Unlock business opportunities and increase total order revenue by automating manual finance processes

Sarah Acton-Hughes

Strategic Sales Manager, V1 Limited

6/1/2018

#SagePartnerSummit

Introduction

We Are V1

- Active in Sage market for over 25 years
- Working with Sage business partners in Europe, Africa, North America, Canada and Australia
- 1st Accredited Business partner on the Developer/ISV Programme
- ~450 Sage Enterprise Management / Sage X3 Customers

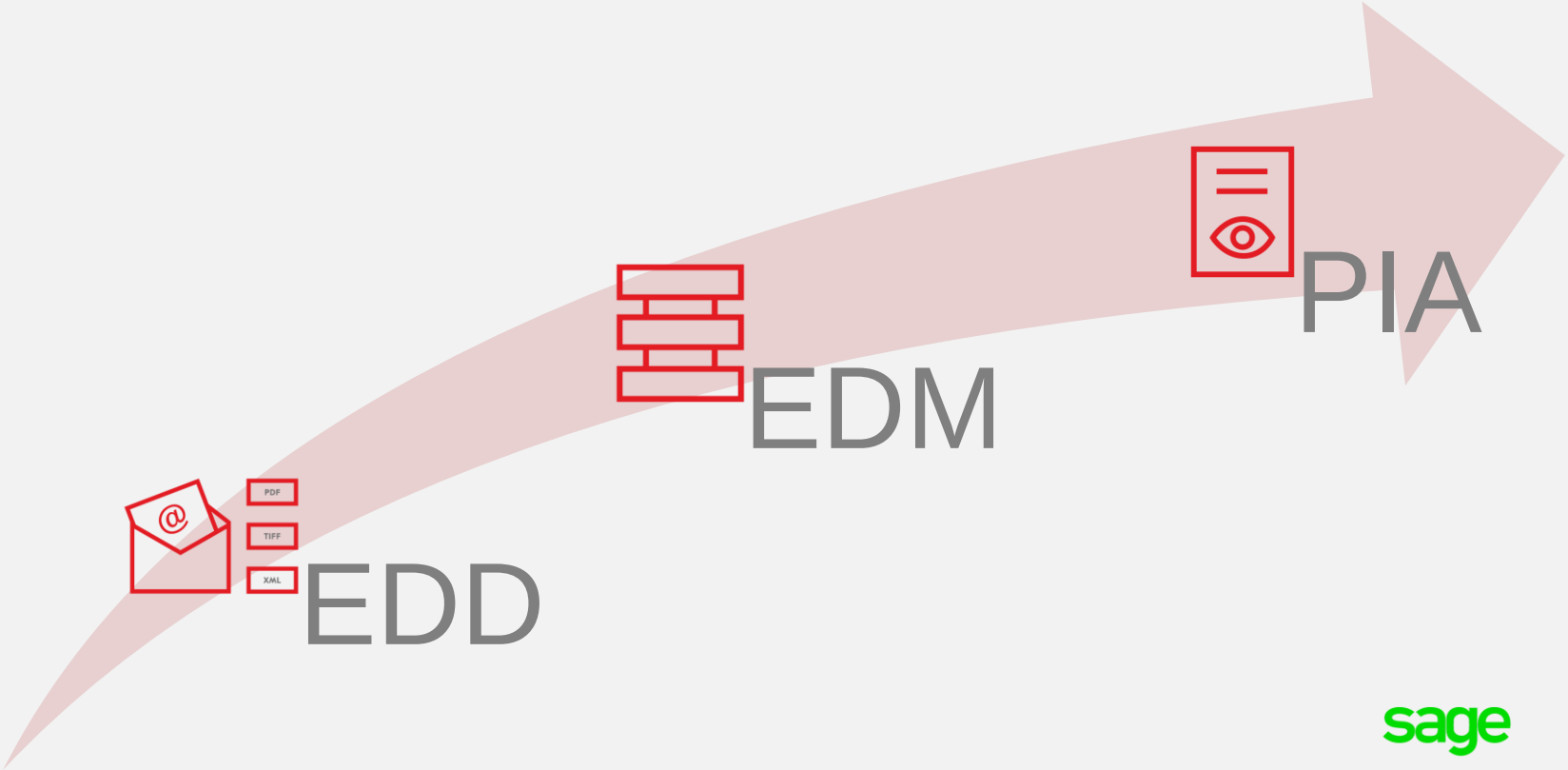
sage 200 | sage 300 | sage 1000 | sage Enterprise Management

Positioning & Opportunities

“Over **90%** of organisations still use paper and manual data entry in their finance function”

A 2017 V1 survey of 100 senior finance and IT professionals across a range of industries found that **58%** have a **clear plan** to **increase automation** with a further **39%** **considering options** in the next 12 months.

Support Your Customer Transformation Journey



sage

Enterprise Management

Benefits to your customers

Reduce costs

Improve productivity

Transparency, audit & compliance (GDPR/SOX)

Support a mobile workforce

Save resources

Benefits to you

- Your customers have digital transformation plans – you should support them!
- Easy to sell with a compelling Return on Investment
- Looks and Feels like Sage – just like any other module so negates competition
- Increase AOV on Net New sales - Up to 30% increase!
- Existing Business Opportunities
  - Compelling ROI to help justify upgrades of Sage Enterprise Management
  - Monetise your customer base and drive the digital transformation journey

Working with V1

- Include EDM minimum in all Sage Enterprise Management sales
- PIA both offers New Business competitive advantage & Existing Customer Upsell opportunity - talk about it with your customers and prospects
- We will support you in the sales process where needed – call us
- Ongoing services training, sales webinars, pre-sales webinars and an extensive roadmap specifically for Sage Enterprise Management – ask us!

