



User Guide for PaperSave extension for Microsoft Dynamics 365 Business Central

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PaperSave is a product of WhiteOwl

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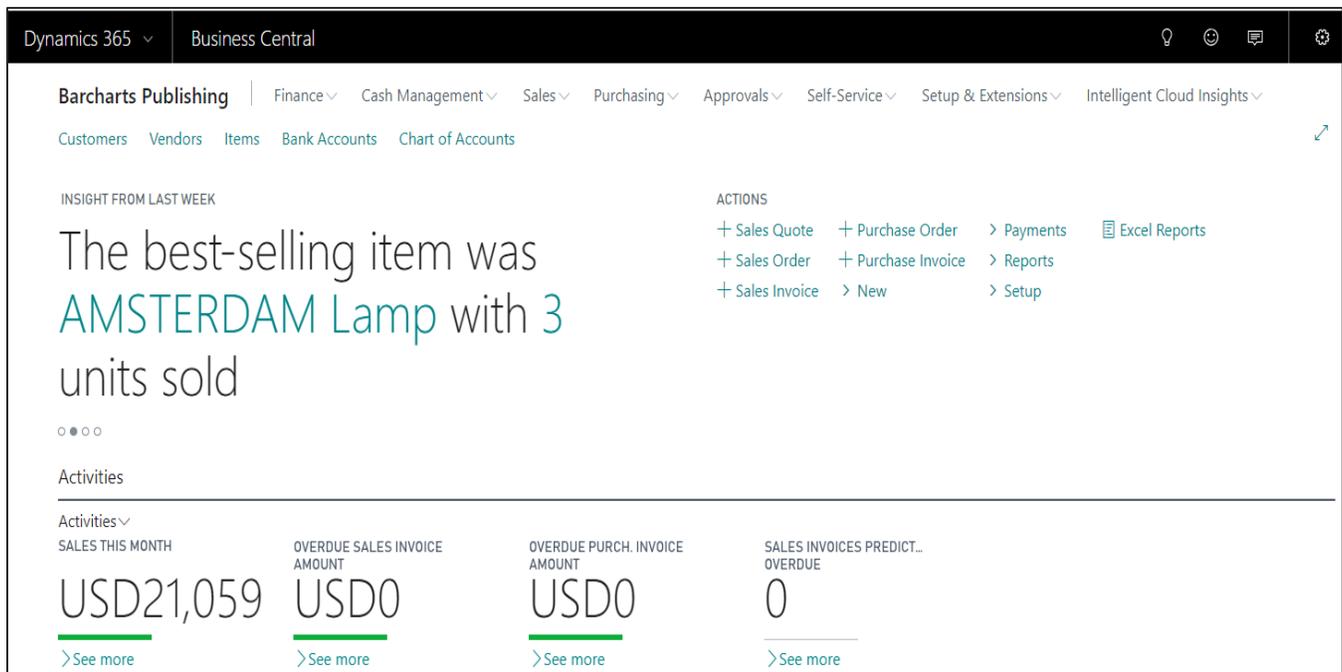
1 INTRODUCTION

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.

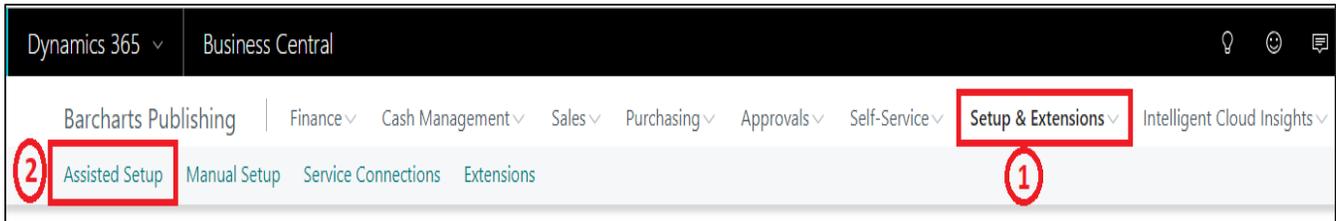
2 PAPERSAVE SETUP & CONFIGURATION STEPS

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.

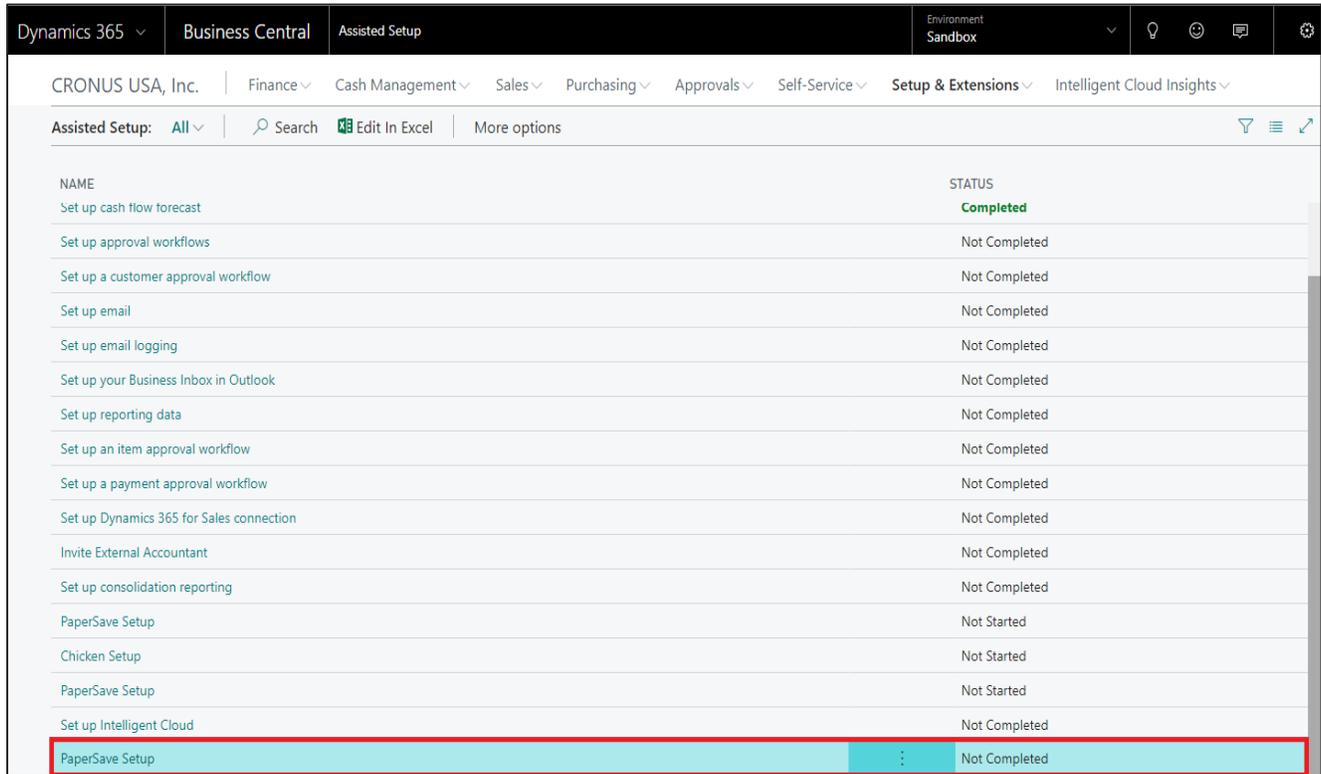
Below is the Dynamics 365 Business Central Home page:



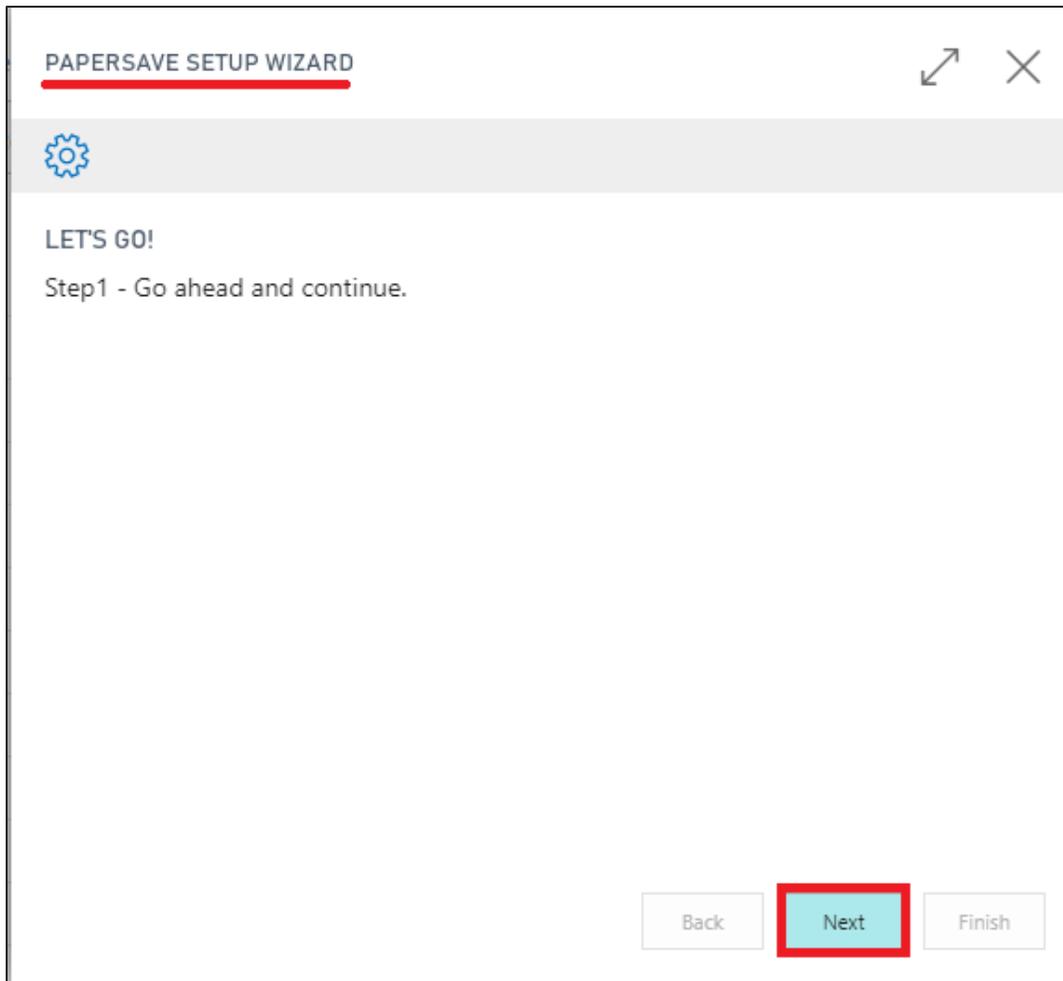
1. On the Dynamics 365 Business Central Home Page, click the **Setup & Extensions** dropdown.
2. Click Assisted Setup.



