



User Guide for PaperSave extension for Microsoft Dynamics 365 Business Central

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www.papersave.com

PaperSave is a product of WhiteOwl

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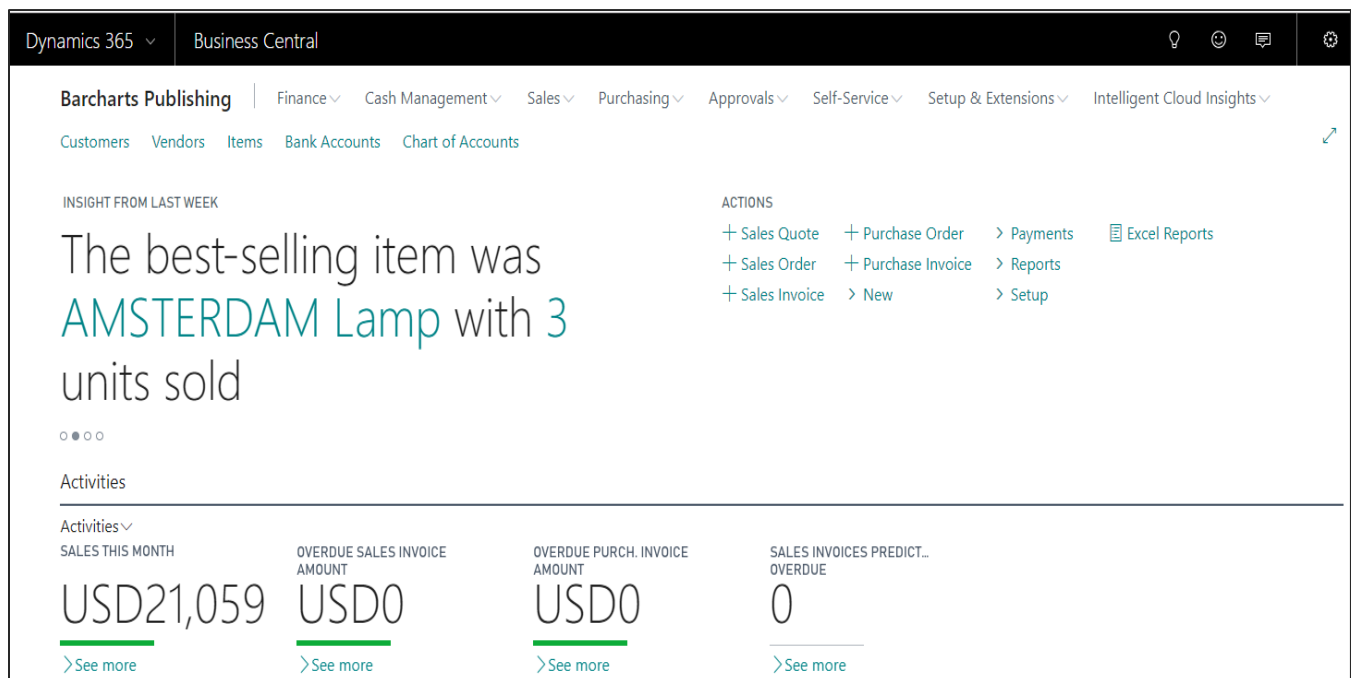
1 INTRODUCTION

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.

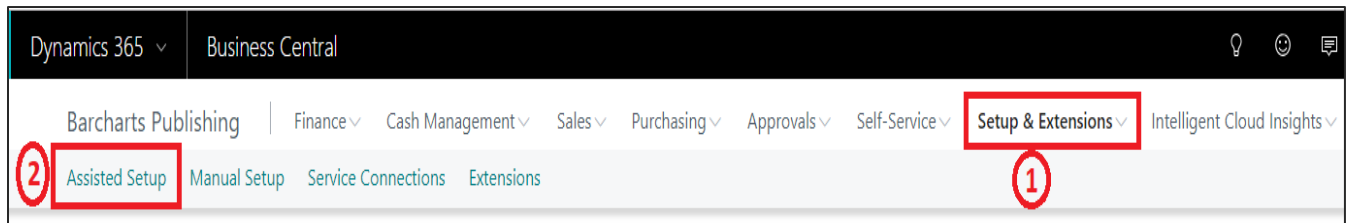
2 PAPERSAVE SETUP & CONFIGURATION STEPS

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.

Dynamics 365

Business Central

Assisted Setup

Environment
Sandbox

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Approvals

Self-Service

Setup & Extensions

Intelligent Cloud Insights

Assisted Setup:

All

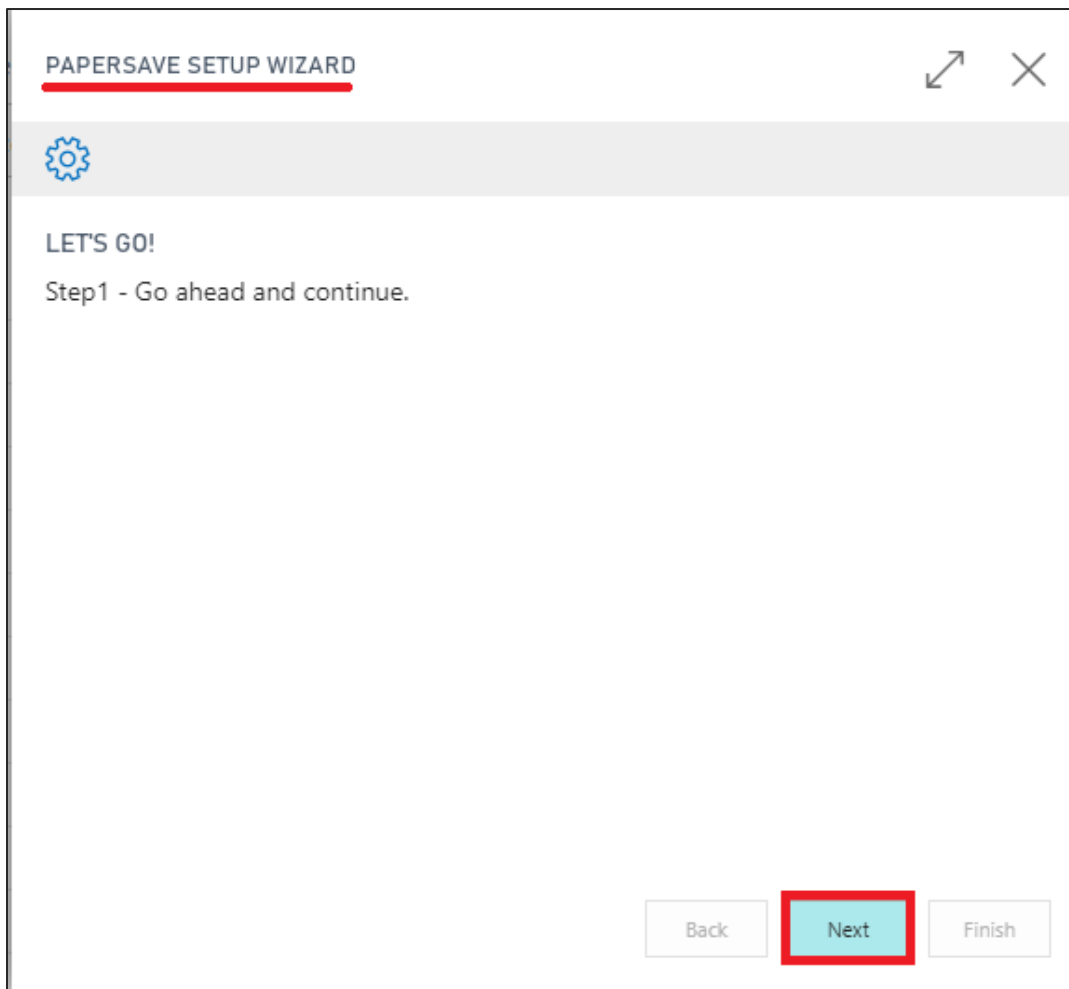
Search

Edit In Excel

More options

NAME	STATUS
Set up cash flow forecast	Completed
Set up approval workflows	Not Completed
Set up a customer approval workflow	Not Completed
Set up email	Not Completed
Set up email logging	Not Completed
Set up your Business Inbox in Outlook	Not Completed
Set up reporting data	Not Completed
Set up an item approval workflow	Not Completed
Set up a payment approval workflow	Not Completed
Set up Dynamics 365 for Sales connection	Not Completed
Invite External Accountant	Not Completed
Set up consolidation reporting	Not Completed
PaperSave Setup	Not Started
Chicken Setup	Not Started
PaperSave Setup	Not Started
Set up Intelligent Cloud	Not Completed
PaperSave Setup	Not Completed

