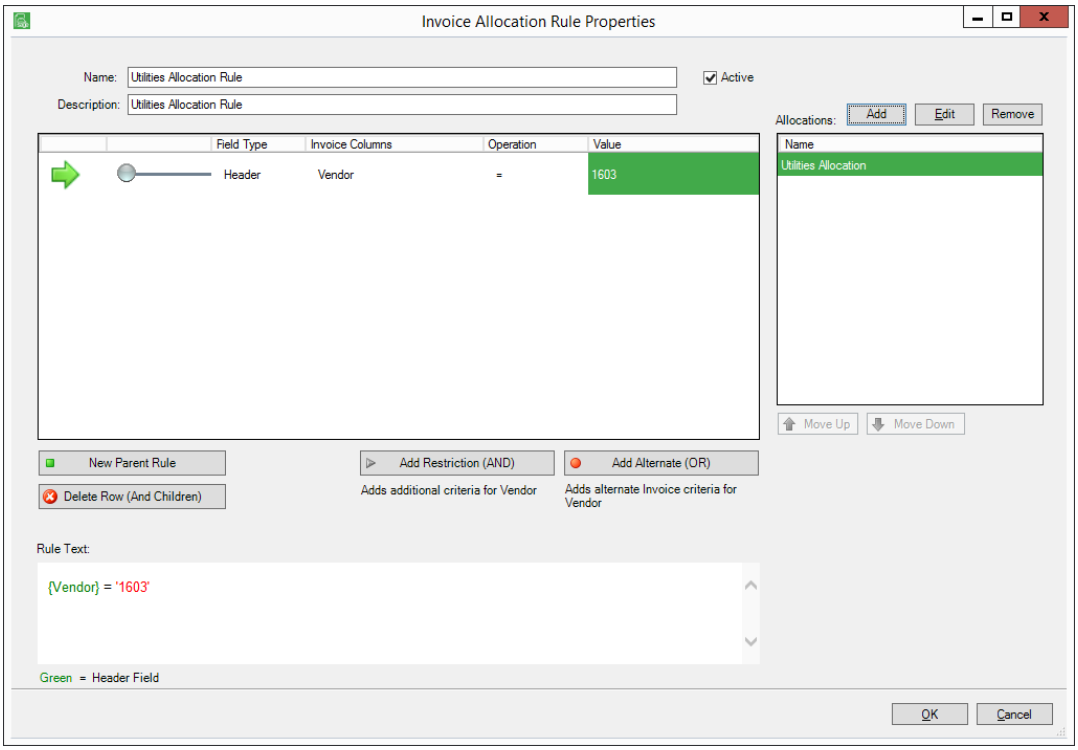


Reassign Email Accounts for Users that have left the Company

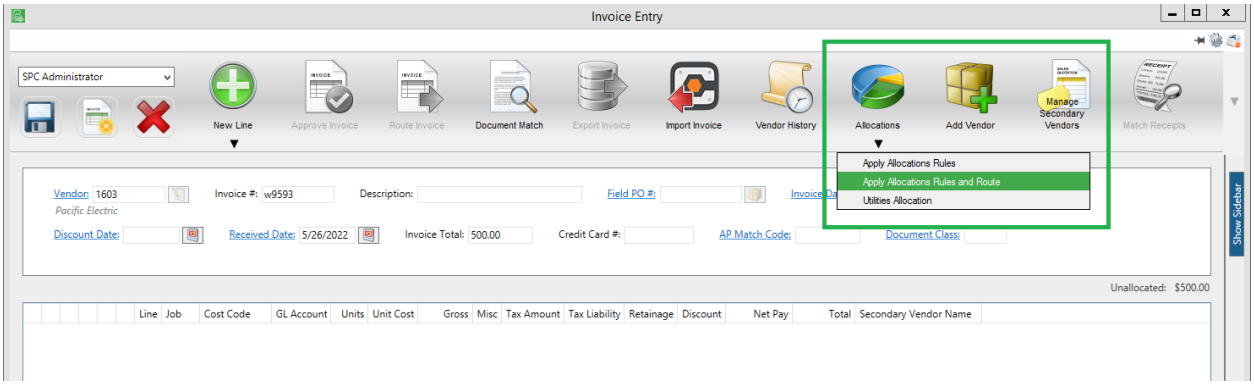
For security, email importer job configurations restrict access to configured inboxes to the job creator. By adding *Email Owners* to your import configuration, email addresses “owned” by a user who is no longer an employee can be easily reassigned to another individual or group.

NEW APFLOW ALLOCATION RULES

We have added the ability to setup **Expense Allocation Rules** whereby % based or $ based allocations can be applied based on entered invoice header values. This will allow you to setup allocations that are for a specific vendor or vendors. In the rule, apply one allocation, or multiple. This will save time for processors who have to remember which allocations get applied when.



