TimberScan GO

Release Notes 2024

Version 1.7.7225.4822

February 2024

Table of Contents

Overview

In this version you will find several enhancements and improvements. We have also included fixes to client issues and issues found in our internal testing. Keep submitting your enhancement requests. You ask and we respond!

NEW FEATURES CURRENT RELEASE

TM-2371 Cloud Capture for TimberScan GO, Capture Settings screen (for Sauron user), Accounting Date Usage page, we removed the option Acquire Date. The page now has 2 has options, Invoice Date and Accounting Date. In data entry, select an invoice. The invoice's accounting date was not being set according to the setting on the Accounting Date Usage page.

TM-2466 We added the invoice description to the AvidPay Payment Inquiry. This is in the Description column.

NEW FEATURES PRIOR RELEASES

1.7.7221.4772

On the Lien Waiver Status in Sage screen, we added the ability to reattach a signed lien waiver document.

↻ Generate Unsigned Lien Waiver

🖉 Attach Unsigned Lien Waiver

⊗ Download Unsigned Lien Waiver

🗑 Delete Unsigned Lien Waiver

⊗ Download Signed Lien Waiver

🖉 Reattach Signed Lien Waiver

Users are now able to reorder the pages of an image in the image viewer.

1.7.7221.4763

Lien Waiver Templates & Sending Lien Waivers

We have added the ability to create lien waiver templates and the ability to send lien waivers from TimberScan GO. Before being able to create a lien waiver template and sending it, the Address Book and Supplier setup needs to be completed.

Address Book Setup and Supplier Setup

We added Address Book Setup and Supplier Setup functions to the Lien Waivers menu. To get access to the new TimberScan GO menu items, users must be given access to them in TimberScan. In **TimberScan ->Admin -> Maintenance - > User Maintenance, Manage Lien Waiver Templates** must be checked.
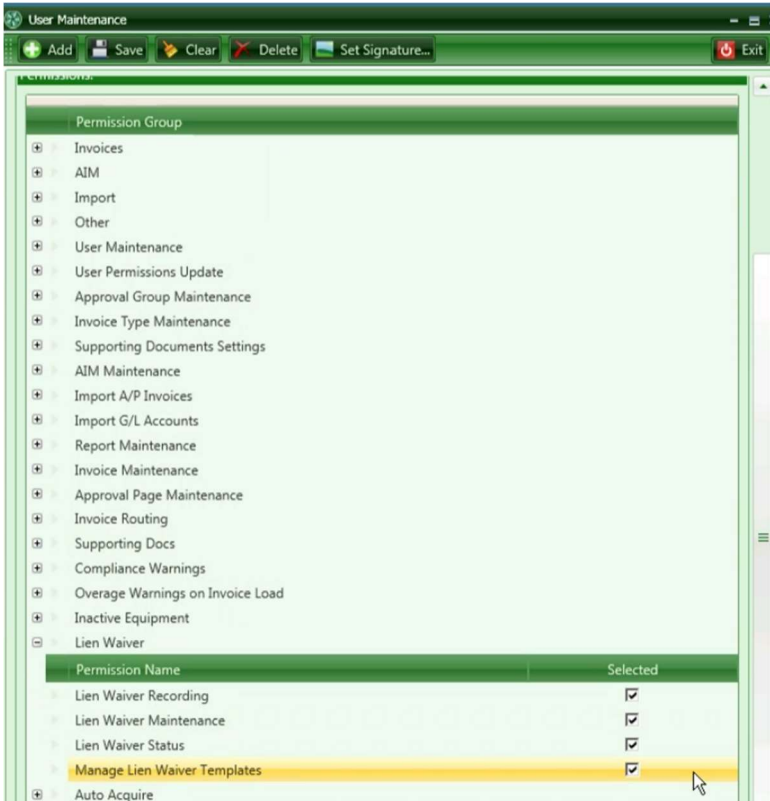
Address Book Setup

Set up signers and receivers of a lien waiver for a vendor in Lien Waiver Address Book Setup. Please note that:

- The signer's title must be entered.
- The signer's title must adhere with your state regulations. For example. in some states, the signer's title must be a board member (President VP, Secretary, Treasurer, or Owner).
- You can add multiple signers and receivers for the same vendor.
- Receivers can receive lien waivers but cannot sign them.