4. This will launch the PaperSave Setup Wizard. Click **Next**.



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

PAPERSAVE SETUP WIZARD

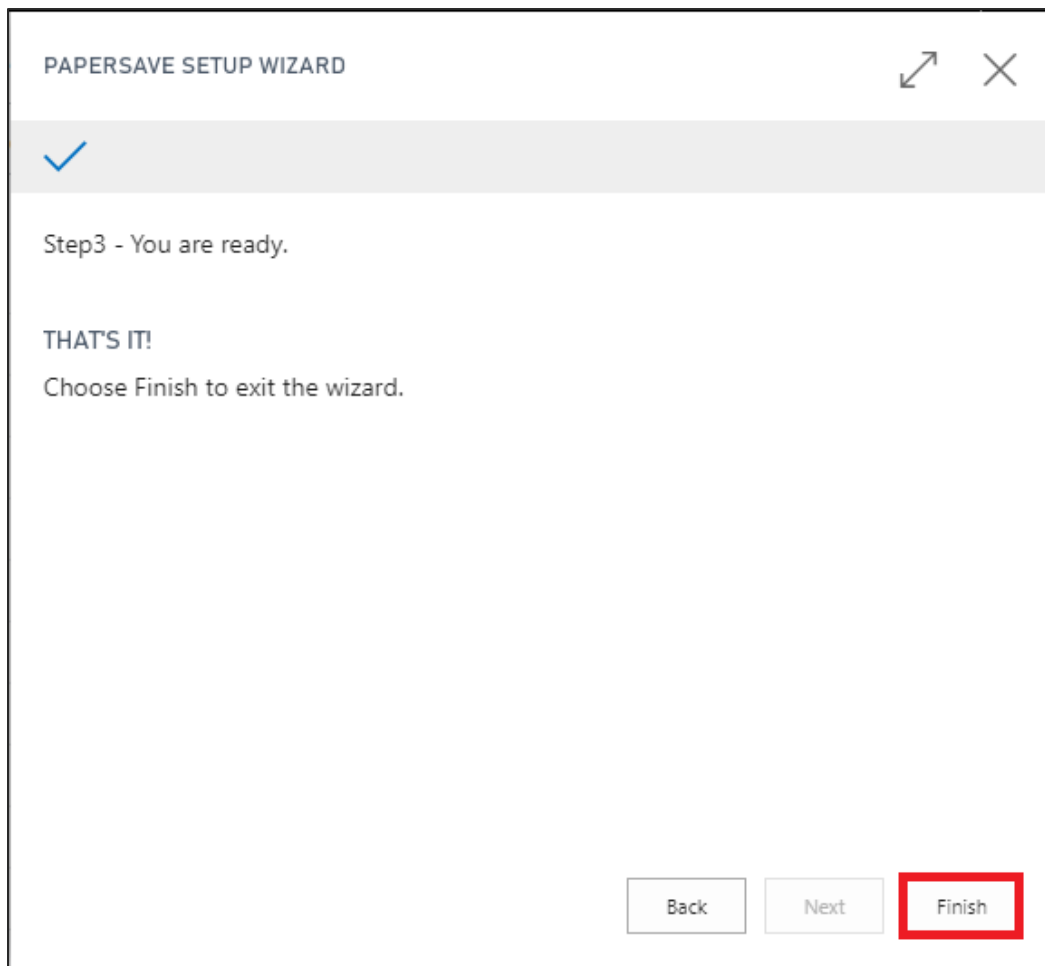
Step2 - Please enter following inputs.

PaperSave Cloud URL

API Secret

Back Next Finish

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



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**".

Dynamics 365 Business Central Purchase Invoices

Environment: Sandbox

CRONUS USA, Inc. | Finance | Cash Management | Sales | **Purchasing** | Approvals | Self-Service | Setup & Extensions | Intelligent Cloud Insights

Vendors | Purchase Quotes | **Purchase Invoices** | Posted Purchase Invoices | Posted Purchase...return Shipments

Incoming Documents | Purchase Orders | Purchase Credit Memos | Posted Purchase Credit Memos

Item Charges | Blanket Purchase Orders | Purchase Return Orders | Posted Purchase Receipts

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**.

Dynamics 365 Business Central Purchase Invoices

Environment: Sandbox

CRONUS USA, Inc. | Finance | Cash Management | Sales | **Purchasing** | Approvals | Self-Service | Setup & Extensions | Intelligent Cloud Insights

Purchase Invoices: All | Search | + New | X Delete | Process | Invoice | Request Approval | Edit In Excel | Actions | Navigate

NO.	BUY-FROM VENDOR NO.	BUY-FROM VENDOR NAME	LOCATION CODE	ASSIGNED USER ID	AMOUNT
107209	10000	Fabrikam, Inc.			364.30
107210	20000	First Up Consultants			1,052.10
107211	30000	Graphic Design Institute			4,253.20
107212	20000	First Up Consultants			250.46
107213	20000	First Up Consultants			250.46
107214	20000	First Up Consultants			474.69
107215	40000	Wide World Importers			158.23
107269	V00030	Fujitsu Computer Products of America, ...			4,400.00
107270	V00070	Rellye Productions			103.00
107284	30000	Graphic Design Institute			580.48

Power BI Reports

You do not have a Power BI account. You can get a Power BI account at the following location:

<https://powerbi.microsoft.com>

Incoming Document Files

NAME	TYPE
PO-000066 - Cantos Janitori...	PDF

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

PURCHASE INVOICE

107209 · Fabrikam, Inc.





Process **Invoice** Request Approval | Actions | Less options

Vendor | Dimensions | **Add Document** | **Show Documents** | **Show Interrelated Documents** | Statistics

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.

PaperSave ▾		Add a New PaperSave Document		Purchase Invoices Documentation ▾		🖨	✉	⬇		
Related Purchase Invoices	<	Document Number 107209	Reference Number	Vendor Name Fabrikam, Inc.	Pay To Krystal York	Date 2017-01-01	Due Date 2018-04-30	Transaction Total 386.16	Vendor Docu 107209	>
 <p>Click to Add from Scanner using Fujitsu Chronos</p>					 <p>Please drag items here or select files to upload</p>					
 <p>Click to Add from Scanner using any TWAIN compliant scanner</p>					 <p>Click to Generate a barcode to scan this document in a batch at a later time</p>					

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.

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.

PaperSave Document Display

Related Purchase Invoices: Document Number 107209, Reference Number, Vendor Name Fabrikam, Inc., Pay To Krystal York, Date 2017-01-01, Due Date 2018-04-30, Transaction Total 386.16, Vendor Doc. 107209

ID: 29132

Document Profile

Doc Type: ☐ Invoice, ☐ Purchase Order, ☐ Receiving Ticket, ☐ Contract

Date Received: Enter Value

Comments: Enter Value

P.O. NUMBER		TERMS		SALES PERSON	
		NET 30		Chris Brown	
QUAN		DESCRIPTION		PRICE	AMOUNT
1.00	Manufacturer FRYMASTER	Model MJ145ECSD	Serial # 0105GA0103	Type Fryer	Mfg Code
1.25		Warranty Location Agreement			
0.50		Cooking - 2/4/2016 9:44:18 AM - JGAYLOR - Fry filter will not pump the grease out. And a fryer that will not open to drain the grease.			
1.00		Notes added by tech Chris Brown on 2/4/2016 12:15:40 PM			
1.00		Upon arrival, I made contact with Ray. Inspected portable filter pump and found that it has no legible information on the data plate. I found that this unit will need a new pump. Ray requested a quote on replacing the pump and also a quote for replacing the entire unit.			
1.00		I also inspected the last fryer and found the spring in the locking mechanism is going bad. We need to order a new handle and/or locking mechanism if it is sold separately. If not, we will have to replace the drain valve.			
1.00		Trip Charge Discounted Rate 55.00 55.00			
1.00		Discounted Labor Rate 85.00 106.25			
0.50		Notes added by tech Chris Brown on 2/16/2016 6:29:31 AM			
1.00		Returned to customer's site and removed old drain handle from the last fryer. Installed new drain handle and checked. Unit can now be opened and drained properly. Manager on site was Cadesia.			
1.00		Discounted Labor Rate 85.00 42.50			
1.00		Drain Valve 102.82 102.82			
1.00		Freight and Delivery 15.00 15.00			
1.00		Invoice Prepared by Annette			

Invoice 0000080307.PDF

PaperSave Document Purchase Invoices Documentation

Related Purchase Invoices: Document Number 107209, Reference Number, Vendor Name Fabrikam, Inc., Pay To Krystal York, Date 2017-01-01, Due Date 2018-04-30, Transaction Total 386.16, Vendor Document Number 107209

+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Doc Type	Date Received	Comments
29132	Invoice 0000080307.PDF	ps\hcondon			
29133	INVOICE_TMP4265068694222479491.pdf	ps\hcondon	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.

PaperSave Document Purchase Invoices Documentation

Related Purchase Invoices: Document Number 107209, Reference Number, Vendor Name Fabrikam, Inc., Pay To Krystal York, Date 2017-01-01, Due Date 2018-04-30, Transaction Total 386.16, Vendor Document Number 107209

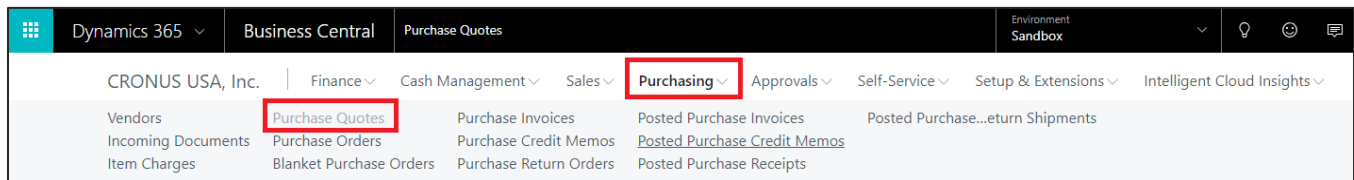
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Doc Type	Date Received	Comments
29132	Invoice 0000080307.PDF	ps\hcondon			
29133	INVOICE_TMP4265068694222479491.pdf	ps\hcondon	Invoice		

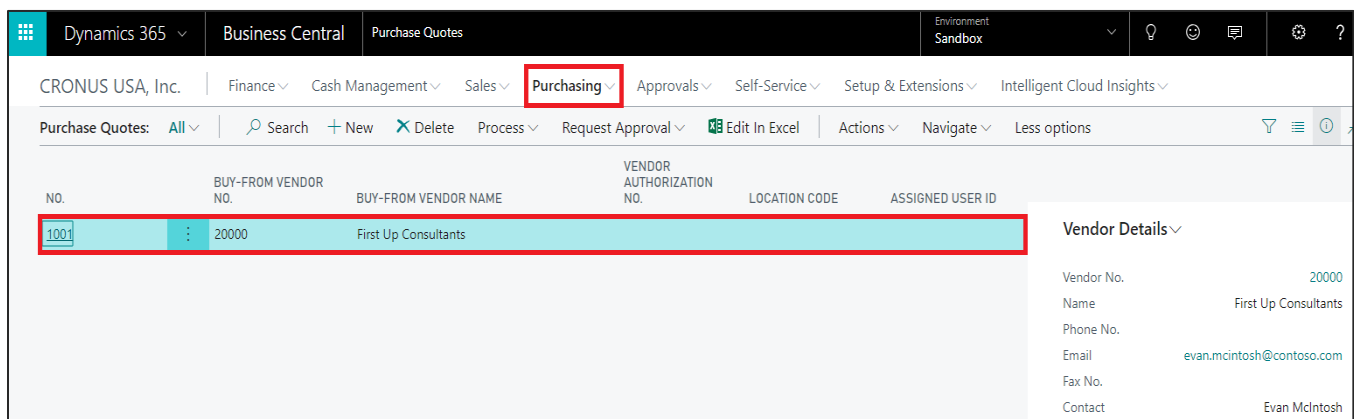
3.2 PURCHASE QUOTE

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

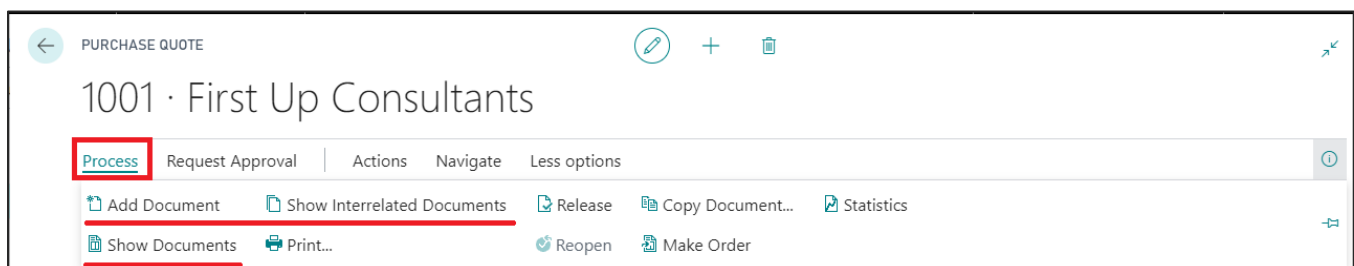
1. On the Home Page, click on **Purchasing** dropdown.
2. Click on "**Purchase Quotes**".