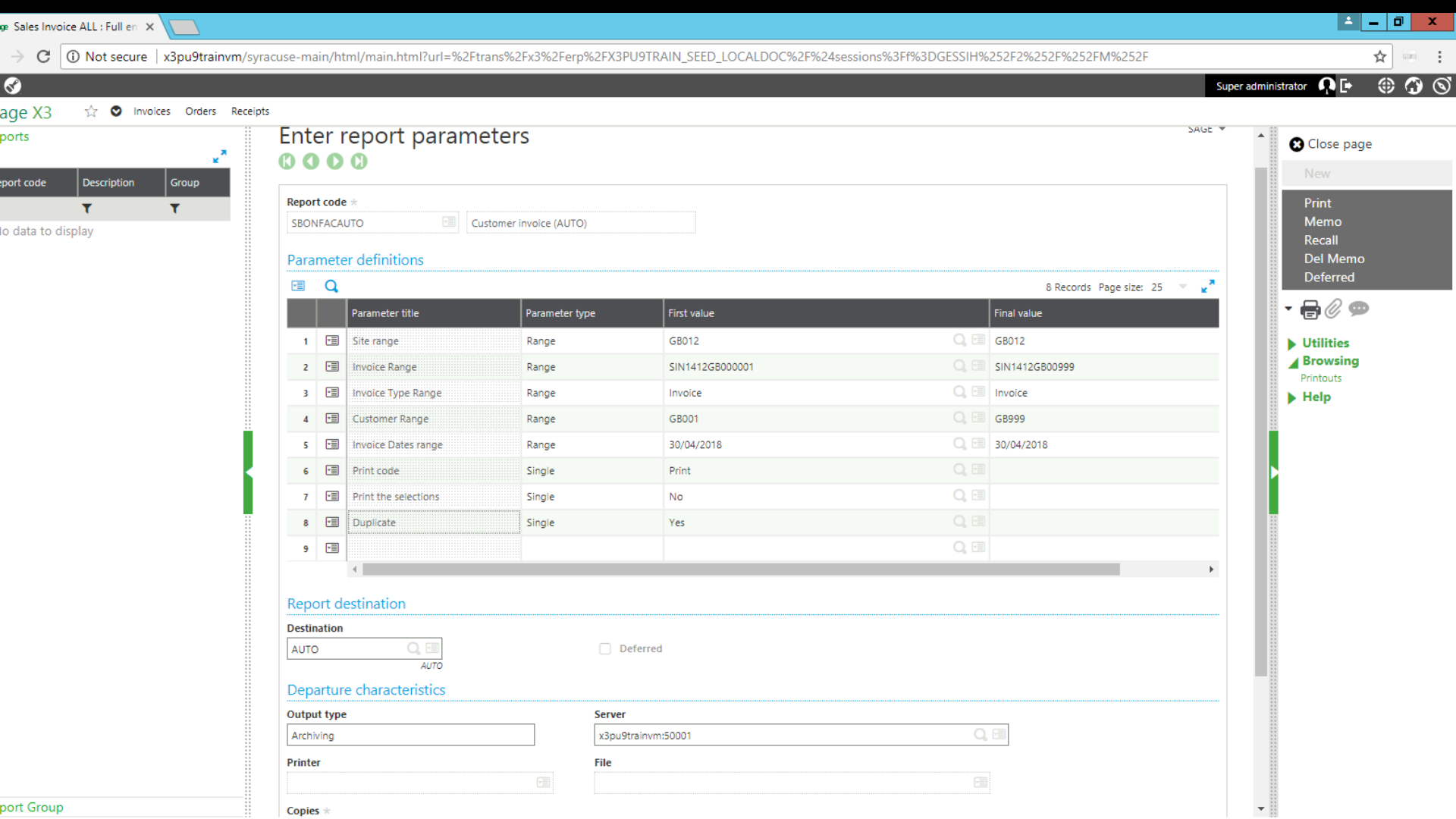
STAND 18 IN THE PARTNER VILLAGE

Product Overview & Update

Richard King
Pre-Sales Manager, V1 Limited

EDM Solution for Sage Enterprise Management

- **Electronic Document Delivery (EDD) solution**
  - **automated emailing (and fax option)**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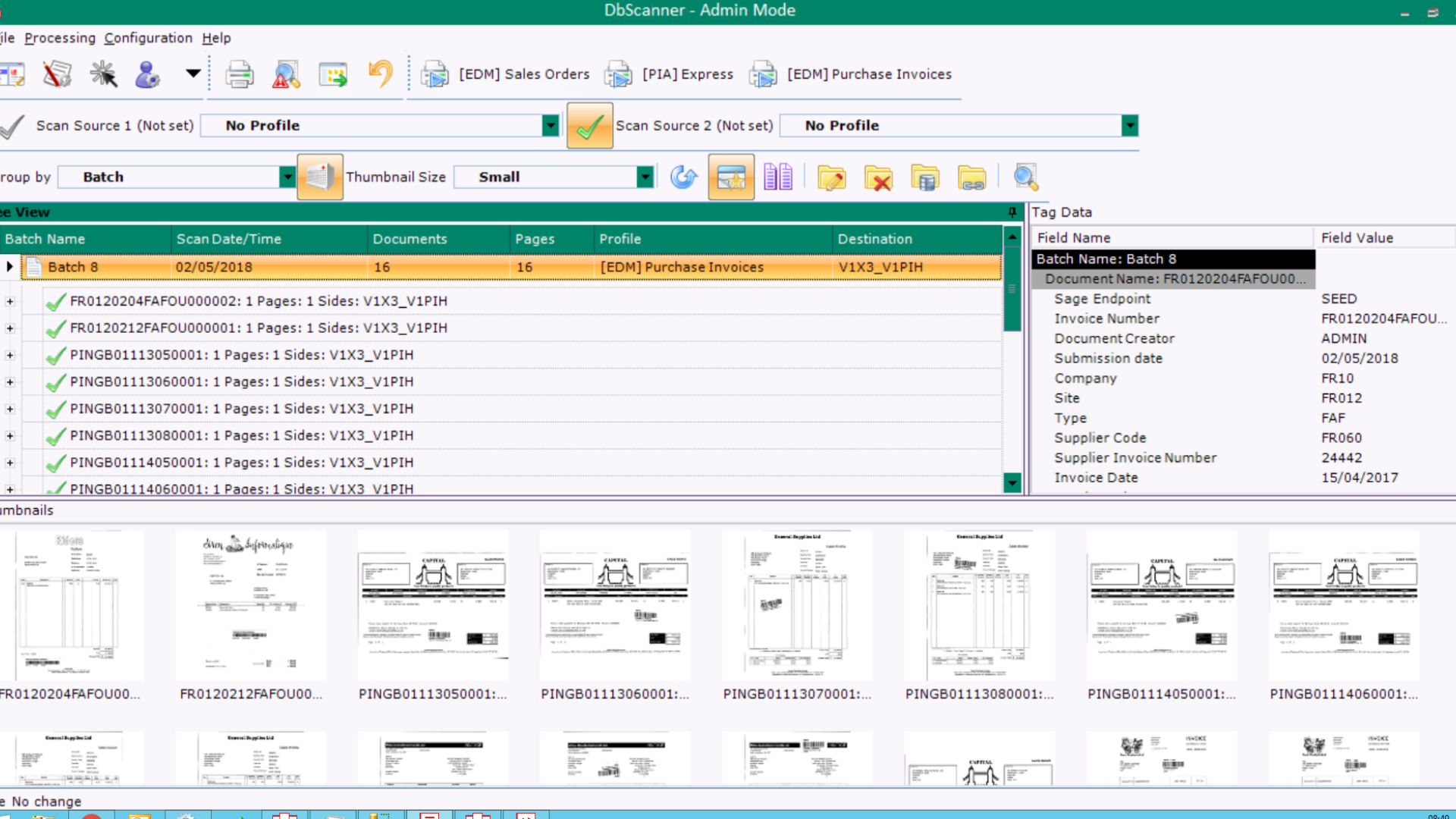
Super administrator
age X3
Invoices
Orders
Receipts
ports
eport code
Description
Group
lo data to display
port Group
Enter report parameters
SAGE
Report code
SBONFACAUTO
Customer invoice (AUTO)
Parameter definitions
8 Records Page size: 25
Parameter title
Parameter type
First value
Final value
1 Site range Range GB012 GB012
2 Invoice Range Range SIN1412GB000001 SIN1412GB00999
3 Invoice Type Range Range Invoice Invoice
4 Customer Range Range GB001 GB999
5 Invoice Dates range Range 30/04/2018 30/04/2018
6 Print code Single Print
7 Print the selections Single No
8 Duplicate Single Yes
9
Report destination
Destination
AUTO
AUTO
Deferred
Departure characteristics
Output type
Archiving
Server
x3pu9trainvm:50001
Printer
File
Copies
Close page
New
Print
Memo
Recall
Del Memo
Deferred
Utilities
Browsing
Printouts
Help