3. Click the **PaperSave Setup** Link.



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



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

PAPERSAVE SETUP WIZARD

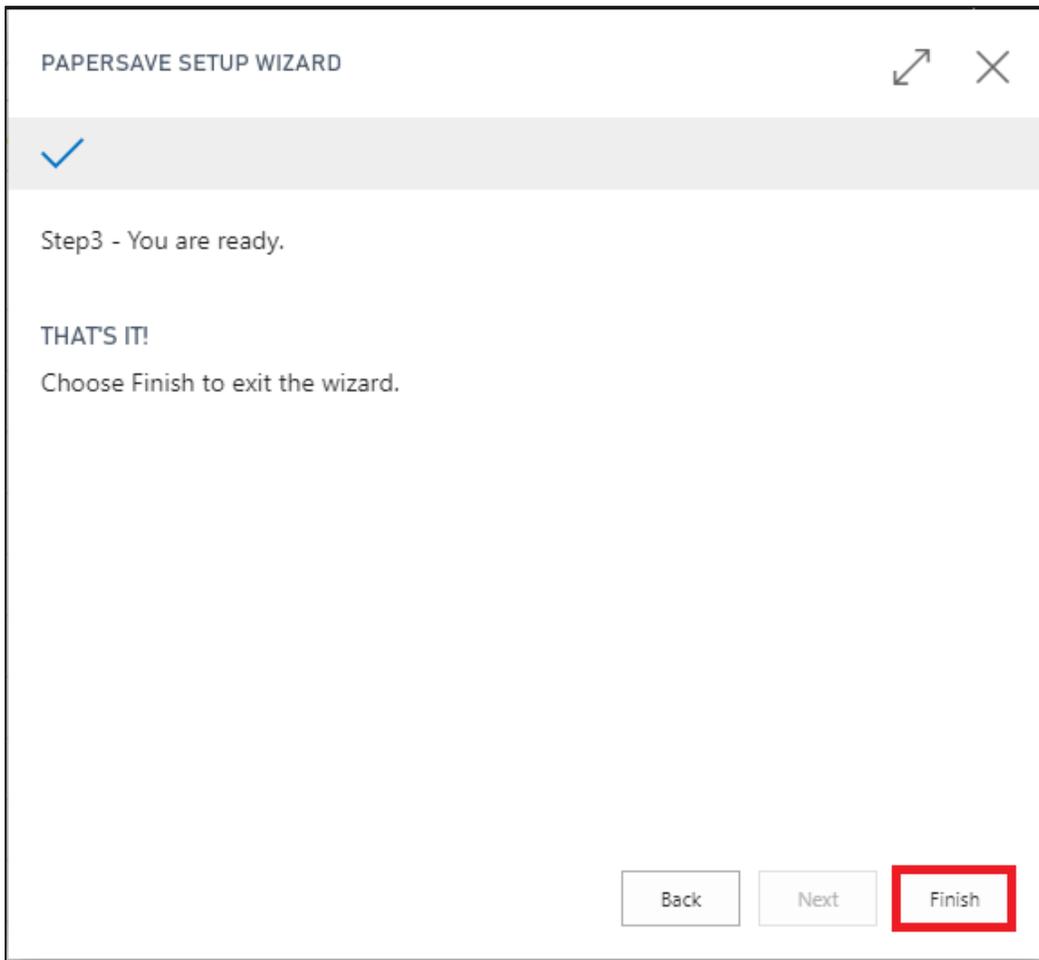
Step2 - Please enter following inputs.

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.

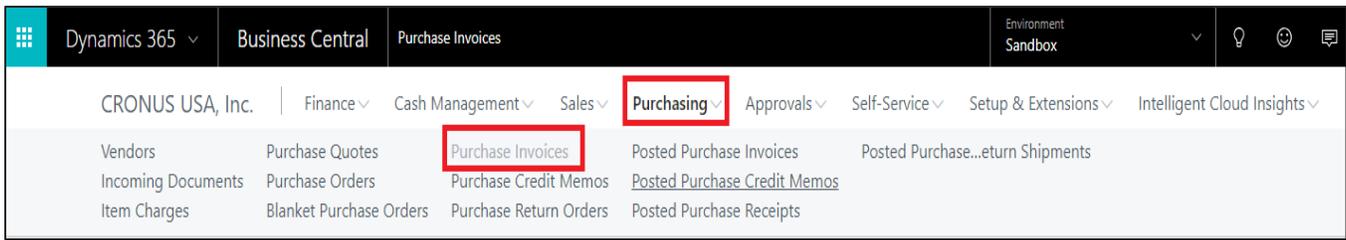
Please refer the [PaperSave User Guide](#) for more information about how these or any of the other PaperSave core features work.

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.

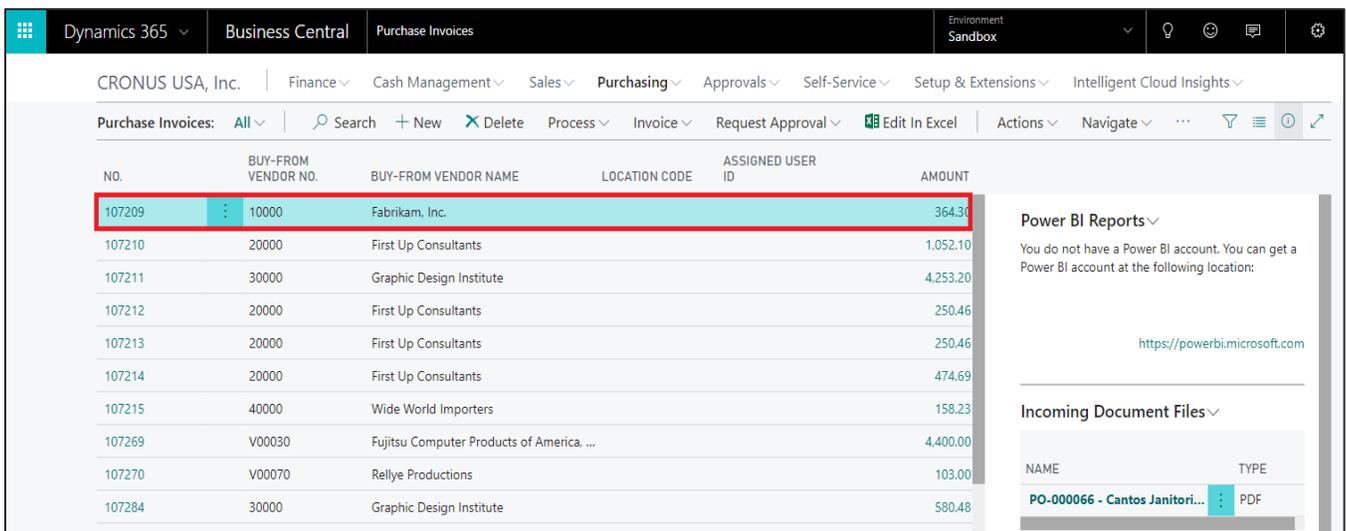
3.1 PURCHASE INVOICE

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

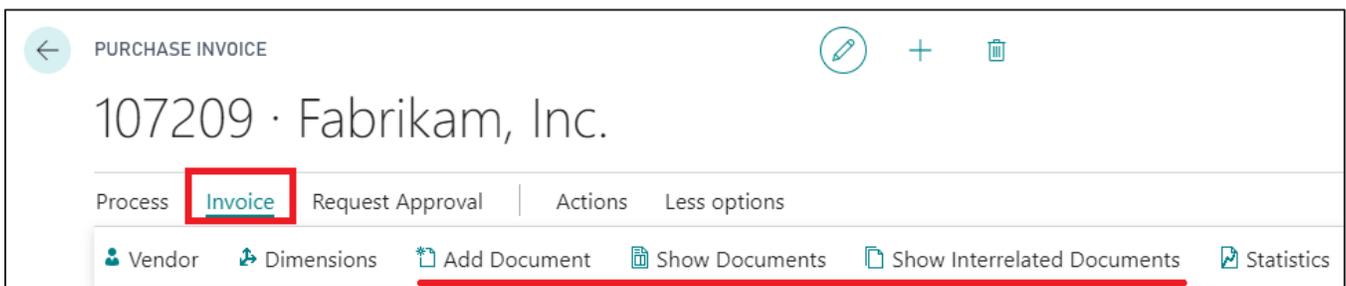
1. On the Home Page, click on the **Purchasing** dropdown.
2. Click on "**Purchase Invoices**".



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.