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.


Related Purchase Quote	Vendor Name	Document Date	Order Date	Total	Contact
	First Up Consultants	2018-04-09	2018-04-09	159.32	Evan McIntosh




Click to [Add from Scanner](#) using Fujitsu Chronos



Please drag items here or [select files](#) to upload



Click to [Add from Scanner](#) using any TWAIN complaint scanner



Click to [Generate a barcode](#) to scan this document in a batch at a later time

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.

PaperSave Add a New PaperSave Document Purchase Quote Documentation + [Print] [Email] [Download] **Save Item** [Reset] [Settings]

Related Purchase Quote Vendor Name First Up Consultants Document Date 2018-04-09 Order Date 2018-04-09 Total 159.32 Contact Evan McIntosh

ID: 29130

Document Profile

Comments:
Enter Value

P.O. NUMBER		TERMS		SALES PERSON	
		NET 30		Chris Brown	
QUAN	DESCRIPTION	PRICE	AMOUNT		
Manufacturer	Model	Serial #	Type	Mfg Code	Warranty
FRYMASTER	MJ145ECSD	0105GA0103	Fryer		
Cooking - 2/4/2016 9:44:18 AM - JGAYLOR - Fry filter will not pump the grease out. And a fryer that will not open to drain the grease.					
Notes added by tech Chris Brown on 2/4/2016 12:15:40 PM					
Upon arrival, I made contact with Ray. Inspected portable filter pump and found that it has no legible information on the data plate. I found that this unit will need a new pump. Ray requested a quote on replacing the pump and also a quote for replacing the entire unit. I also inspected the last fryer and found the spring in the locking mechanism is going bad. We need to order a new handle and/or locking mechanism if it is sold separately. If not, we will have to replace the drain valve.					
1.00	Trip Charge Discounted Rate	55.00	55.00		
1.25	Discounted Labor Rate	85.00	106.25		
Notes added by tech Chris Brown on 2/16/2016 6:29:31 AM					
Returned to customer's site and removed old drain handle from the last fryer. Installed new drain handle and checked. Unit can now be opened and drained properly. Manager on site was Cadesia.					
0.50	Discounted Labor Rate	85.00	42.50		
1.00	FRY810-15 Drain Valve	102.82	102.82		
1.00	Freight and Delivery	15.00	15.00		
Invoice Prepared by Annette					

1 / 1 Invoice 0000080307.PDF

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.

PaperSave Document Display

Related Purchase Quote: Vendor Name: First Up Consultants, Document Date: 2018-04-09, Order Date: 2018-04-09, Total: 159.32, Contact: Evan McIntosh

ID: 29130

Document Profile

Comments: Enter Value

P.O. NUMBER		TERMS		SALES PERSON	
		NET 30		Chris Brown	
QUAN	DESCRIPTION	PRICE	AMOUNT		
Manufacturer	Model	Serial #	Type	Mfg Code	Warranty
FRYMASTER	MJ145ECS	0105GA0103	Fryer		
1.00	Cooking - 2/4/2016 9:44:18 AM - JGAYLOR - Fry filter will not pump the grease out. And a fryer that will not open to drain the grease. Notes added by tech Chris Brown on 2/4/2016 12:15:40 PM Upon arrival, I made contact with Ray. Inspected portable filter pump and found that it has no legible information on the data plate. I found that this unit will need a new pump. Ray requested a quote on replacing the pump and also a quote for replacing the entire unit. I also inspected the last fryer and found the spring in the locking mechanism is going bad. We need to order a new handle and/or locking mechanism if it is sold separately. If not, we will have to replace the drain valve.				
1.25	Trip Charge Discounted Rate	55.00			55.00
	Discounted Labor Rate	85.00			106.25
0.50	Notes added by tech Chris Brown on 2/16/2016 6:29:31 AM Returned to customer's site and removed old drain handle from the last fryer. Installed new drain handle and checked. Unit can now be opened and drained properly. Manager on site was Cadesia.				
1.00	Discounted Labor Rate	85.00			42.50
1.00	FRY810-15 Drain Valve	102.62			102.62
1.00	Freight and Delivery	15.00			15.00
	Invoice Prepared by Annette				

1 / 1 Invoice 0000080307.PDF

PaperSave Document Purchase Quote Documentation

Related Purchase Quote: Vendor Name: First Up Consultants, Document Date: 2018-04-09, Order Date: 2018-04-09, Total: 159.32, Contact: Evan McIntosh

+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Comments
29130	Invoice 0000080307.PDF	ps\hcondon	
29131	INVOICE_TMP1088948245530689268.pdf	ps\hcondon	

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.

PaperSave Document Purchase Quote Documentation

Related Purchase Quote: Vendor Name: First Up Consultants, Document Date: 2018-04-09, Order Date: 2018-04-09, Total: 159.32, Contact: Evan McIntosh

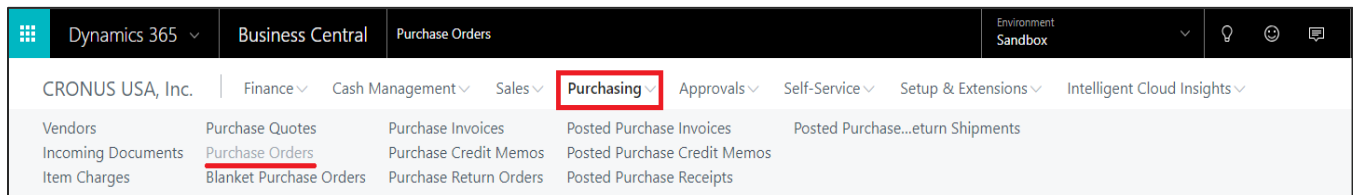
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Comments
29130	Invoice 0000080307.PDF	ps\hcondon	
29131	INVOICE_TMP1088948245530689268.pdf	ps\hcondon	

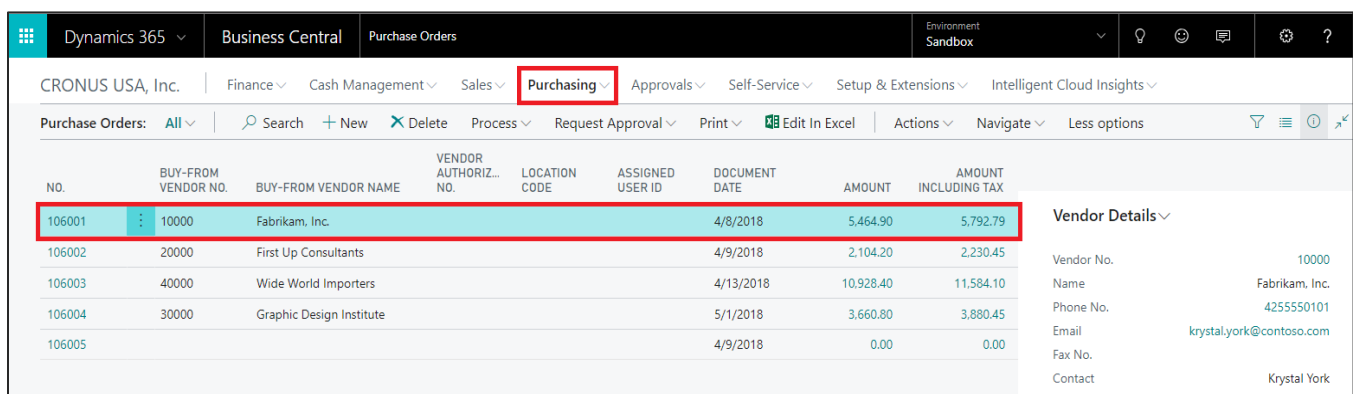
3.3 PURCHASE ORDER

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".

PURCHASE ORDER

106001 · Fabrikam, Inc.

Process | Release | Request Approval | Print | Actions | Navigate | Less options

[Add Document](#) | [Show Interrelated Documents](#) | [Post and Print...](#) | [Release](#) | [Create Inventory...t-away/Pick...](#)
[Show Documents](#) | [Post...](#) | [Statistics](#) | [Copy Document...](#)

Contact Krystal York Vendor Shipment No.

Document Date 4/8/2018


Balance (\$)	2,071.13
Outstanding Orders (\$)	5,792.79
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	386.16
Total (\$)	8,250.08
Overdue Amounts (\$)	as of 0...
Invoiced Prepayment Amoun...	0.00
Payments (\$)	20,814.56
Last Payment Date	2/10/2018

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVE QUANTIT
Lines Manage More options					

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.

Related Purchase Order	Document Number	Vendor Name	Order Date	Due Date	Total	Contact
	106001	Fabrikam, Inc.	2018-04-08	2018-04-30	5792.79	Krystal York




Click to [Add from Scanner](#) using Fujitsu Chronos


Add Document →



Please drag items here or [select files](#) to upload



Click to [Add from Scanner](#) using any TWAIN compliant scanner



Click to [Generate a barcode](#) to scan this document in a batch at a later time

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.

