User Guide for PaperSave extension for Microsoft Dynamics 365 Business Central

**PaperSave is a product of WhiteOwl**

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1 INTRODUCTION

This document primarily describes the steps to setup and use the PaperSave for Dynamics 365 Business Central extension. Please note that this is not a user guide for PaperSave. The user guide for PaperSave can be found here. This guide only covers PaperSave's integration into Dynamics 365 Business Central and how that integration interacts with different PaperSave functionalities such as Add Document, Show Documents and Show Interrelated Documents for various transaction types like Purchase Invoice, Vendor, Sales Invoice, General Journal, Customer etc.

2 PAPERSAVE SETUP & CONFIGURATION STEPS

The following steps will guide you through the setup for the PaperSave extension in Dynamics 365 Business Central. These steps should be performed by a Dynamics 365 Business Central admin once and only once before users will be able to utilize the PaperSave extension.

Below is the Dynamics 365 Business Central Home page:
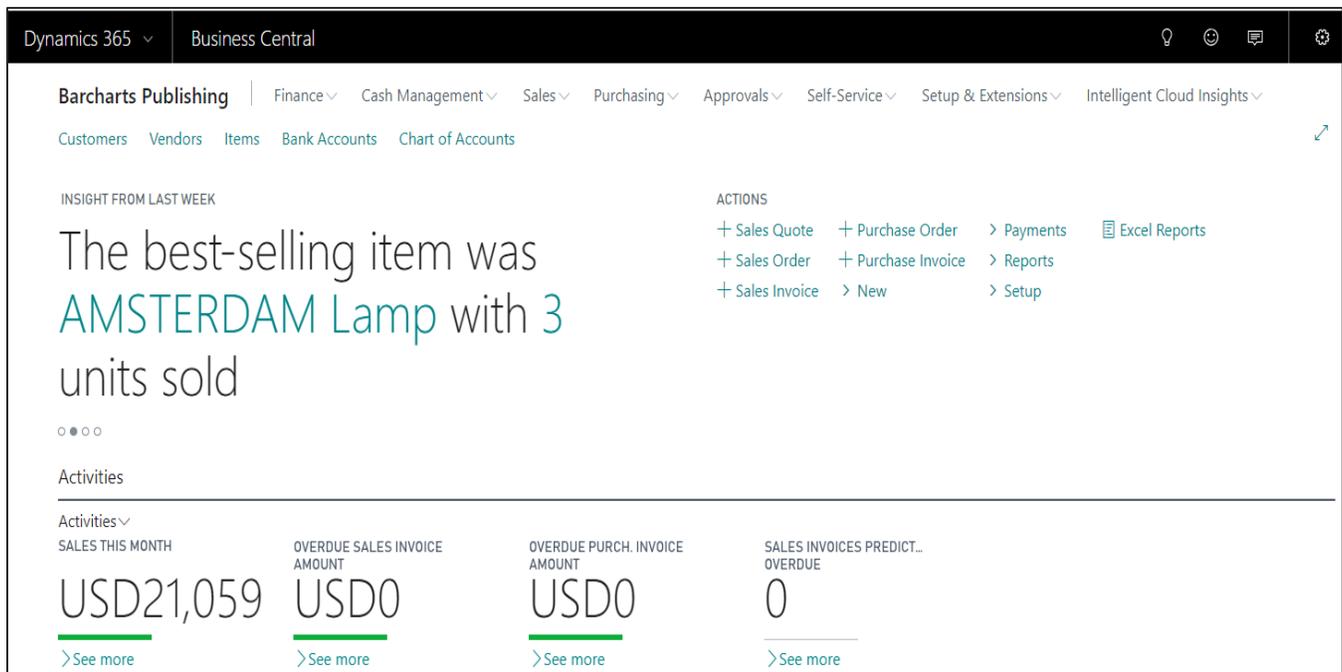
1. On the Dynamics 365 Business Central Home Page, click the **Setup & Extensions** dropdown.

2. Click Assisted Setup.
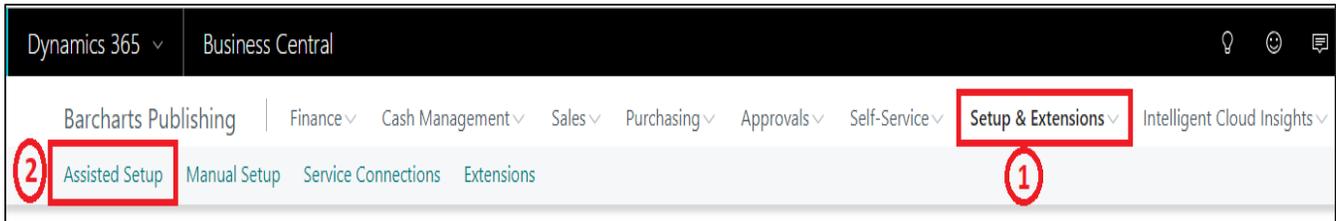
3. Click the **PaperSave Setup** Link.
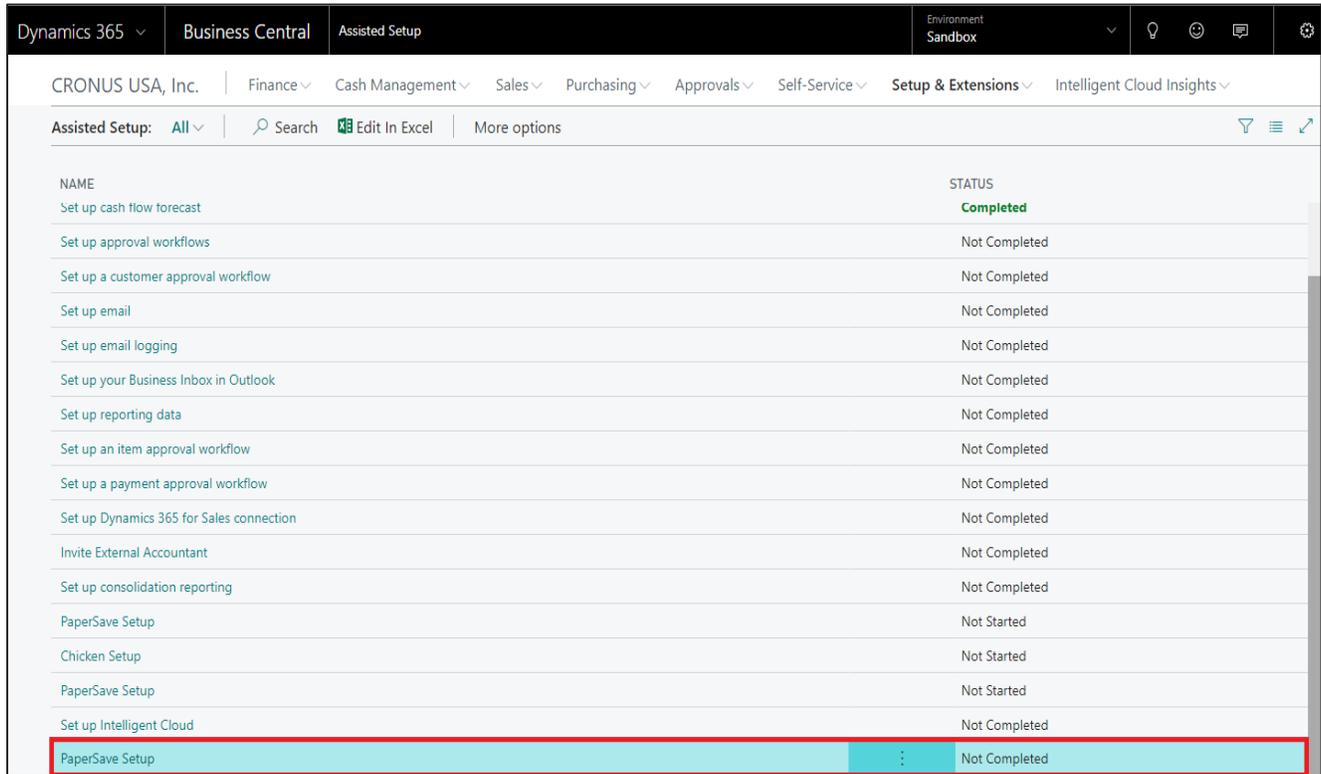
4. This will launch the PaperSave Setup Wizard. Click **Next**.

