

Sage Paperless Construction

Release Notes

Version 2023.1

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Version 2023.1

We are pleased to announce the release of our newest Sage Paperless Construction version 2023.1.

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

ePortal 2.0 released

A complete re-wiring of the backend code behind the scenes has resulted in more efficient data loading, transitions between screens and across platforms for ePortal, eForms and eCapture. Tests have shown that loading is 5x faster than ePortal 1.0.

AvidXchange integration

The new Payment Manager module is integrated with AvidXchange's AvidPay electronic payment system. Send invoice information for payment and receive confirmation/settlement documentation directly to and from AvidXchange.

Sage Paperless Tiff Printer Driver Update

You can now migrate your Paperless TIFF Printer to version 12! This latest version ensures better image quality and sharper resolution. This update is done systematically.



New payment manager module

Introducing the new Payment Manager module. This module replaces the existing Check Review module, taking that functionality to the next level. You can still perform all the processes you performed within Check Review – review payments before you send them out, double-check that supporting documentation is in place, and verify that compliance requirements are met. But now, through Payment Manager, there is the added payment processing functionality where payments are moved through the process based on payment status. Payments can be approved and rejected by the reviewers.

In addition, the advanced search sidebar allows the user to search for payment information similar to what is found on the APFlow™ Invoice Search screen.

The screenshot displays the Sage Payment Manager interface. At the top, there is a navigation bar with icons for Search, View, Approve Payment, Hold to Pending, Rejected Payment, Release Hold, Mark As Paid, Save To File, Email, Print, Invoice Info, and Vendor History. Below this, the main workspace is divided into several sections:

- Search Sidebar:** A vertical sidebar on the left containing a search criteria table with columns for Field, Operator, and Value. Fields include Payment Type, Bank Account, Check Number, EFT Batch, EFT Sequence, Payment Date, Payment Amount, Vendor Number, Payer Name, Joint Payer, Payer Address, Payer Address 2, Payer City, Payer State, Payer Zip, Invoice ID, Document ID, Document Description, Processor, Date Reported, Vendor Name, Invoice #, Description, Invoice Date, Due Date, Discount Date, Field PO #, Pay Control, Invoice Total, Local Tax, State Tax, Private, Hold Code, and Payer Name.
- Main Data Table:** A central table with tabs for Pending, Rejected, On Hold, and Paid. The Pending tab is active, showing a list of payments with columns for Hold Status, Vendor Number, Payer, Joint Payer, EFT Payment Date, Payment Amount, Bank Account, Payment Type, Check Number, and EFT Batch. Below this table is an Invoices section with columns for Invoice #, Payment Amount, Description, Invoice Date, Due Date, Discount Date, Invoice Total, Date Entered, Processor, and Field PO #.
- Right-Hand Sidebar:** Contains several informational panels: Alerts (Payment Approved, Payment Rejected, Payment Paid), Payment Information (Payee Address: PO Box 00355, Baltimore, MD 21284), Compliance (Compliance Check Passed), Associated Documents (AP Invoice - 24 West Swan Road Resources - 200311), and Payment Notes (SYSTEM MESSAGE: Payment was set back to pending by p/a/s Administrator).

APflow Invoice Search – New Capabilities

In previous versions, you could only search on exported invoices or search on non-exported invoices. With the addition of an **All** radio button, you can search on both exported *and* non-exported invoices. This will speed up your searches if you are unsure if the invoice you seek was exported—or not!