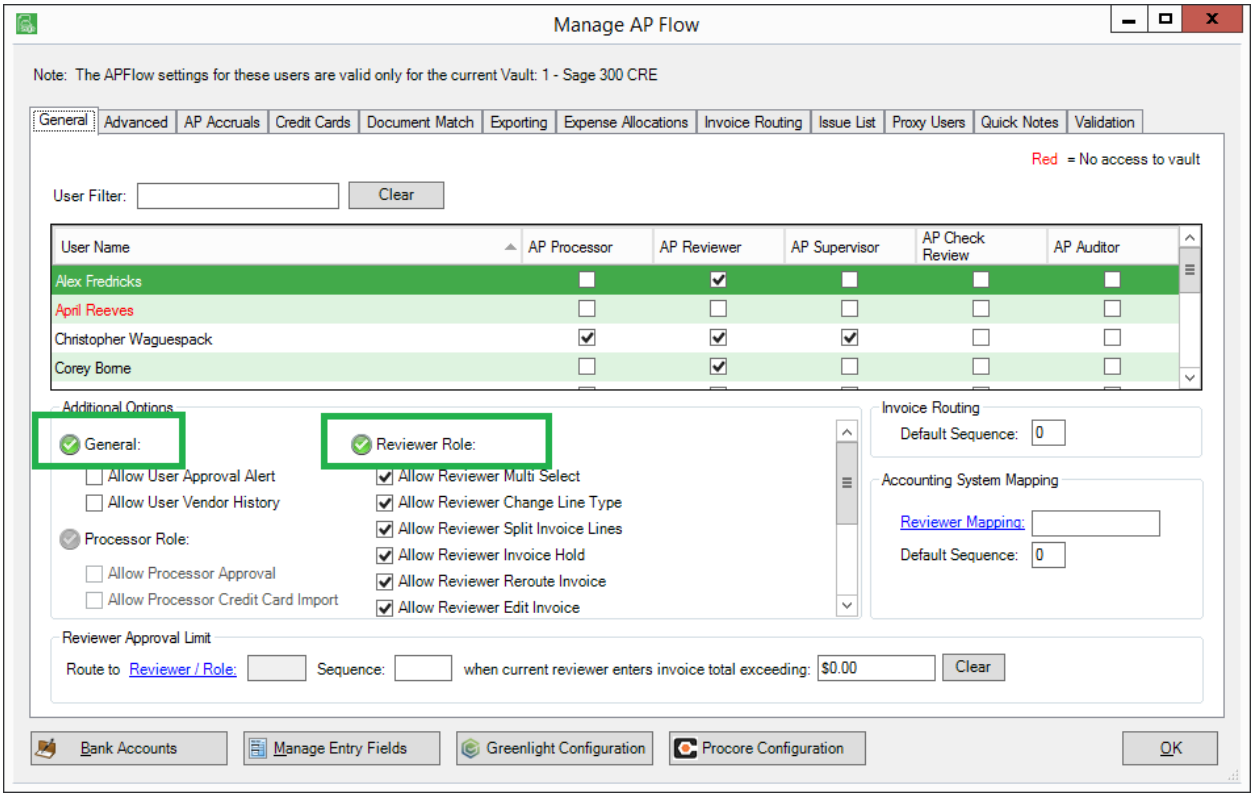
When entering a new invoice, processors can now choose **Apply Allocation Rules** which will apply any applicable rules to the current invoice. In this case the results will be shown to the processor immediately. For a more powerful option, the processor can choose **Apply Allocation Rules and Route**. In this case, applicable allocation rules will be applied and if the invoice is fully allocated and reviewers are assigned to the invoice, it will instantly routed to the reviewer(s) and the processor will begin entering the next invoice.



APFLOW EASE OF USE ENHANCEMENT

Quickly Configure APFlow™ Users by Role

Want to give users of a particular role all available permissions? Quickly select all options by clicking the green checkmark in each available section.

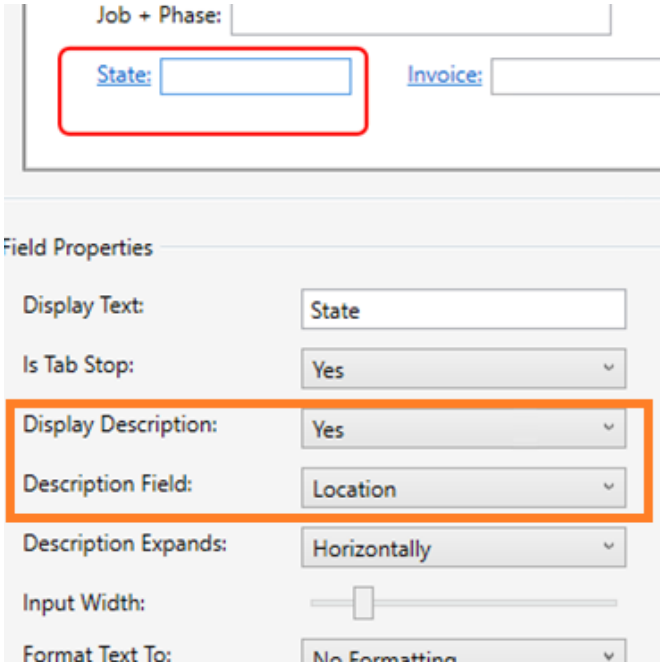


CONFIGURE INVOICE ENTRY FIELDS

Additional options for configuring entry fields has been added on the **Manage Entry Fields** screen! Administrators can now create calculations for fields, set descriptions on custom fields, and configure lookups for fields based on Paperless lists, Query Lists, and Index Types. We also allow list and Query List configuration directly on the **Configure Invoice Entry Fields** dialog.