The screenshot displays the 'Add a New PaperSave Document' interface. At the top, there is a navigation bar with 'PaperSave', 'Add a New PaperSave Document', and 'Purchase Invoices Documentation'. Below this is a table with the following data:

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

The main content area is divided into four quadrants:

- Top Left:** Features the Fujitsu logo and the text: 'Click to [Add from Scanner](#) using Fujitsu Chronos'.
- Top Right:** Features a large upward-pointing arrow icon and the text: 'Please drag items here or [select files](#) to upload'.
- Bottom Left:** Features a scanner icon and the text: 'Click to [Add from Scanner](#) using any TWAIN compliant scanner'.
- Bottom Right:** Features a barcode icon and the text: '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.

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
Manufacturer	Model	Serial #
Type	Mfg Code	Warranty
Location	Agreement	AMOUNT
1.00	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.	
	Trip Charge Discounted Rate	55.00
1.25	Discounted Labor Rate	85.00
	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
1.00	FRY810-15 Drain Valve	102.82
1.00	Freight and Delivery	15.00
	Invoice Prepared by Annette	

Invoice 0000080307.PDF

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.

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, Warranty, Location, Agreement				
	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.				
	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				

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

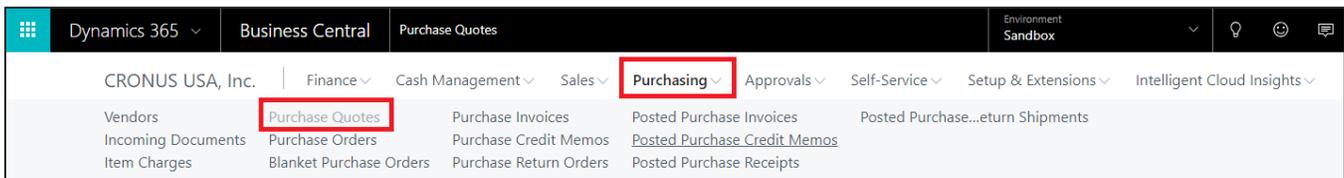
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

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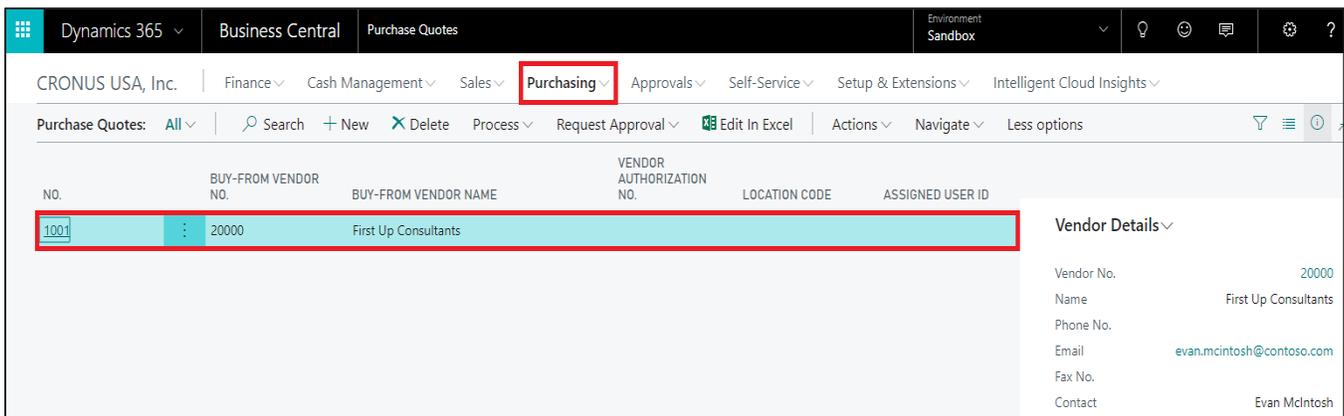
3.2 PURCHASE QUOTE

The following steps describe how to interact with PaperSave within the “Purchase Quotes” record type’s main screen:

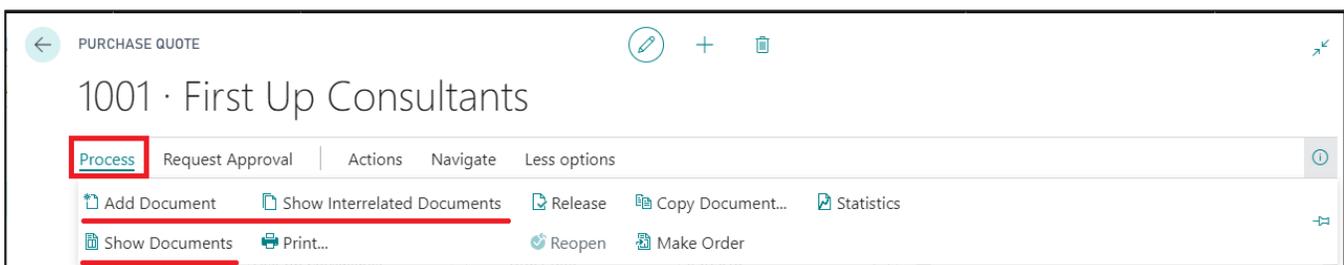
1. On the Home Page, click on **Purchasing** dropdown.
2. Click on **“Purchase Quotes”**.



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**.

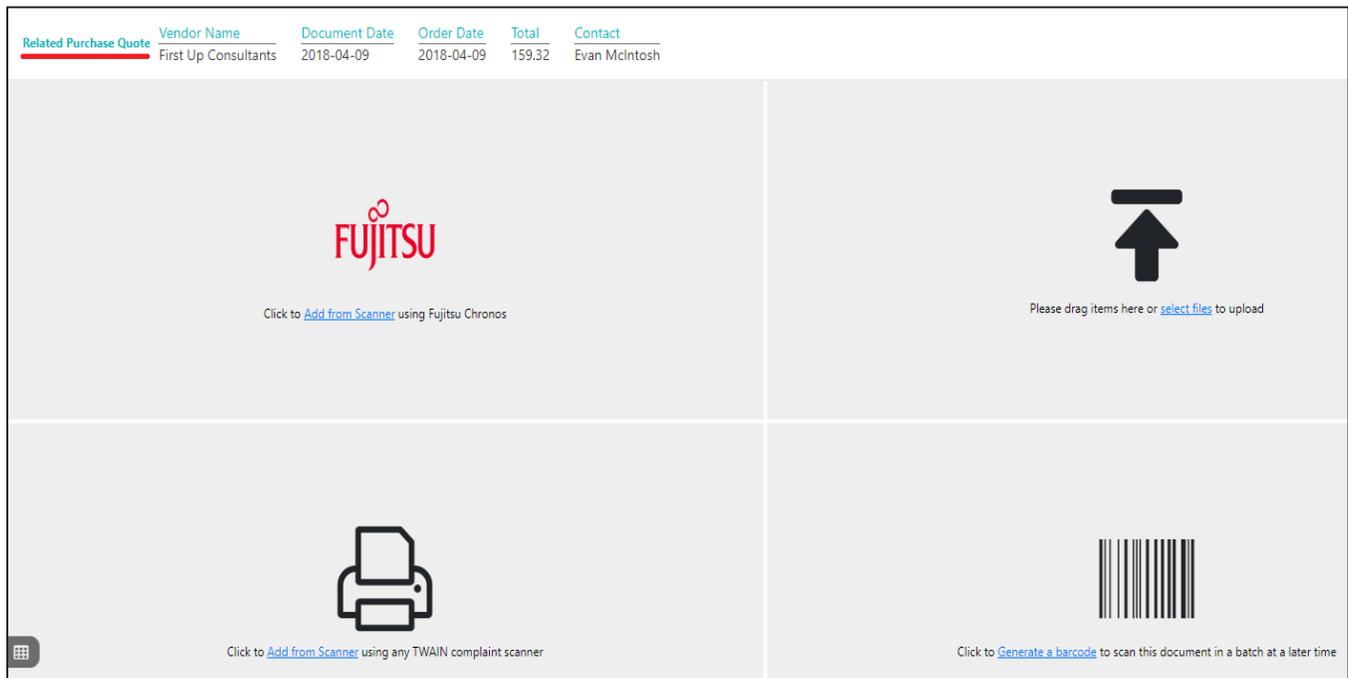


5. Click **“Process”** to access the PaperSave functionalities such as “Add Document”, “Show Documents” and “Show Interrelated Documents”.



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.

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

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 Warranty Location Agreement				
	Notes added by tech Chris Brown on 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.				
	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		
1.00	Manufacturer Model Serial # Type Mfg Code Warranty Location Agreement 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. Trip Charge Discounted Rate 55.00 55.00 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 Cadestia. Discounted Labor Rate 85.00 42.50 Drain Valve 102.82 102.82 Freight and Delivery 15.00 15.00 Invoice Prepared by Annette				
0.50					
1.00	FRY810-15				
1.00					

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

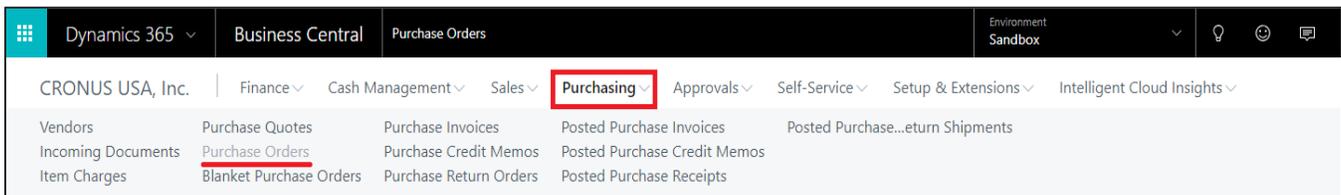
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

ID	File Name	Created By	Comments
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29131	INVOICE_TMP1088948245530689268.pdf	ps\hcondon	