Timberline Construction

☰ ⊛timberscan•GO

👤 FN123 LN856 ⌄

🖨 Acquire ④ ⌄

⌨ Invoice Entry 886 ⌄

✔ Approve 68 ⌄

🏁 Final Review 82 ⌄

📑 Inquiries ⌄

❎ AvidPay 70 ⌄

⚙ Admin ⌄

📄 Lien Waivers 13 ⌃

  ⚏ Lien Waiver Queue 13

  ↻ Lien Waiver Status

  📋 Lien Waiver Templates

  👁 Lien Waiver Review

  👤 Address Book Setup

  ⚙ Supplier Setup

Lien Waiver Address Book

Company — Timberline Construction ✕ ▼

Vendor — ▼

Title —

First Name —

Last Name —

Email —

Phone — (__) ___-____

Active — ☑

Save Cancel

Supplier Setup

After the signers and receivers are set up in the address book, the next step is to set up the suppliers the lien waivers by type will be sent to. This is set up for each job or for all jobs, by marking a supplier for all jobs as a default.

Add Lien Waiver Templates

Now that the Address Book and Supplier set up are complete, you can add Lien Waiver Templates.

If you have a Word document of the lien waiver, copy and paste it into the Lien Waiver Template screen to create the template. If you do not have a Word document to copy/paste from, you are able to type the lien waiver text into the template area.

To insert the fields from Sage into the lien waiver template (check #, check date, vendor name…), highlight the field to insert, and the pick the appropriate field from the 'merge fields' drop down. Insert all applicable fields into the template and then save the template.

Use the Preview button to get a preview of what the lien waiver will look like when sent.

Lien Waiver Template

| Company | Timberline Construction ▾ | Lien Waiver Type | ▾ | ☐ Mark as default (No job selection) |

Document   **Select Job**

B I U abc ≡ ≡ ≡ ≡ 🔗 ⬚ A ▾ ◌ ▾ **Merge Fields** ▾ 👁

| Merge Fields dropdown: |
| Signer Title |
| Vendor Address 1 |
| Vendor Address 2 |
| Vendor City |
| Vendor Name |
| Vendor State |
| Vendor Zip Code |

...iver (Release) Job

Date: _____ ##checkdate## ____ Check: _____ ##checknumber## _____ _____ ##checkamount## _____

Contractor: __TS Company Name _____ ##vedorname## _____ _____

TS Company Address _____ ##vendoraddr1## ##vendoraddr2## ##ve... # ##vendorzip##

Project: _____JOB_____ ##jobcode## _____ ##jobname## _...

Project Location: _____JOB ADDRESS __ ##jobaddr1## _____ ...y## _____ ##jobstate## _____ ##jobzip## _

Contract # _____Commitment # check in sage if there is commitm... description?)__ ##commitmentid## _____ ##commimentdesc## _____ ..._____ ##commitmentpayments## __ ##commitmentbalance##

Company: ##company##

(First and Last name from LW address book)___Name from Address book__ (Name) does herby certify that he/she is the ___need to add title in address book and create a html tag_(need to add Title in Address book – text box 50 chars in length)_ (title) of ___Vendor Name___ (name of supplier or sub-contractor) herein after called the "Company", and that said Company has heretofore supplied materials and/or services to the ____Job Name___ (project name) being constructed at ___Job Address_____ (project location) an agreed price of $ _____Commitment Amount_____ (total contract amount). He/she does further certify that the Company has received $_____ Check amount___ (amount paid) on account of agreed price and that the sum of $ _20,000_____ Commitment amount minus previous payments (including this payment) (Commitment Payments) _____(amount left to be paid) (Commitment Balance) remains owing to the Company by _____Company___(Vendor Name)_____(name of contractor). He/she does further certify that the contractor has made suitable arrangements for payment to the Company of all sums remaining due to the Company by virtue of said delivery of materials and performance of services in connection with the aforesaid project; does hereby waive any and all rights which the Company may now or in the future have to file any lien or liens pursuant to the Lien Law of the State of __TS Company State_(Vendor State or Job State)_ against the aforesaid project, its Owners, or the contractor, as an inducement to the Owner to pay all sums due the contractor for the Owner pursuant to the contract between the contractor and the Owner, without any obligation on the part of the Owner to see that sums due to the Company from the contractor are paid.

IN WITNESS WHEREOF, the undersigned has set his/her hand and seal this _____ day of _____, 20_____.