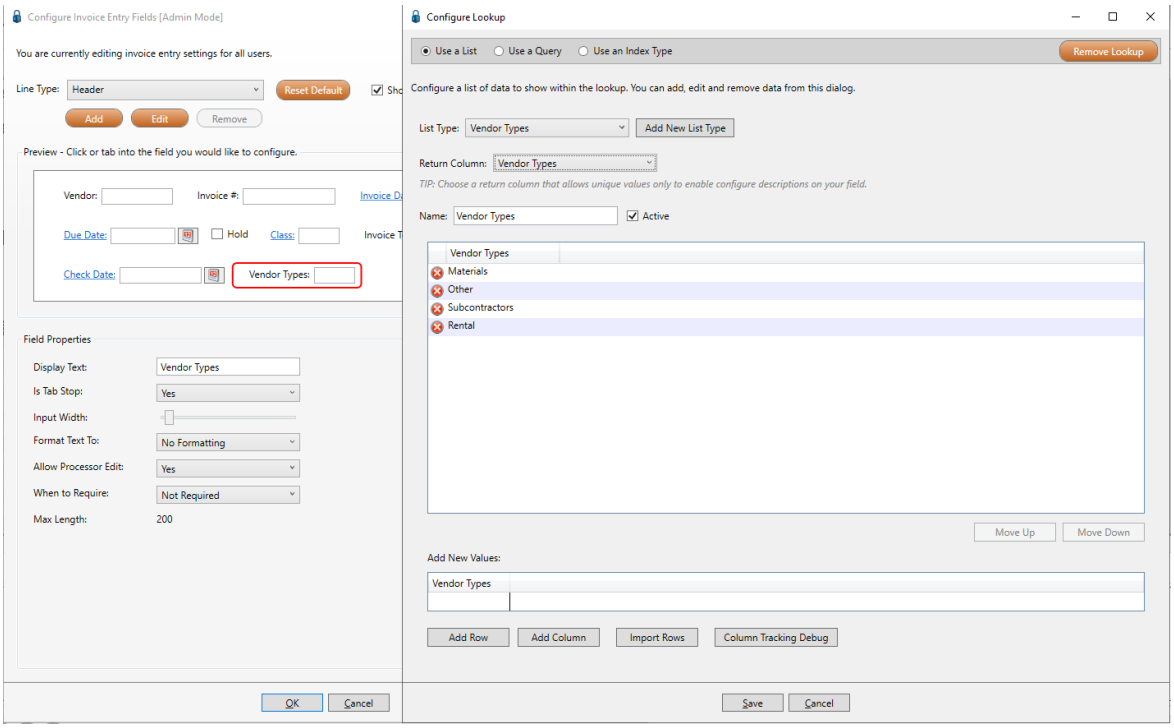
Set Descriptions on Fields

Select which column of a lookup list will be displayed as the description shown under the input field.

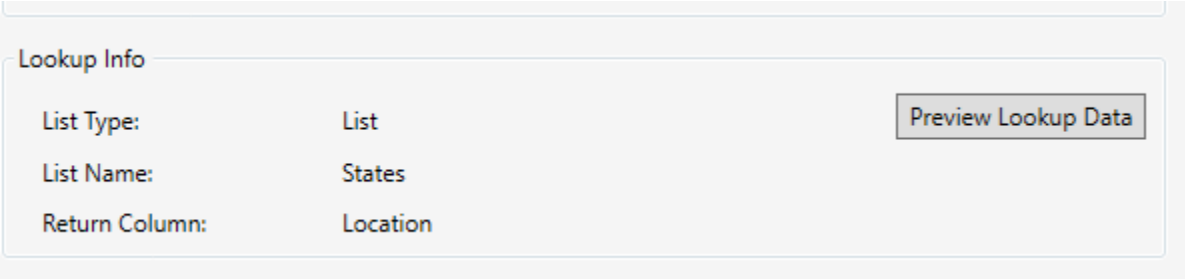


Set Lookups on Fields

Quickly Add Paperless Lists, Query Lists and Index Types on the fly. Then tie directly to your newly added custom fields.

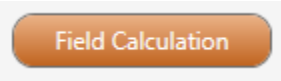


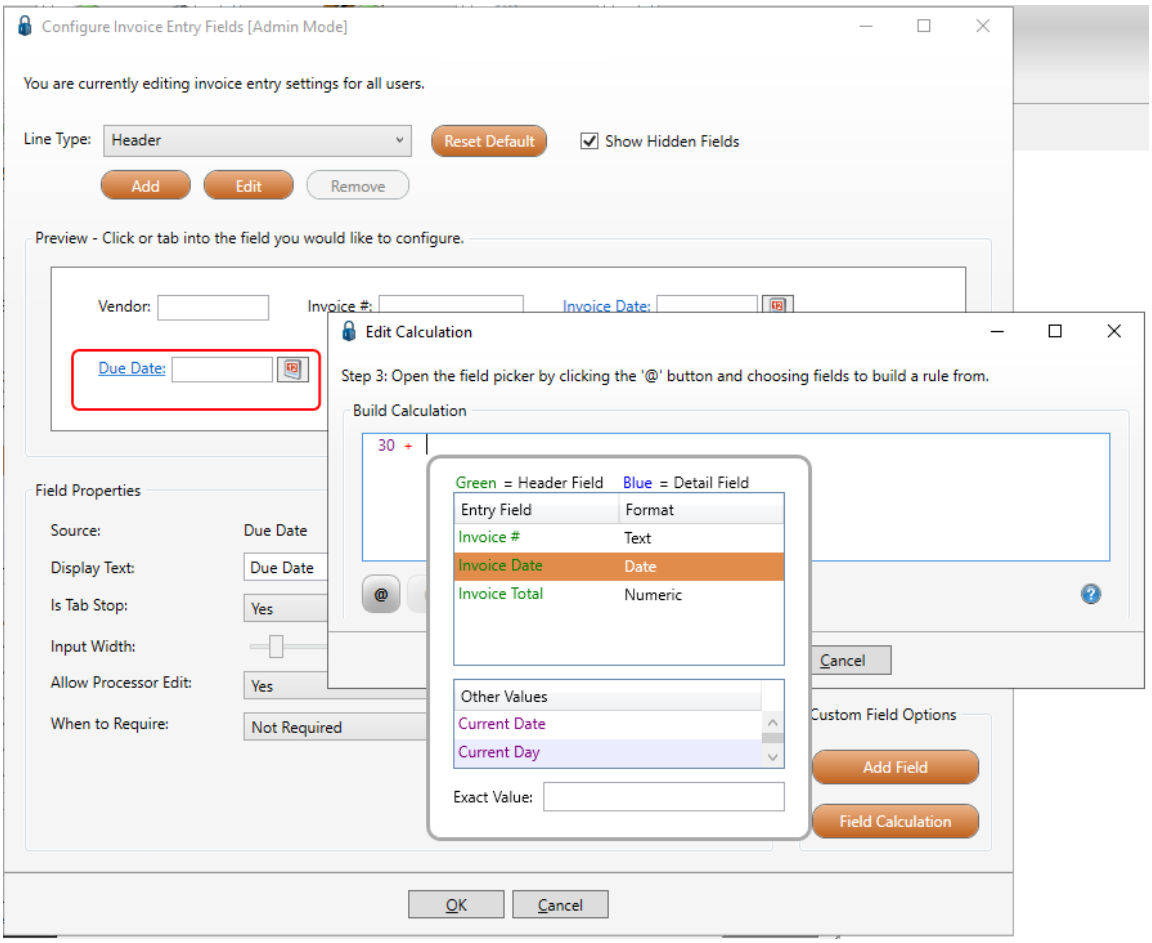
Once your lookups are in place you can now quickly identify which fields are tied to lookup configuration and preview lookup data directly on **Configure Invoice Entry Fields.**



Create Calculated Fields

String, numerical, and date calculations can now be created to populate the values of your custom fields. You can also use the calculation builder to default values, and populate line values from the header.





