V1

Electronic Document Management

WHAT'S NEW IN EDM R13 ELECTRONIC DOCUMENT MANAGMENT FOR SAGE ENTERPRISE MANAGEMENT BY V1

The latest release of V1's Electronic Document Management for Sage Enterprise Management is the most feature rich release yet. It is a streamlined version of the solution, offering increased automation to simplify installation as well as integration with attachments. This means that it is now easier to archive documents from Sage screens as well as supporting more object types.

▶ **Security and Compliance**
The latest release enhances the security of the EDM solution, and offers customers the opportunity to enhance the security of their data. With the incoming General Data Protection Regulation (GDPR) fast approaching, you can now take advantage of the V1 SmartRetentions module. This is designed to manage the retention policies for all documents, allowing both automated removal and controlled manual deletion of documents. This will support your journey to compliance with the GDPR.

▶ **Improved Data Capture**
V1 have replaced the OCR engine behind the data capture system within the Purchase Invoice Automation (PIA) solution. This is to allow for improved handling and better support of difficult images. The handling of protected PDF invoices has improved, as has the support for all PDF invoices. The automated archiving of PDF invoices now includes the covering email and any additional attachments to help keep your important documents together. Importing these invoices from mailboxes now supports IMAP as well as POP3.

The revitalised data capture system captures all invoice types with a single profile to simplify your document handling. To further streamline the process, purchase invoices can now be more easily matched to orders and receipts. There is also the improved functionality to allow faster selection of multiple orders and receipts against a single invoice.
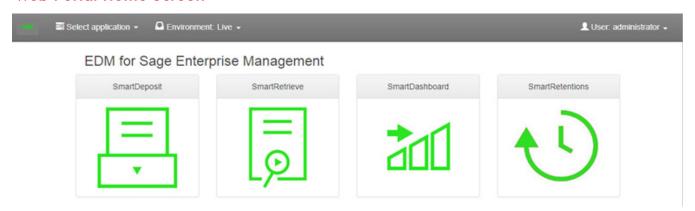
▶ **Automation**
V1 are focused on utilising automation to simplify your document handling. The automated archiving of PDF invoices has been enhanced to include the covering email, and any additional attachments. We have also automated the coding of Supplier Invoices (BIS) from Account Structures.

▶ **New Functionality for Sage Users**
To aid the controlling of your data this update will provide an easier way to archive documents that are in Sage. We have also simplified operations in the document viewer, and enhanced its functionality. The viewer allows you to access related documents within its responsive layout that now adapts to small screens such as smartphones and tablets. This enables moving towards a modern workplace, and collaborative working. The viewer has been also been improved to support document annotations from external users.

Web Portal Home Screen

EDM for Sage Enterprise Management

| SmartDeposit | SmartRetrieve | SmartDashboard | SmartRetentions |

SmartDeposit

SmartDeposit ▾ | Environment: Live ▾ | User: admin ▾

Lookup / validate | Deposit document

❶ Select document
Browse | BMS007_PICTURE.JPG
✖ Clear document

❷ Select document type
Transactional Attachments ▾

⤢ ⊕ ⊖ ↻ Open externally

❸ Populate fields | ↻ Clear fields

Sage Endpoint
TEST ▾

Document Creator
admin

Submission Date
04/25/2018

Document Type
[SIH] Sales Invoices ▾

Transaction Number
ZAINV1404ZA011000001

Transaction Date
04/10/2016

Company
ZA10

Site
ZA011

Purchase Invoice Automation

Name	Image	Value
Sage Endpoint		TEST
Validate User		ADMIN
Search Type		
Supplier Lookup		GB013 | Kraft Electronics | GBP
Supplier Code		GB013
Supplier Name		Kraft Electronics
Supplier Currency		GBP
Supplier Country		United Kingdom
Supplier Address		54 Brompton Road
Supplier Payment Terms		CH30NET
Purchase Order Number	POGB0110027	
Purchase Receipt Number		
Packing Slip Number		
Process Type		PIH – POP
Captured Document Identification		
Imported Document Identification		INVOICE
Site Code Identifier		
Site Code		AO023

Tag 'Total Gross Value' anchored to document identification

Data appears valid.

Line Source	Source Number	Line Number	Product Code	Product Description	Unit of Measure	Quantity to Invoice	Unit Price	Line Amount - Tax	Tax Code
ORDER NO.	POGB0110044	1000	ASS001	Server	UN	5.00	15.00	75.00	GB001