Save   **Cancel**

Lien Waiver Review

As soon as a lien waiver is generated in Sage, TimberScan GO searches for the lien waiver template (by type and by job). If TimberScan GO finds the appropriate template, it will then go into lien waiver Review queue. Here you review the lien waiver before sending it to your supplier.

If everything looks correct on the lien waiver, then mark it as reviewed by clicking on the Review button.

The Email button will be enabled after the lien waiver is reviewed. Click the email button to email the lien waiver to your supplier.

After the lien waiver is sent successfully, it is removed from the Liew Waiver Review queue.

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Lien Waiver Review

	Vendor Id	Vendor	Lien Waiver Type	Lien Waiver Amount	Check	Job	Invoice	Invoice Amount	Created Date ↓
👁 ⬇	103	Ace Drywall	Unconditional Partial	$270.87	26321	03-001	jan182024	$300.00	01-18-2024
👁 ⬇	102	Acme Door & Glass Distributors	Conditional Partial	$180.58	26322	03-002	jan18	$200.00	01-18-2024
👁 ⬇	102	Acme Door & Glass Distributors	Unconditional Partial	$180.58	26322	03-002	jan18	$200.00	01-18-2024
👁 ⬇	100	A-1 Electric Company	Conditional Partial	$4,875.73	26324	03-001	J9015	$5,400.00	01-18-2024

⏮ ◀ **1** 2 3 4 5 6 7 8 9 10 ... ▶ ⏭   20 ▾ items per page   1 - 20 of 2440 items

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AvidXchange Managed Bookmarks Gmail YouTube Maps https://crm.core-ass... Core Associates - S... The Makers of Timb... Mobile Version Trac... JIRA webex

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☰ timberscan GO ‹ › | Download Unreview Send Regenerate Cancel

- 🏦 FN123 LN856 ˅
- 📠 Acquire (4) ˅
- 📄 Invoice Entry (886) ˅
- ✔ Approve (68) ˅
- 🚩 Final Review (82) ˅
- 📋 Inquiries ˅
- ❌ AvidPay (70) ˅
- ⚙ Admin ˅
- 📄 Lien Waivers (13) ˄
  - Lien Waiver Queue (13)
  - Lien Waiver Status
  - Lien Waiver Templates
  - Lien Waiver Review
  - Address Book Setup
  - Supplier Setup

CONDITIONAL LIEN WAIVER FOR PARTIAL / PROGRESS PAYMENT - Default

Vendor Id	Vendor	Lien Waiver Type	Lien Waiver A...	Check	Job	Invoice	Invoice Amount	Created Date
100	A-1 Electric Company	Conditional Partial	$1,805.83	26307	03-002	T_Go_24	$5,600.00	01-12-2024

Send Email ✕

To: jaimin007 bhatt007 (jr) ✕   ✕

Cc: type or select an email address

Message:

See attached lien waiver for invoice jan172024. Kindly return this at your earliest convenience.

