

PaperSave Microsoft Dynamics 365 Business Central User Scenario Guide

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PaperSave is a product of WhiteOwl



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1 INTRODUCTION

This document primarily describes the steps to PaperSave setup for Dynamics 365 Business Central. Furthermore, it includes the User Scenarios to test the different PaperSave functionalities viz. Add Document, Show Documents and Show Interrelated Documents for various Record types like Purchase Invoice, Vendor, Sales Invoice, General Journal, Customer, etc.

2 PAPERSAVE SETUP & CONFIGURATION STEPS

NOTE: Please refer to <u>this</u> section to learn about permissions required for the user who will run the assisted setup for PaperSave. The user must have the required rights before running the assisted setup for PaperSave.

The following steps will guide you through the assisted setup for PaperSave. Below is the Dynamics 365 Business Central Home page.

	tems Bank Accounts Chart of Acco	unts	& Extensions > Intelligent Cloud Insights >>	2
HEADLINE	earn more ab Central?		ACTIONS + Sales Quote + Purchase Quote > New > Setup + Sales Order + Purchase Order > Payments > PaperSave + Sales Invoice + Purchase Invoice > Reports E Excel Reports	v
Activities ~ SALES THIS MONTH \$0 > See more	See more	overdue purch. Invoice AMOUNT \$70,566	SALES INVOICES PREDICT OVERDUE >See more	
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- 1. On the Dynamics 365 Business Central Home Page, click on the **Setup & Extensions** dropdown.
- 2. Click on **Assisted Setup**.

 Dynamics 365 Business Central	Sandbox 🗘	م	ŝ	?	SP
CRONUS USA, Inc. Finance Cash Management Sales Purchasing Setup & Extensions Intelligent Cloud Insights					
Assisted Setup Manual Setup Service Connections Extensions Workflows 1	4F				

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

Assisted Setup: All -> Search COP Open in Excel More options	$\nabla \equiv 2$
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NAME	 STATUS
Migrate business data	Not Completed
Set up sales tax	Completed
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
Chicken Setup	Not Started



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

PAPERSAVE SETUP WIZARD		2	\times
\$ <u>\$</u>			
LET'S GO! Step1 - Go ahead and continue.			
	Back Next	Fin	ish



 Specify the relevant PaperSave Cloud URL, API secret, Web API Username, and Web API Password. Then, click on Next.

PAPERSAVE SETUP WIZARD	2	×
Step2 - Please enter following inputs.		
PaperSave Cloud URL https://*****.cloud.papersave.com		
API Secret		
Web API Username		
Web API Password		
Back Next	Fir	nish

Tip :

You can access the Web API password from the Web Service Access section in the USER CARD. Also, you can change the existing Web API password.

Follow the below steps to capture the Web API Password or change the existing Web API Password:

- Search **users** in the Search box on Dynamics 365 Business Central Home.
- Click on **Users** from "Go to Pages and Tasks".
- Click on the desired **User Name** from the list of users in the Dynamics 365 Business Central.
- This shall open the User Card as shown below. You can get the Web Service Access key as shown in the below screen. Moreover, you can change the existing Web API password by clicking on the "Change Web Service Key" option.



	ge Web Service Key 🛛 📅 Eff	ective Permissions	More options				
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Full Nam	1e · · · · · · · · · · · · · · · · · · ·	Himai Patel		Contact Email	hpatel@sales.papersave.com		
							Links +
Web S	ervice Access						(There is nothing to show in this view)
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Web Sen	vice Access Key			Web Service Expiry Date			(There is nothing to show in this view)
Web Sen	vice Access Key			Web Service Expiry Date	Company Name 1	8	(There is nothing to show in this view)
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6. Click **Finish** to complete the PaperSave setup.

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	Fini



Now, you have successfully completed the assisted setup for PaperSave for Dynamics 365 Business Central.

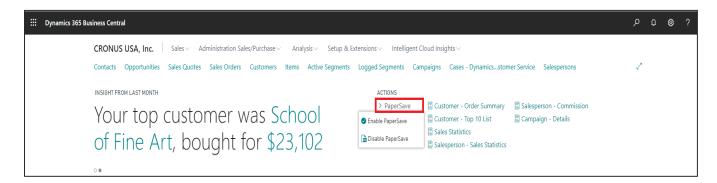
NOTE: The new users added or imported in Dynamics 365 Business Central after running the Assisted setup would require the permissions to access the PaperSave functionalities. Please refer to <u>this</u> section for more details.