PAPERSAVE SETUP WIZARD

⚙

LET'S GO!

Step1 - Go ahead and continue.
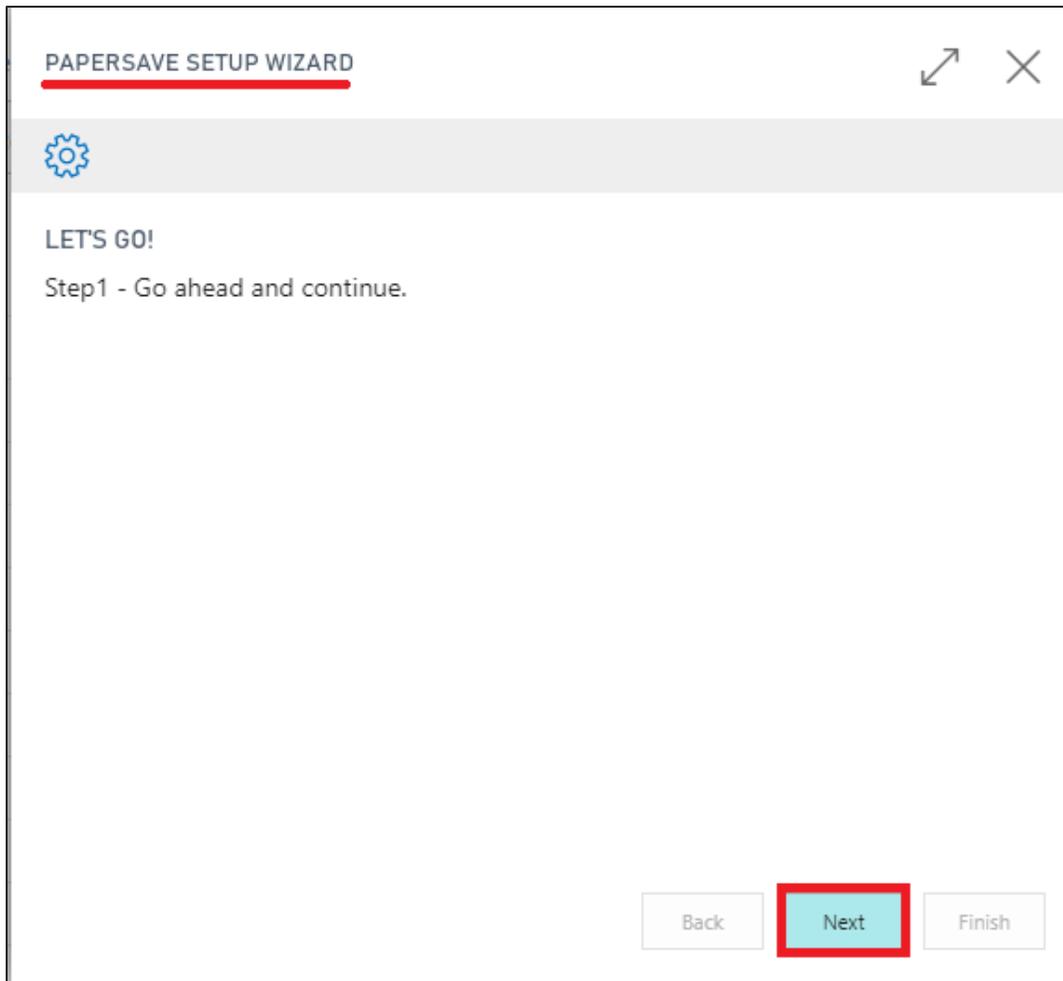
Back | Next | Finish

5. Specify the relevant PaperSave Cloud URL and API secret. Then, click **Next**.

6. Click **Finish** to complete the PaperSave setup.

PAPERSAVE SETUP WIZARD

✓

Step3 - You are ready.

THAT'S IT!

Choose Finish to exit the wizard.

Back   Next   **Finish**
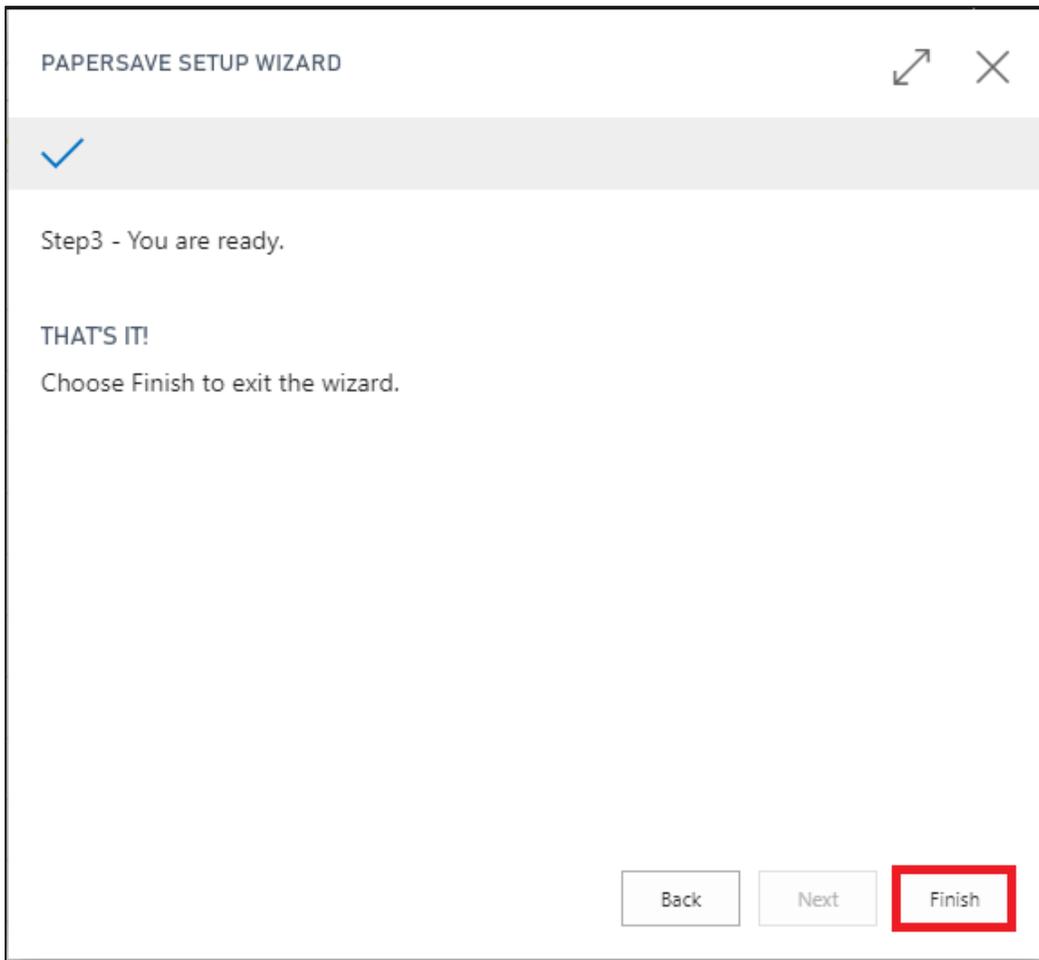
3 USING THE PAPERSAVE EXTENSION WITHIN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

The PaperSave extension allows users to interact with PaperSave from within Dynamics 365 Business Central to do the following:

1) **Add Document**: You can add documents to records that PaperSave is integrated into through various acquisition methods such as direct TWAIN compatible web scanning, scanning using a Fujitsu NX series web enabled scanner, drag & drop or selecting files using a file browser, scanned later using a barcode sheet and more.

2) **Show Document**: You can view documents related to any instance of type of record in Dynamics 365 Business Central that PaperSave is integrated into.

3) **Show Interrelated Documents**: You can view documents that are indirectly related to any instance of type of record in Dynamics 365 Business Central that PaperSave is integrated into.

Please refer the PaperSave User Guide for more information about how these or any of the other PaperSave core features work.

The following sections delves into the specifics about how the PaperSave extension works within each currently integrated record type. Some of the steps show one way of navigating to specific instances of record types within Dynamics 365 Business Central.   PaperSave's integration surfaces within each record type's primary screen. Thus, any which way that a user can arrive at that screen will allow them to click on the PaperSave buttons in the toolbar.