Characters Remaining: 400

Cancel   Send email

Email Settings

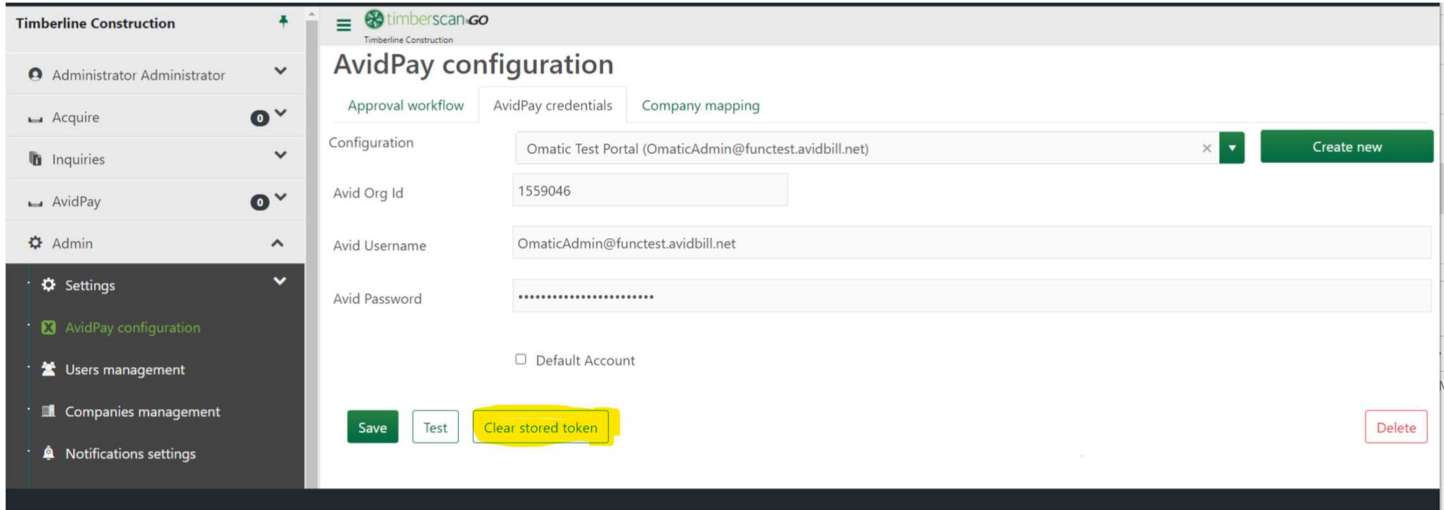We added the Email Settings screen from TimberScan to TimberScan GO. Only the Administrator user has access to this screen.
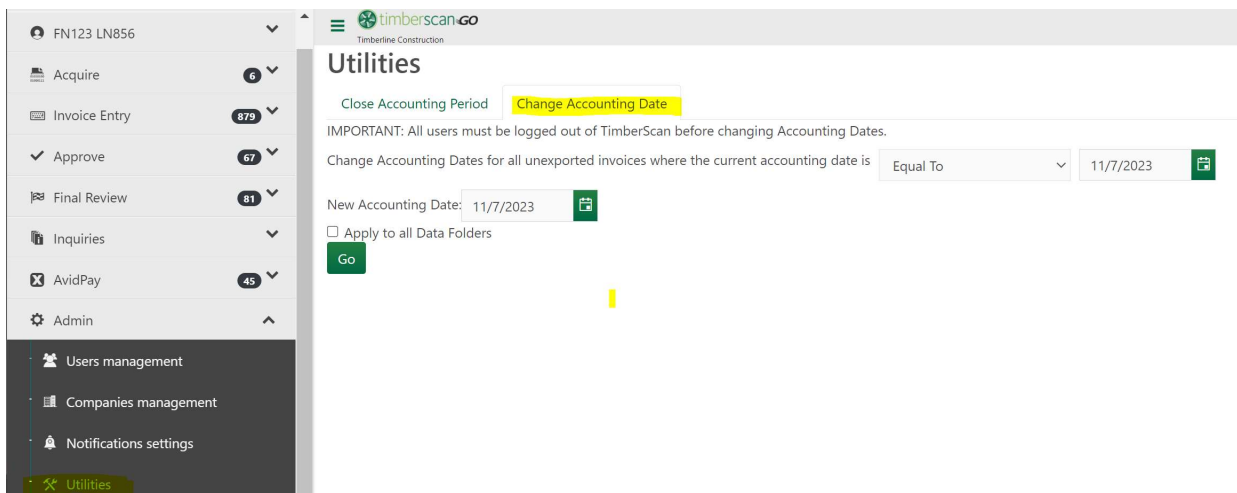
1.7.7.7187.4475

Clear Stored Token Button

We added a Clear stored token button to the AvidPay configuration screen. Only the Administrator and Sauron users have access to this screen and button.

1.7.7.7187.4282

Change Accounting Date

In Utilities, we added Change Accounting Date function to TimberScan GO. This is the same functionality that is in TimberScan.

This step will change the accounting date for all un-exported invoices in TimberScan/TimberScan GO (not just on those accrued invoices). You will want to do this so the invoices are not rejected in Sage when you close your month there. **Be very careful when using this tool**, as If you make a mistake you will need to manually change the invoices in TimberScan/TimberScan GO.