PaperSave Add a New PaperSave Document Purchase Order Documentation **Save Item** Reset

Related Purchase Order: 106001 Vendor Name: Fabrikam, Inc. Order Date: 2018-04-08 Due Date: 2018-04-30 Total: 5792.79 Contact: Krystal York

Document Profile
ID: 29128
Doc Type: ☐ PO Form ☐ Requisition ☐ Contract ☐ Correspondence
Comments: Enter Value

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334788785

Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	421728	Tip, Rubber Feet (Set of 4)	3	3	P4	6.96	20.88
20	610972	TONG, LIFT AND GRIP S/S 12"	3	3	EA	5.16	15.48
Misc							
10	SHIPPING	Shipping	1	0	EA	13.45	13.45
							49.81
Sales Tax							1.46
Total Including Tax							51.27

1 / 1 INVOICE_TMP1582482674955491422.pdf

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.

PaperSave Document Display

Related Purchase Order: 106001 | Vendor Name: Fabrikam, Inc. | Order Date: 2018-04-08 | Due Date: 2018-04-30 | Total: 5792.79 | Contact: Krystal York

Document Profile
ID: 29128
Doc Type: ☐ PO Form ☐ Requisition ☐ Contract ☐ Correspondence
Comments: Enter Value

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334788785

Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	421728	Tip, Rubber Feet (Set of 4)	3	3	P4	6.96	20.88
20	610972	TONG, LIFT AND GRIP S/S 12"	3	3	EA	5.16	15.48
Misc							
10	SHIPPING	Shipping	1	0	EA	13.45	13.45
							49.81
Sales Tax							1.46
Total Including Tax							51.27

INVOICE_TMP1582482674955491422.pdf

PaperSave Document Purchase Order Documentation

Related Purchase Order: 106001 | Vendor Name: Fabrikam, Inc. | Order Date: 2018-04-08 | Due Date: 2018-04-30 | Total: 5792.79 | Contact: Krystal York

+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Doc Type	Comments
29128	INVOICE_TMP1582482674955491422.pdf	ps\hcondon		
29129	INVOICE_TMP4435956351906090752.pdf	ps\hcondon	Correspondence	

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.

PaperSave Document Purchase Order Documentation

Related Purchase Order: 106001 | Vendor Name: Fabrikam, Inc. | Order Date: 2018-04-08 | Due Date: 2018-04-30 | Total: 5792.79 | Contact: Krystal York

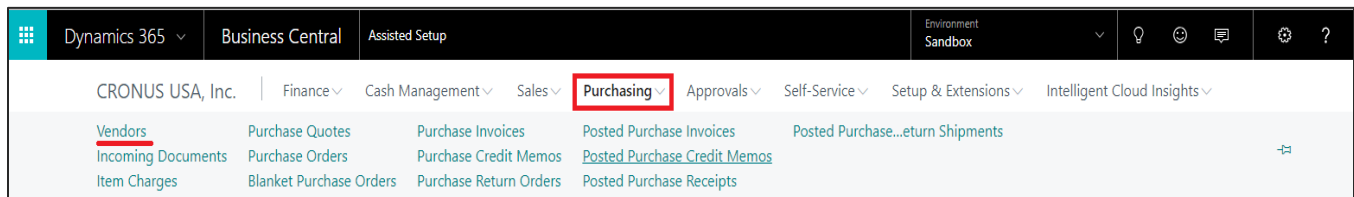
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Doc Type	Comments
29128	INVOICE_TMP1582482674955491422.pdf	ps\hcondon		
29129	INVOICE_TMP4435956351906090752.pdf	ps\hcondon	Correspondence	

3.4 VENDOR

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

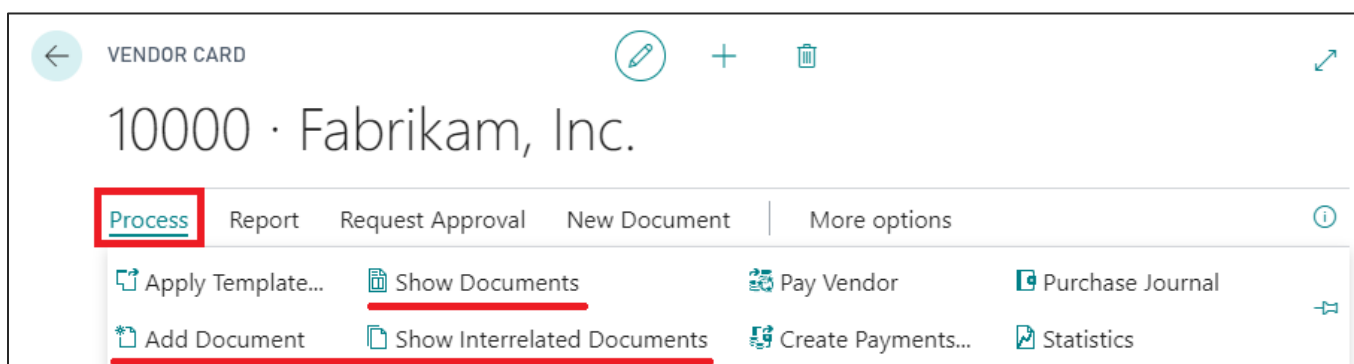
1. On the Home Page, click on **Purchasing** dropdown.
2. Click on **"Vendors"**.



3. Click the **number field** of desired record in the Vendors list to open a Vendor.
4. This will **launch** the Vendor card.





NO.	NAME	LOCATION CODE	PHONE NO.	CONTACT	SEARCH NAME	BALANCE (\$)	BALANCE DUE (\$)	PAYMENTS
10000	Fabrikam, Inc.		4255550101	Krystal York	FABRIKAM, ...	2,071.13	2,071.13	20,814
20000	First Up Consultants			Evan McIntosh	FIRST UP C...	4,903.88	4,903.88	57,195

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.

PaperSave ▾ Add a New PaperSave Document Vendor Documentation ▾							
<u>Related Vendor</u>	<u>Vendor ID</u>	<u>Vendor Name</u>	<u>Address</u>	<u>City</u>	<u>State</u>	<u>Zip</u>	<u>Contact</u>
	10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York
 Click to Add from Scanner using Fujitsu Chronos				 Please drag items here or select files to upload			
 Click to Add from Scanner using any TWAIN compliant scanner				 Click to Generate a barcode to scan this document in a batch at a later time			

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.

PaperSave ▾ Add a New PaperSave Document Vendor Documentation ▾ + [Icons] [Save Item] [Reset] [Settings]

Related Vendor

Vendor ID	Vendor Name	Address	City	State	Zip	Contact
10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York

Burger King 331
29211 7 MILE RD
LIVONIA, MI 48152-3558
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334784494

Attn: CAROL
Comment:

Doc Type: ☐ W-9 ☐ Contract ☐ Credit Application ☒ Correspondence

Comments: Enter Value

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	492421	Bandage, Blue Knuckle (20 per pack)	3	3	EA	2.09	6.27
20	331618	Spoon, 8" Solid Salad 0.5 oz, Black	2	2	EA	1.30	2.60
E4969V350							
30	241271	Container, 10 Gallon White	1	1	EA	9.59	9.59
E4964V177							
40	611288-1	Pan, 1/6 Size x 4" D, Black	1	1	EA	2.98	2.98
50	621760	Pan, 1/2 Size 2-1/2 Deep Amber Carlisle - High Temperature	5	5	EA	10.10	50.50
80	619565	Label, BK 1" Frozen Ready (E) General Use, Roll of 500	3	3	R5C	2.92	8.76

1 / 2 INVOICE_TMP4535577695376957713.pdf

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.

Related Vendor

Vendor ID	Vendor Name	Address	City	State	Zip	Contact
10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York

Burger King 331
29211 7 MILE RD
LIVONIA, MI 48152-3558
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334784494

Attn: CAROL
Comment:

Doc Type: ☐ W-9 ☐ Contract ☐ Credit Application ☒ Correspondence

Comments: Enter Value

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	492421	Bandage, Blue Knuckle (20 per pack)	3	3	EA	2.09	6.27
20	331618	Spoon, 8" Solid Salad 0.5 oz, Black	2	2	EA	1.30	2.60
E4969V350							
30	241271	Container, 10 Gallon White	1	1	EA	9.59	9.59
E4964V177							
40	611288-1	Pan, 1/6 Size x 4" D, Black	1	1	EA	2.98	2.98
50	621760	Pan, 1/2 Size 2-1/2 Deep Amber Carlisle - High Temperature	5	5	EA	10.10	50.50
80	619565	Label, BK 1" Frozen Ready (E) General Use, Roll of 500	3	3	R5C	2.92	8.76

1 / 2 INVOICE_TMP4535577695376957713.pdf

PaperSave

Document

Vendor Documentation

Search within document list

Related Vendor

Vendor ID

Vendor Name

Address

City

State

Zip

Contact

10000

Fabrikam, Inc.

10 North Lake Avenue

Atlanta

GA

31772

Krystal York

+ NEW

FILTER

REFRESH

PRINT

SAVE

EMAIL

DOWNLOAD

INTERRELATED

SHOW GROUPING

CHOOSE FIELDS

EXPORT TO EXCEL

☐

Created

Created By

Doc Type

Comments

☐

09/27/2018 02:18:20 PM

ps\hcondon

Correspondence

Dispute Letter

☐

09/27/2018 02:19:53 PM

ps\hcondon

Contract

☐

09/27/2018 02:21:52 PM

ps\hcondon

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.

PaperSave

Document

Vendor Documentation

Search within document list

Related Vendor

Vendor ID

Vendor Name

Address

City

State

Zip

Contact

10000

Fabrikam, Inc.

