

sage



Release Notes

Sage Accounting Mobile APP

Release 4.0.0 (Android – Build 164 and iOS – Build 164)



Release Date: 18 September 2020

Release detail

The Sage Business Cloud Accounting Mobile application helps customers manage their business with convenience and ease. Customers can perform multiple functions all on the go and at their fingertips.

The Sage Business Cloud Accounting Mobile application is available for download on the **Apple App Store** and **Google Play** for new and existing customers.

Links to the App Stores are:

-  **Android:** <https://play.google.com/store/apps/details?id=com.sage.accounting.mea.apac>
-  **iOS:** <https://itunes.apple.com/us/app/sage-accounting-mea-apac/id1452572685?ls=1&mt=8>

The application is still free to use as a companion app to the website version of Sage Accounting. This document details all items that will be included in the **Version 4.0.0** release.

Audience

This document is aimed at all the users that will be using the mobile app in **the Middle East/Africa and Asia Pacific region**.

General

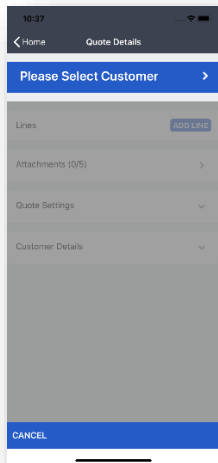
Version 4.0.0 includes the following changes:

- **General workflow improvements to enhance User Experience**
- **Functionality added to allow a User to add Attachments to Customer Documents (Quotes and Invoices)**

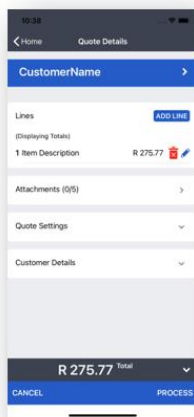
General Workflow Improvements

General Workflow Improvements include the following changes:

- A simplified **Home Screen**.
- When creating Customer documents, the main content of the screen has been greyed out until a Customer has been selected. The customer field has been enhanced by changing the background colour.



- The **Process** option will only be displayed once the user has selected a **Customer** as well as at least one **Line Item**.

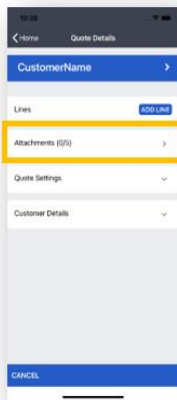


- The user is able to immediately select a line item with the removal of an additional screen that was displayed.
- Keyboards have been updated across the application to include a **Done** option to enhance the movements between fields while adding information.

Add attachments to Customer Documents (Quotes and Invoices)

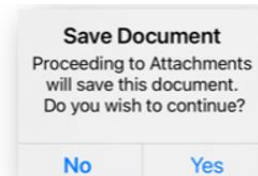
Adding of Transaction Attachments

- This functionality is only applicable to **Quotes** and **Invoices**.
- Users have the option to add Attachments while adding or editing Quotes/Invoices.
- The **Attachments** section is displayed below the item lines of the document.

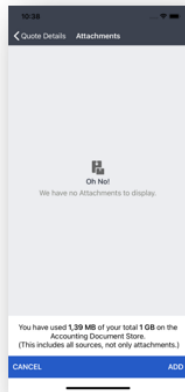


TAKE NOTE: The customer document will have to be saved in order to proceed with the adding of attachments.

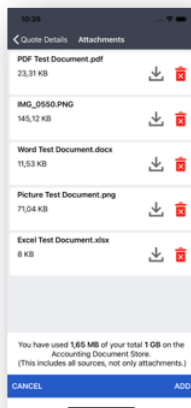
- When selecting **Attachments**, the user will be prompted to confirm whether they want to save the Document or not.



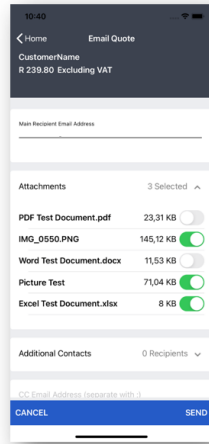
- By selecting **Yes**, the user can proceed to add attachments to the Customer document.
- The following screen will be displayed



- Users can select to add attachments from the device's **Camera, Gallery or Files**.
- A maximum file size of **2MB** per file is allowed.
- **Only five** Attachments per Customer document is allowed.
- At the bottom of the screen a message is displayed that will indicate to the user how much storage they have already used from the **1GB** that is allowed per Company.
- This will be updated with each attachment that is added to different transactions.
- The screen will be updated as the attachments are added.
- Only attachments per the specific Customer document will be displayed.



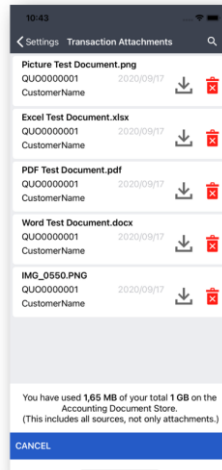
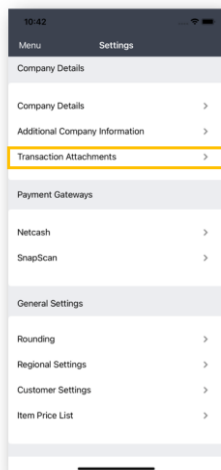
- From this screen, the user can **Delete** or **Download** attachments.
- The user can continue with the adding of the Customer Document after selecting the applicable Attachment/s.
- **Attachments can be distributed by:**
 - Selecting **Process > Save & Email**.
 - Selecting **Process > Save & Share**.
- Each time the user will be prompted to confirm if they want to include attachments with the sending of the Customer Document.
- **Email the document:** The user can select which document/s they want to include when sending the email.



TAKE NOTE: When selecting the **Save & Share** option, all attachments will be forwarded via e.g. Messaging.

Also: When processing a Quote and selecting the **Save & Create Invoice** option, any attachments from the Quote, will **not** be added to the newly created Invoice.

- A list of all Attachments is displayed in the **Transaction Attachments** section in the **Company Settings** menu option.



- From the **Transaction Attachments** screen, the user can **Download/Delete** attachments.
- By clicking in the document name area, the Customer Document to which the attachment is linked to, will be displayed.



Sage
6th Floor, Gateway West
22 Magwa Crescent
Waterfall 5-lr
Midrand
2066

www.sage.com

© 2017 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.