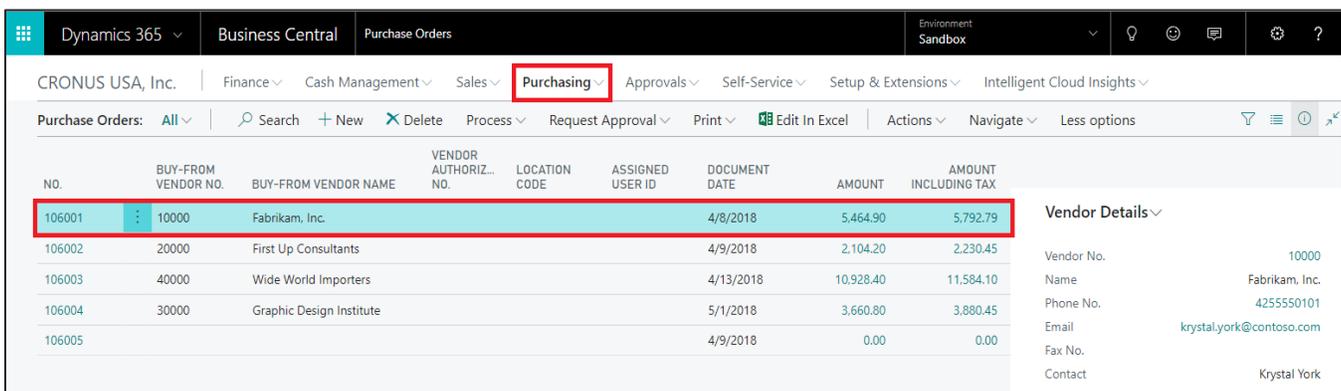
3.3 PURCHASE ORDER

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

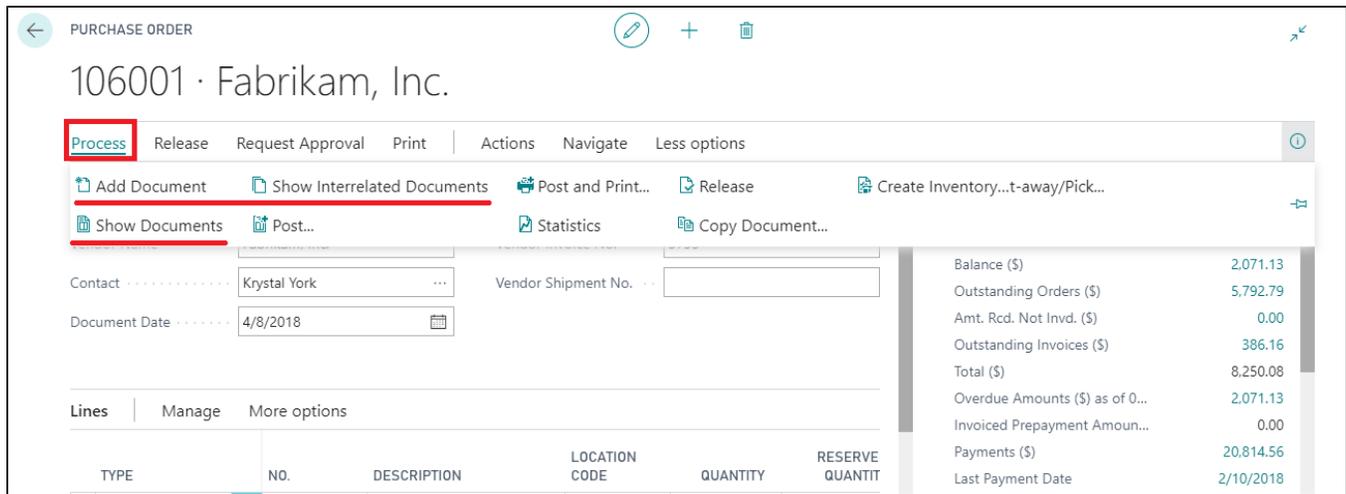
1. On the Home Page, click on **Purchasing** dropdown.
2. Click on "**Purchase Orders**".



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**.

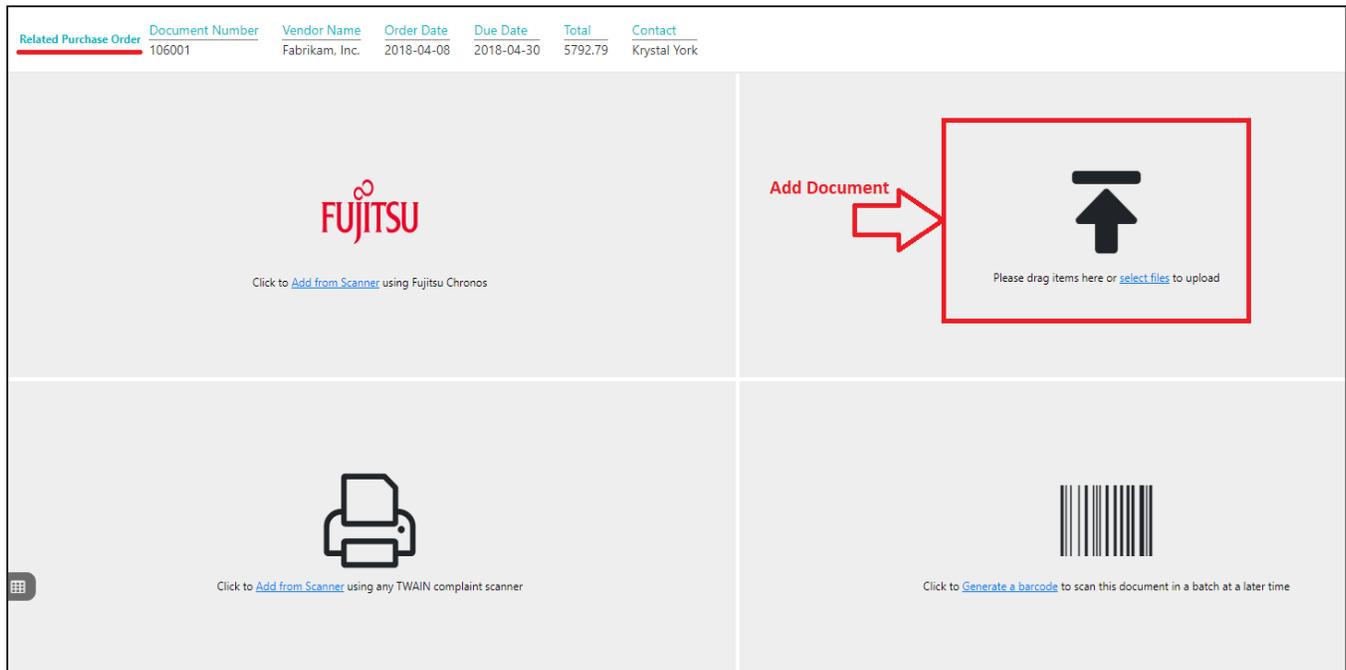


5. Click "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".



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.



- 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.
- Click “**Save item**” to add the document.

The screenshot shows the PaperSave interface for adding a new document. The top navigation bar includes 'PaperSave', 'Add a New PaperSave Document', and 'Purchase Order Documentation'. A 'Save Item' button is highlighted in red. The main area displays document details for 'Burger King 13161' and a table of items including 'Tip, Rubber Feet (Set of 4)', 'TONG, LIFT AND GRIP S/S 12"', and 'SHIPPING'. A right-hand panel shows 'Document Profile' with a 'Doc Type' dropdown menu.

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

3.3.2 SHOW DOCUMENTS IN PURCHASE ORDER

- On the Process tab of Purchase Order Card, click on “**Show Documents**”.
- If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.
- On successful login, it will **show** the document(s) that is/are directly related to this Purchase Order.

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

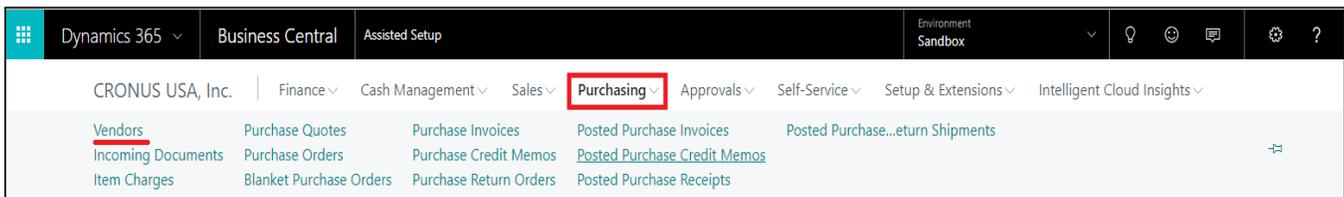
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

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

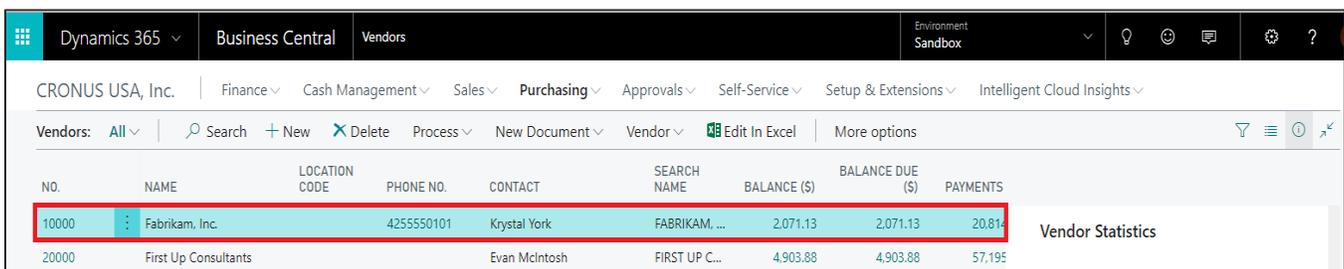
3.4 VENDOR

The following steps describe how to interact with PaperSave within the “Vendor” record type’s main screen:

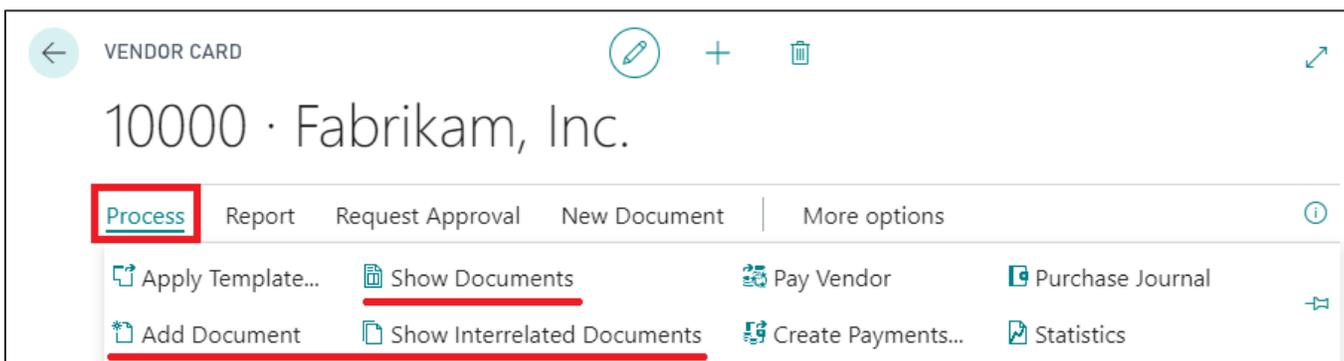
1. On the Home Page, click on **Purchasing** dropdown.
2. Click on **“Vendors”**.



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



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.

The screenshot shows the 'Add Document' page for Vendor Fabrikam, Inc. The top navigation bar includes 'PaperSave', 'Add a New PaperSave Document', and 'Vendor Documentation'. Below the navigation is a table with vendor details:

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

The main content area is divided into four quadrants:

- Top Left:** Features the Fujitsu logo and the text: "Click to [Add from Scanner](#) using Fujitsu Chronos".
- Top Right:** Features a large upward-pointing arrow icon and the text: "Please drag items here or [select files](#) to upload".
- Bottom Left:** Features a scanner icon and the text: "Click to [Add from Scanner](#) using any TWAIN complaint scanner".
- Bottom Right:** Features a barcode icon and the text: "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 + 🖨 ✉ ↓ Save Item Reset ⚙

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:

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

ID: 29127
Document Profile
Doc Type: W-9 Contract Credit Application Correspondence
Comments: Enter Value

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:

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

ID: 29127
Document Profile
Doc Type: W-9 Contract Credit Application Correspondence
Comments: Enter Value

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						

3.4.3 SHOW INTERRELATED DOCUMENTS IN VENDOR

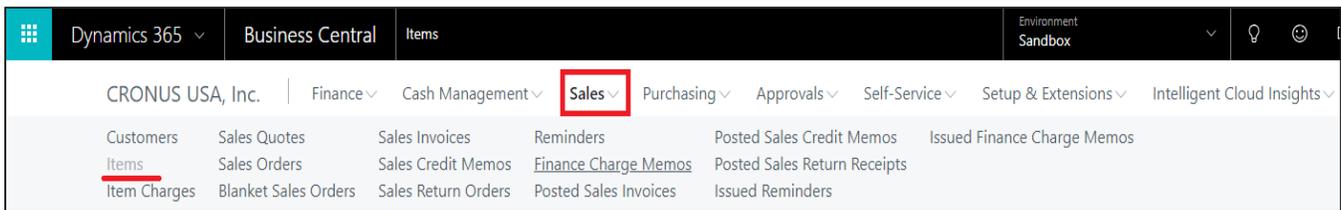
1. On the Process tab of Vendor Card, click on **"Show Interrelated Documents"**.
2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials
3. On successful login, it will **show** the document(s) that is/are indirectly related to this Vendor.

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					

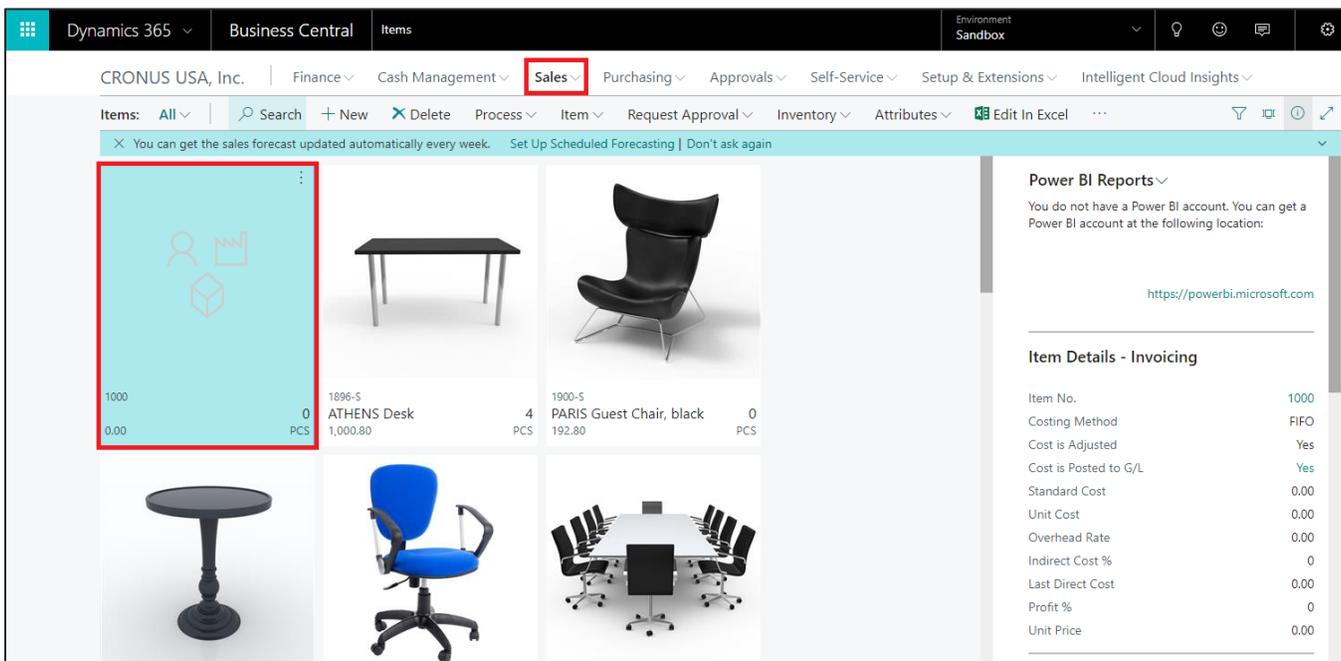
3.5 SALES ITEM

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	Document Number	Description	UOM	Type
	1000		PCS	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.

The screenshot displays the PaperSave software interface. At the top, there is a navigation bar with options like 'PaperSave', 'Add a New PaperSave Document', and 'Sales Item Documentation'. A 'Save Item' button is highlighted with a red box. Below the navigation bar, the main content area shows a document profile for ID: 29123. The document details include the address: Burger King 12476, 5388 HWY 129 N, JEFFERSON, GA 30549-1665, USA. Reference information includes Payment terms: Net 30, Delivery terms: FOB Shipping Point, Ship via: UPSCS, GST #: 869575928RT0001, and Tracking #: 9235957170. The document is attributed to Bethel, Nicole. A table of parts is shown with columns for Line #, Part #, Description, Total Qty Ordered, Qty Shipped, UOM, Unit price USD, and Totals USD. The table lists two parts: a Freezer (Line 10, Part 624925) and Shipping (Line 10, Part SHIPPING). The total including tax is 1,412.99.

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

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**.

Document Display

Related Sales Item: 1000

Document Number: 1000

Description: Burger King 124/6
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:

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

Page # 1 / 1

INVOICE_TMP8193730966268360722.pdf

Document | Sales Item Documentation

Search within document list

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.