10 North Lake Avenue

Atlanta

GA

31772

Krystal York

+ NEW

FILTER

REFRESH

PRINT

SAVE

EMAIL





DOWNLOAD

INTERRELATED

SHOW GROUPING

CHOOSE FIELDS

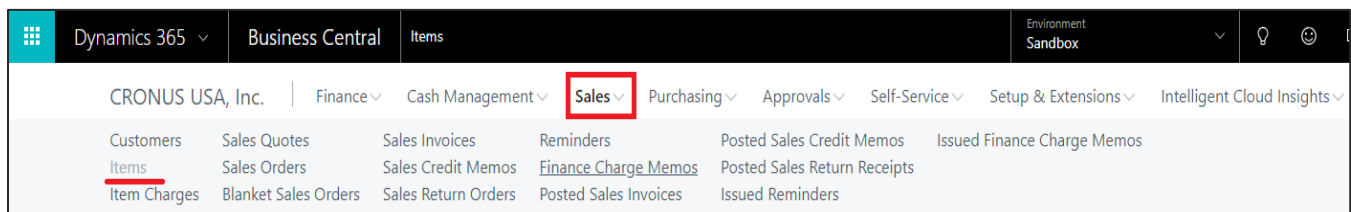
EXPORT TO EXCEL

<input type="checkbox"/>		Created	Created By	Doc Type	Comments
<input type="checkbox"/>		09/27/2018 02:18:20 PM	ps\hcondon	Correspondence	Dispute Letter
<input type="checkbox"/>		09/27/2018 02:19:53 PM	ps\hcondon	Contract	
<input type="checkbox"/>		09/27/2018 02:21:52 PM	ps\hcondon		
<input type="checkbox"/>		09/27/2018 03:50:56 PM	ps\hcondon	W-9	

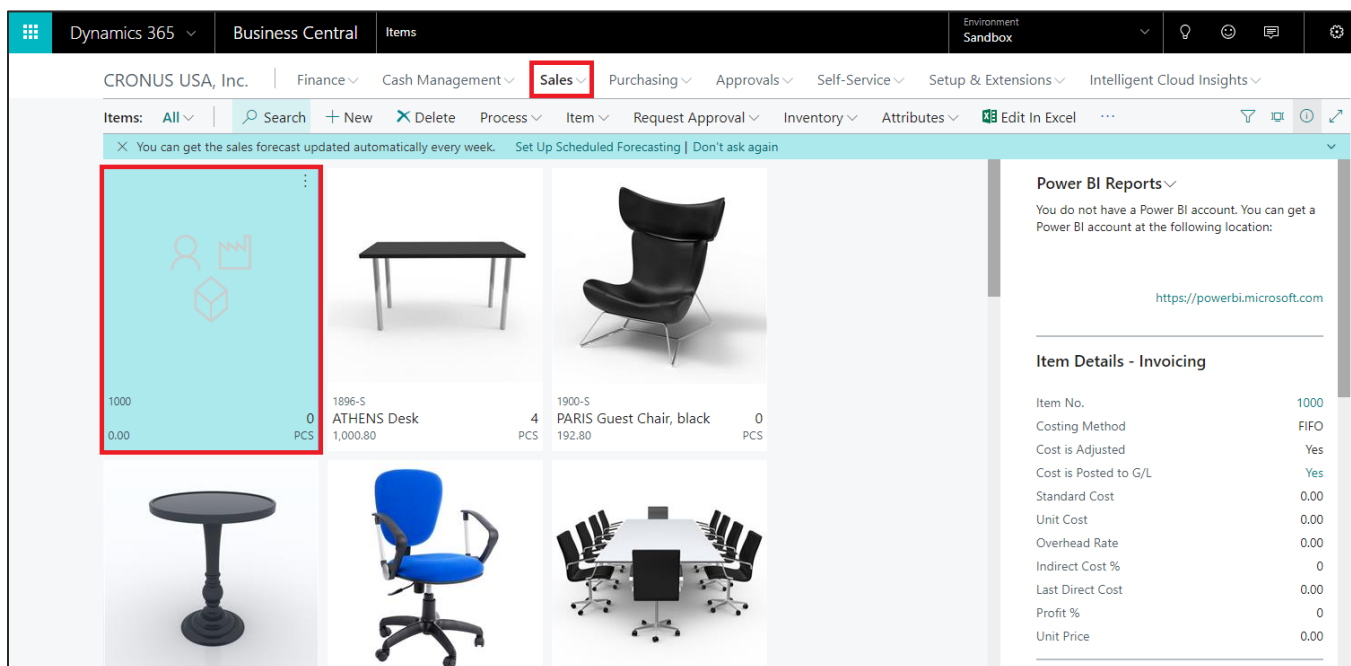
3.5 SALES ITEM

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”.

ITEM CARD

1000

Process | Item | History | Special Sales P...ces & Discounts | Request Approval | Actions | Navigate | Report | Less options

Add Document | Show Documents | Show Interrelated Documents | Item Journal | Item Reclassification Journal

Description * Base Unit of Measure ... PCS

Blocked ☐ Item Category Code ...

Type Inventory

Inventory Show more

Shelf No. Stockout Warning Default (Yes)

Quantity on Hand 0 ... Unit Volume 0

Qty. on Purch. Order ... 0 SAT Item Classification ...

Qty. on Sales Order 0





Costs & Posting > 0.00 RETAIL RESALE

Item Attributes

ATTRIBUTE	VALUE

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.

PaperSave ▾		Add a New PaperSave Document		Sales Item Documentation ▾				
Related Sales Item	<u>Document Number</u> 1000	<u>Description</u>	<u>UOM</u> PCS	<u>Type</u> Inventory				
 Click to Add from Scanner using Fujitsu Chronos			 Please drag items here or select files to upload					
 Click to Add from Scanner using any TWAIN compliant scanner			 Click to Generate a barcode to scan this document in a batch at a later time					

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.

PaperSave Add a New PaperSave Document Sales Item Documentation + [Icons] Save Item Reset [Settings]

Related Sales Item Document Number Description UOM Type
1000 PCS Inventory

ID: 29123
Document Profile

Burger King 12476
5388 HWY 129 N
JEFFERSON, GA 30549-1665
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPSCS
GST #: 869575928RT0001
Tracking #: 9235957170

Attn: Bethel, Nicole
Comment:

Page # 1 / 1

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	624925	Freezer, U/C Reach-In 120/60/1 3" Casters	1	1	EA	1,169.55	1,169.55
SN: ALDP117549A							
Misc							
10	SHIPPING	Shipping	1	0	EA	151.00	151.00
							1,320.55
Sales Tax							92.44
Total Including Tax							1,412.99

1 / 1 INVOICE_TMP8193730966268360722.pdf [Icons]

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**.

PaperSave Document Display

Related Sales Item: 1000

Document Number: 1000

Description: Burger King 124/b
5388 HWY 129 N
JEFFERSON, GA 30549-1665
USA

UOM: PCS

Type: Inventory

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPSCS
GST #: 869575928RT0001
Tracking #: 9235957170

Attn: Bethel, Nicole
Comment:

Page # 1 / 1

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	624925	Freezer, U/C Reach-In 120/60/1 3" Casters	1	1	EA	1,169.55	1,169.55
SN: ALDP117549A							
Misc							
10	SHIPPING	Shipping	1	0	EA	151.00	151.00
							1,320.55
Sales Tax							92.44
Total Including Tax							1,412.99

1 / 1 INVOICE_TMP8193730966268360722.pdf

PaperSave Document Sales Item Documentation

Related Sales Item: 1000

Document Number: 1000

Description: Burger King 124/b
5388 HWY 129 N
JEFFERSON, GA 30549-1665
USA

UOM: PCS

Type: Inventory

+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By
29123	INVOICE_TMP8193730966268360722.pdf	ps\hcondon
29126	INVOICE_TMP8193730966268360722.pdf	ps\hcondon

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.

PaperSave Document Sales Item Documentation

Related Sales Item: 1000

Document Number: 1000

Description: Burger King 124/b
5388 HWY 129 N
JEFFERSON, GA 30549-1665
USA

UOM: PCS

Type: Inventory

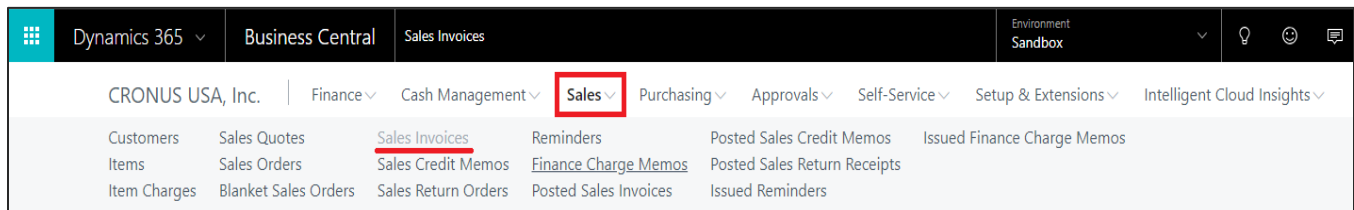
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By
29123	INVOICE_TMP8193730966268360722.pdf	ps\hcondon
29126	INVOICE_TMP8193730966268360722.pdf	ps\hcondon