3.1 PURCHASE INVOICE

The following steps describe how to interact with PaperSave within the "Purchase Invoice" record type's main screen:

1. On the Home Page, click on the **Purchasing** dropdown.

2. Click on "**Purchase Invoices**".
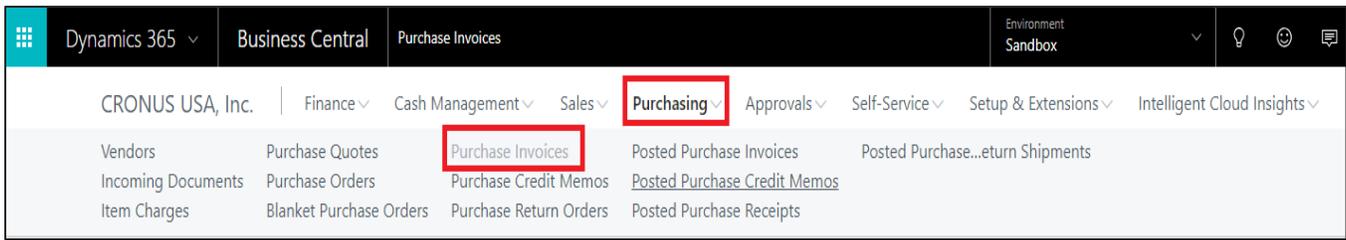
3. Click on the **number field** of desired record in the Purchase Invoices list to open a Purchase invoice.

4. This will launch the **Purchase Invoice card**.
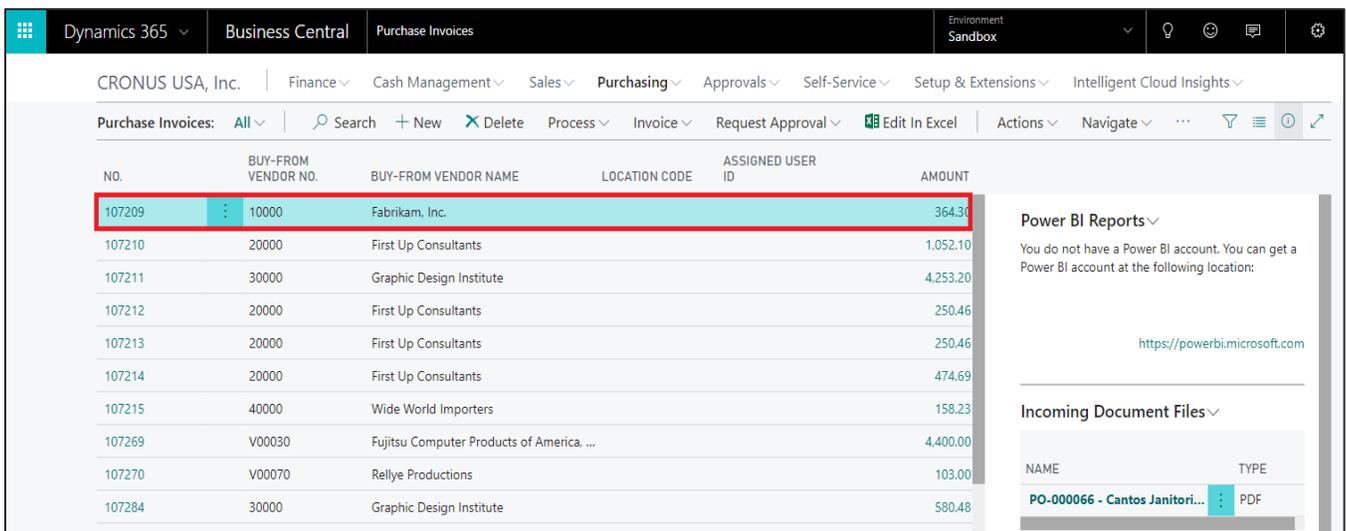
5. Click "**Invoice**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
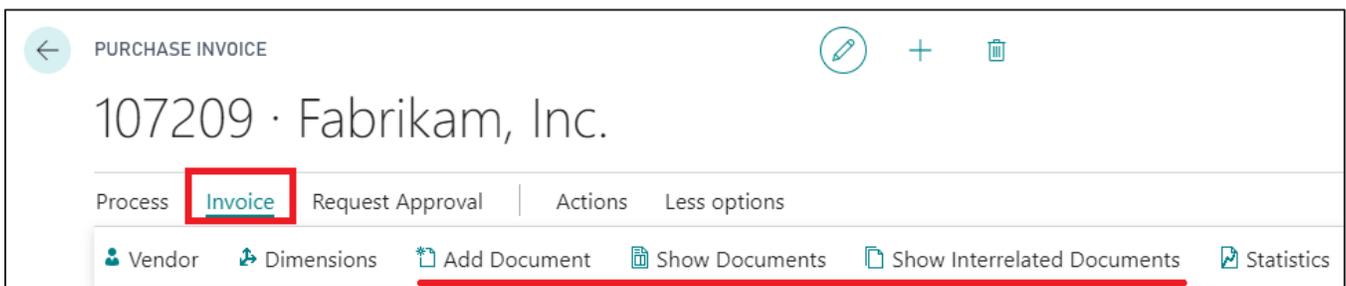
3.1.1 ADD DOCUMENT IN PURCHASE INVOICE

1. On the Invoice tab of Purchase Invoice Card, click on "**Add Document**".

2. If you are not already logged in, then it will open PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method files to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.1.2 SHOW DOCUMENTS IN PURCHASE INVOICE

1. On the Invoice tab of Purchase Invoice Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will show the document(s) that is/are directly related to this Purchase Invoice.

3.1.3 SHOW INTERRELATED DOCUMENTS IN PURCHASE INVOICE

1. On the Invoice tab of Purchase Invoice Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will show the documents that are indirectly related to this Purchase Invoice.

3.2 PURCHASE QUOTE

The following steps describe how to interact with PaperSave within the "Purchase Quotes" record type's main screen:

1. On the Home Page, click on **Purchasing** dropdown.

2. Click on "**Purchase Quotes**".
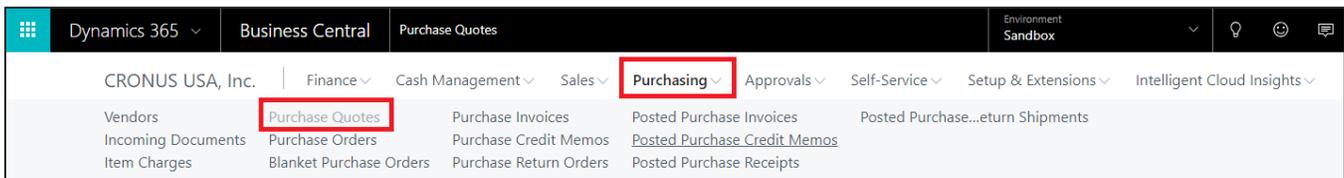
3. Click the **number field** of the desired record in the Purchase Invoices list to open a Purchase Quote.