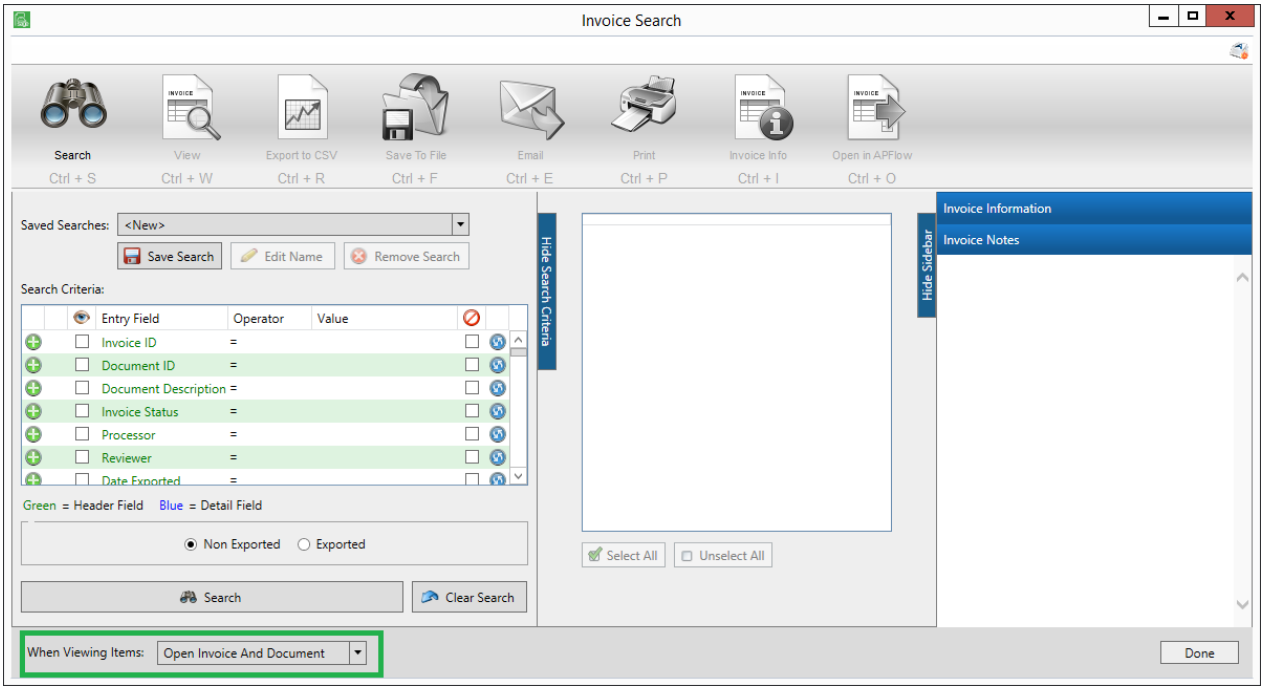
INVOICE SEARCH ENHANCEMENTS

The functionality of opening a document when viewing an invoice has been enhanced. Now you can view documents and/or invoices with or without opening an invoice while in Invoice Search.

If you select *Open Document*, the actual document displays in an **Image** tab window with the **Invoice Search** screen visible in the background.

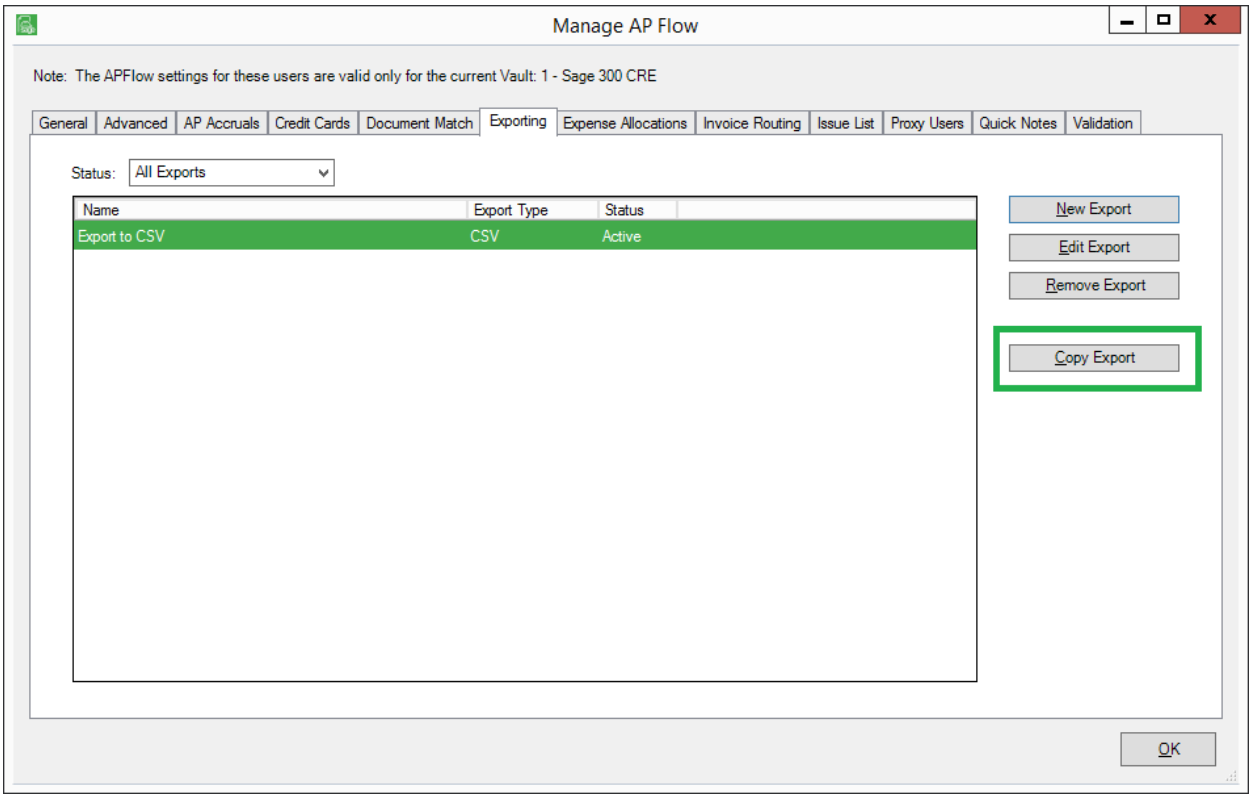
If you select *Open Invoice*, the **Invoice Entry** screen displays with fields populated. The **Invoice Search** screen is visible in the background.