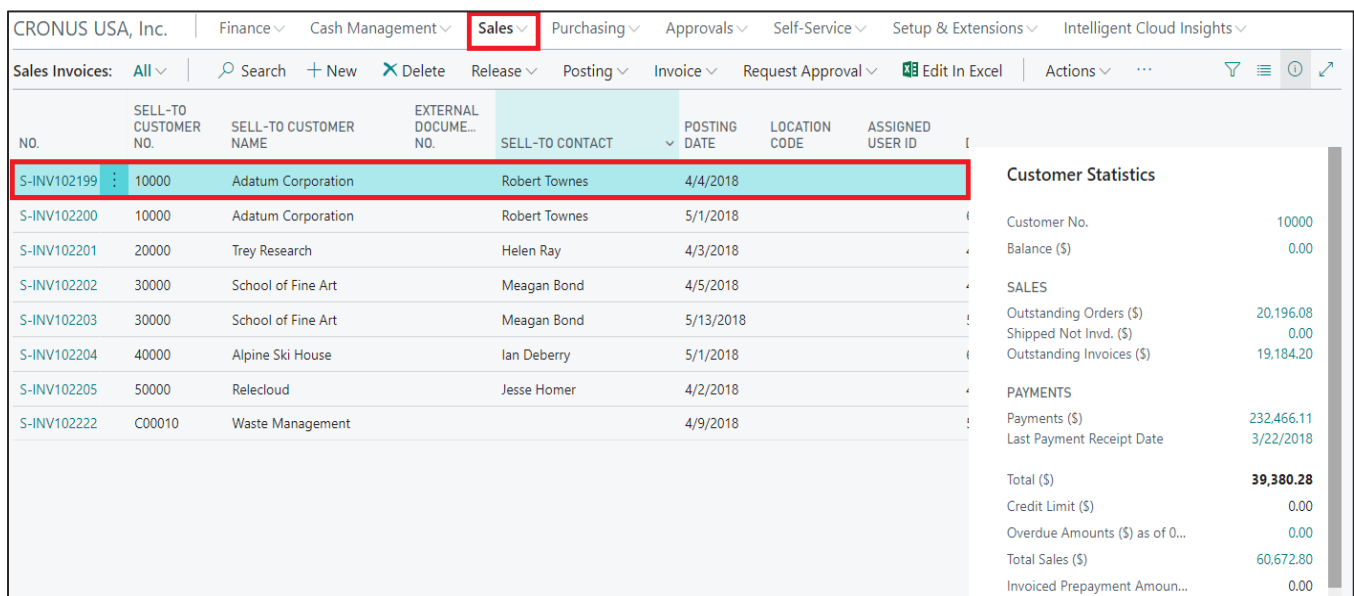
3.6 SALES INVOICE

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

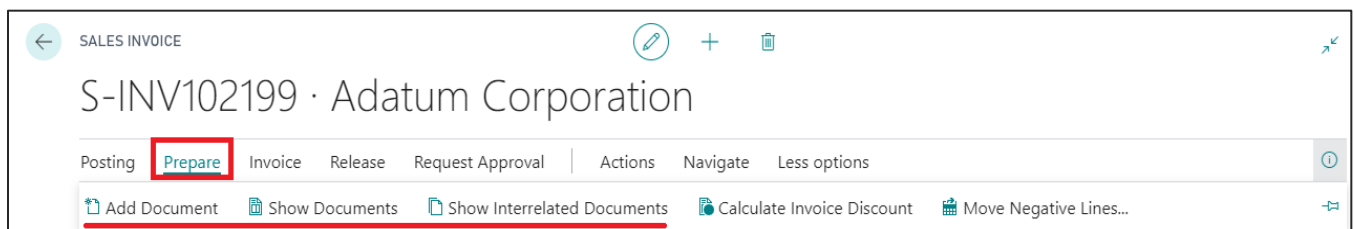
1. On the Home Page, click on **Sales** dropdown.
2. Click on **"Sales Invoices"**.



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.

Document Number	Customer Name	Posting Date	Contact	Due Date	Total
S-INV102199	Adatum Corporation	2018-04-04	Robert Townes	2018-05-04	11375.50

Related Sales Invoice

Click to [Add from Scanner](#) using Fujitsu Chronos

Please drag items here or [select files](#) to upload

Click to [Add from Scanner](#) using any TWAIN compliant scanner

Click to [Generate a barcode](#) to scan this document in a batch at a later time

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.

PaperSave Add a New PaperSave Document Sales Invoice Documentation **Save Item** Reset

Related Sales Invoice Document Number S-INV102199 Customer Name Adatum Corporation Posting Date 2018-04-04 Contact Robert Townes Due Date 2018-05-04 Total 11375.50

ID: 29119

Document Profile

Burger King 8054
4410 WADE GREEN RD NW
KENNESAW, GA 30144-1254
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334789122

Attn: Hornung, Donna
Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	27023108	Shield, PHU Pan Splash f/ Duke Broller	1	1	EA	18.87	18.87
20	613894	Tong, 9" Forest Green	6	6	EA	1.84	11.04
Misc							
10	SHIPPING	Shipping	1	0	EA	11.25	11.25
							41.16
Sales Tax							2.47
Total Including Tax							43.63

1 / 1 INVOICE_TMP4435956351906090752.pdf

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.

PaperSave Document Display

Related Sales Invoice: S-INV102199, Customer Name: Adatum Corporation, Posting Date: 2018-04-04, Contact: Robert Townes, Due Date: 2018-05-04, Total: 11375.50

ID: 29119

Document Profile

Burger King 8854
4410 WADE GREEN RD NW
KENNESAW, GA 30144-1254
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334789122

Attn: Hornung, Donna
Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	27023108	Shield, PHU Pan Splash f/ Duke Broler	1	1	EA	18.87	18.87
20	613894	Tong, 9" Forest Green	6	6	EA	1.84	11.04
Misc							
10	SHIPPING	Shipping	1	0	EA	11.25	11.25
							41.16
Sales Tax							2.47
Total Including Tax							43.63

1 / 1 INVOICE_TMP4435956351906090752.pdf

PaperSave Document Sales Invoice Documentation

Related Sales Invoice: S-INV102199, Customer Name: Adatum Corporation, Posting Date: 2018-04-04, Contact: Robert Townes, Due Date: 2018-05-04, Total: 11375.50

+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By
29119	INVOICE_TMP4435956351906090752.pdf	ps\hcondon
29125	INVOICE_TMP4265068694222479491.pdf	ps\hcondon

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.

PaperSave Document Sales Invoice Documentation

Related Sales Invoice: S-INV102199, Customer Name: Adatum Corporation, Posting Date: 2018-04-04, Contact: Robert Townes, Due Date: 2018-05-04, Total: 11375.50

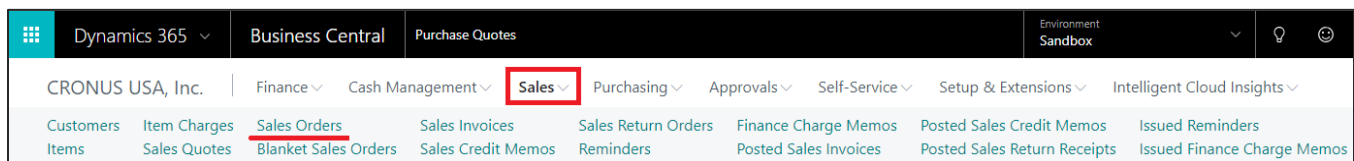
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By
29119	INVOICE_TMP4435956351906090752.pdf	ps\hcondon
29125	INVOICE_TMP4265068694222479491.pdf	ps\hcondon

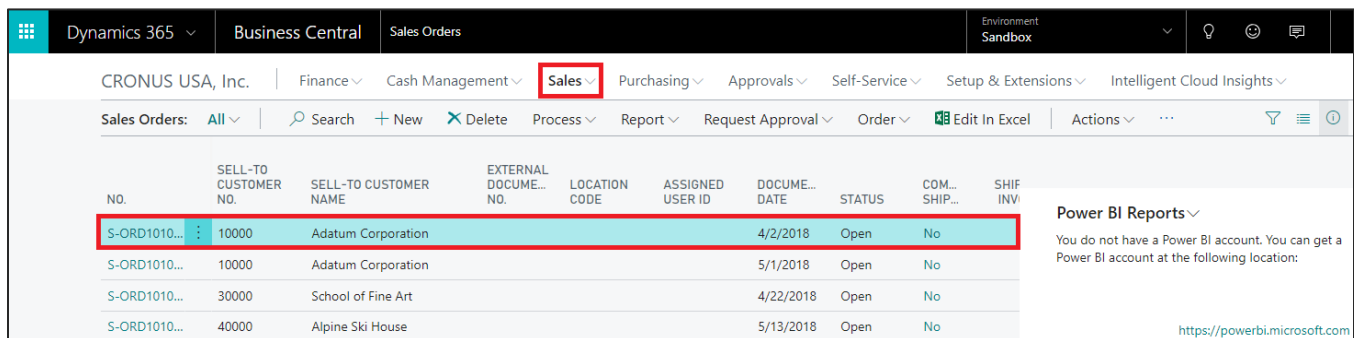
3.7 SALES ORDER

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

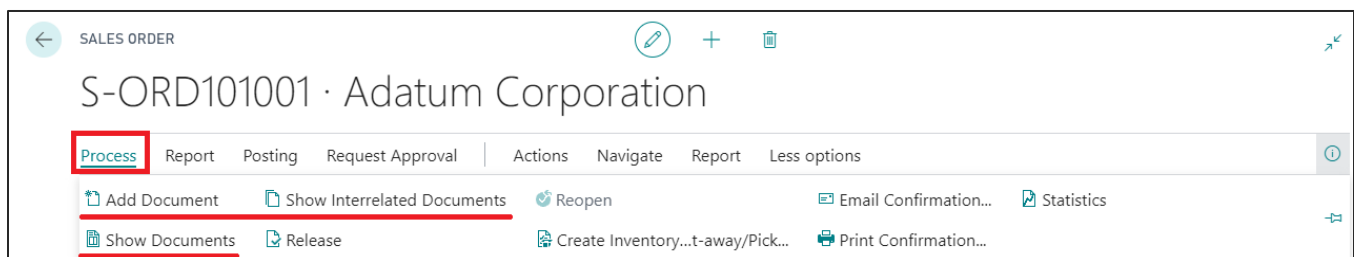
1. On the Home Page, click on the **Sales** dropdown.
2. Click on "**Sales Orders**".



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.


PaperSave ▾		Add a New PaperSave Document		Sales Order Documentation ▾		+	🖨	✉	⬇
<u>Related Sales Order</u>	<u>Document Number</u>	<u>Customer Name</u>	<u>Posting Date</u>	<u>Contact</u>	<u>Due Date</u>	<u>Order Date</u>	<u>Total</u>		
	S-ORD101001	Adatum Corporation	2018-04-02	Robert Townes	2018-05-02	2018-04-02	17773.66		




Click to [Add from Scanner](#) using Fujitsu Chronos



Please drag items here or [select files](#) to upload



Click to [Add from Scanner](#) using any TWAIN compliant scanner



Click to [Generate a barcode](#) to scan this document in a batch at a later time

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.

PaperSave Add a New PaperSave Document Sales Order Documentation **Save Item** Reset

Related Sales Order: Document Number S-ORD101001 Customer Name Adatum Corporation Posting Date 2018-04-02 Contact Robert Townes Due Date 2018-05-02 Order Date 2018-04-02 Total 17773.66

ID: 29117

Document Profile

Burger King 9911
3215 Peachtree
Corners Circle
Norcross, GA 30092
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334789186

Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	132602	Faucet Only f/Dispensers	2	2	EA	14.39	28.78
20	152796	Wing Nut f/Faucet, Black	2	2	EA	3.17	6.34
40	621758	Screw, 6/32 x 3/4, f/Timer Bar	4	4	EA	0.51	2.04
50	613354	Latch, Pan f/Duke FWM324 Holding Uni	4	4	EA	4.74	18.96

Page # 1 / 2

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.