4. This will launch the **Purchase Quote record**.
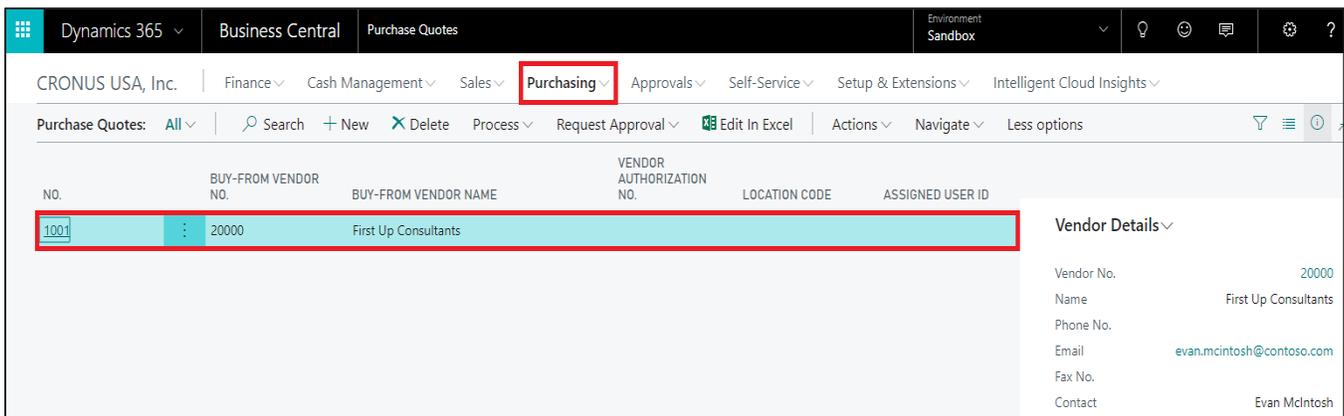
5. Click "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".
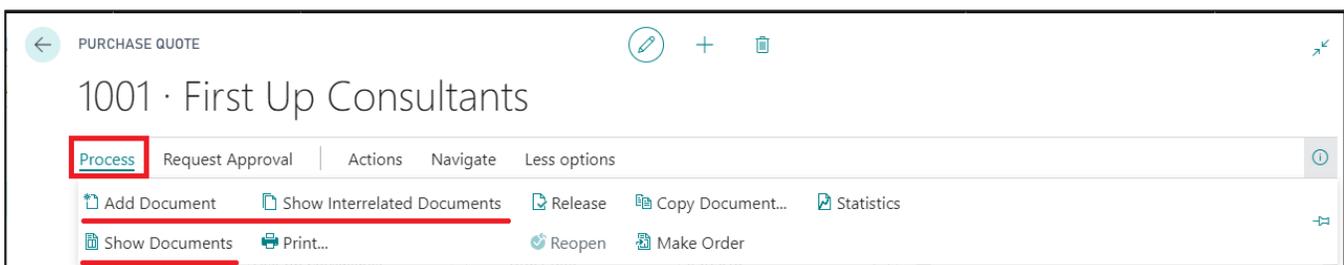
3.2.1 ADD DOCUMENT IN PURCHASE QUOTE

1. On the Process tab of Purchase Quote Card, click on "**Add Document**".

2. If you are not already logged in, then this will open PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.2.2 SHOW DOCUMENTS IN PURCHASE QUOTE

1. On the Process tab of Purchase Quote Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will show the document(s) that is/are directly related to this Purchase Quote.

3.2.3 SHOW INTERRELATED DOCUMENTS IN PURCHASE QUOTE

1. On the Process tab of Purchase Quote Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this Purchase Quote.

3.3 PURCHASE ORDER

The following steps describe how to interact with PaperSave within the "Purchase Order" record type's main screen:

1. On the Home Page, click on **Purchasing** dropdown.

2. Click on "**Purchase Orders**".
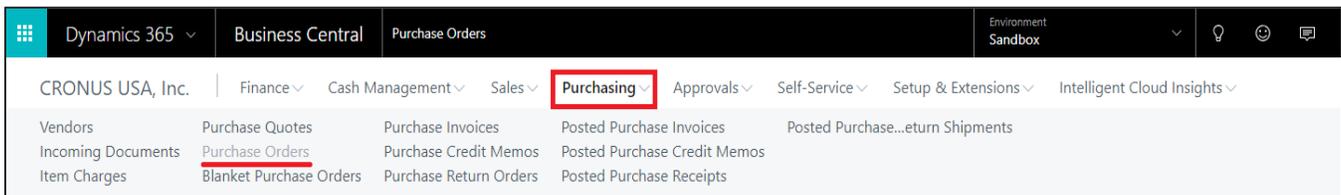
3. Click the **number field** of desired record in the Purchase Orders list to open a Purchase Order.

4. This will launch the **Purchase Order record**.
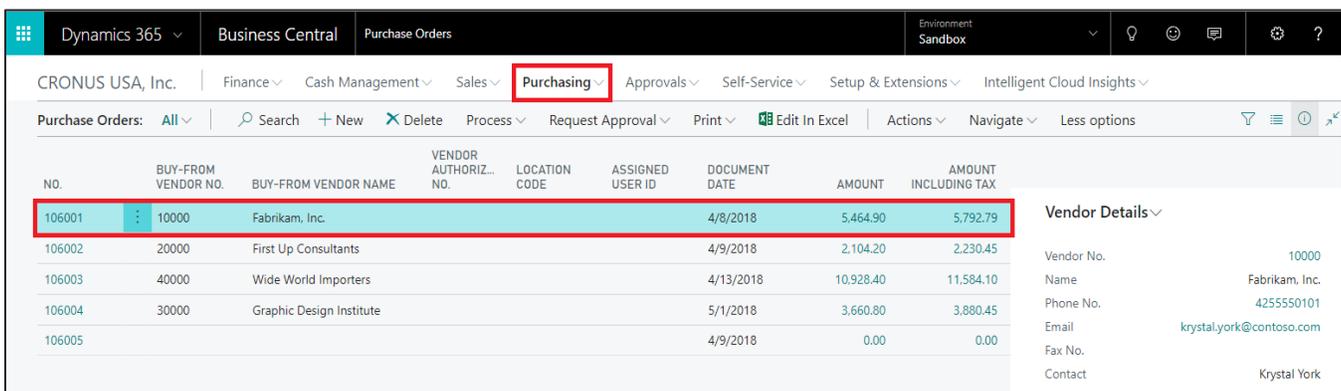
5. Click "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
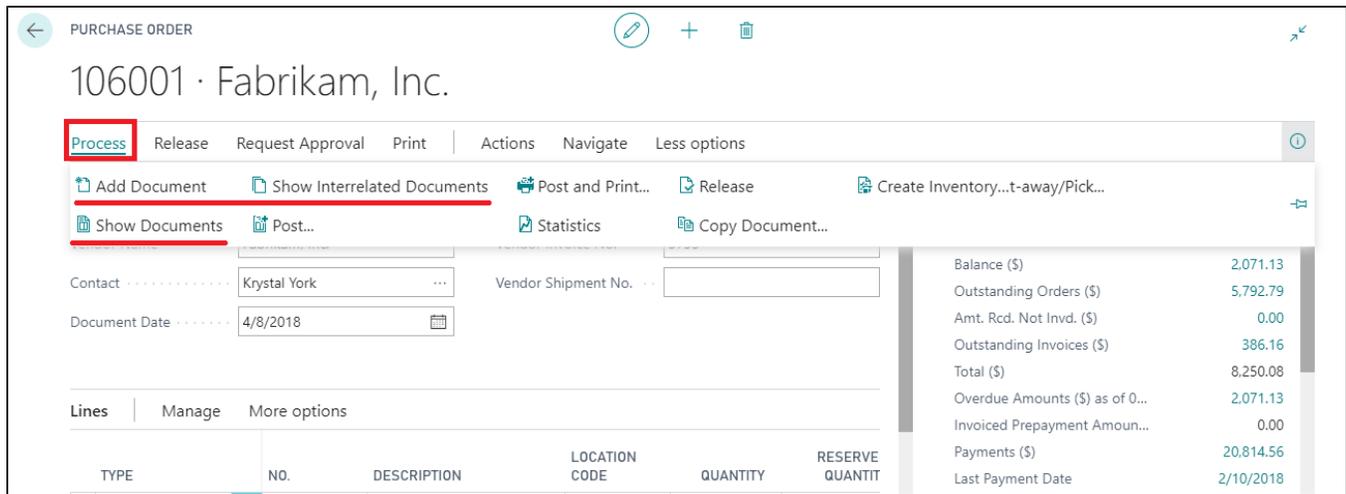
3.3.1 ADD DOCUMENT IN PURCHASE ORDER

1. On the Process tab of Purchase Order Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.3.2 SHOW DOCUMENTS IN PURCHASE ORDER

1. On the Process tab of Purchase Order Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. On successful login, it will **show** the document(s) that is/are directly related to this Purchase Order.

3.3.3 SHOW INTERRELATED DOCUMENTS IN PURCHASE ORDER

1. On the Process tab of Purchase Order Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this Purchase Order.

3.4 VENDOR

The following steps describe how to interact with PaperSave within the "Vendor" record type's main screen:

1. On the Home Page, click on **Purchasing** dropdown.

2. Click on "**Vendors**".
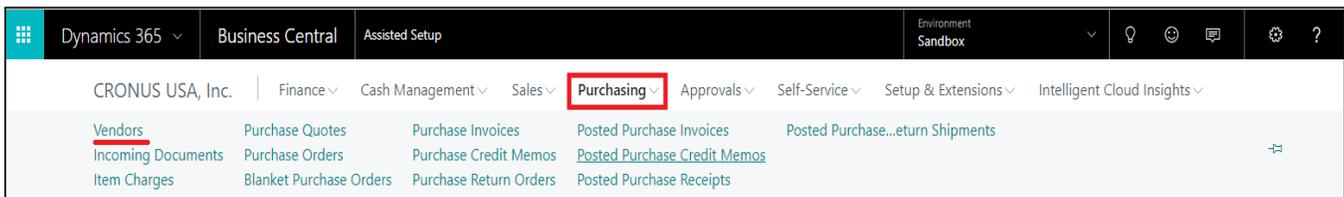
3. Click the **number field** of desired record in the Vendors list to open a Vendor.

