

The background features a series of concentric, wavy lines in various shades of green and blue, creating a sense of depth and movement. A small, stylized figure of a person in a white shirt and dark trousers is walking along a path that leads from the bottom right towards the top right, where the path disappears into the bright green background.

Sage AR Automation Webinar

29th May 2025

Sage

Agenda

- Enhancements
- Issues

Issue : SS Portal-Under Closed Invoice Tab, Added "Select All" option to Include All Invoices and export to excel

- Functional Flow
 - Open SS Portal
 - Navigate to Closed Invoice
 - Click on Select All Option
 - Click on Export

Search

Send message

Download attachments

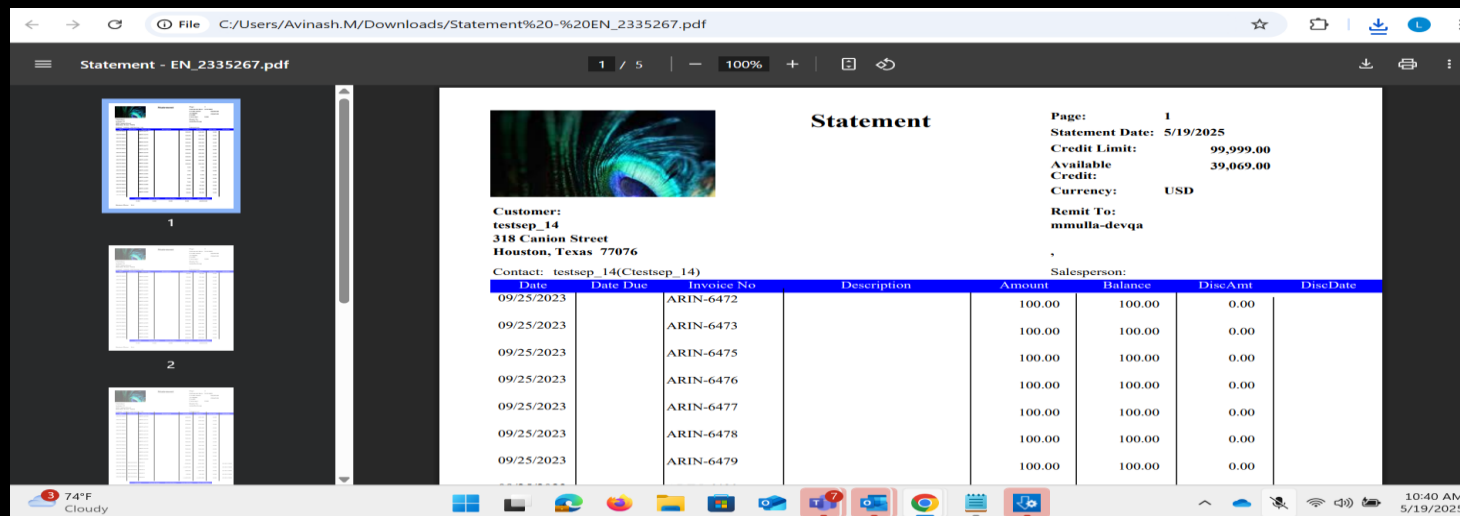
Export

All 10 invoices on this page are selected. [Select all 679 invoices in closed invoices.](#)

<input type="checkbox"/>	Actions	Invoice Number	Amount Paid	Transaction Id	Date paid	Invoice Date	Customer PO	ORIGTRANAMT	InDispute
<input checked="" type="checkbox"/>	Actions	1000014113-IN	\$ 260.00	7575	Jan 15, 2025	Jan 15, 2025		\$ 260.00	false
<input checked="" type="checkbox"/>	Actions	1000014107-IN	\$ 71.00	7587	Jan 15, 2025	Jan 15, 2025		\$ 71.00	false
<input checked="" type="checkbox"/>	Actions	1000014105-IN	\$ 392.00	7577	Jan 15, 2025	Jan 15, 2025		\$ 400.00	false
<input checked="" type="checkbox"/>	Actions	1000014102-IN	\$ 293.00	7586	Jan 15, 2025	Jan 15, 2025		\$ 299.00	false
<input checked="" type="checkbox"/>	Actions	1000014101-IN	\$ 220.00	7586	Jan 15, 2025	Jan 15, 2025		\$ 225.00	false

Issue : Webclient-Manhattan Plumbing - Invoice reports don't properly pull logos from the company

- Functional Flow
 - Update Logo at Company Page
 - Navigate to Inquiry > By User > Invoice Page
 - Select an Invoice and Click on Reports
 - Select Report and Click on Process and Preview



Issue : Need to Sync Contact Email 2 for P21

- User is now able to view second email
- Functional Flow
 - Navigate to account overview page of any customer
 - Click on Overview drop down
 - Click on Contact tab

Contact InformationTimestamp

Contact ID2406xabi

Job TitleManager

Address ID103363

Company Namecontactmay

Address 1123 street

Address 2

City/State/ZipjersyJY30305

CountryUS

Mail Stop

Contact E-Mailxabi1@mm.com

Secondary E-Mailolive@mm.com

Comments

Call Cycle Days0Delete

Last Hard TouchMM/dd/yyyy

Contact Role

☐ Email Opt Out

25Go1 of 11 - 1 of 1 items

CONTACT TYPE	COMPANY ID	COMPANY NAME	CONTACT LINK	LINK NAME	STATUS
Customer 1	Acme Paper & Supply Co, Inc.	103363 contactmay		Active	

103363: contactmay

OVERVIEWCONTACTSDOCUMENTS

CreditInfoHistoryRolled Up HistoryContactsTransactionsNACMAccount NotesPortal Access

Contact Name	Phone	Primar	Email	Email2	Name	Email
xabi alonso	42312:	<input type="checkbox"/>	<input type="checkbox"/>	Delete	xabi alonso	xabi1@mm.com
	Print As					olive@mm.com

EditAddUDF

Issue : Added Validation to ensure that the sync end time is always greater than the start time.

Screenshot

Schedule Tasks

Schedule Description

Acumatica - AcumaticaR1-devqa

Time Zone

(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Next Run Date

5/19/2025 3:15 PM

Run

Hourly

Every 1 Hour

Between

11:00 AM

and

10:00 AM

Last Run Date

4/6/2025 12:30:00 PM

☐

Enabled

Save

Cancel

Delete

Lockstep entities to sync

☐

Company

☐

Customer

☐

Contacts

☐

Invoice☐☐

Companies to Sync

Run

☐ Re-Initialize

End time cannot be earlier than start time!

Thank You!