If you select *Open Invoice And Document*, both the invoice document displays in an **Image** tab window as well as the **Invoice Entry** screen. The order of the screen display depends on what was visible most recently.



COPY CSV EXPORT CONFIGURATIONS

You can now copy a CSV export configuration from one vault to another, as long as both are bridged to the same accounting system.



PAPERLESS OCR

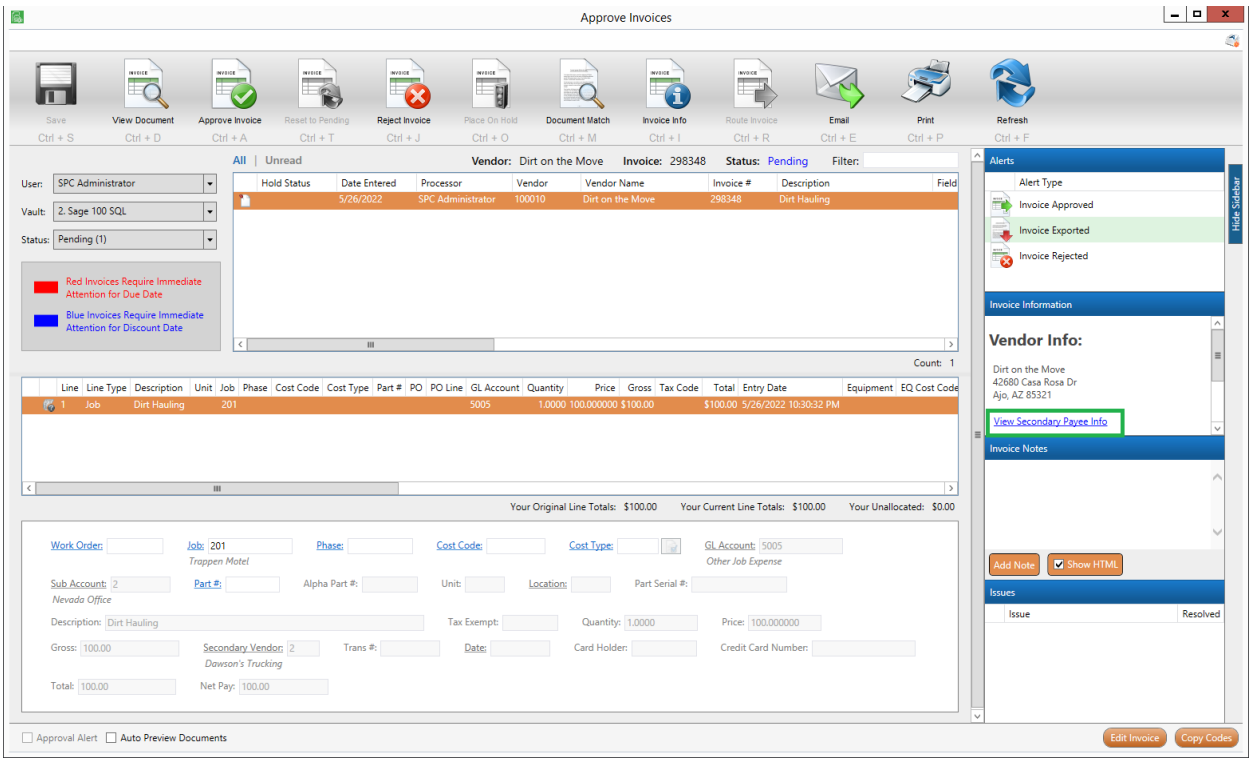
We have expanded our popular OCR functionality!

- Our OCR queue now **automatically refreshes** the status of your documents so no more clicking the Refresh button to see if the document has returned.
- Our OCR Invoice Starter Pack reads the vendor, invoice number, invoice date, invoice amount and purchase order number.
- You can now configure purchase order and subcontract fields read by OCR to automatically open their respective quicklists to expedite adding commitment lines.
- Our OCR engine can now apply your allocation rules and **auto-route** the invoice.

SAGE 100 CONTRACTOR ENHANCEMENT

Secondary payee information is now available for reviewers in our Approve Invoices module.