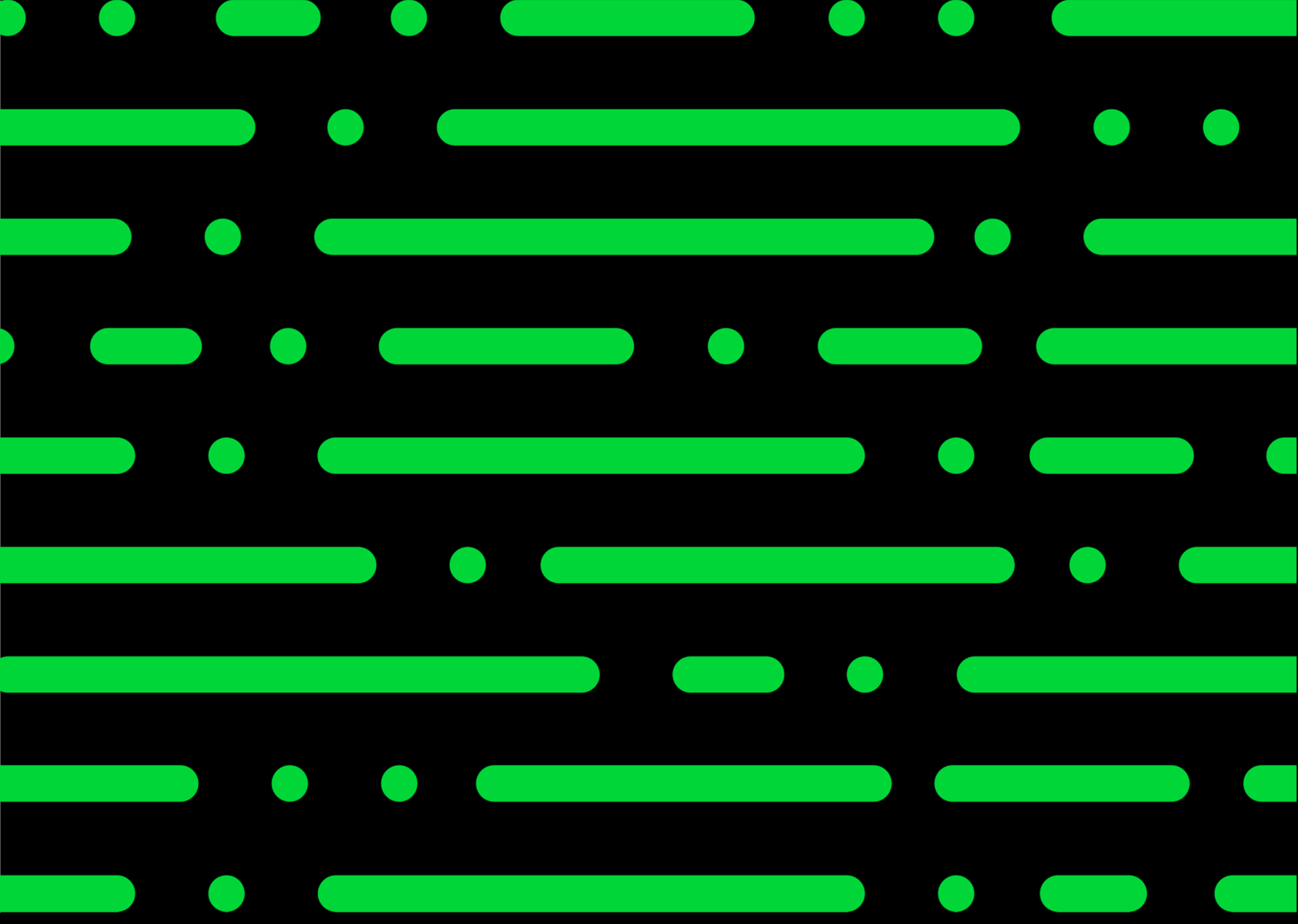
The screenshot displays the APflow Invoice Search interface. At the top, there is a 'Saved Searches' dropdown menu set to '<New>', with buttons for 'Save Search', 'Edit Name', and 'Remove Search'. Below this is the 'Search Criteria' section, which is a table with columns for 'Entry Field', 'Operator', and 'Value'. The table lists various fields such as Invoice ID, Document ID, Invoice Status, Processor, Reviewer, Date Exported, Vendor, Vendor Name, Invoice #, Description, Invoice Date, Due Date, and Discount Date. Each row has a green plus icon on the left and a red minus icon on the right. A legend below the table indicates 'Green = Header Field' and 'Blue = Detail Field'. At the bottom, there are radio buttons for 'Non Exported' (selected), 'Exported', and 'All'. A search bar with a magnifying glass icon and a 'Clear Search' button are also present.

Entry Field	Operator	Value
<input type="checkbox"/> Invoice ID	=	
<input type="checkbox"/> Document ID	=	
<input type="checkbox"/> Document Description	=	
<input type="checkbox"/> Invoice Status	=	
<input type="checkbox"/> Processor	=	
<input type="checkbox"/> Reviewer	=	
<input type="checkbox"/> Date Exported	=	
<input type="checkbox"/> Vendor	=	
<input type="checkbox"/> Vendor Name	=	
<input type="checkbox"/> Invoice #	=	
<input type="checkbox"/> Description	=	
<input type="checkbox"/> Invoice Date	=	
<input type="checkbox"/> Due Date	=	
<input type="checkbox"/> Discount Date	=	

Green = Header Field Blue = Detail Field

Non Exported Exported All

Search Clear Search



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