Add Sync Lien Waiver Records From date validation in setting screen

We added a new setting in Lien Waiver settings, "Sync Lien Waivers Records From". From the date entered on this field onwards, our system will sync lien wavier records from Sage.
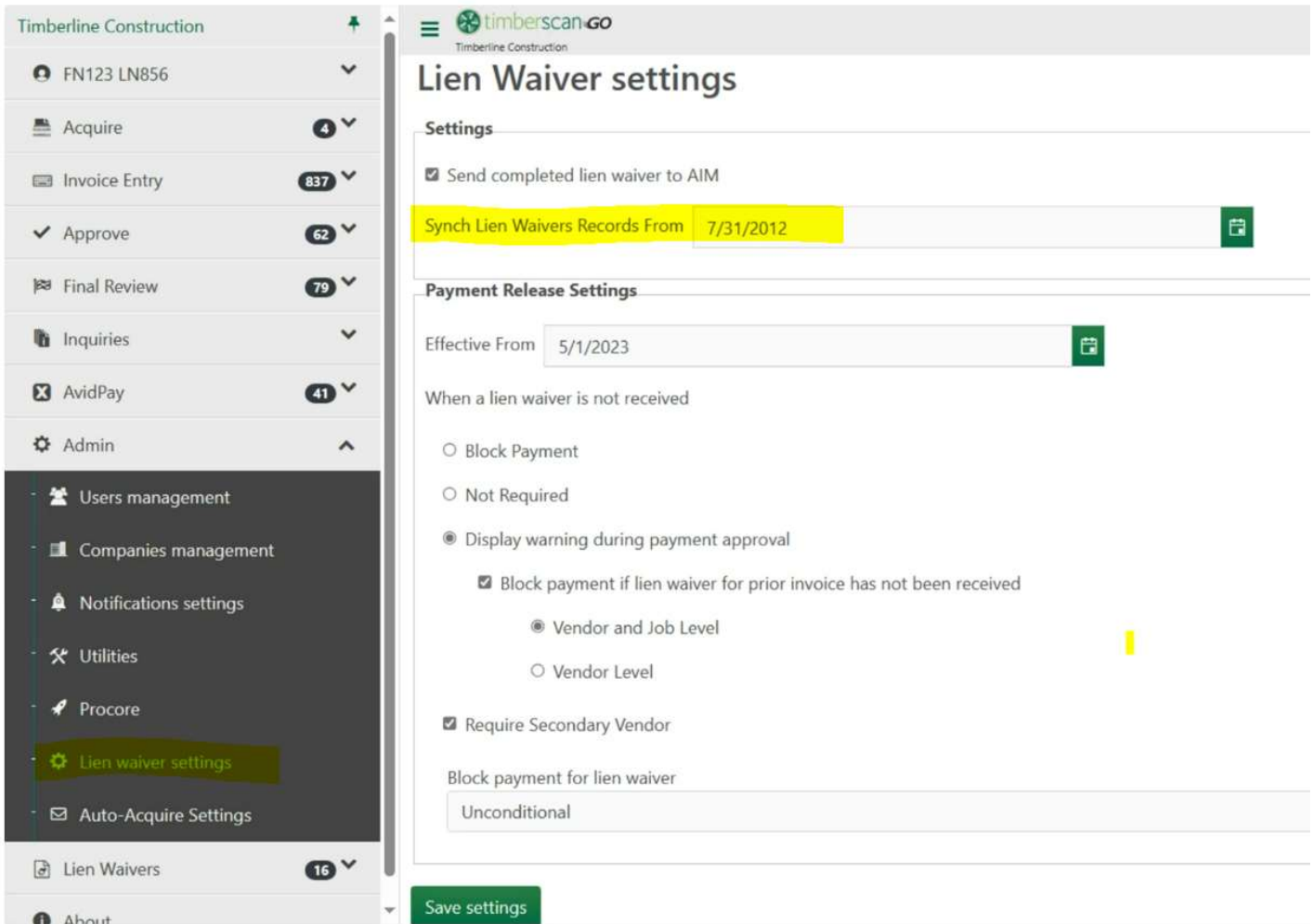
Added an "Update License" button to the About screen.

We added an "Update License" button to the About screen.   Only the Administrator user, Sauron user, and users that have administrator rights will see this button.

timberscanGO

v1.7.7187.4285

Activation Key

ANQS0C0C06GFHJKM8P1X2Y8C2KPURSGYDZ

Maximum User Accounts

200

🏠 Home | Update License

RESOLVED ISSUES CURRENT RELEASE

TM-1442 When using the search criteria in TimberScan GO Invoice Inquiry, the incorrect result count is displayed on the TimberScan GO Invoice Inquiry page, when compared to the TimberScan Regular Invoice Inquiry page.

TM-2188 Approvers are not receiving emails sent from TimberScan GO.

TM-2455 An error message was displayed while selecting the account values on the invoice entry page.