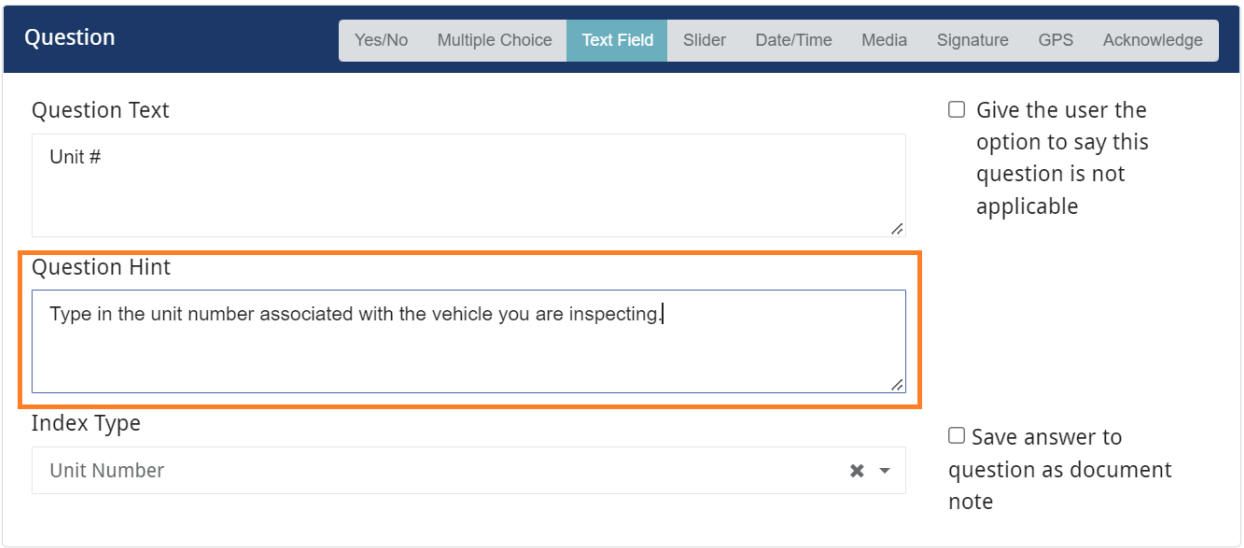
A link was added to the **Approve Invoices** screen so that Reviewers can see the secondary payees and totals when they are approving subcontractor invoices if a joint check payment is required.



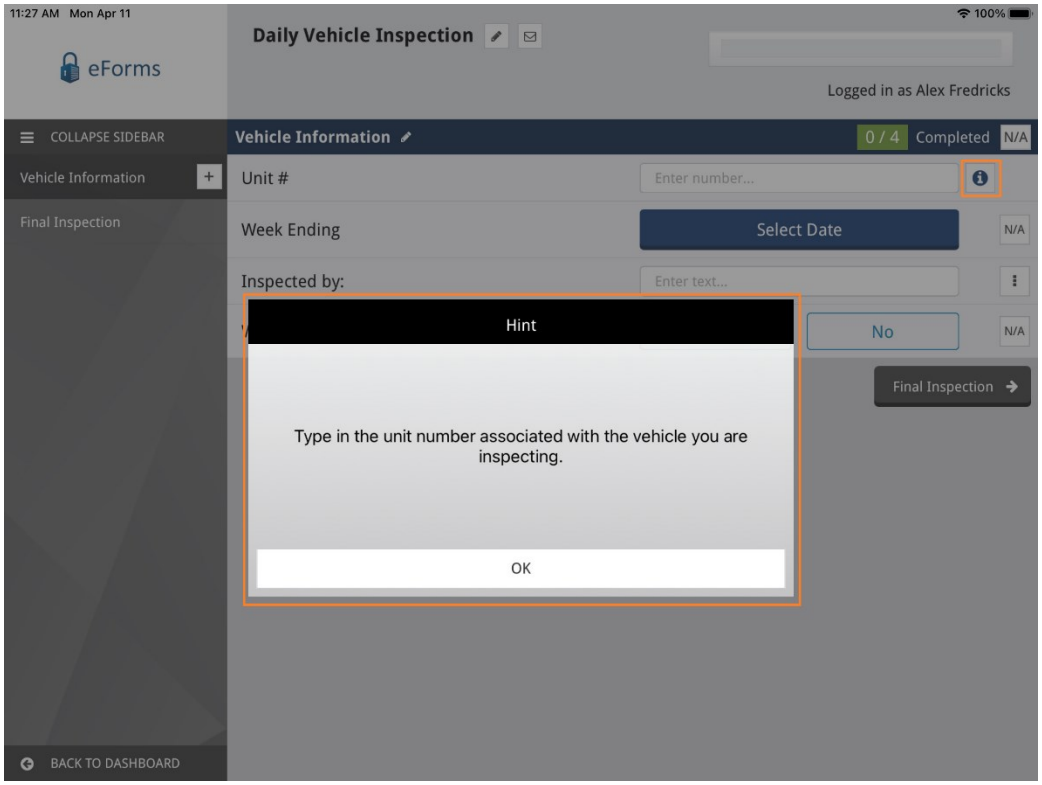
EFORMS™ ENHANCEMENTS

Question Hints

We have added the ability to add instructions or "hints" to the questions on your eForms. From the administration screen, you will see a **Question Hint** section below the **Question Text** field. Type in the hint you want to display with this question.

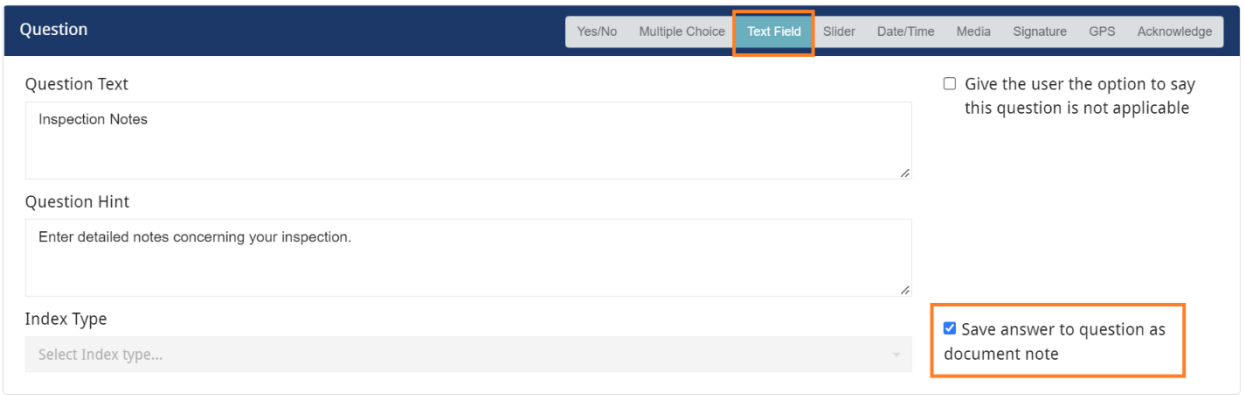


In the eForms™ app, the icon will appear next to questions that have hints associated with them. Tapping on the icon will reveal the hint as shown below.