4. This will **launch** the Vendor card.
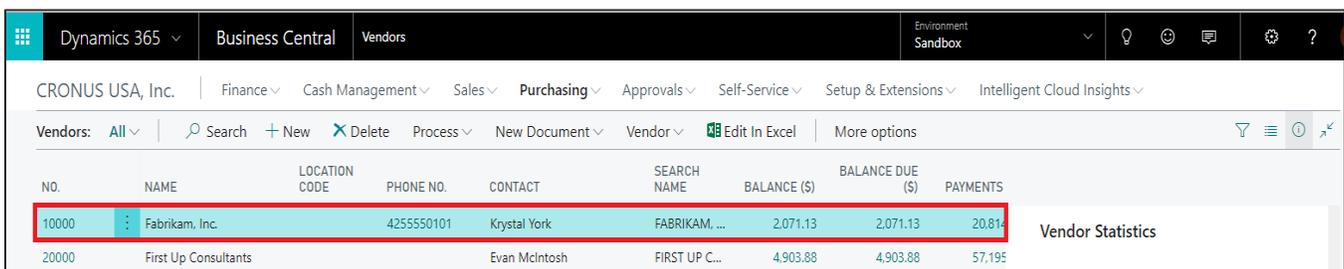
5. Click "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".
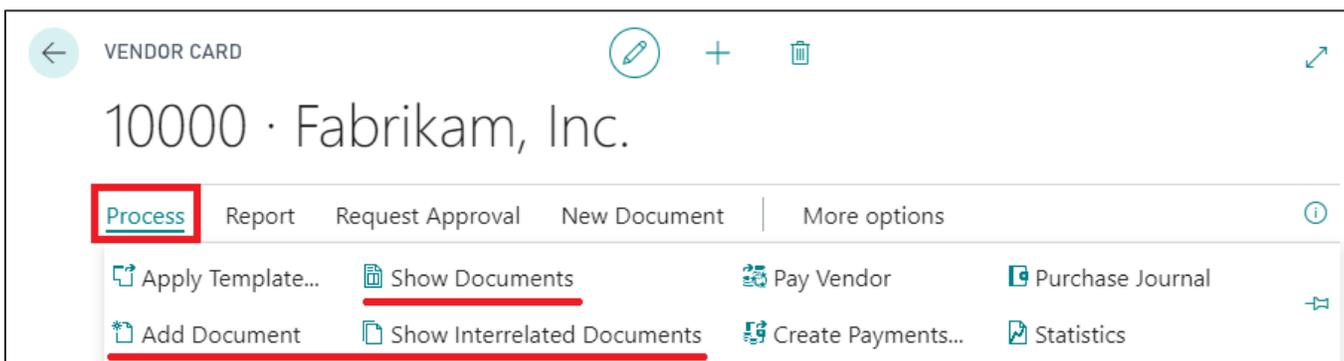
3.4.1 ADD DOCUMENT IN VENDOR

1. On the Process tab of Vendor Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.4.2 SHOW DOCUMENTS IN VENDOR

1. On the Process tab of Vendor Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are directly related to this Vendor.

3.4.3 SHOW INTERRELATED DOCUMENTS IN VENDOR

1. On the Process tab of Vendor Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials

3. On successful login, it will **show** the document(s) that is/are indirectly related to this Vendor.

3.5 SALES ITEM

The following steps describe how to interact with PaperSave within the "Sales Item" record type's main screen:

1. On the Home Page, click on **Sales** dropdown.

2. Click on "**Items**".
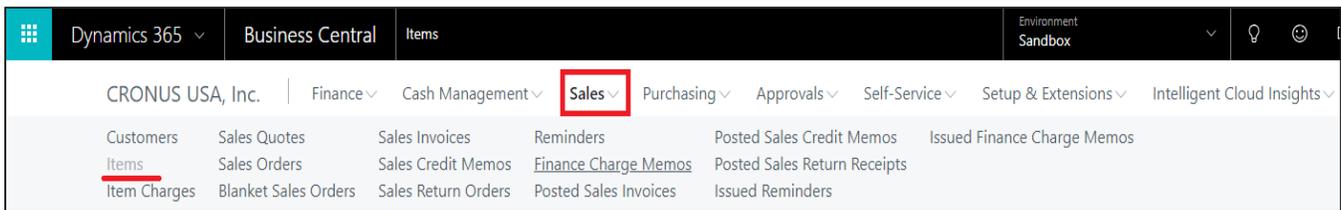
3. Click the **desired record** in the Sales Items list to open the Sales item.

4. This will **launch** the Sales Item card.

5. Click "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**

3.5.1 ADD DOCUMENT IN SALES ITEM

1. On the Process tab of Sales Item Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.5.2 SHOW DOCUMENTS IN SALES ITEM

1. On the Process tab of Sales Item Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. On successful login, it will **show** the document(s) that is/are directly related to this **Sales Item**.

3.5.3 SHOW INTERRELATED DOCUMENTS IN SALES ITEM

1. On the Process tab of Sales Item Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this Sales Item.

3.6 SALES INVOICE

The following steps describe how to interact with PaperSave within the "Sales Invoice" record type's main screen:

1. On the Home Page, click on **Sales** dropdown.

2. Click on "**Sales Invoices**".
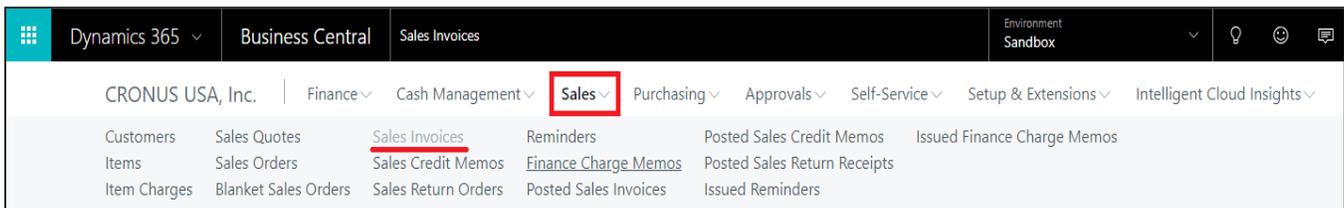
3. Click the **number field** of desired record in the Sales Invoices list to open a Sales Invoice.