Related Sales Order: Document Number S-ORD101001 Customer Name Adatum Corporation Posting Date 2018-04-02 Contact Robert Townes Due Date 2018-05-02 Order Date 2018-04-02 Total 17773.66

ID: 29117

Document Profile

Burger King 9911
3215 Peachtree
Corners Circle
Norcross, GA 30092
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334789186

Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	132602	Faucet Only f/Dispensers	2	2	EA	14.39	28.78
20	152796	Wing Nut f/Faucet, Black	2	2	EA	3.17	6.34
40	621758	Screw, 6/32 x 3/4, f/Timer Bar	4	4	EA	0.51	2.04
50	613354	Latch, Pan f/Duke FWM324 Holding Uni	4	4	EA	4.74	18.96

Page # 1 / 2

PaperSave Document Sales Order Documentation Search within document list

Related Sales Order: Document Number S-ORD101001 Customer Name Adatum Corporation Posting Date 2018-04-02 Contact Robert Townes Due Date 2018-05-02 Order Date 2018-04-02 Total 17773.66

+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By
29117	INVOICE_TMP1088948245530689268.pdf	ps\hcondon
29118	INVOICE_TMP4535577695376957713.pdf	ps\hcondon

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.

PaperSave

Document

Sales Order Documentation

Search within document list

Related Sales Order

Document Number

S-ORD101001

Customer Name

Adatum Corporation

Posting Date

2018-04-02

Contact

Robert Townes

Due Date

2018-05-02

Order Date

2018-04-02

Total

17773.66

+ NEW

FILTER

REFRESH

PRINT

SAVE

EMAIL

DOWNLOAD

INTERRELATED

SHOW GROUPING

CHOOSE FIELDS

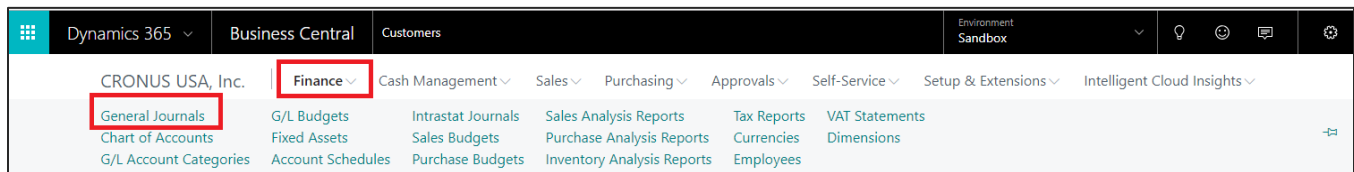
EXPORT TO EXCEL

<input type="checkbox"/>	ID	File Name	Created By
<input type="checkbox"/>	29117	INVOICE_TMP1088948245530689268.pdf	ps\hcondon
<input type="checkbox"/>	29118	INVOICE_TMP4535577695376957713.pdf	ps\hcondon

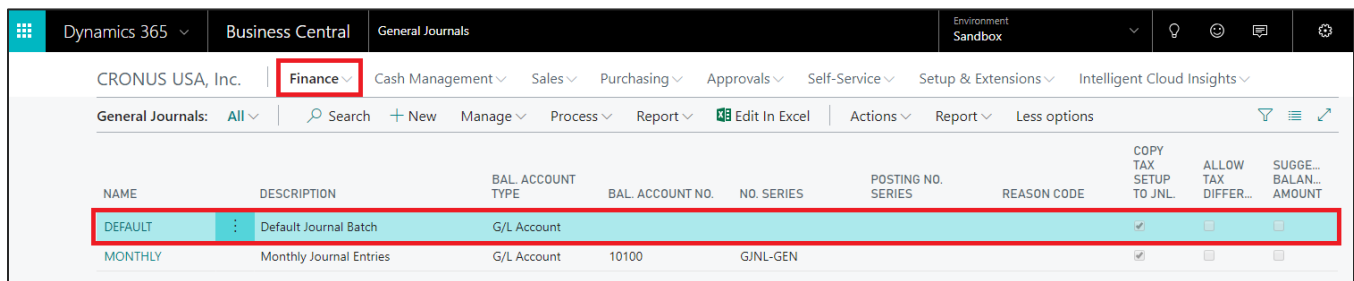
3.8 GENERAL JOURNALS

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

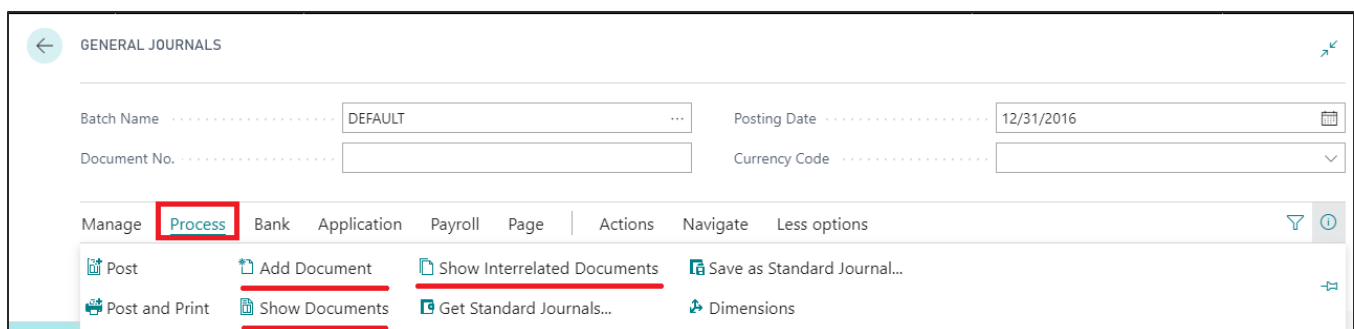
1. On the Home Page, click on **Finance** dropdown.
2. Click on "**General Journals**".



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.

Related General Journals	BatchName	Total
	DEFAULT	0

Click to [Add from Scanner](#) using Fujitsu Chronos

Please drag items here or [select files](#) to upload

Click to [Add from Scanner](#) using any TWAIN compliant scanner

Click to [Generate a barcode](#) to scan this document in a batch at a later time

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.

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.

Page 41

PaperSave

Document

Journal Documentation

Search within document list

Related General Journals


BatchName


DEFAULT


Total

0


+ NEW


 FILTER


 REFRESH


 PRINT

 SAVE


 EMAIL



 DOWNLOAD

 INTERRELATED

 SHOW GROUPING

 CHOOSE FIELDS

 EXPORT TO EXCEL

<input type="checkbox"/>	ID	File Name	Created By	Comments
<input type="checkbox"/>	29108	 State_Historical_Soc- Gifts.pdf	ps\hcondon	123
<input type="checkbox"/>	29109	 Grace Overstreet_check.pdf	ps\hcondon	

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.

PaperSave

Document

Journal Documentation

Search within document list

Related General Journals


BatchName


DEFAULT


Total


0

+ NEW


 FILTER


 REFRESH


 PRINT


 SAVE

 EMAIL


 DOWNLOAD

 INTERRELATED

 SHOW GROUPING

 CHOOSE FIELDS

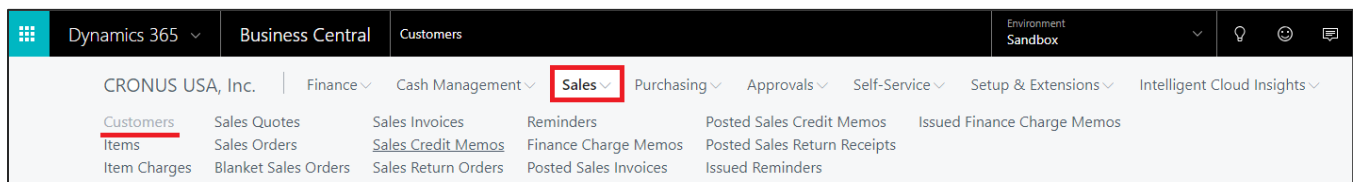
 EXPORT TO EXCEL

<input type="checkbox"/>	<input type="checkbox"/>	ID	File Name	Created By	Comments
<input type="checkbox"/>		29108	State_Historical_Soc- Gifts.pdf	ps\hcondon	123
<input type="checkbox"/>		29109	Grace Overstreet_check.pdf	ps\hcondon	

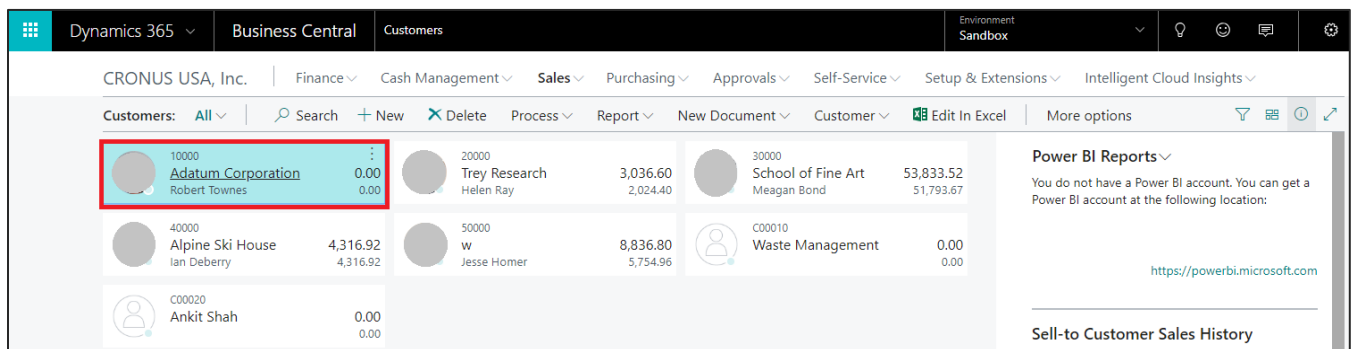
3.9 CUSTOMER

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

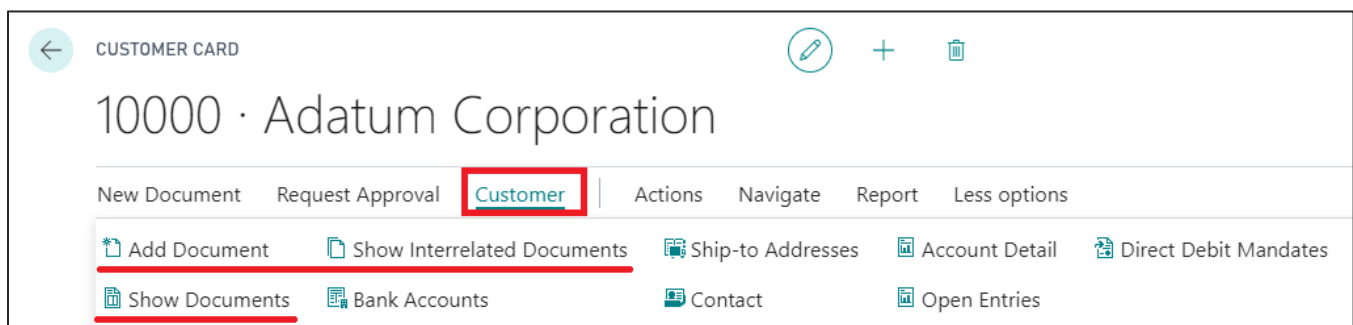
1. On the Home Page, click on **Sales** dropdown.
2. Click on "**Customers**".