EDM Solution for Sage Enterprise Management

- Electronic Document Delivery (EDD) solution
  - automated emailing (and fax option)
- Electronic Document Management (EDM) solution
  - automated emailing
  - secure document storage
  - automated archiving of Sage output
  - Optional batch scanning with barcodes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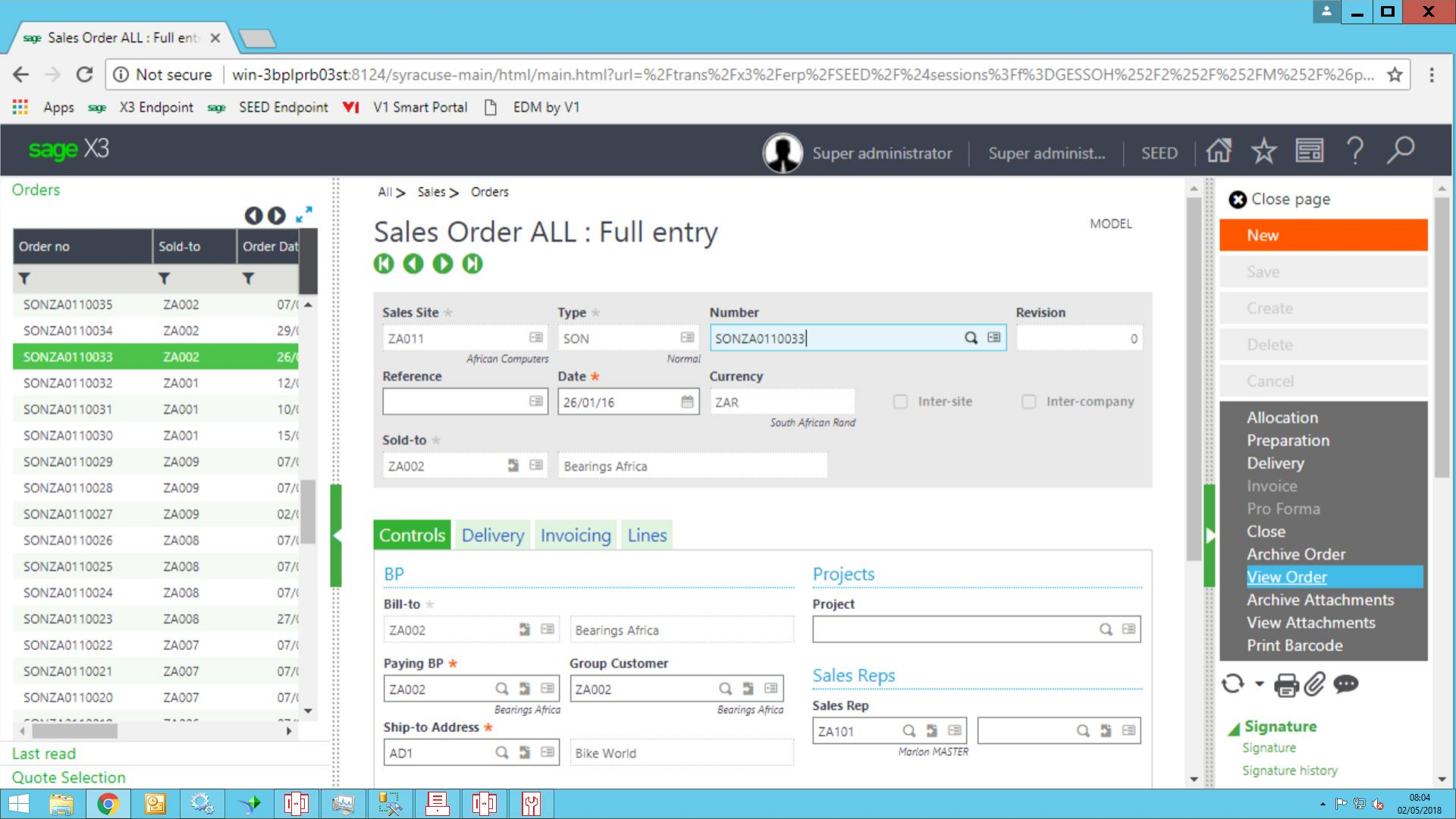
[EDM] Sales Orders
[PIA] Express
[EDM] Purchase Invoices
Scan Source 1 (Not set)
No Profile
Scan Source 2 (Not set)
No Profile
roup by
Batch
Thumbnail Size
Small
ee View
Batch Name
Scan Date/Time
Documents
Pages
Profile
Destination
Batch 8
02/05/2018
16
16
[EDM] Purchase Invoices
V1X3_V1PIH
FR0120204FAFOU000002: 1 Pages: 1 Sides: V1X3_V1PIH
FR0120212FAFOU000001: 1 Pages: 1 Sides: V1X3_V1PIH
PINGB01113050001: 1 Pages: 1 Sides: V1X3_V1PIH
PINGB01113060001: 1 Pages: 1 Sides: V1X3_V1PIH
PINGB01113070001: 1 Pages: 1 Sides: V1X3_V1PIH
PINGB01113080001: 1 Pages: 1 Sides: V1X3_V1PIH
PINGB01114050001: 1 Pages: 1 Sides: V1X3_V1PIH
PINGB01114060001: 1 Pages: 1 Sides: V1X3_V1PIH
Tag Data
Field Name
Field Value
Batch Name: Batch 8
Document Name: FR0120204FAFOU00...
Sage Endpoint
SEED
Invoice Number
FR0120204FAFOU...
Document Creator
ADMIN
Submission date
02/05/2018
Company
FR10
Site
FR012
Type
FAF
Supplier Code
FR060
Supplier Invoice Number
24442
Invoice Date
15/04/2017
umbnails
FR0120204FAFOU00...
FR0120212FAFOU00...
PINGB01113050001:...
PINGB01113060001:...
PINGB01113070001:...
PINGB01113080001:...
PINGB01114050001:...
PINGB01114060001:...
e No change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Apps
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SEED Endpoint
V1 Smart Portal
EDM by V1
sage X3
Super administrator
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SEED
Orders
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Sold-to
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SONZA0110034 ZA002
SONZA0110033 ZA002
SONZA0110032 ZA001
SONZA0110031 ZA001
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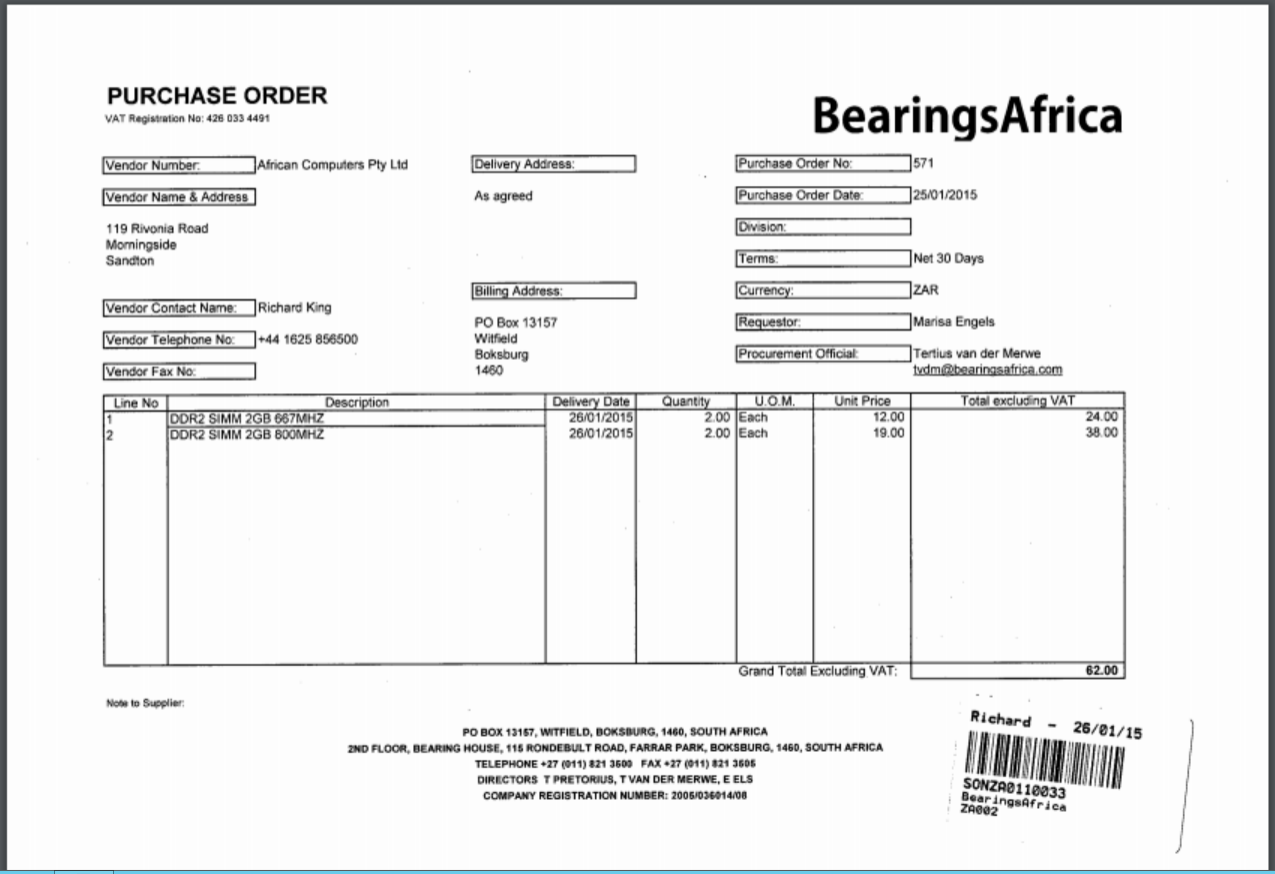
SONZA0110028 ZA009
SONZA0110027 ZA009
SONZA0110026 ZA008
SONZA0110025 ZA008
SONZA0110024 ZA008
SONZA0110023 ZA008
SONZA0110022 ZA007
SONZA0110021 ZA007
SONZA0110020 ZA007
Last read
Quote Selection
All > Sales > Orders
Sales Order ALL : Full entry
MODEL
Sales Site
ZA011
African Computers
Type
SON
Normal
Number
SONZA0110033
Revision
0
Reference
Date
26/01/16
Currency
ZAR
South African Rand
Inter-site
Inter-company
Sold-to
ZA002
Bearings Africa
Controls
Delivery
Invoicing
Lines
BP
Bill-to
ZA002
Bearings Africa
Paying BP
ZA002
Bearings Africa
Group Customer
ZA002
Bearings Africa
Ship-to Address
AD1
Bike World
Projects
Project
Sales Reps
Sales Rep
ZA101
Marion MASTER
Close page
New
Save
Create
Delete
Cancel
Allocation
Preparation
Delivery
Invoice
Pro Forma
Close
Archive Order
View Order
Archive Attachments
View Attachments
Print Barcode
Signature
Signature
Signature history
08:04
02/05/2018



PURCHASE ORDER

VAT Registration No: 426 033 4491

BearingsAfrica

Vendor Number:	African Computers Pty Ltd	Delivery Address:		Purchase Order No:	571
Vendor Name & Address		As agreed		Purchase Order Date:	25/01/2015
119 Rivonia Road Morningside Sandton				Division:	
				Terms:	Net 30 Days
		Billing Address:		Currency:	ZAR
Vendor Contact Name:	Richard King	PO Box 13157 Witfield Boksburg 1460		Requestor:	Marisa Engels
Vendor Telephone No:	+44 1625 856500			Procurement Official:	Tertius van der Merwe tvdm@bearingsafrica.com
Vendor Fax No:					

Line No	Description	Delivery Date	Quantity	U.O.M.	Unit Price	Total excluding VAT
1	DDR2 SIMM 2GB 667MHZ	26/01/2015	2.00	Each	12.00	24.00
2	DDR2 SIMM 2GB 800MHZ	26/01/2015	2.00	Each	19.00	38.00
					Grand Total Excluding VAT:	62.00

Note to Supplier:

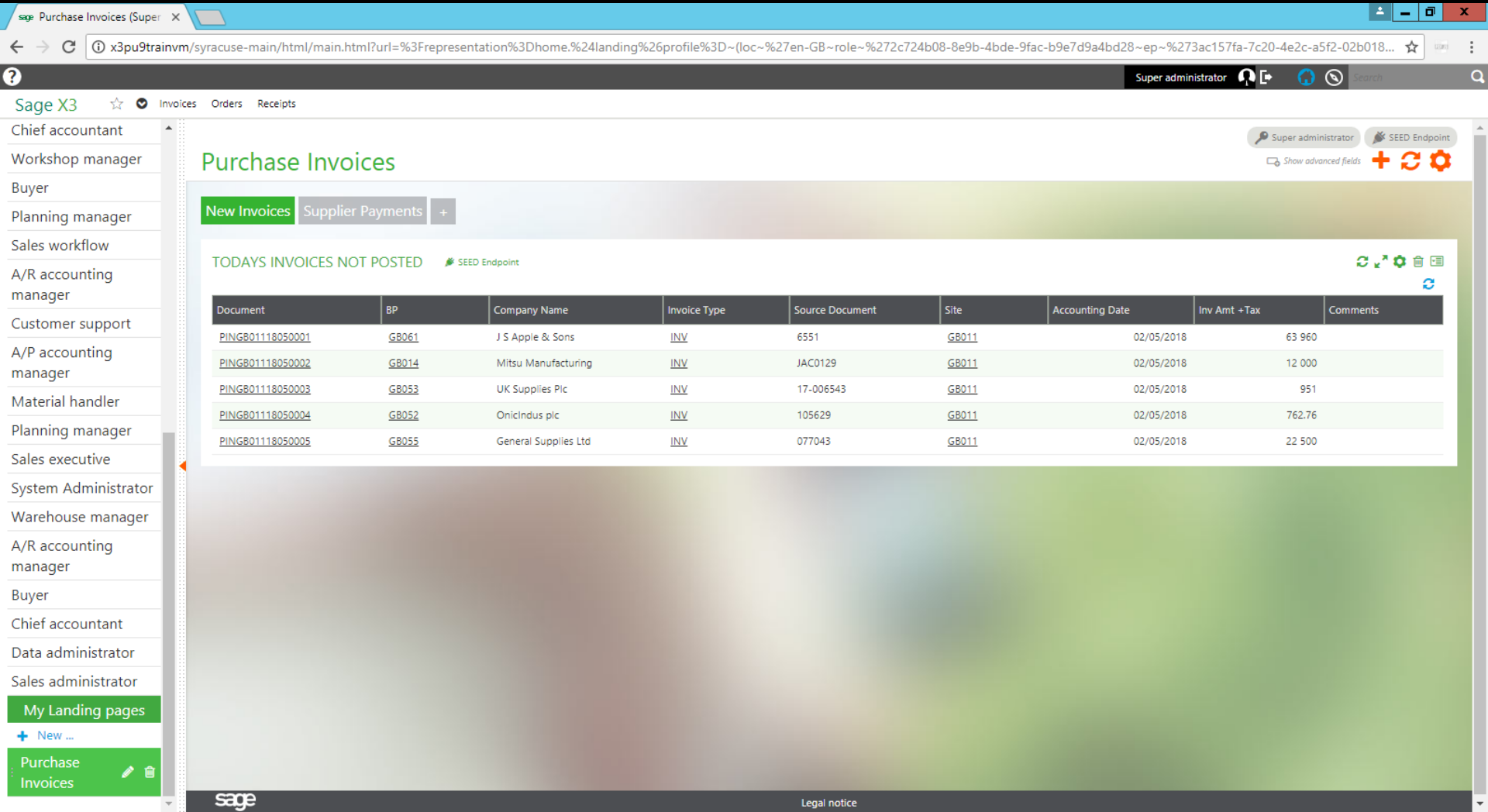
Richard - 26/01/15

SONZA0110033
BearingsAfrica
ZA002

PO BOX 13157, WITFIELD, BOKSBURG, 1460, SOUTH AFRICA
2ND FLOOR, BEARING HOUSE, 115 RONDEBULT ROAD, FARRAR PARK, BOKSBURG, 1460, SOUTH AFRICA
TELEPHONE +27 (011) 821 3500 FAX +27 (011) 821 3505
DIRECTORS T PRETORIUS, T VAN DER MERWE, E ELS
COMPANY REGISTRATION NUMBER: 2005/036014/08

EDM Solution for Sage Enterprise Management

- Electronic Document Delivery (EDD) solution
  - automated emailing (and fax option)
- Electronic Document Management (EDM) solution
  - automated emailing
  - secure document storage
  - automated archiving of Sage output
  - Optional batch scanning with barcodes
- Purchase Invoice Automation (PIA) solution
  - Intelligent OCR data capture from email and scans
  - Supplier invoices created automatically in Sage


Purchase Invoices (Super
x3pu9trainvm/syracuse-main/html/main.html?url=%3Frepresentation%3Dhome.%24landing%26profile%3D~(loc~%27en-GB~role~%272c724b08-8e9b-4bde-9fac-b9e7d9a4bd28~ep~%273ac157fa-7c20-4e2c-a5f2-02b018...
Super administrator
Search
Sage X3
Invoices
Orders
Receipts
Chief accountant
Workshop manager
Buyer
Planning manager
Sales workflow
A/R accounting manager
Customer support
A/P accounting manager
Material handler
Planning manager
Sales executive
System Administrator
Warehouse manager
A/R accounting manager
Buyer
Chief accountant
Data administrator
Sales administrator
My Landing pages
New ...
Purchase Invoices
Purchase Invoices
Super administrator
SEED Endpoint
Show advanced fields
New Invoices
Supplier Payments
+
TODAYS INVOICES NOT POSTED
SEED Endpoint
Document
BP
Company Name
Invoice Type
Source Document
Site
Accounting Date
Inv Amt +Tax
Comments
PINGB01118050001
GB061
J S Apple & Sons
INV
6551
GB011
02/05/2018
63 960
PINGB01118050002
GB014
Mitsu Manufacturing
INV
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GB011
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12 000
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GB053
UK Supplies Plc
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02/05/2018
951
PINGB01118050004
GB052
OnicIndus plc
INV
105629
GB011
02/05/2018
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GB055
General Supplies Ltd
INV
077043
GB011
02/05/2018
22 500
sage
Legal notice

File View Tools Goto Help

Cycleurope — Facture de vente

27 rue Marcel Brunelière
44270 MACHECOUL
France

0800 345 5555

FAB-TECH SA
8 IMPASSE DES JADES
44000 NANTES

N° FACTURE	152472
DATE	15-02-2017
COMMANDE	81667
RÉFÉRENCE	POFR0120049
ÉCHEANCE	Fin de mois + 30 jours
TRANSPORT	Camion Cycleurope
CONTACT	Pierre Du Roi

ADRESSE DE LIVRAISON
FAB-TECH SA
8 IMPASSE DES JADES
44000 NANTES

Taux TVA 20,0%

QUANTITÉ	CODE	LIBELLÉ	PRIX UNITAIRE	MONTANT HT
12	BMS008	JANTE RAYONS 20" ROUTE DU SSTR	8.45	101.40
12	BMS014	JANTE RAYONS 26" ROUTE	14.67	176.04

Name	Image	Value
FR VAT Detection	33432772218	33432772218
Sage X3 Folder / Endpoint		SEED
Query Database		FR051 | Cycleurope |...
Supplier Code		FR051
Supplier Name		Cycleurope
Supplier Currency		EUR
Site / Branch		FR012
Journal Type		FAF
Process		POP
Document Identification		INVOICE
Supplier Reference	152472	152472
Document Date	15-02-2017	15/02/2017
Accounting Date		02/05/2018
Purchase Order Number(s)	POFR0120049	POFR0120049
Purchase Receipt Number(s)		

Anchor

Tag "Purchase Order Number(s)" anchored to document identification

Data appears valid.

Accept
Check
On Hold
Skip
Quit

POFR0120049

Source	Number	Product Code	Product Description	Quantity to Invoice	Line Amount	NET Price
ORDER	POFR0120049	BMS008	Jante rayons 20 route d...	12	101.40	8.45
ORDER	POFR0120049	BMS014	Jante rayons 26 route	12	176.04	14.67
ORDER	POFR0120049	BMS015	Jante rayons 20 VTT	12	165.36	13.78

Tag entry ready

Evolution of the EDM Solution

- Release 9, 10, 11, 11.1, 12, 12.1
  - Regular updates to keep up with Sage releases
- Release 13
  - Launching this week
  - Lots of enhanced and extended functionality
  - Major Update to all V1 components
  - Available for Sage X3 PU9, V11 and later
- Release 12.1 will remain available for users on V6.5 to PU8

EDM Release 13 Summary

- Simplified installation and integration
- No longer needs to be installed on the Sage Application Server
- More ‘Cloud-friendly’
- Deposit and Retrieve documents from phones and tablets
- More secure for cloud deployment
- New optional module for Retention rules (help with GDPR)
- Improved OCR engine and data capture profile for the PIA solution

What's New in EDD

- No longer uses webservices
- Delivery logic now in the familiar environment of Crystal
- More processing in the background
- Better performance
- Easier to integrate with third-party applications
- More object types supported

New EDM Functionality for Sage users

- **New document types – 20 objects supported out of the box**
- **Easier to archive documents from inside Sage**

Invoices

Invoice Number	Bill-to
SIN1412GB000085	GB009
SIN1412GB000059	GB006
SIN1412GB000054	GB006
SIN1412GB000053	GB003
SIN1409GB000084	GB009
SIN1406GB000083	GB009
SIN1404GB000087	GB012
SIN1404GB000086	GB009
SIN1404GB000085	GB009
SIN1404GB000084	GB012
SIN1404GB000083	GB012
SIN1404GB000082	GB012

Last read
Select Shipments
Order Selection
Select Service Contracts
Service Request Selection
Scheduled invoices selection

Sales Invoice ALL : Full entry invoice

SAGE

Sales Site: GB013 (Machine Tool)
Type: INV (Invoice)
Invoice Number: SIN1612GB013090
Reference:
Date: 22/12/17
Currency: GBP (British Pound)
Inter-company
Bill-to: GB002 Amalgamate Supply plc