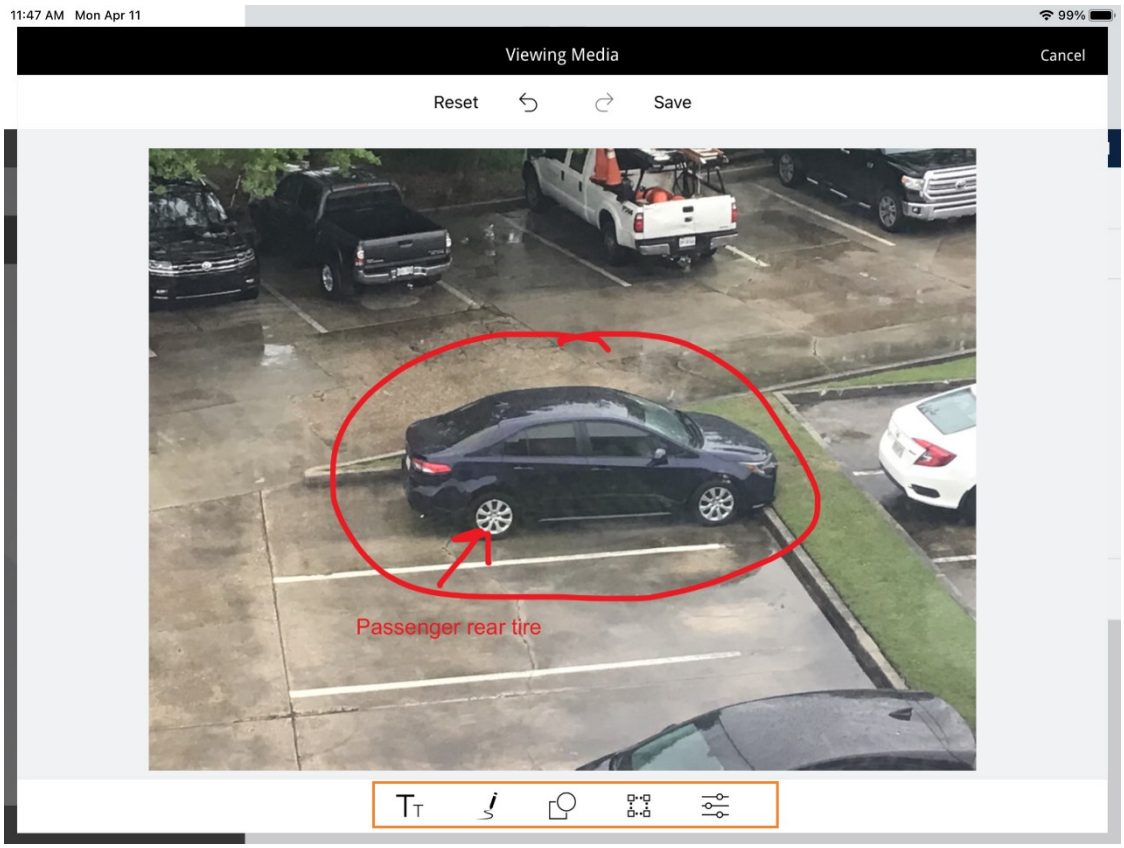
Saving text field answers as Document Notes

Many customers have asked for the ability to save text questions to the document notes of the form saved in Sage Paperless. When setting up or editing a Text Field question, simply check the **Save answer to question as document note** checkbox.



Edit Images on the Tablet App

We have added extensive editing capabilities to the media question in eForms.



Tap on the photo to bring up the **Viewing Media** screen. Editing tool icons are listed at the bottom of the screen.

Text tool – allows you to add text to the photo. Add text, select font size, color, alignment and transparency.

Freehand tool – use this tool to draw lines with your finger or pointing device. Select line size, color and transparency.

