



Sage AR Automation Webinar

29th May 2025

Sage

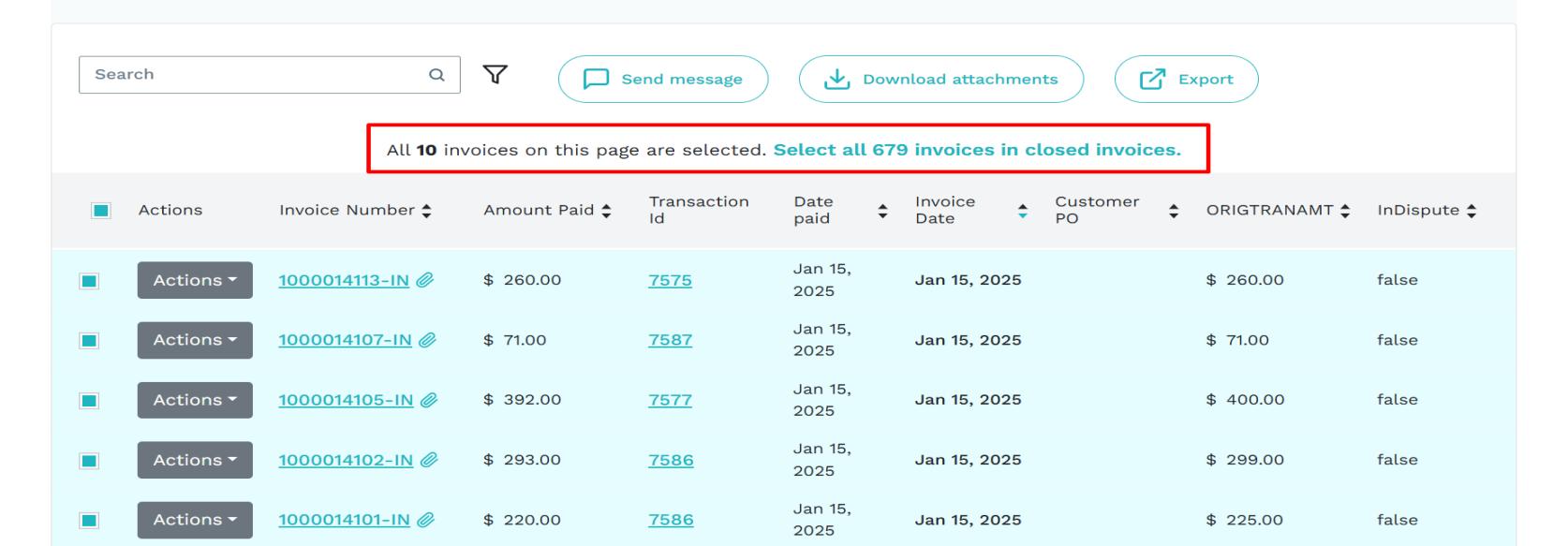
Agenda

- 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



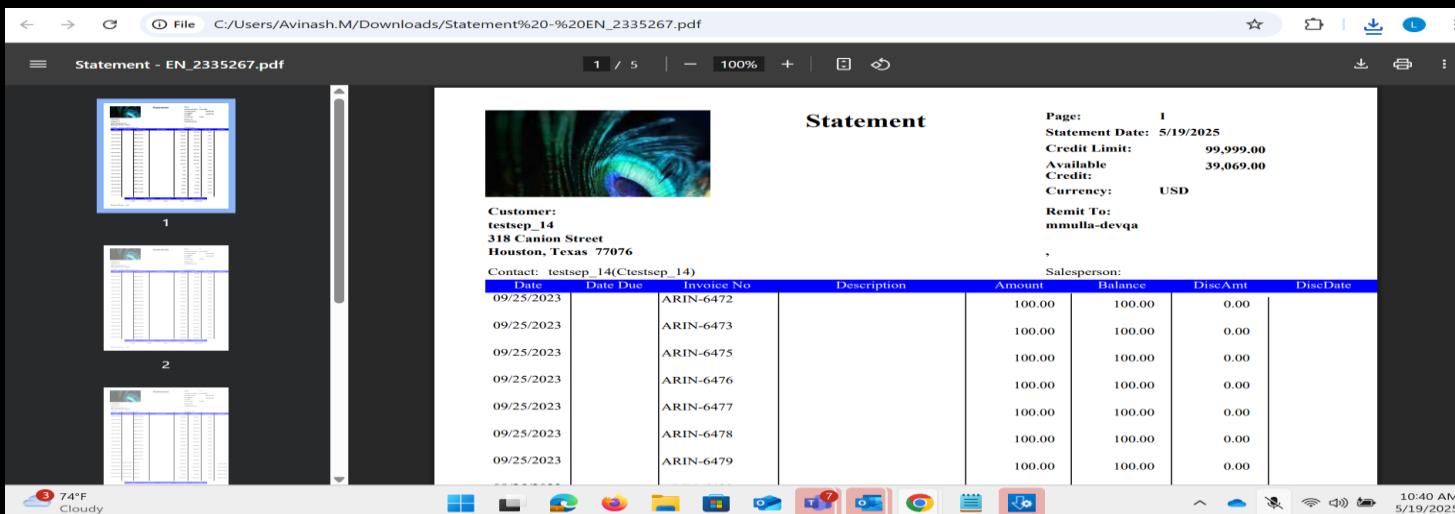
The screenshot shows a table of closed invoices with the following data:

Actions	Invoice Number	Amount Paid	Transaction Id	Date paid	Invoice Date	Customer PO	ORIGTRANAMT	InDispute
Actions ▾	1000014113-IN	\$ 260.00	7575	Jan 15, 2025	Jan 15, 2025		\$ 260.00	false
Actions ▾	1000014107-IN	\$ 71.00	7587	Jan 15, 2025	Jan 15, 2025		\$ 71.00	false
Actions ▾	1000014105-IN	\$ 392.00	7577	Jan 15, 2025	Jan 15, 2025		\$ 400.00	false
Actions ▾	1000014102-IN	\$ 293.00	7586	Jan 15, 2025	Jan 15, 2025		\$ 299.00	false
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 Information		Timestamp	...		
Contact ID	2406	xabi	alonso	Last Hard Touch <input checked="" type="checkbox"/> MM/dd/yyyy	
Job Title	Manager			Contact Role <input type="checkbox"/> Email Opt Out	
Address ID	103363	Comments			
Company Name	contactmay				
Address 1	123 street				
Address 2					
City/State/Zip	jersy	JY	30305		
Country	US				
Mail Stop				Call Cycle Days <input type="text" value="0"/> <input type="checkbox"/> Delete	
Contact E-Mail	xabi1@mm.com				
Secondary E-Mail	olive@mm.com				
<input type="button" value="25"/> <input type="button" value="Go"/> <input type="button" value="1 of 1"/>		<input type="button" value="<"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value=">"/>			
1 - 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

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 (selected) Every 1 Hour

Last Run Date: 4/6/2025 12:30:00 PM

Enabled

Lockstep entities to sync:

Company Customer Contacts Invoice Payment Calc Dashboard

Companies to Sync:

Re-Initialize

End time cannot be earlier than start time!

Thank You!