Controls | Invoicing | Lines | Valuation

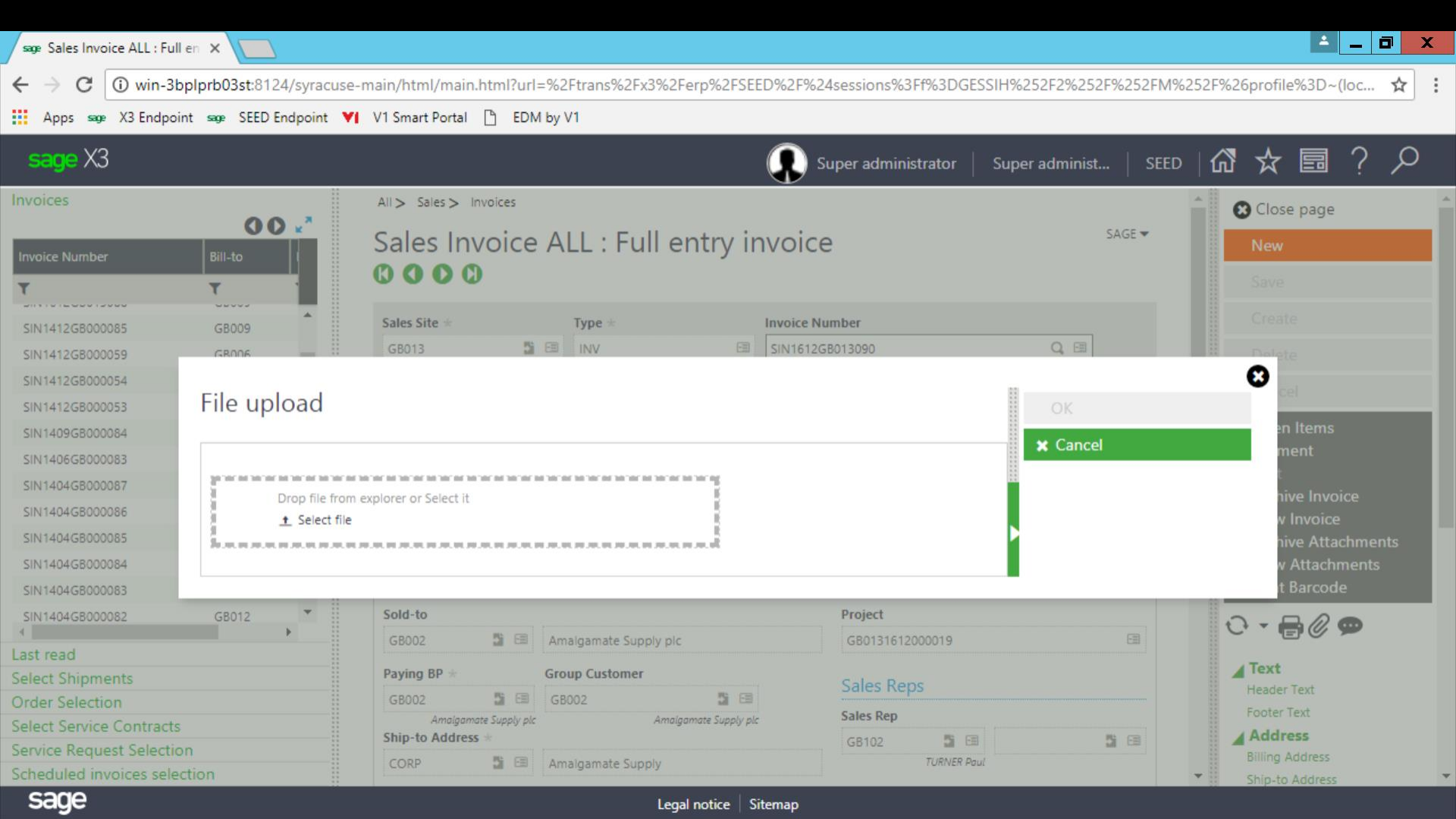
BP
Sold-to: GB002 Amalgamate Supply plc
Paying BP: GB002 (Amalgamate Supply plc)
Group Customer: GB002 (Amalgamate Supply plc)
Ship-to Address: CORP Amalgamate Supply

Projects
Project: GB01316120000019

Sales Reps
Sales Rep: GB102 (TURNER Paul)

Close page
New
Save
Create
Delete
Cancel
Open Items
Payment
Post
Archive Invoice
View Invoice
Archive Attachments
View Attachments
Print Barcode

Text
Header Text
Footer Text
Address
Billing Address
Ship-to Address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Apps
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SEED Endpoint
V1 Smart Portal
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Invoices
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SIN1406GB000083
SIN1404GB000087
SIN1404GB000086
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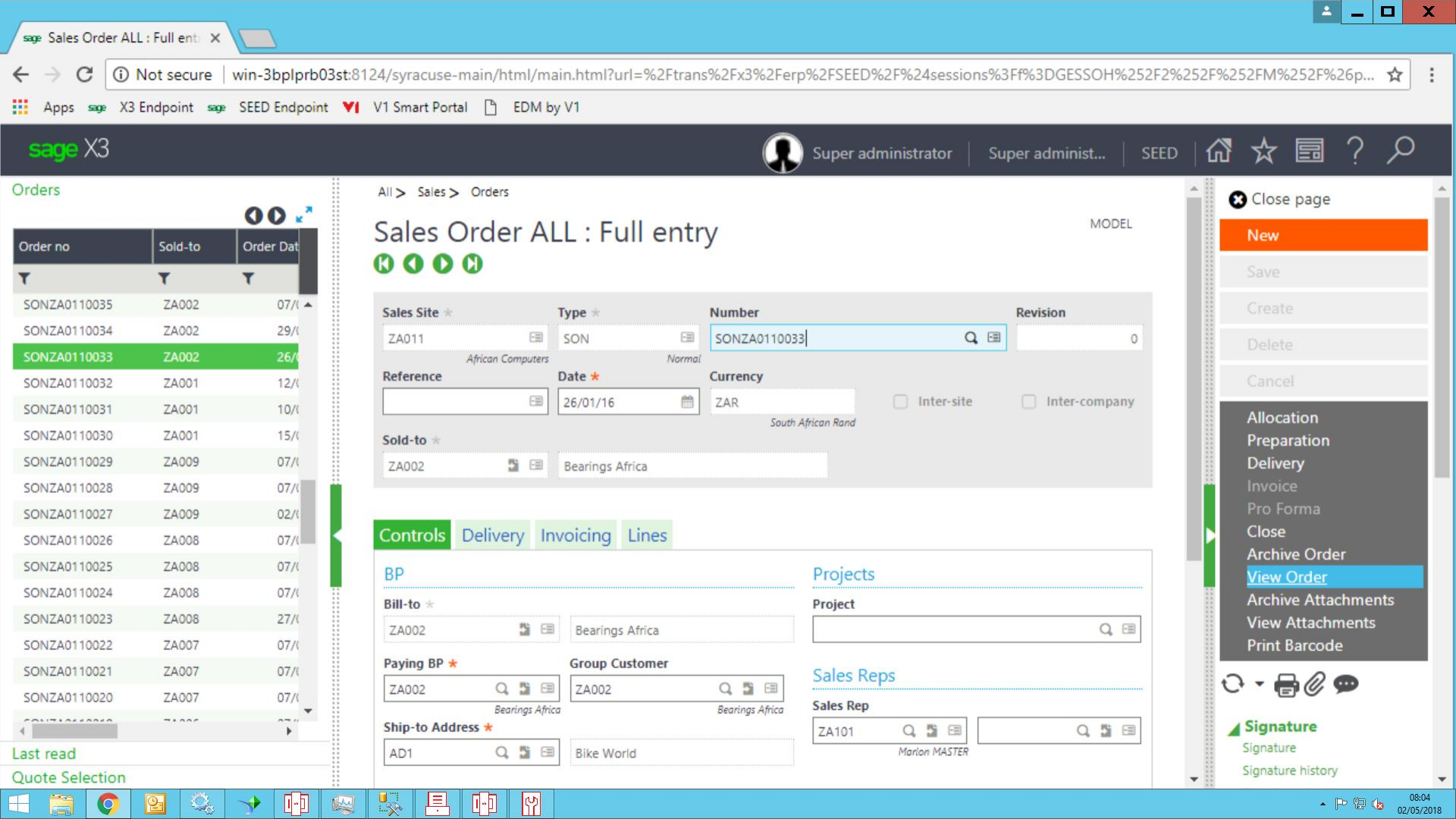
SIN1404GB000084
SIN1404GB000083
SIN1404GB000082
GB012
Last read
Select Shipments
Order Selection
Select Service Contracts
Service Request Selection
Scheduled invoices selection
All > Sales > Invoices
Sales Invoice ALL : Full entry invoice
SAGE
Sales Site
Type
Invoice Number
GB013
INV
SIN1612GB013090
File upload
Drop file from explorer or Select it
Select file
OK
Cancel
Sold-to
GB002
Amalgamate Supply plc
Project
GB01312612000019
Paying BP
Group Customer
GB002
GB002
Amalgamate Supply plc
Amalgamate Supply plc
Ship-to Address
CORP
Amalgamate Supply
Sales Reps
Sales Rep
GB102
TURNER Paul
Close page
New
Save
Create
Text
Header Text
Footer Text
Address
Billing Address
Ship-to Address
sage
Legal notice
Sitemap