Document | Sales Item Documentation

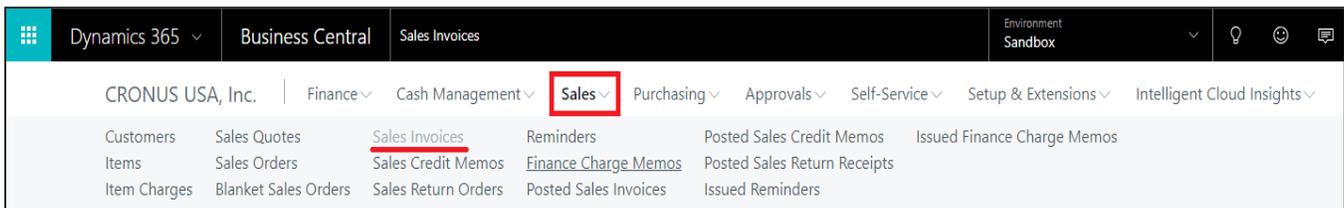
Search within document list

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

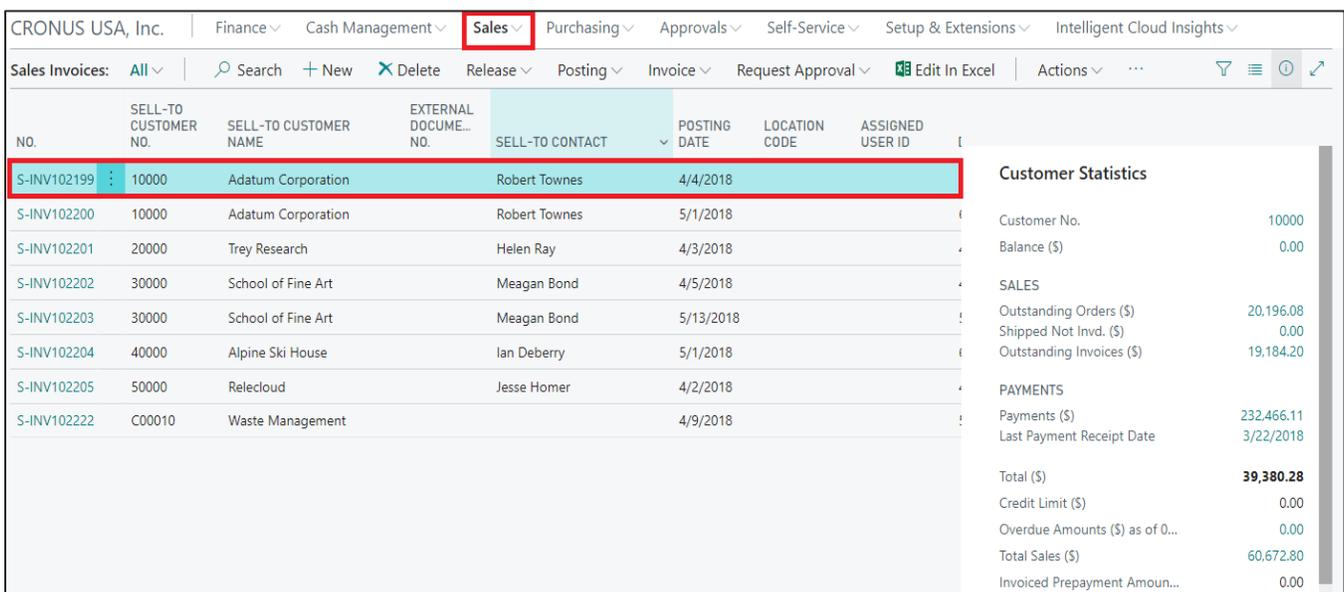
3.6 SALES INVOICE

The following steps describe how to interact with PaperSave within the “Sales Invoice” record type’s main screen:

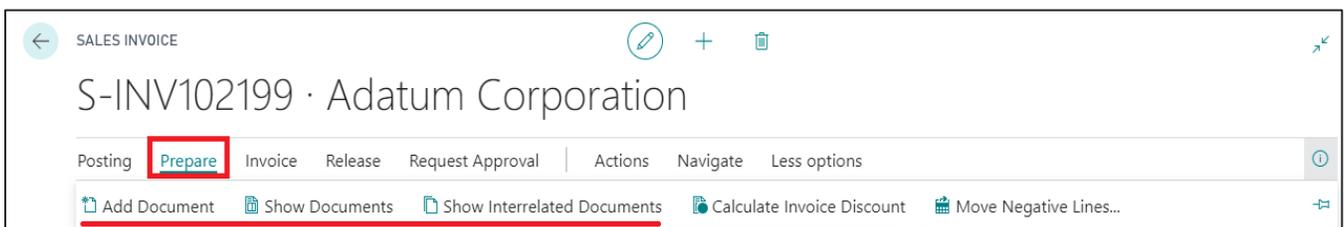
1. On the Home Page, click on **Sales** dropdown.
2. Click on **“Sales Invoices”**.



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

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 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

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.

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

Document Sales Invoice Documentation

Search within document list

Related Sales Invoice: S-INV102199, Adatum Corporation, 2018-04-04, Robert Townes, 2018-05-04, 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.

Document Sales Invoice Documentation

Search within document list

Related Sales Invoice: S-INV102199, Adatum Corporation, 2018-04-04, Robert Townes, 2018-05-04, 11375.50

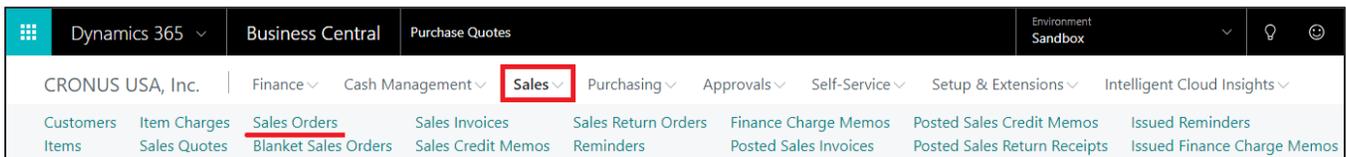
+ NEW FILTER REFRESH PRINT SAVE EMAIL DOWNLOAD INTERRELATED SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

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

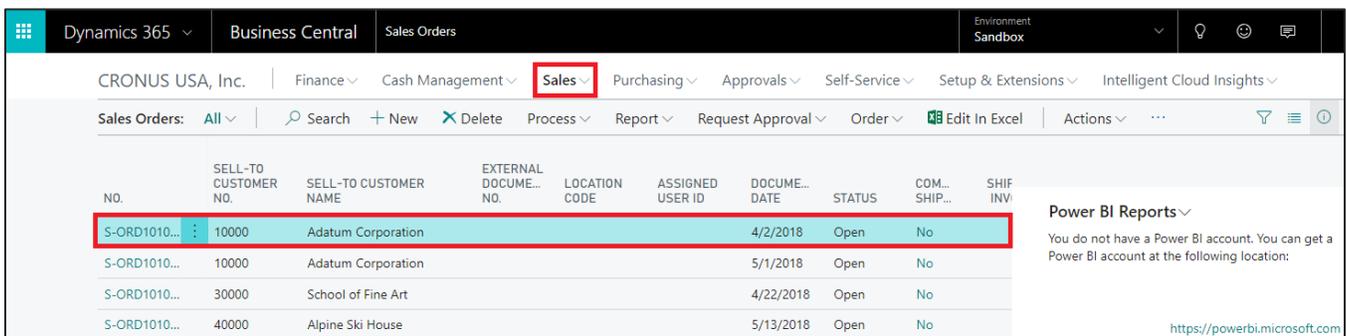
3.7 SALES ORDER

The following steps describe how to interact with PaperSave within the “Sales Order” record type’s main screen:

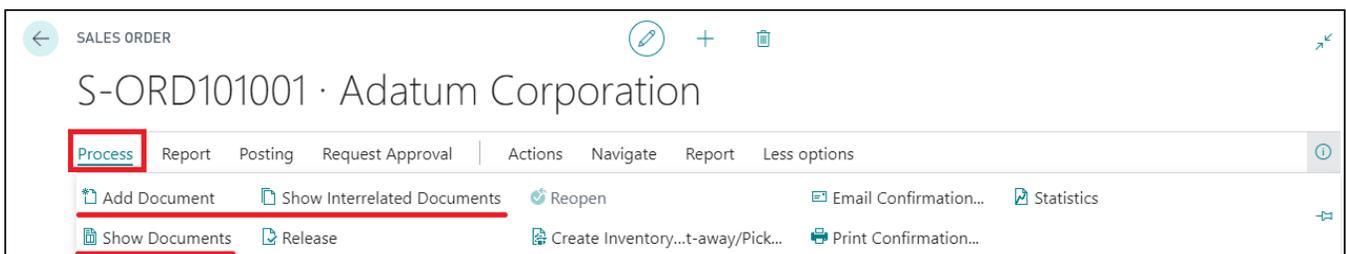
1. On the Home Page, click on the **Sales** dropdown.
2. Click on **“Sales Orders”**.



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 ▾ + 🖨️ ✉️ ↓

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

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

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

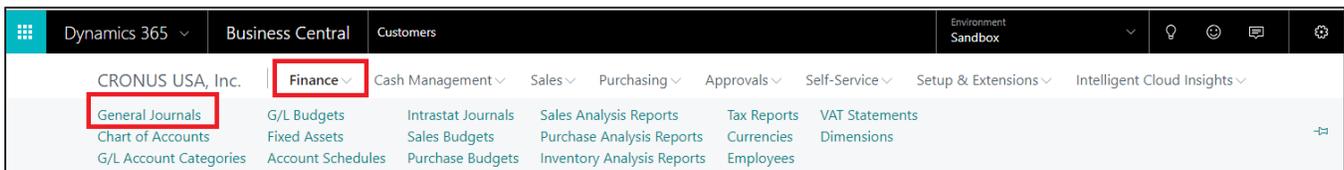
1. On the Process tab of Sales Order Card, click on **"Show Interrelated Documents"**.
2. If you are not already logged in, then this will open the PaperSave login prompt. Enter your login credentials.
3. Upon successful login, it will show the document(s) that is/are indirectly related to this Sales Order.

PaperSave		Document		Sales Order Documentation		Search within document list	
Related Sales Order	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-ORD101001	Adatum Corporation	2018-04-02	Robert Townes	2018-05-02	2018-04-02	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				

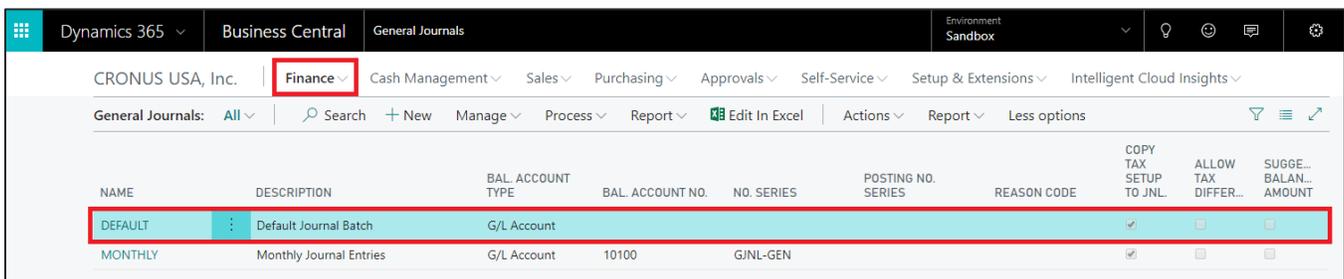
3.8 GENERAL JOURNALS

The following steps describe how to interact with PaperSave within the “Purchase Invoice” record type’s main screen:

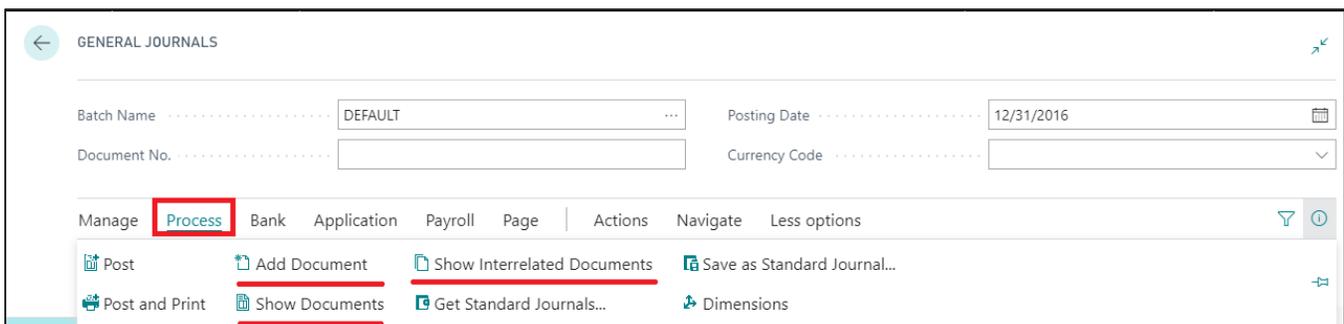
1. On the Home Page, click on **Finance** dropdown.
2. Click on **“General Journals”**.