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.

The screenshot displays the PaperSave web interface. At the top, a navigation bar includes 'PaperSave', 'Add a New PaperSave Document', and 'Customer Documentation'. Below this, a customer profile is shown for 'Adatum Corporation' with fields for Customer ID, Name, Address, City, State, Zip, and Country. The main area is divided into four sections for adding documents: 'Fujitsu Chronos', 'Add from Scanner using any TWAIN compliant scanner', 'Add Document' (highlighted with a red box and an upward arrow icon), and 'Generate a barcode'. Each section includes a brief instruction on how to use that method.

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.

Related Customer	Customer ID	Customer Name	Phone	Address	City	State	Zip	Country
	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US

Fall 2003 Co-op Time Sheet
Must be received in our office by December 5th, 2003

Student Name:	_____	Name of Company:	_____
Address:	_____	Address:	_____
Social Security #:	_____		_____
Phone:	_____	Phone:	_____
Major:	_____	Supervisor's Signature:	_____
Semester:	_____	Student's Signature:	_____

Return to: **Eastern Kentucky University**
Cooperative Education
SSB 455 CPO 61
Richmond, KY 40475
Phone (859) 622-1296 Fax (859) 622-1300

ID: 29113

Document Profile

Doc Type:

☐ Application
☐ Contract
☒ Correspondence
☐ Tax Exempt Form

Comments:
 Enter Value

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.

Related Customer	Customer ID	Customer Name	Phone	Address	City	State	Zip	Country
	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US

Fall 2003 Co-op Time Sheet
Must be received in our office by December 5th, 2003

Student Name:	_____	Name of Company:	_____
Address:	_____	Address:	_____
Social Security #:	_____		_____
Phone:	_____	Phone:	_____
Major:	_____	Supervisor's Signature:	_____
Semester:	_____	Student's Signature:	_____

Return to: **Eastern Kentucky University**
Cooperative Education
SSB 455 CPO 61
Richmond, KY 40475
Phone (859) 622-1296 Fax (859) 622-1300

ID: 29113

Document Profile

Doc Type:

☐ Application
☐ Contract
☒ Correspondence
☐ Tax Exempt Form

Comments:
 Enter Value

PaperSave

Document

Customer Documentation

Search within document list

Related Customer	Customer ID	Customer Name	Phone	Address	City	State	Zip	Country
	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US

+ NEW

FILTER

REFRESH

PRINT

SAVE

EMAIL


DOWNLOAD

INTERRELATED

SHOW GROUPING

CHOOSE FIELDS

EXPORT TO EXCEL

<input type="checkbox"/>		Created	Created By	Doc Type	Comments	
<input type="checkbox"/>		01/24/2019 08:36:17 AM	ps\hcondon	Correspondence		

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.

PaperSave

Document

Customer Documentation

Search within document list

Related Customer	Customer ID	Customer Name	Phone	Address	City	State	Zip	Country
	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US

+ NEW

FILTER

REFRESH

PRINT

SAVE

EMAIL



DOWNLOAD

INTERRELATED

SHOW GROUPING

CHOOSE FIELDS

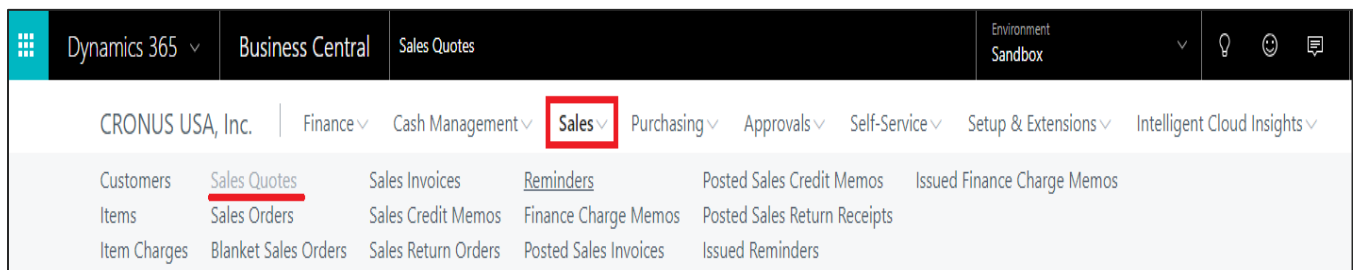
EXPORT TO EXCEL

<input type="checkbox"/>		ID	File Name	Created By	Doc Type	Comments	
<input type="checkbox"/>		29113	xlsdemo1.pdf	ps\hcondon	Correspondence		
<input type="checkbox"/>		29114	FormNew.pdf	ps\hcondon			

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.

Dynamics 365

Business Central

Sales Quotes

Environment
Sandbox

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Approvals

Self-Service

Setup & Extensions

Sales Quotes:

All

Search

+ New

X Delete

Process

Quote

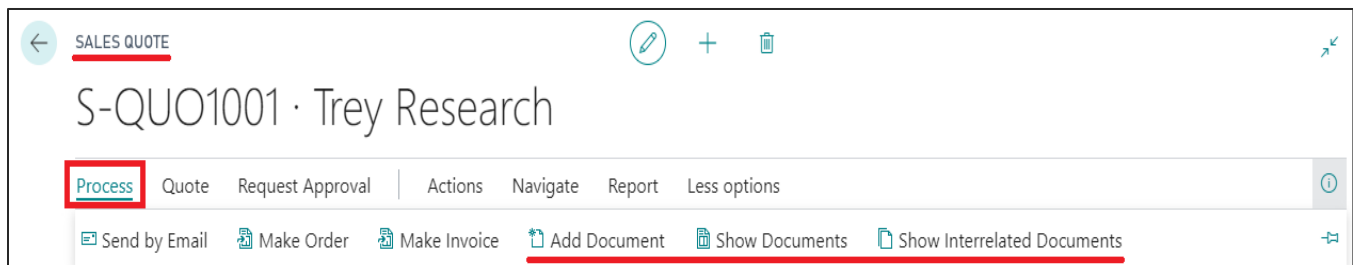
Request Approval

Edit In Excel

More options

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	SELL-TO CONTACT	POSTING DATE	DUE DATE	REQUES... DELIVERY DATE	AMOUNT
S-QUO1001	20000	Trey Research		Helen Ray	4/2/2018	4/16/2018		1,928.00
S-QUO1002	40000	Alpine Ski House		Ian Deberry	4/3/2018	5/3/2018		950.50


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.


Related Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QUO1001	Trey Research	2018-04-02	Helen Ray	2018-04-16	2017-01-01	2024.40




Click to [Add from Scanner](#) using Fujitsu Chronos



Please drag items here or [select files](#) to upload



Click to [Add from Scanner](#) using any TWAIN compliant scanner



Click to [Generate a barcode](#) to scan this document in a batch at a later time

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.

PaperSave Add a New PaperSave Document Sales Quote Documentation + [Icons] Save Item Reset

Related Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QU01001	Trey Research	2018-04-02	Helen Ray	2018-04-16	2017-01-01	2024.40

ID: 29115

Document Profile

Clayhouse Theatre
123 MAIN STREET
ANYTOWN, USA 12345
555.123.4567 - FAX 555.123.5678

Thank you for your pledge in support of the arts at the **Clayhouse Theatre**.
Please return this reminder with your remittance by June 30th. A receipt will be mailed to you. If payment has been made, please disregard this reminder.
We are truly grateful for your support!

5/2/2007

TOTAL PLEDGED	AMOUNT PAID	BALANCE
\$ 2,250.00	\$ 0.00	\$ 2,250.00

2007 Annual Fund

112
RCS Corporation
1259 Six Forks Road
Raleigh, NC 27609

☐ ☐

Card # _____
Expiration (MM/YYYY) _____

☐ **Check enclosed**
Please make your check payable to
Clayhouse Theatre

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.

Related Sales Quote Document Number Customer Name Posting Date Contact Due Date Order Date Total

Related Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QU01001	Trey Research	2018-04-02	Helen Ray	2018-04-16	2017-01-01	2024.40

ID: 29115

Document Profile

Clayhouse Theatre
123 MAIN STREET
ANYTOWN, USA 12345
555.123.4567 - FAX 555.123.5678

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5/2/2007

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2007 Annual Fund

112
RCS Corporation
1259 Six Forks Road
Raleigh, NC 27609

☐ ☐

Card # _____
Expiration (MM/YYYY) _____

☐ **Check enclosed**
Please make your check payable to
Clayhouse Theatre

PaperSave Document Sales Quote Documentation							
Search within document list							
Related Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QUO1001	Trey Research	2018-04-02	Helen Ray	2018-04-16	2017-01-01	2024.40
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL							
<input type="checkbox"/>	ID	File Name	Created By				
<input type="checkbox"/>	29115	Playhouse Theatre_funds.pdf	ps\hcondon				
<input type="checkbox"/>	29116	Invc_362478.PDF	ps\hcondon				

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.

PaperSave Document Sales Quote Documentation							
Search within document list							
Related Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QUO1001	Trey Research	2018-04-02	Helen Ray	2018-04-16	2017-01-01	2024.40
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL							
<input type="checkbox"/>	ID	File Name	Created By				
<input type="checkbox"/>	29115	Playhouse Theatre_funds.pdf	ps\hcondon				
<input type="checkbox"/>	29116	Invc_362478.PDF	ps\hcondon				