New EDM Functionality for Sage users

- New document types – 20 objects supported out of the box
- Easier to archive documents from inside Sage
- New functionality in the document viewer
  - Access related documents from the viewer
  - Responsive layout adapts to small screens (such as on Smartphones and tablets)
  - View document annotations from External (non-Sage) users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SEED Endpoint
V1 Smart Portal
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SONZA0110028 ZA009
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SONZA0110024 ZA008
SONZA0110023 ZA008
SONZA0110022 ZA007
SONZA0110021 ZA007
SONZA0110020 ZA007
Last read
Quote Selection
All > Sales > Orders
Sales Order ALL : Full entry
MODEL
Sales Site
ZA011
African Computers
Type
SON
Normal
Number
SONZA0110033
Revision
0
Reference
Date
26/01/16
Currency
ZAR
South African Rand
Inter-site
Inter-company
Sold-to
ZA002
Bearings Africa
Controls
Delivery
Invoicing
Lines
BP
Bill-to
ZA002
Bearings Africa
Paying BP
ZA002
Bearings Africa
Group Customer
ZA002
Bearings Africa
Ship-to Address
AD1
Bike World
Projects
Project
Sales Reps
Sales Rep
ZA101
Marion MASTER
Close page
New
Save
Create
Delete
Cancel
Allocation
Preparation
Delivery
Invoice
Pro Forma
Close
Archive Order
View Order
Archive Attachments
View Attachments
Print Barcode
Signature
Signature
Signature history
08:04
02/05/2018

Sales Order ALL : Full ent
v1 Document Manageme
172.26.49.237:5002/retrieve/results/AS/V1X3_V1SOH/DBA_FILTER_FIELD%7C%7C~~%7C%7Cequals%7C%7C~~%7C%7CSEED/ORD_NO%7C%7C~~%7C%7Cequals%7C%7C~~...
Apps X3 Endpoint SEED Endpoint V1 Smart Portal EDM by V1
SmartRetrieve Environment: Live User: ADMIN
New search
See Attachments to this [SOH] Sales Order
Open externally

PURCHASE ORDER

VAT Registration No: 426 033 4491

BearingsAfrica

Vendor Number:	African Computers Pty Ltd	Delivery Address:	Purchase Order No: 571
Vendor Name & Address		As agreed	Purchase Order Date: 25/01/2015
119 Rivonia Road Morningside Sandton			Division:
			Terms: Net 30 Days
		Billing Address:	Currency: ZAR
Vendor Contact Name:	Richard King	PO Box 13157 Witfield	Requestor: Marisa Engels
Vendor Telephone No:	+44 1625 856500		

08:06
02/05/2018

Sales Order ALL : Full ent | v1 Document Manageme

172.26.49.237:5002/retrieve/results/AS/V1X3_V1ATT/TRANS_NUM%257C%257C~~%257C%257Cequals%257C%257C~~%257C%257CSONZA0110033

Apps | X3 Endpoint | SEED Endpoint | V1 Smart Portal | EDM by V1

SmartRetrieve | Environment: Live | User: ADMIN

New search

Sort by **Most Relevant** | Show **10** per page

See [SOH] Sales Orders related to this Attachment

All 2 results | Save search

Document 1 | **Document 2**

1 : Document type : Transactional Attachments

Submission Date : 5/2/2018 **Document Creator :** ADMIN

Sage Endpoint:SEED **Document Type:**[SOH] Sales Orders **Transaction Number:**SONZA0110033 **Transaction Date:**1/26/2016 **Company:**ZA10

2 : Document type : Transactional Attachments

Submission Date : 5/2/2018 **Document Creator :** ADMIN

Sage Endpoint:SEED **Document Type:**[SOH] Sales Orders **Transaction Number:**SONZA0110033 **Transaction Date:**1/26/2016 **Company:**ZA10

1 of 1

Open externally

Mitsu Manufacturing UK Ltd **INVOICE**

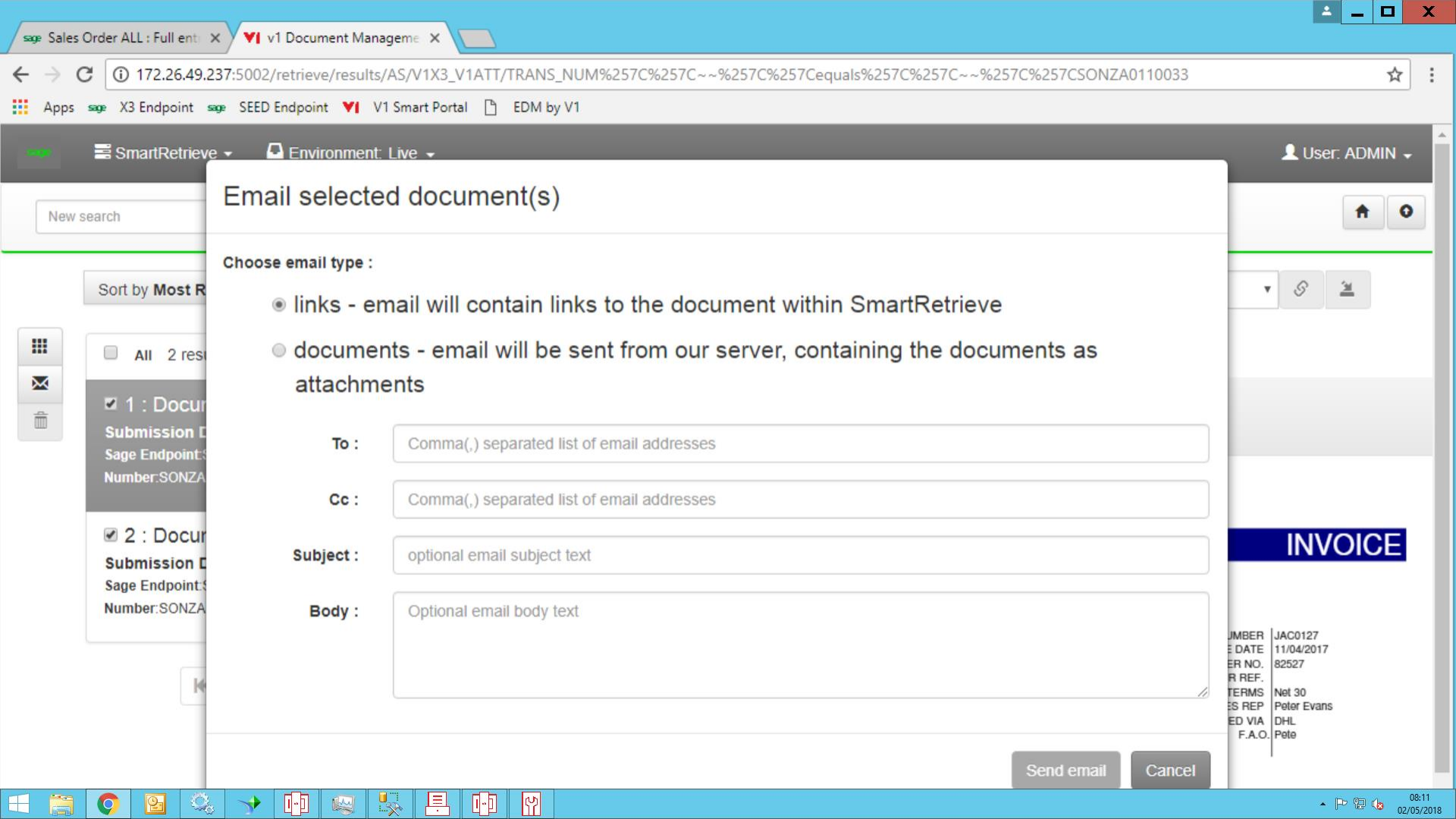
101 West George Street
COATBRIDGE
North Lanarkshire ML5 2BY
01698 403200

SOLD TO:
GB Computer Products
Wharfedale Road
Winnersh Triangle
Reading
RG41 5RD

DELIVERY ADDRESS
As above

INVOICE NUMBER	JAC0127
INVOICE DATE	11/04/2017
OUR ORDER NO.	82527
YOUR REF.	
TERMS	Net 30
SALES REP	Peter Evans
SHIPPED VIA	DHL
F.A.O.	Pete

08:02
02/05/2018


Sales Order ALL : Full ent
v1 Document Manageme
172.26.49.237:5002/retrieve/results/AS/V1X3_V1ATT/TRANS_NUM%257C%257C~~%257C%257Cequals%257C%257C~~%257C%257CSONZA0110033
Apps
X3 Endpoint
SEED Endpoint
V1 Smart Portal
EDM by V1
SmartRetrieve
Environment: Live
User: ADMIN
New search
Sort by Most R
All 2 resu
1 : Docu
Submission D
Sage Endpoint:
Number:SONZA
2 : Docu
Submission D
Sage Endpoint:
Number:SONZA
Email selected document(s)
Choose email type :
links - email will contain links to the document within SmartRetrieve
documents - email will be sent from our server, containing the documents as attachments
To :
Comma(,) separated list of email addresses
Cc :
Comma(,) separated list of email addresses
Subject :
optional email subject text
Body :
Optional email body text
Send email
Cancel
INVOICE
UMBER JAC0127
E DATE 11/04/2017
ER NO. 82527
R REF.
TERMS Net 30
ES REP Peter Evans
ED VIA DHL
F.A.O. Pete
08:11
02/05/2018

Sales Order ALL : Full ent | v1 Document Manageme

172.26.49.237:5002/retrieve/results/AS/V1X3_V1ATT/TRANS_NUM%257C%257C~~%257C%257Cequals%257C%257C~~%257C%257CSONZA0110033