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.



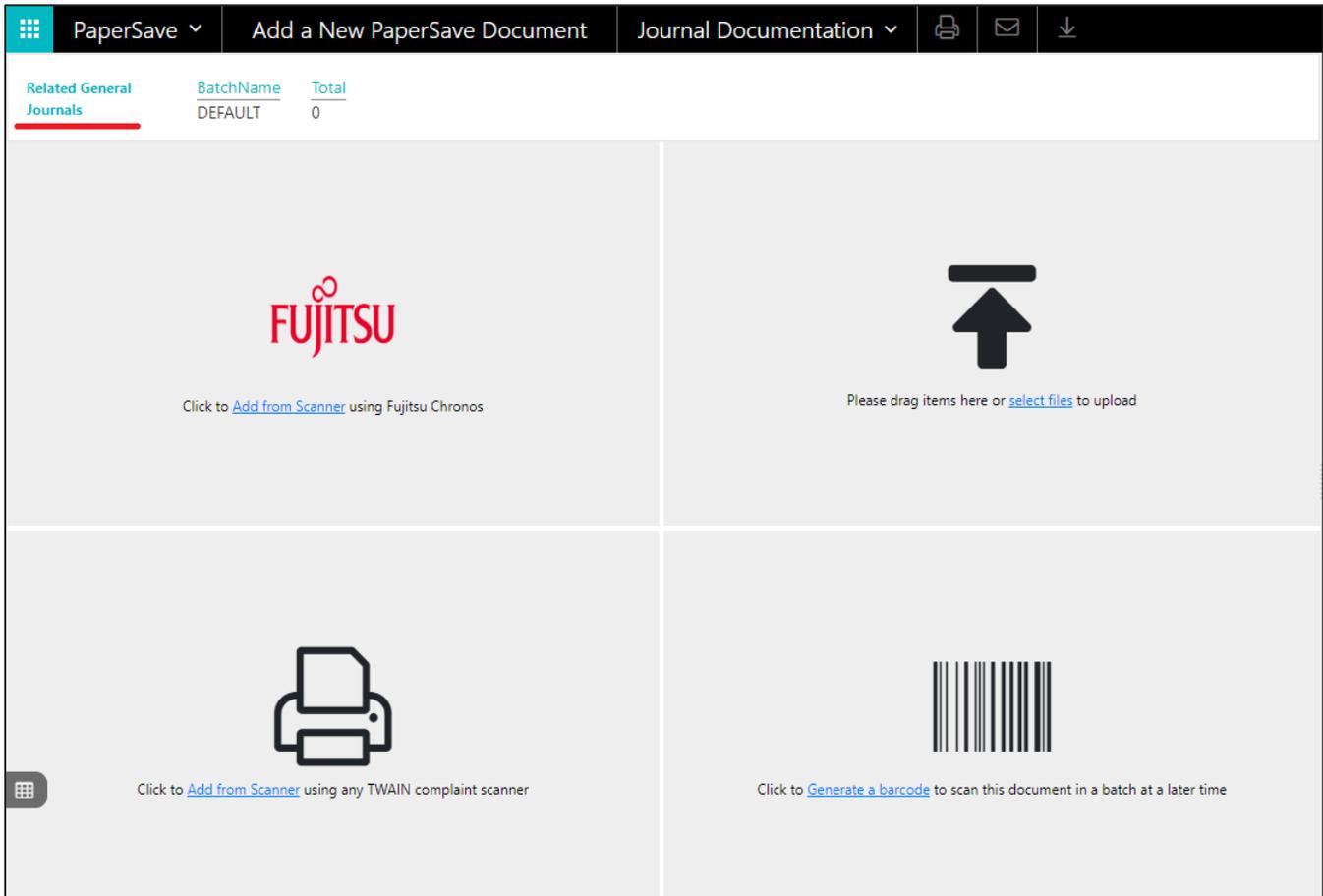
5. Click **“Process”** to access the PaperSave functionalities viz. “Add Document”, “Show Documents” and “Show Interrelated Documents”.



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.



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.

PaperSave Document Journal Documentation					
Related General Journals		BatchName	Total		
		DEFAULT	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

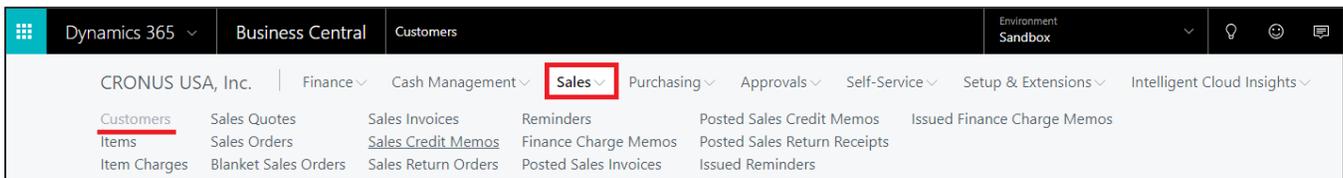
1. On the Process tab of General Journals Card, click on **"Show Interrelated Documents"**.
2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.
3. On successful login, it will **show** the document(s) that is/are indirectly related to this General Journal.

PaperSave Document Journal Documentation					
Related General Journals		BatchName	Total		
		DEFAULT	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		

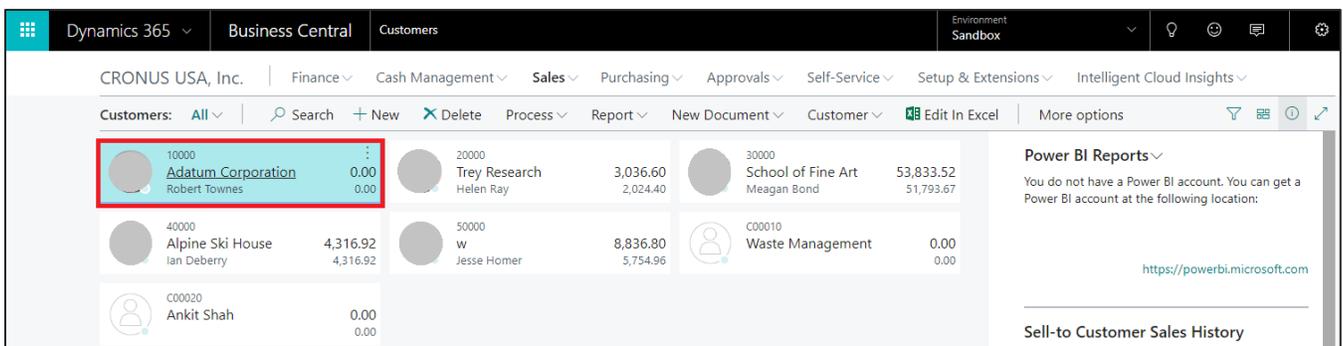
3.9 CUSTOMER

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

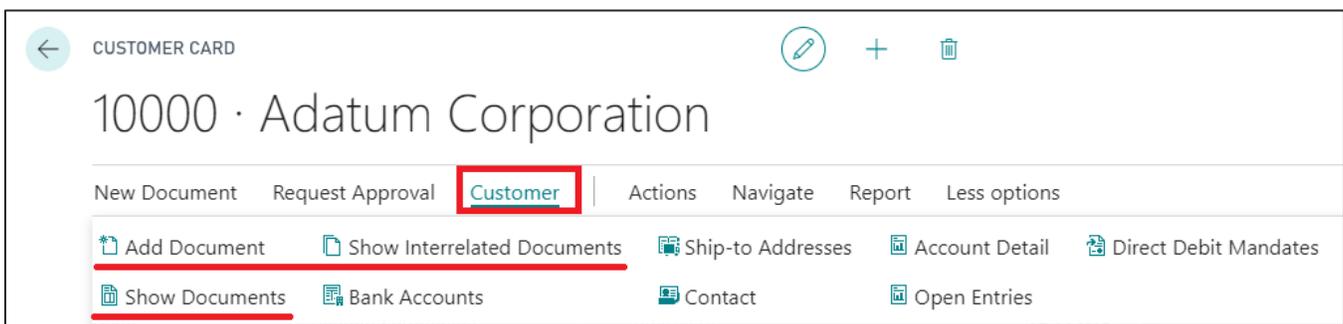
1. On the Home Page, click on **Sales** dropdown.
2. Click on "**Customers**".



3. Click the **desired record** in the Customers list to open a Customer record.
4. This will **launch** the Customer card.