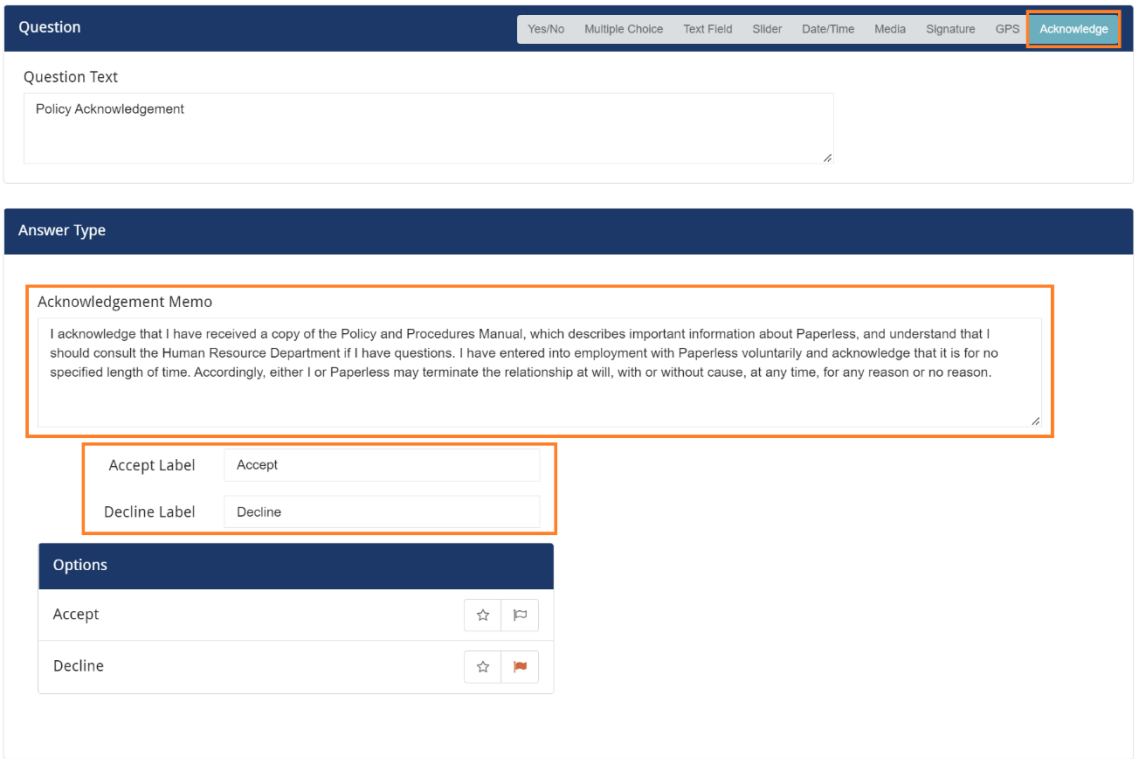
Shape tool – used to draw squares, circles or arrows on photo. Choose line size, color and transparency.

Crop, Rotate & Flip tool – used to crop, rotate or flip photos.

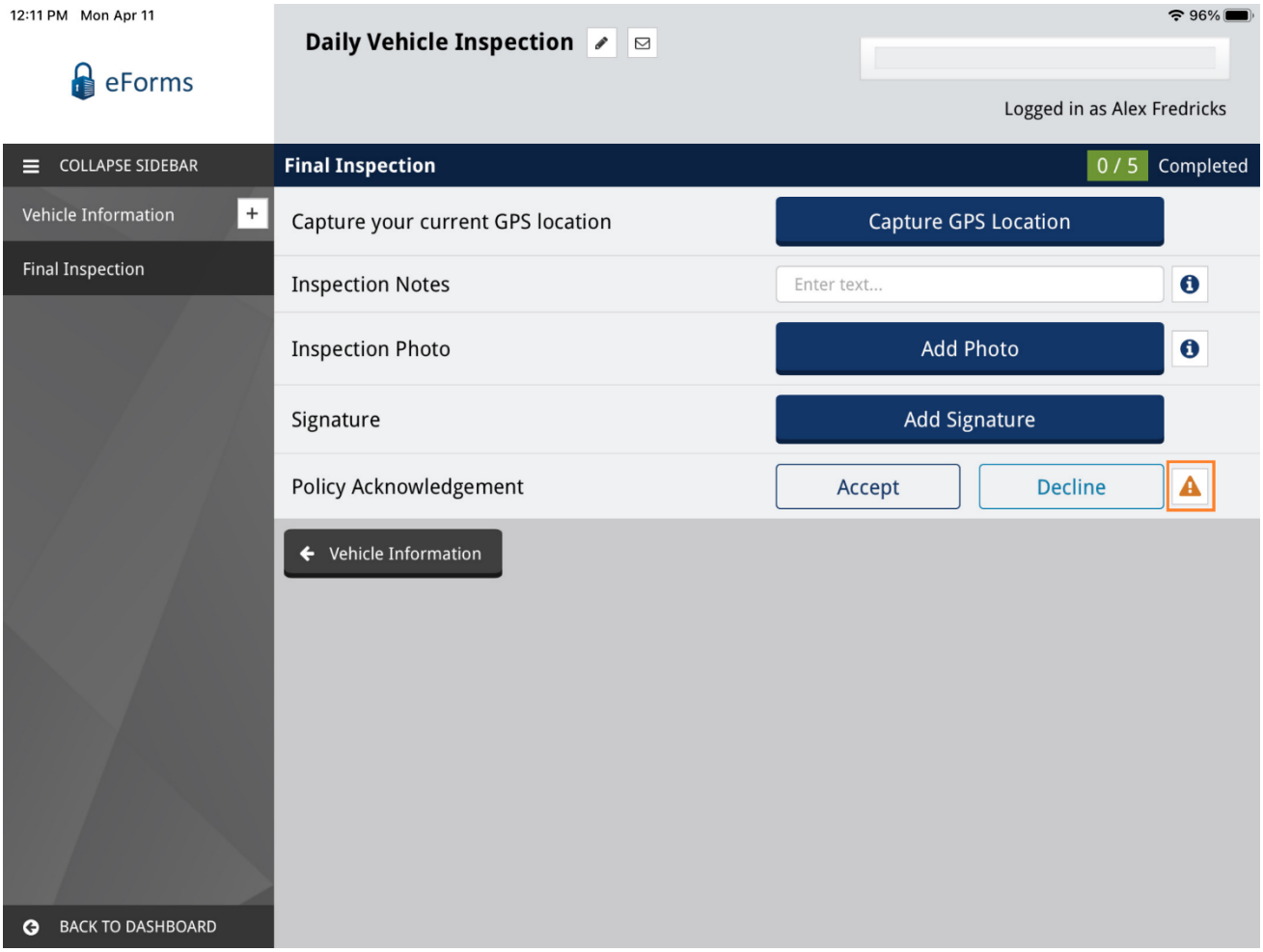
Picture Editor tool – change the hue, saturation, brightness, contrast, blur and sharpen aspects of the photo.

New – Acknowledgment Question

A new **Acknowledge** question has been added to the list of question types for a form. This question is used to present text that you want the form user to "acknowledge". Often times used for legal policy memos that must be acknowledged by the user.



The **Accept** and **Decline** answer labels can be customized to whatever you want them to be.



The user can click the  icon of the Acknowledgement question to view the memo.