TM-2464 When sending emails from TiimberScan GO with a CC and BCC, the BCC is showing in the Invoice Notes.

RESOLVED ISSUES PRIOR RELEASES

1.7.7221.4791-ReleaseHotFixCloudCapture

Users are experiencing errors when using Cloud Capture via Auto Acquire or Manual Acquire.

1.7.7221.4772

The discount date is prefilling information on the Invoice Entry page.

1.7.7221.4763

Avid Payment Approval, approve payment successfully, on the History page the payments is displayed with an error.

Print to Avid, the user was getting an error, the invoice amount does not equal the total check amount.

Error message when user tried to delete coding profiles on the template. Error when trying to review the invoice in Primary Invoices.

User is unable to edit Capture templates in TimberScan GO.

When creating a template, after we chose all of the fields and clicked next, and got to the identifier, chose the vendor and clicked SAVE, we got an error "Identifier must be unique",

Approved invoices form Avidpay control- Approve page are not displayed on Avidpay payment Inquiry page. Supplier setup and vendor contact data should be in the send email screen. If supplier setup data matches then that data should auto populate. Once the email is manually added sent, that data should display in the future emails.

Add regenerate button on the Lien Waiver Review screen.

User is unable to send an unsigned lien waiver email from Lien Waiver status screen before review.

We fixed multiple issues on the Liew Waiver Review screen.

Added a regenerate button on the Lien Waiver status screen.

Lien Waiver Email from Lien Waiver Status. When a new email address is used, it should save and shown next time in the drop down

Unnecessary information is being displayed in the Lien Waiver log files.

When sending an email from the Lien Waiver status screen users were getting an error message and the BCC recipients did not receive the email.

Users are getting a user error message when redirected to the invoice recording screen.

Users are getting a user error message when acquiring an invoice from the Lien Waiver Acquire screen.

The "Lien waiver is not attached" icon is not displaying on those records that are not having unsigned LW.

We changed the column display order of the Lien Waiver Review screen grid.

User is no getting the access denied error message when trying to send an email from "testmail@corecloudsystems.com" in TimberscanGo.

The secondary lien waiver records are showing on the Lien Waiver Review screen.

Users are getting an error message when trying to acquire an invoice.

Lien Waiver image type is not showing in "Add Auto Acquire Settings" screen when all the Lien Waiver settings are enabled.

User is getting a 500 error when acquiring an invoice.

Able to active supplier set up with the same job which is already in active state.

The incorrect date format is displaying on all lien waiver screens.

In certain instances, TimberScan GO Cloud Capture did not acquire invoices.

The options in Review page is enabled when there are no invoices available in the review page.

The new cutoff date is not defaulting on the accrue invoices page.

Clickable functionality is not working properly in LW recording screen.

We added a preview button to the Lien Waiver Template screen.

Smart extraction is not working properly.

The user is getting a 500 error when sending an email from the Lien Waiver Review screen.

The Email button is not disabled after the lien waiver is received in the Lien Waiver status screen.

Remove generate button from LW review listing screen.

In Lien Waiver Review, the send email button is getting disabled on the second record after sending an email for first record.

In a certain scenario, the Job value saved in the Accrual Settings page was not replaced with actual Invoice values for few invoice.

The "Lien Waiver Status" screen was renamed to "Lien Waiver Status in Sage"

We changed the verbiage of email message to "Attached is the lien waiver for invoice "#", Please sign and return at your earliest convenience. Thank You."

Export to excel option was added to the Avidpay control Approve and On Hold pages.

1.7.7.7208.4622

User was unable to receive the AvidPay Payment control initial and reminder email notifications.

TimberScan GO is unresponsive and errors out.

Export Batches: Exported by, Verified, Status and Message columns were missing in TimberScan GO version of the application.

The Admin User doesn't have access to AvidPay Control and History.

User is receiving an error message when trying to send an email in the lien waiver review screen.

Liew Waiver address book, a space is counted in Title field, First name & Last name fields.

There are several filter issues in the Liew Waiver Address Book, Liew Waiver supplier setup, and Liew Waiver template screen.

Liew Waiver supplier setup, search for a job, no data displays.

Liew Waiver supplier detail screen, edit an inactive supplier, change the recipient and signer, save, user gets an error, "Cannot save this record because default record already exists for a selected company and a vendor."

Capture, create new template, add field Commitment, when finishing the template, the Commitment value is showing under the field name "Order #".