4. This will **launch** the Sales Invoice card.
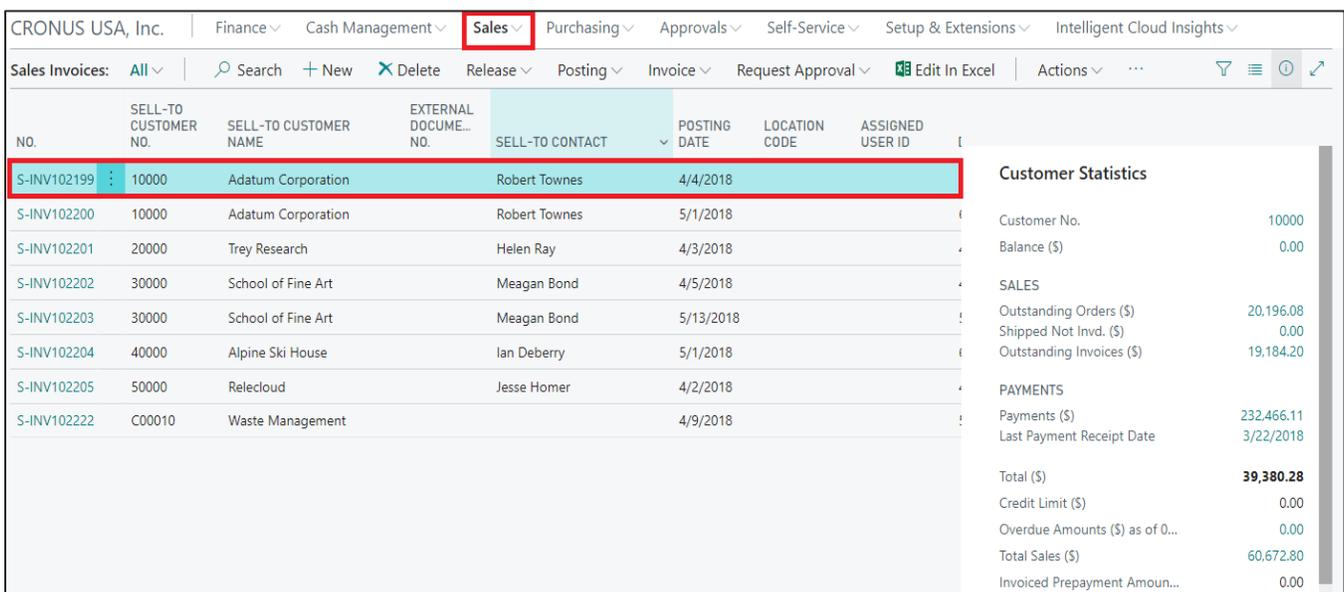
5. Click "**Prepare**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
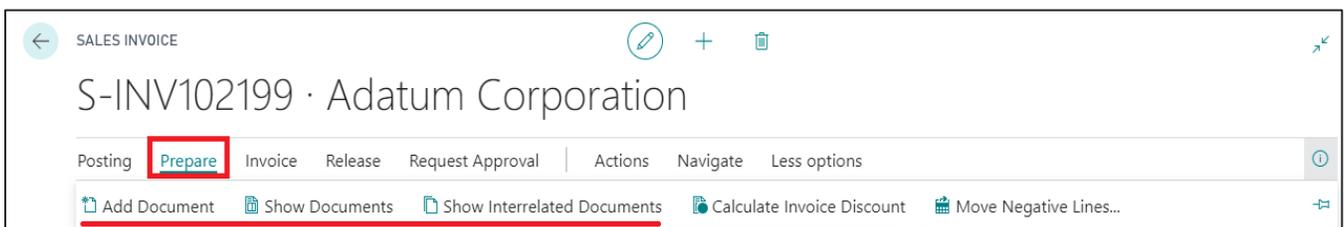
3.6.1 ADD DOCUMENT IN SALES INVOICE

1. On the Prepare tab of Sales Invoice Card, click "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.6.2 SHOW DOCUMENTS IN SALES INVOICE

1. On the Prepare tab of Sales Invoice Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials

3. On successful login, it will **show** the document(s) that is/are directly related to this Sales Invoice.

3.6.3 SHOW INTERRELATED DOCUMENTS IN SALES INVOICE

1. On the Prepare tab of Sales Invoice Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this Sales Invoice.

3.7 SALES ORDER

The following steps describe how to interact with PaperSave within the "Sales Order" record type's main screen:

1. On the Home Page, click on the **Sales** dropdown.

2. Click on "**Sales Orders**".
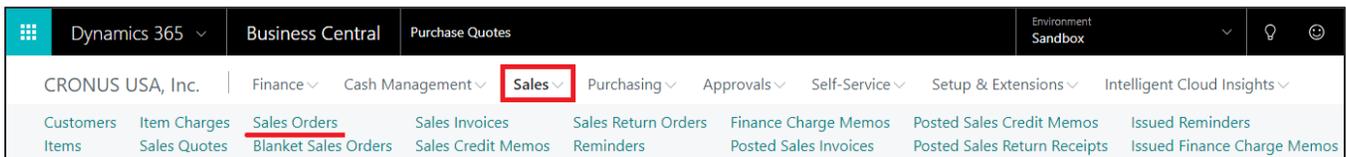
3. Click the **number field** of desired record in the Sales Order list to open a Sales Order.

4. This will **launch** the Sales Order card.
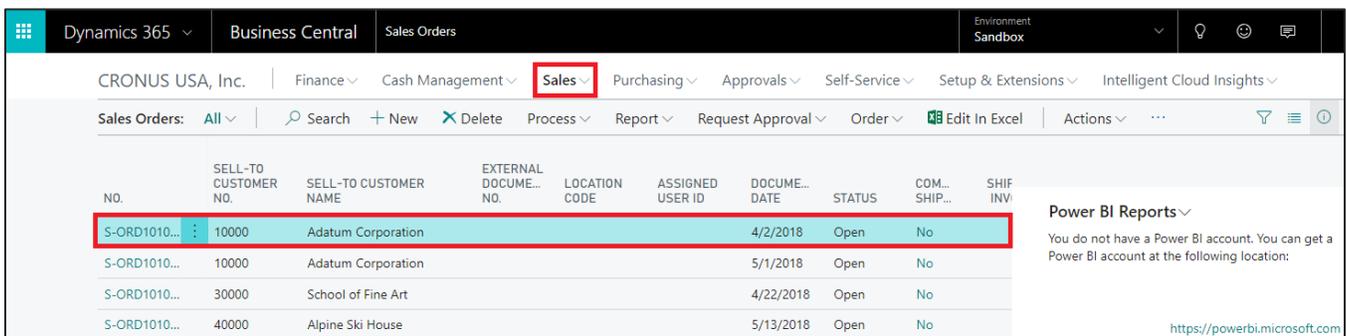
5. Click "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
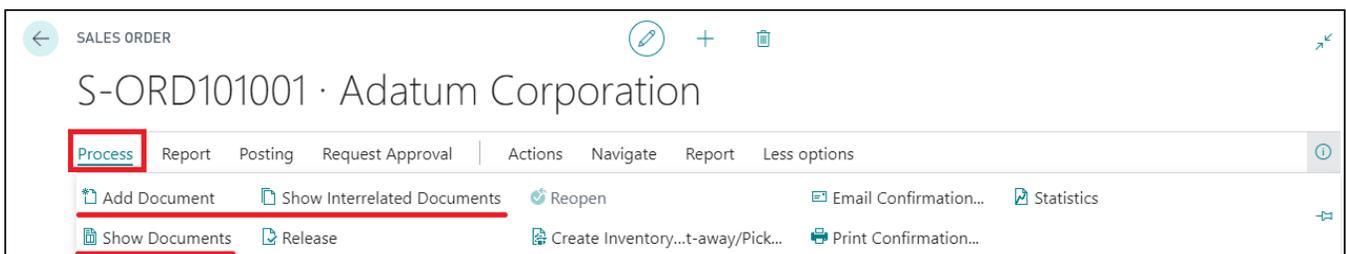
3.7.1 ADD DOCUMENT IN SALES ORDER

1. On the Process tab of Sales Order Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.7.2 SHOW DOCUMENTS IN SALES ORDER

1. On the Process tab of Sales Order Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are directly related to this Sales Order.

3.7.3 SHOW INTERRELATED DOCUMENTS IN SALES ORDER

1. On the Process tab of Sales Order Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. Enter your login credentials.

3. Upon successful login, it will show the document(s) that is/are indirectly related to this Sales Order.

3.8 GENERAL JOURNALS

The following steps describe how to interact with PaperSave within the "Purchase Invoice" record type's main screen:

1. On the Home Page, click on **Finance** dropdown.

2. Click on "**General Journals**".
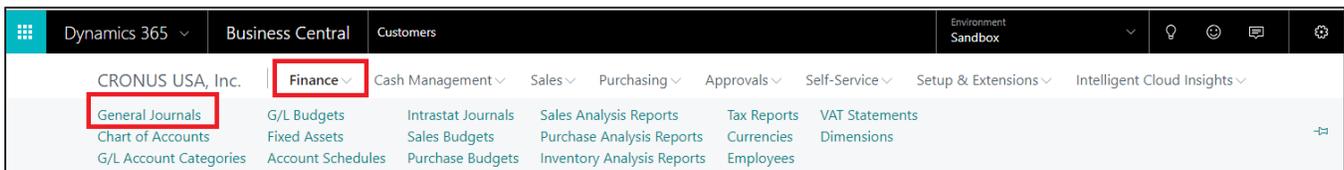
3. Click the **name field** of desired record in the General Journals list to open a General Journal.