Apps | X3 Endpoint | SEED Endpoint | V1 Smart Portal | EDM by V1

SmartRetrieve | Environment: Live | User: ADMIN

New search

Sort by **Most Relevant** | Show **10** per page

See [SOH] Sales Orders related to this Attachment

All 2 results | Save search

Document 1 | **Document 2**

1 : Document type : Transactional Attachments

Submission Date : 5/2/2018 **Document Creator :** ADMIN

Sage Endpoint:SEED **Document Type:**[SOH] Sales Orders **Transaction Number:**SONZA0110033 **Transaction Date:**1/26/2016 **Company:**ZA10

2 : Document type : Transactional Attachments

Submission Date : 5/2/2018 **Document Creator :** ADMIN

Sage Endpoint:SEED **Document Type:**[SOH] Sales Orders **Transaction Number:**SONZA0110033 **Transaction Date:**1/26/2016 **Company:**ZA10

1 of 1

Open externally

Mitsu Manufacturing UK Ltd **INVOICE**

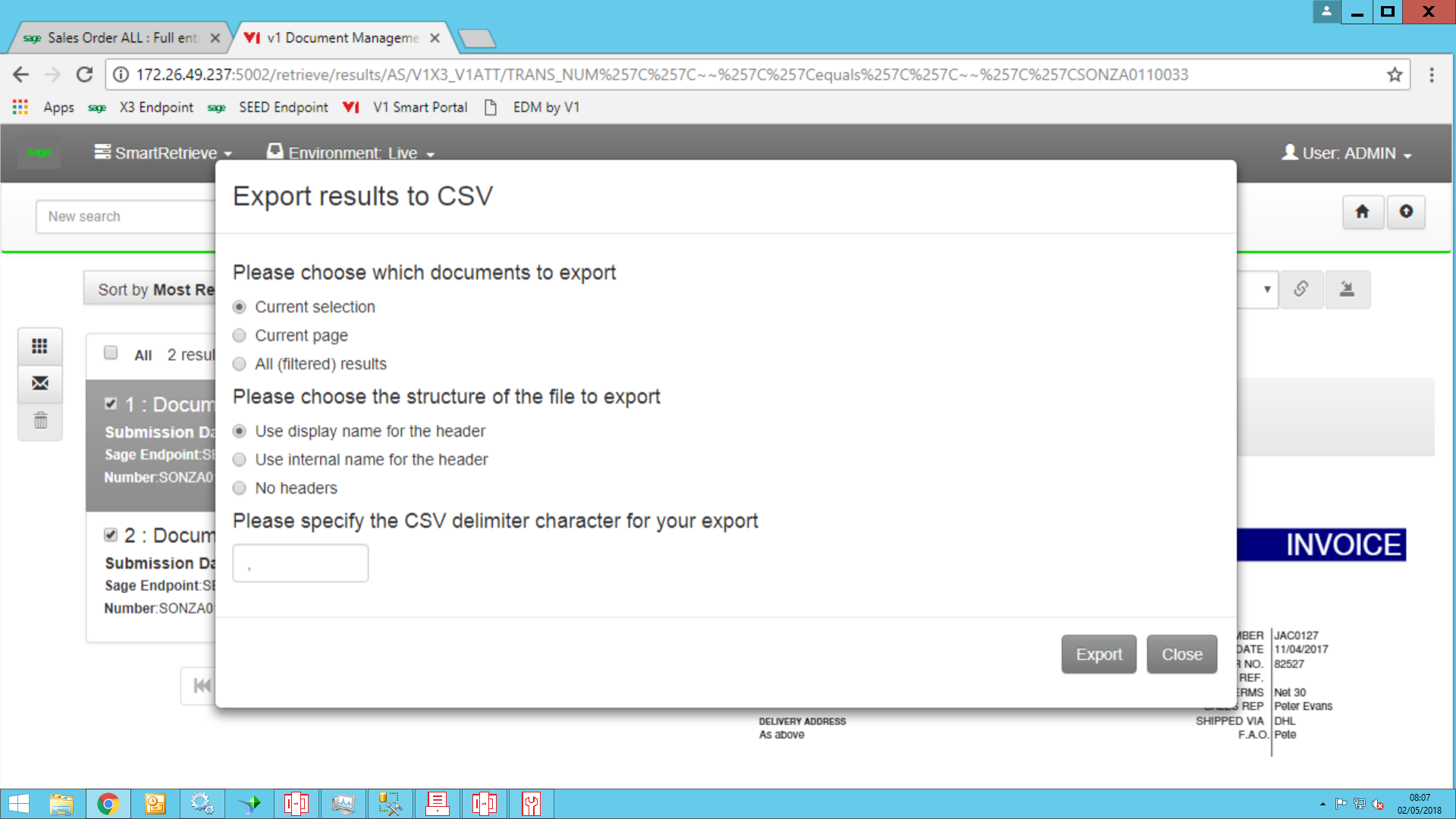
101 West George Street
COATBRIDGE
North Lanarkshire ML5 2BY
01698 403200

SOLD TO:
GB Computer Products
Wharfedale Road
Winnersh Triangle
Reading
RG41 5RD

DELIVERY ADDRESS
As above

INVOICE NUMBER	JAC0127
INVOICE DATE	11/04/2017
OUR ORDER NO.	82527
YOUR REF.	
TERMS	Net 30
SALES REP	Peter Evans
SHIPPED VIA	DHL
F.A.O.	Pete

08:02
02/05/2018


Sales Order ALL : Full ent
v1 Document Manageme
172.26.49.237:5002/retrieve/results/AS/V1X3_V1ATT/TRANS_NUM%257C%257C~~%257C%257Cequals%257C%257C~~%257C%257CSONZA0110033
Apps
X3 Endpoint
SEED Endpoint
V1 Smart Portal
EDM by V1
SmartRetrieve
Environment: Live
User: ADMIN
New search
Sort by Most Re
All 2 resul
1 : Docum
Submission Da
Sage Endpoint:SE
Number:SONZA0
2 : Docum
Submission Da
Sage Endpoint:SE
Number:SONZA0
Export results to CSV
Please choose which documents to export
Current selection
Current page
All (filtered) results
Please choose the structure of the file to export
Use display name for the header
Use internal name for the header
No headers
Please specify the CSV delimiter character for your export
,
Export
Close
INVOICE
JAC0127
11/04/2017
82527
Net 30
Peter Evans
DHL
Pete
DELIVERY ADDRESS
As above
08:07
02/05/2018

New EDM Functionality for External users

- Completely new document search portal based on V1 SmartRetrieve
  - Quick Search powered by Elastic searches across all document types
  - New Advanced search options
  - Save and share document searches, save search results to CSV
  - Email documents or hyperlinks to documents
  - Annotate documents
- Deposit client replaced by V1 SmartDeposit
  - Web-based with responsive layout (usable from smartphones and tablets)
  - Deposit multiple documents at a time
  - Deposit related documents from the viewer screen