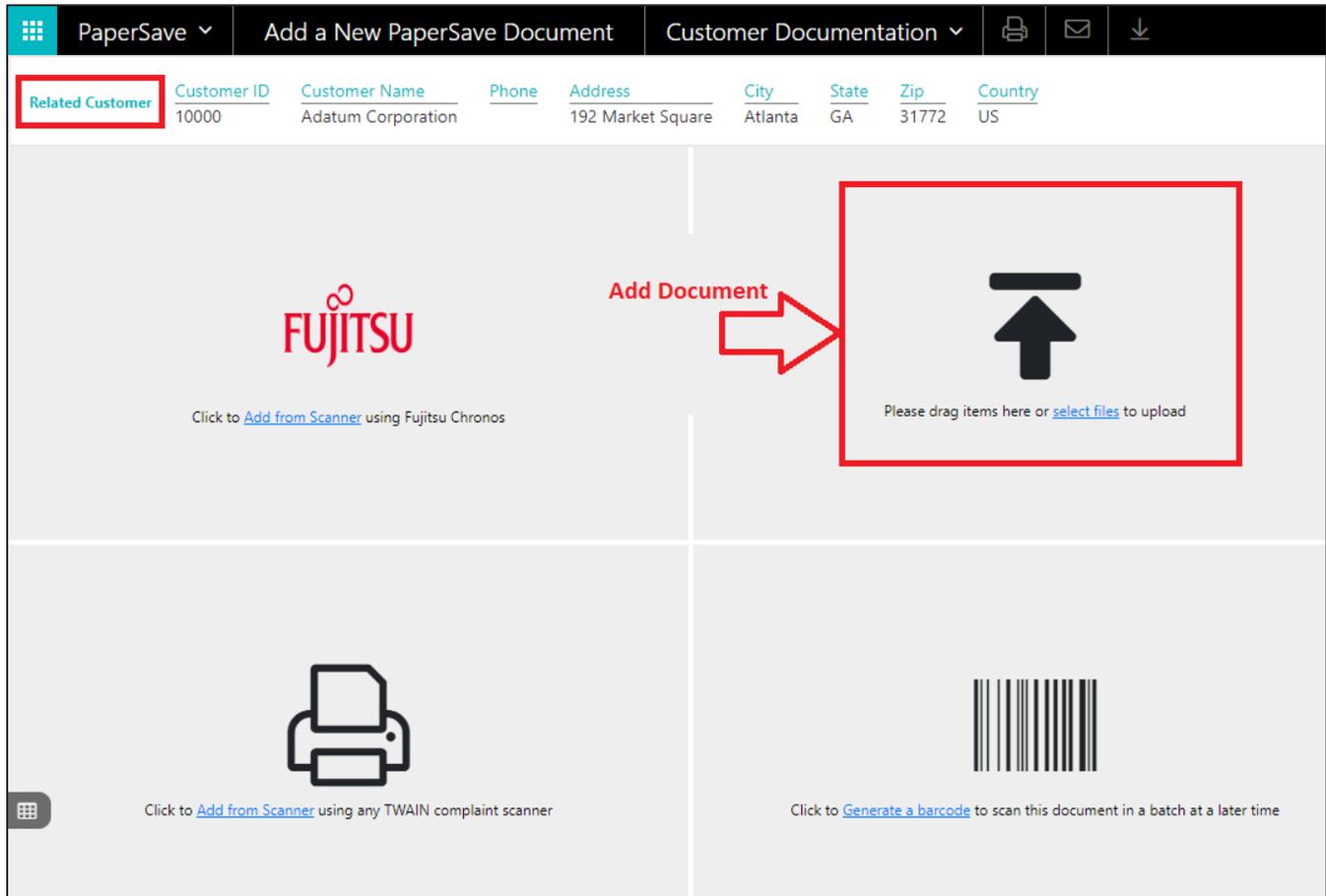
5. Click on "**Customer**" menu to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".



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.

PaperSave Add a New PaperSave Document Customer Documentation Save Item Reset

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: Comments: Enter Value

Application

Contract

Correspondence

Tax Exempt Form

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.

PaperSave Add a New PaperSave Document Customer Documentation Save Item Reset

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: Comments: Enter Value

Application

Contract

Correspondence

Tax Exempt Form

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

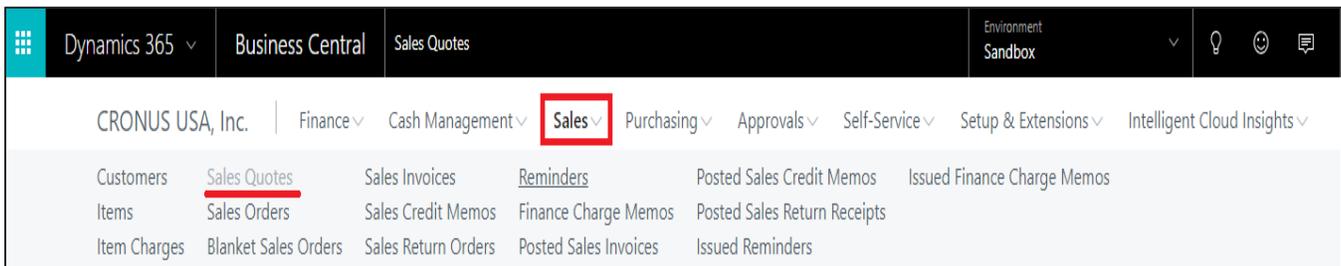
1. On the Customer tab of Customer Card, click on **"Show Interrelated Documents"**.
2. If you are not already logged in, then this will open the PaperSave login prompt. **Enter** your login credentials.
3. Upon successful login, it will **show** the document(s) that is/are indirectly related to this 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					

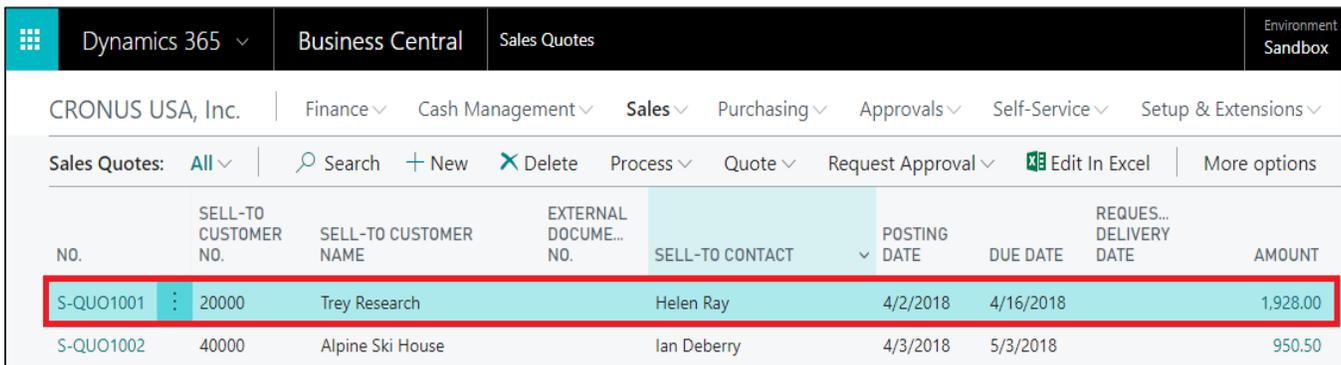
3.10 SALES QUOTE

The following steps describe how to interact with PaperSave within the “Sales Quote” record type’s main screen:

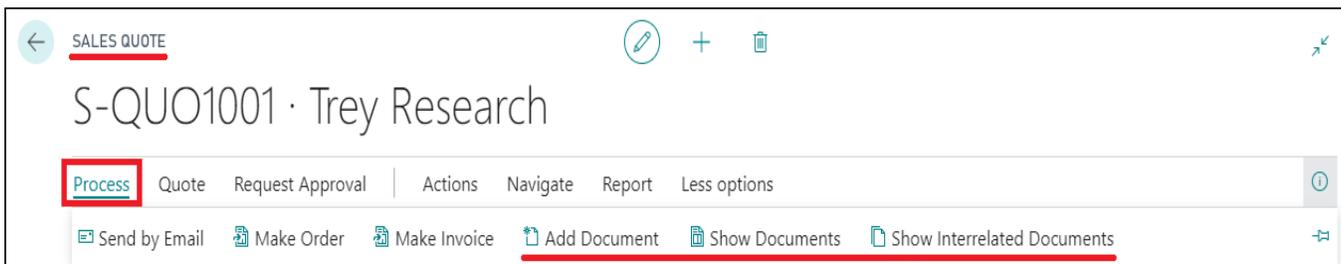
1. On the Home Page, click on **Sales** dropdown.
2. Click on **“Sales Quotes”**.



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.



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

The interface is divided into four main sections:

- Top Left:** Features the Fujitsu logo and a link to "Add from Scanner" using Fujitsu Chronos.
- Top Right:** Features a large upward-pointing arrow icon and the instruction "Please drag items here or [select files](#) to upload".
- Bottom Left:** Features a scanner icon and a link to "Add from Scanner" using any TWAIN compliant scanner.
- Bottom Right:** Features a barcode icon and a link 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 Save Item Reset

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

ID: 29115
Document Profile



Playhouse 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 **Playhouse 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

Card # _____
Expiration (MM/YYYY) _____

Check enclosed
Please make your check payable to
Playhouse Theatre

112
RCS Corporation
1259 Six Forks Road
Raleigh, NC 27609

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.

PaperSave Add a New PaperSave Document Sales Quote Documentation Save Item Reset

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

ID: 29115
Document Profile



Playhouse Theatre
123 MAIN STREET
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2007 Annual Fund

Card # _____
Expiration (MM/YYYY) _____

Check enclosed
Please make your check payable to
Playhouse Theatre

112
RCS Corporation
1259 Six Forks Road
Raleigh, NC 27609

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					