1.7.7.7280.4475

The secondary vendor status is not updated when the lien waiver is expanded, and the grid is refreshed

Lien waiver log records are being displayed in ascending order. They should be displayed in descending order.

The pre-tax isn't calculating automatically when the total is entered on the top line.

Add field to a coding profile "+" symbol was not displayed beside the fields after adding the capture template on the invoice on Data Entry page.

The invoice accounting period date is changing back to pervious day date on the Approve page after changing the date in invoice entry page.

The "oops" error message is being displayed when opening the invoice detail on the invoice entry page.

An error message was not displayed for the vendor, job, and Description field when the user tries to add the coding profile to the identifier when its already added to the default coding profile.   .

The distribution values like company, account, and tax no longer automatically fill after hitting tab from the header line.

When an approver tries to change the distributions on an invoice, and split them, as soon as he enters an amount on the first line, an error message appears.

Users are getting an error on the export "The error is GL not valid."

In a specific scenario in Data Entry, the invoice field values are not removed when the user clicks on the cancel invoice button.

In Data Entry, select an invoice, click on the History button, historical invoices are not displayed.

TimberscanGo is decreasing the invoice date on all invoices by 1 day immediately after its routed.

Error message is displayed while user tries to 'Save' / 'Accept' the invoice on the Invoice Entry page.

Oops error message was displayed when user opens the invoice in detail page in Invoice Entry page.

The Back button was missing on all lien waiver screens.

Liew Waiver Template we changed the label "Insert HTML" to "Merge Fields".

The Description field value was removed after creating the template by Clicking on Add Capture template option on Invoice Entry page.

An error message was displayed when the user searches the invoices with Invoice Location = Current in Job Inquiry page.

Invoices that fail verification should be returned to the queue and the batch count and totals should be updated to only account for successfully exported invoices.

We added more information to the Approval confirmation box, The total Amount for the selected payments, and the Number of Payment of Total payments in Queue.

On the lien waiver review screen, the PDF file name is displayed in the File Name column. It should display the Review & Download button.

1.7.7.7280.4367

The Procore API is sending duplicate company IDs.

The Auto Acquire settings permission is referencing the wrong Soraco feature ID.

The Auto Acquire settings Invoice type is not showing in the drop-down list.

Users were getting an error message when clicking on the save button in Data Entry.

1.7.7.7280.4335

We added the label "Synch Lien Waivers Records From:" to Admin, Lien waiver settings.

1.7.7.7187.4282

When a user clicks the History button in invoice entry, nothing is displayed.

In invoice entry, we corrected a typo on the "Reload OCR" button.

The user was getting an error message when trying to export more than 20 invoices at a time from the Export page.

All Capture results are not displayed on the invoice coding on data entry page after the Capture template was defined.

We added Connection ID to the LienWaiverNotification log.

Cloud Capture for TS GO, when creating a template on the fly, it does not save the vendor even though the vendor is entered.

Users are getting an error when entering an invoice and entering the GL code.

The aggregate total was not displayed in the Pre-Tax column.

"Capture template are not matched" message is displayed on the invoice recording screen when Capture is disabled for the user.

The invoice recording screen is not opening from the Data Entry.

In a specific scenario, the invoice was not displayed in detailed view in the Data Entry page.

1.7.7.7187.4205

In Data Entry, Primary Invoices, click on an invoice, hover over the TimberScan GO logo with the mouse, it now displays how many invoices are in the queue and what number invoice the user is currently on.

Exported invoices are not showing in Sage 300.

Search for Valid Sage Vendor in Edit profile is not working.

In Acquire->Capture templates, users are getting an error when selecting an identifier and trying to save template.

In a specific scenario, an empty warning dialog box is displayed when the user clicks on the save button on Data Entry-> Final review page.

An error is appearing in the console when the user clicks on the Alternate Invoice List.

The delete reason is not getting removed when the invoice is deleted, and we redirect to another invoice.

Users are getting an error when clicking on Invoice status inquiry, "Oops something happened on the server ... Object reference not set to an instance of an object."

Users are getting 500 internal server error when using the Search without entering a User field in Alternate Invoice->Date Entry.

On the Invoice Entry page, an error was displayed, and invoice coding fields are not displayed.

When searching for invoices on Invoice Entry page, invoices are not displayed and an invalid warning message " User is not selected" is displayed.

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