v1 Document Manageme

win-3bplprb03st:5002/portal

Apps | X3 Endpoint | SEED Endpoint | V1 Smart Portal | EDM by V1

Select application | Environment: Live | User: admin

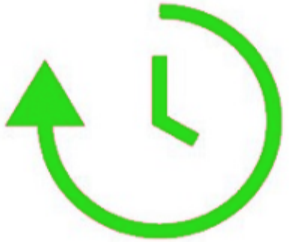
EDM for Sage Enterprise Management

SmartDeposit

SmartRetrieve

SmartDashboard

SmartRetentions



07:37
02/05/2018

v1 Document Manageme

win-3bplprb03st:5002/portal

Apps | X3 Endpoint | SEED Endpoint | V1 Smart Portal | EDM by V1

Select application | Environment: Live | User: admin

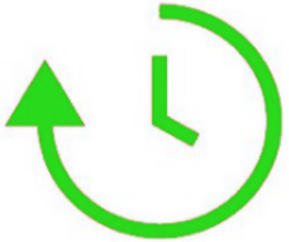
EDM for Sage Enterprise Management

SmartDeposit

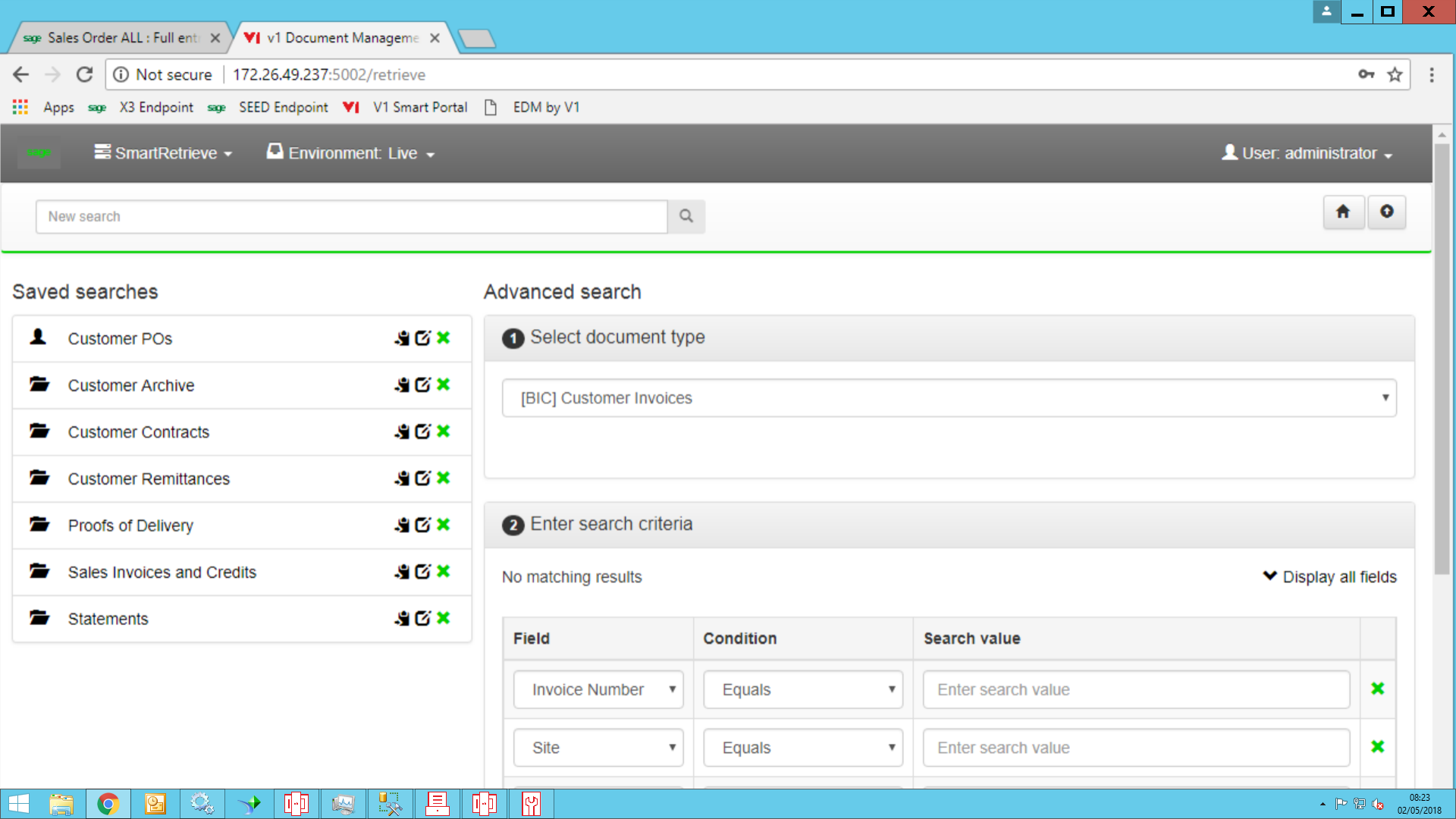
SmartRetrieve

SmartDashboard

SmartRetentions



07:37
02/05/2018


Sales Order ALL : Full ent
v1 Document Manageme
Not secure
172.26.49.237:5002/retrieve
Apps
X3 Endpoint
SEED Endpoint
V1 Smart Portal
EDM by V1
SmartRetrieve
Environment: Live
User: administrator
New search
Saved searches
Customer POs
Customer Archive
Customer Contracts
Customer Remittances
Proofs of Delivery
Sales Invoices and Credits
Statements
Advanced search
1 Select document type
[BIC] Customer Invoices
2 Enter search criteria
No matching results
Display all fields
Field
Condition
Search value
Invoice Number
Equals
Enter search value
Site
Equals
Enter search value

v1 Document Manageme

Not secure | 172.26.49.237:5002/retrieve/results/QS/GB012

Apps | X3 Endpoint | SEED Endpoint | V1 Smart Portal | EDM by V1

SmartRetrieve | Environment: Live | User: administrator

GB012

Filter by **All** | Sort by **Most Relevant** | Show **10** per page

See Attachments to this [SOH] Sales Order

All 2 results

1 : Document type : [SOH] Sales Orders
Submission date : 5/2/2018 **Document Creator :** ADMIN
Sage Endpoint:SEED **Order Number:** SONGB0120005 **Company:**GB10

2 : Document type : [SOH] Sales Orders
Submission date : 5/2/2018 **Document Creator :** ADMIN
Sage Endpoint:SEED **Order Number:** SONGB0120033 **Company:**GB10

1 of 1

Document 1 | Document 2

Open externally

Johnson & Brothers Ltd

PURCHASE ORDER

Johnson House
Michael Faraday Avenue
Rochdale OL16 4FW
Tel: 01706 222259

VAT Reg No: GB 792 4384 06

Order Number: GF00902
Order Date: 12-MAY-2016
Date Required: 01-SEP-2016
Contact: Richard
Account: GBB002

Page: 1

Please Supply and Deliver to:

GB Bike Products
Wharfedale Road
Winnersh
Wokingham
RG41 5RD

Johnson & Brothers Wholesale
Distribution Centre
Michael Faraday Avenue
Kingsway Business Park
Rochdale
OL16 4FW

Product / Service	Quantity	Price £	Net £	VAT £	Vat Code	Total £
Bicycle Pump Standard BMS007 - SPECIAL ORDER	10,000	4.75	47,500.00	9,500.00	S	57,000.00

ADMIN
SONGB0120033
Johnson & Brothers Wholesale

v1 Document Manageme | Sales Order ALL : Full ent

Not secure | win-3bplprb03st:5002/retrieve/results/QS/SONZA0110033

Apps | X3 Endpoint | SEED Endpoint | V1 Smart Portal | EDM by V1

SmartRetrieve | Environment: Live | User: admin

SONZA0110033

Filter by **All** | Sort by **Most Relevant** | Show **10** per page

All 2 results

1 : Document type : [SOH] Sales Orders

Submission date : 5/2/2018 **Document Creator :** ADMIN

Sage Endpoint:SEED **Order Number:** SONZA0110033 **Company:**ZA10

2 : Document type : Transactional Attachments

Submission date : 5/2/2018 **Document Creator :** ADMIN

Document Type:[SOH] Sales Orders **Transaction Number:** SONZA0110033 **Transaction Date:**1/26/2016

1 of 1

Select link

Document 1 | Document 2

Open externally

PURCHASE ORDER

VAT Registration No: 426 033 4491

BearingsAfrica

Vendor Number: African Computers Pty Ltd

Vendor Name & Address

119 Rivonia Road
Morningside
Sandton

Vendor Contact Name: Richard King

Vendor Telephone No: +44 1625 856500

Vendor Fax No:

Delivery Address:

As agreed

Billing Address:

PO Box 13157
Witfield
Boksburg
1460

Purchase Order No: 571

Purchase Order Date: 25/01/2015

Division:

Terms: Net 30 Days

Currency: ZAR

Requestor: Marisa Engels

Procurement Official: Tertius van der Merwe
tvdm@bearingsafrica.com

Line No	Description	Delivery Date	Quantity	U.O.M.	Unit Price	Total excluding VAT
1	DDR2 SIMM 2GB 667MHZ	26/01/2015	2.00	Each	12.00	24.00
2	DDR2 SIMM 2GB 800MHZ	26/01/2015	2.00	Each	19.00	38.00

Grand Total Excluding VAT: $2.00

Note to Supplier:

Richard - 26/01/15

PO BOX 13157, WITFIELD, BOKSBURG, 1460, SOUTH AFRICA
2ND FLOOR, BEARING HOUSE, 115 RONDEBULT ROAD, FARRAR PARK, BOKSBURG, 1460, SOUTH AFRICA
TELEPHONE +27 (011) 821 3600 FAX +27 (011) 821 3600

New Optional Component: SmartRetentions

- Manages Retention Policies for all documents
- Allows automated removal of old documents
- Helps users with GDPR compliance
- Allows controlled manual deletion of documents

Improved data capture system for the PIA solution

- New OCR engine and better support for difficult images
- Improved support for colour scanning and PDF invoices
- Improved handling of protected PDF invoices
- Import of PDF invoices from mailboxes now supports IMAP as well as POP3
- Automated archiving of PDF invoices now including the covering email and additional attachments

Improved data capture profile for the PIA solution

- New profile captures all invoice types with a single profile (PO-related and Direct, PIH and BIS)
- Improved site selection
- Improved control account selection
- Improved matching of Purchasing Invoices to Orders and Receipts
- Faster selection of multiple Orders and Receipts against a single invoice
- Automated coding of Supplier Invoices (BIS) from Account Structures
- Improved handling of credit notes
- R13 profile enhancements will be available for V6.5/R12 users later in the year

Release 13 Availability

- Release 13 currently in testing with UK business partners
- General availability expected later this month for
  - new installations with V11 on Windows with SQL Server
  - English language only
  - AWS / Azure deployment not yet supported for the PIA solution
- Later this year
  - Support for upgrading
  - French and Portuguese languages
  - AWS / Business Cloud support

Help us to help you

- We are looking for partners to assist with
  - beta testing Release 13
  - improving the translations
  - supporting new legislations in the PIA solution

- We will be running further training courses in
  - UK
  - France
  - wherever else there is demand …

Help us to help you

- Webinars in English every month for partners and end-users
- Regular webinars and demo assistance for Pre-sales staff
- Release 13 webinars for partners
- Training Courses
- Free demo licences
- Join our Partner mailing list
- Access the EDM portal for up to date news and product information

Thank you, come and talk to us on Stand 18!

T: +44 (0)1625 856 505

www.WeAreV1.com