4. This will **launch** the General Journals card.
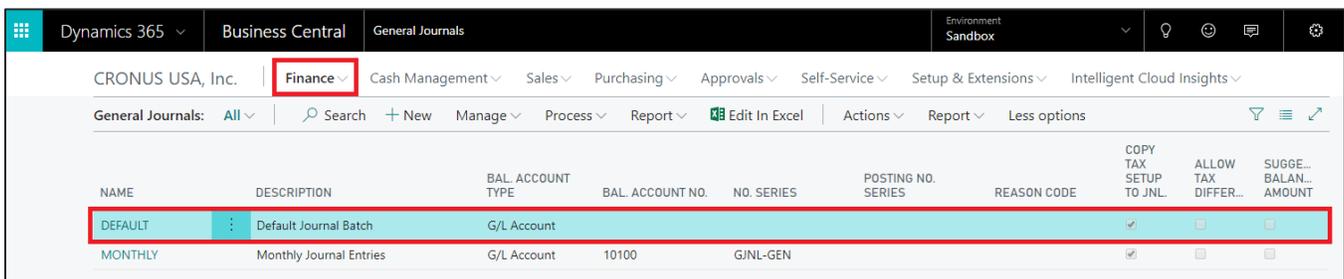
5. Click "**Process**" to access the PaperSave functionalities viz. "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
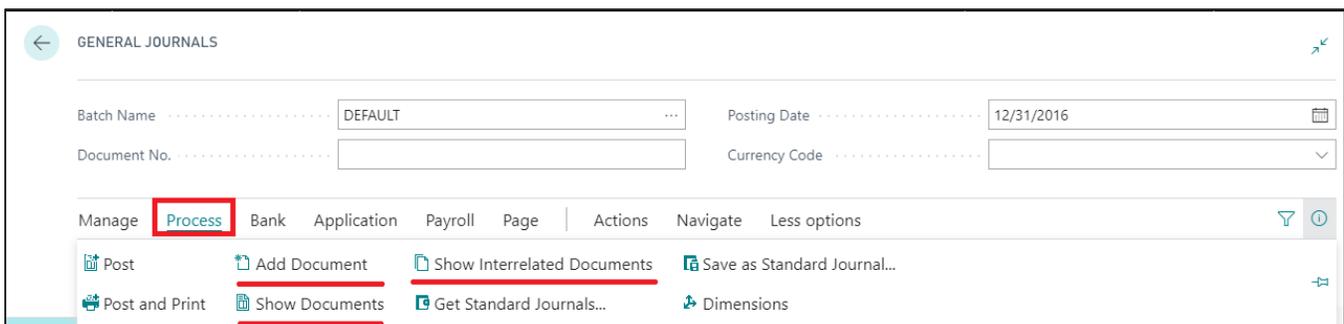
3.8.1 ADD DOCUMENT IN GENERAL JOURNAL

1. On the Process tab of General Journals Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.
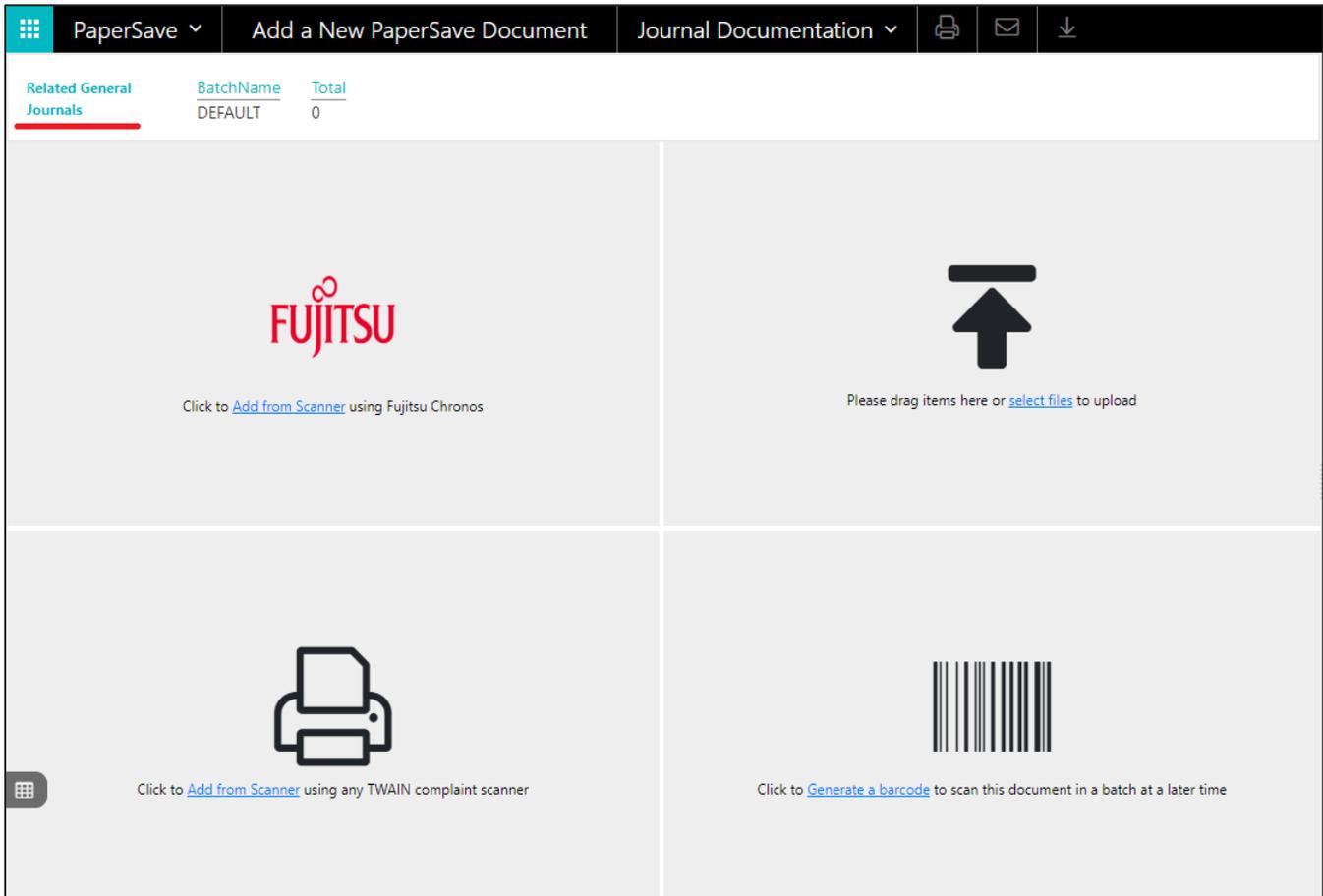
5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.8.2 SHOW DOCUMENTS IN GENERAL JOURNAL

1. On the Process tab of General Journals Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are directly related to this General Journal.

3.8.3 SHOW INTERRELATED DOCUMENTS IN GENERAL JOURNAL

1. On the Process tab of General Journals Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. On successful login, it will **show** the document(s) that is/are indirectly related to this General Journal.

3.9 CUSTOMER

The following steps describe how to interact with PaperSave within the "Customer" record type's main screen:

1. On the Home Page, click on **Sales** dropdown.
2. Click on "**Customers**".
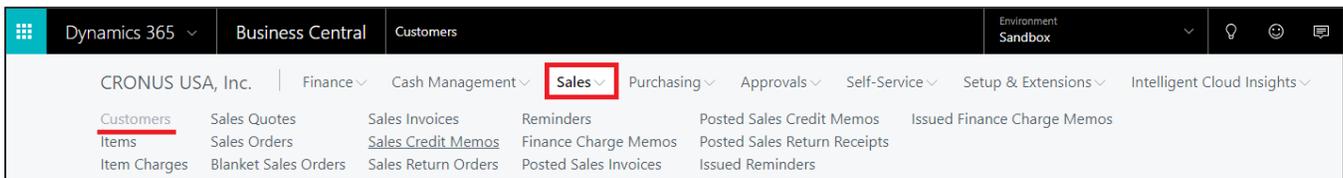
3. Click the **desired record** in the Customers list to open a Customer record.
4. This will **launch** the Customer card.
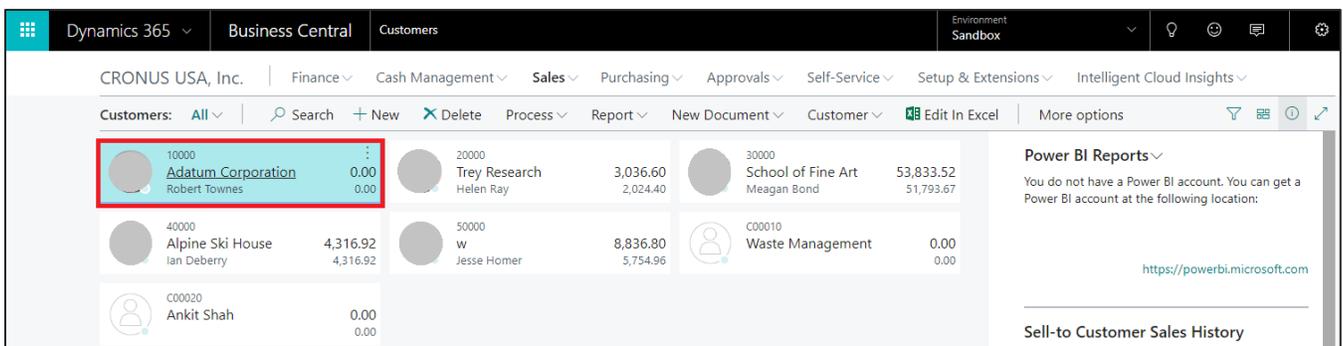
5. Click on "**Customer**" menu to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
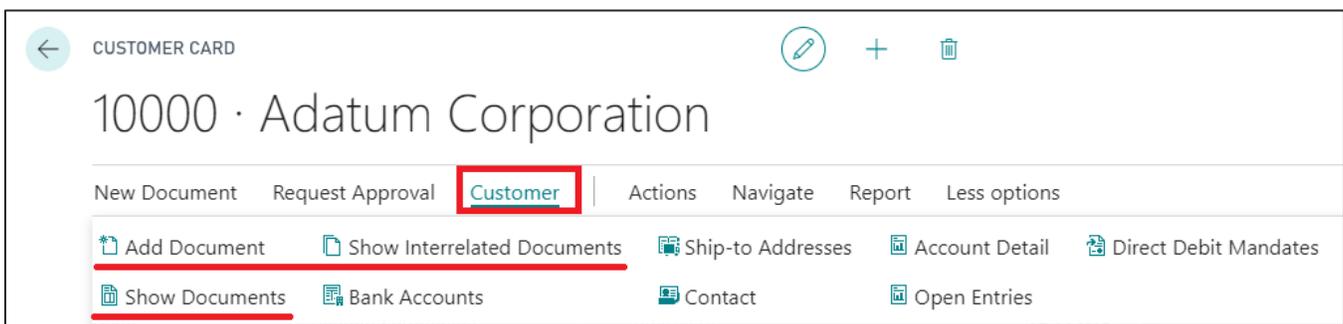
3.9.1 ADD DOCUMENTS IN CUSTOMER

1. On the Customer tab of Customer Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.9.2 SHOW DOCUMENTS IN CUSTOMER

1. On the Customer tab of Customer Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login
    credentials.

3. Upon successful login, it will **show** the document(s) that is/are directly related to this Customer.

3.9.3 SHOW INTERRELATED DOCUMENTS IN CUSTOMER

1. On the Customer tab of Customer Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this Customer.

3.10 SALES QUOTE

The following steps describe how to interact with PaperSave within the "Sales Quote" record type's main screen:

1. On the Home Page, click on **Sales** dropdown.

2. Click on "**Sales Quotes**".
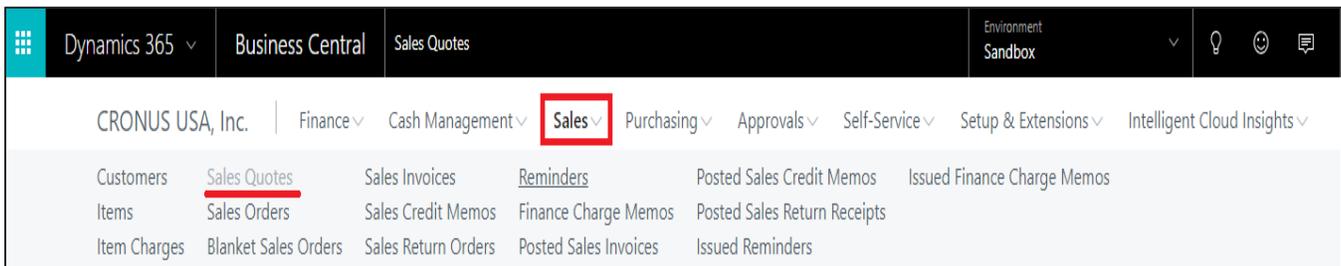
3. Click the **number field** of the desired record in the Sales Quotes list to open the Sales Quote.

4. This will **launch** the Sales Quote card.
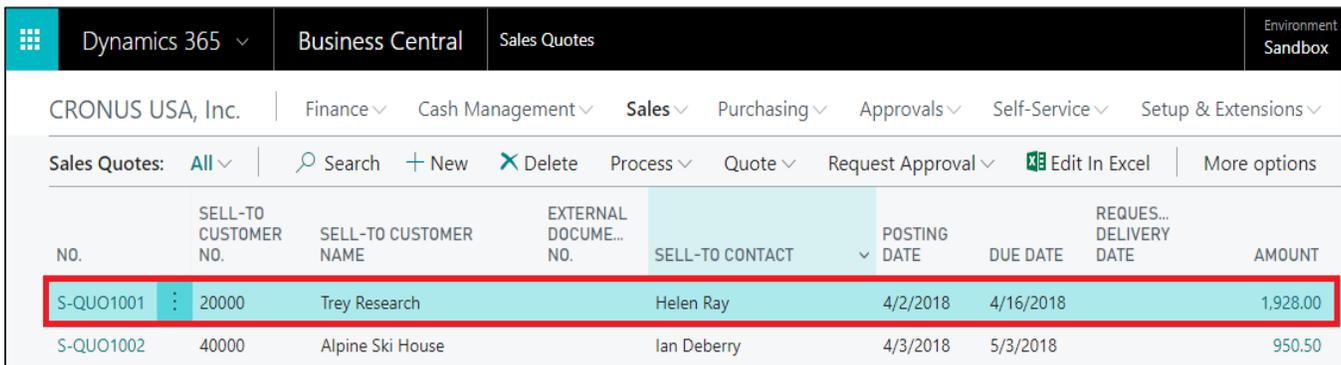
5. Click on "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents"**.**
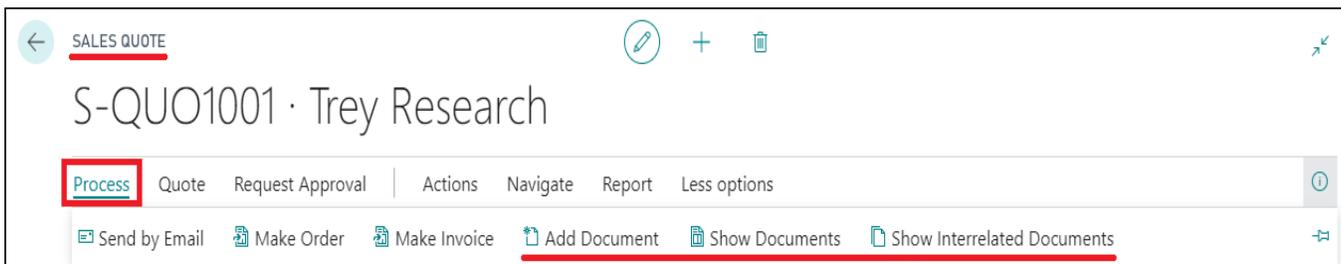
3.10.1 ADD DOCUMENT IN SALES QUOTE

1. On the Process tab of Sales Quote Card, click on "**Add Document**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon a successful login, the system will navigate you to the "Add Document" page.

4. Use your desired acquisition method to add the content.

5. This will open the document preview screen. You can then **select** the relevant "document type" from the drop down in the upper tool bar indicating the document types that have been configured for the record type. Next fill out fields that are relevant to the document type.

6. Click "**Save item**" to add the document.

3.10.2 SHOW DOCUMENTS IN SALES QUOTE

1. On the Process tab of Sales Quote Card, click on "**Show Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are directly related to this Sales Quote.

3.10.3 SHOW INTERRELATED DOCUMENTS IN SALES QUOTE

1. On the Process tab of Sales Quote Card, click on "**Show Interrelated Documents**".

2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.

3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this Sales Quote.