NOTE:

PaperSave will reset the Access/Refresh token for all the users if the tenant is changed in PaperSave Cloud URL (by the user who runs the assisted setup). Thus, all the users will be required to perform the login steps again before they can use PaperSave functionalities in Dynamics 365 Business Central. Refer this section for more details on one-time user login steps.

2.1 ENABLE/DISABLE PAPERSAVE

You can enable or disable the PaperSave functionalities using the PaperSave tab from Actions on the Dynamics 365 Business Central Home:



NOTE: Enable/Disable PaperSave option is available on Dynamics 365 Business Central Home for all the user roles.



3 USER PERMISSIONS REQUIRED IN DYNAMICS 365 BUSINESS CENTRAL

3.1 GRANT PERMISSIONS TO THE USER WHO RUNS THE ASSISTED SETUP FOR PAPERSAVE

Follow the below steps to grant required user permissions to the user who will run the assisted setup for PaperSave for Dynamics 365:

- 1. Enter "Users" in the search box of Dynamics 365 Business Central home.
- 2. Click on **Users** from "Go to Pages and Tasks".

TELL	ME WHAT YOU WANT TO DO		$ \ \ \ \ \ \ \ \ \ \ \ \ \$
user	s		
Go t	o Pages and Tasks		Show all (16)
>	Users	Lists	
> /	ADCS Users	Lists	
>	User Groups	Lists	
Doc	umentation		Show all (20)
	Manage users and roles Learn how to manage users and Role Centers in Business Ce	ntral.	
\sim	How to Set Up Approval Users Before you can create workflows that involve approval steps	you must set up the	workflo
	How to Set Up Workflow Users Before you can create workflows, you must set up the users	who take part in work	cflows. T
Get	from Microsoft AppSource		Show all (33)
	p <mark>dock</mark> Interactive SmartLists that gives users their data back		
Loa	ans Allows users to perform a financial management or simulatio	on of different types o	of loans
	ırnal Controls Establish Maker - Checker control in Journals by assigning sp	pecific permissions to	users.
Didn	't find what you were looking for? Try exploring		



- 3. It shall load the list of all the users in the Dynamics 365 Business Central.
- 4. Click on the **User Name** to open the user card.

	🐯 Edit List 📋 Delete 🖍 Edit 🦉	View Process Navigate	Page More of	ptions	Y
User Name 1	Full Name	State	✓ License Type	Authentication Email	
→ HICONIDIONI	Hally Condon	Enabled	Full User	hcondon@sales.papersave.com	Permission Sets ~
HPATEL	Himal Patel	Enabled	Full User	hpatel@sales.papersave.com	
TBOWER	Tammy Bower	Enabled	Full User	tbower@sales.papersave.com	Permission Set † Company †
					D365 BUS FULL E CRONUS USA, Inc.
					D365 BUS PREMI CRONUS USA, Inc.
					LOCAL CRONUS USA, Inc.
					SUPER
					TROUBLESHOOT CRONUS USA, Inc.
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					D365 BUS FULL E CRONUS USA, Inc.
					D365 BUS PREMI CRONUS USA. Inc.
					D365 TROUBLES CRONUS USA, Inc.
					User Setup
					Allow Posting From

5. It shall open the user card with user details. Add "PaperSave" and "Security" in the User Permission Set with relevant details. Also, you need to add "D365 EXTENSION MGT" user group to the user (who will run the assisted setup).

6)	USER CARD I WORK DATE 01-04-3	2020	(⊘ + ≋		~SAVED	C	
	Change Web Service Key	Effective Permissions M	one options				,	
	Code ?		Name		Company Name 7			
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_	D365 EXTENSION MGT		Dynamics 365 Extension m	anagement	CRONUS AU			
	D365 TROUBLESHOOT		D365 Troubleshoot		CRONUS AU			
	EXCEL EXPORT ACTION		0365 Excel Export Action		CRONUS AU			
	User Permission Sets Mary	191		Extension Name Specifies the name of the extension. Learn more			1	
	Permission Set 1 D365 EXTENSION MGT	Description Dynamics 365 Extension M.	Company 1 CRONUS AU	Extension Name	Permason Scope System			
	EXCEL EXPORT ACTION	0365 Excel Export Action	CRONUS AU		System			
	LOCAL	Country/region-specific fu	CRONUS AU		System			
	PAPERSAVE	PaperSave	CRONUS AU	PaperSave for Dynamics 365 Business Central	Tenant			
- 1	SECURITY	Ovnamics 365 User setup			System			



3.2 GRANT PERMISSIONS TO THE USERS ADDED OR IMPORTED IN DYNAMICS 365 BUSINESS CENTRAL AFTER RUNNING THE ASSISTED SETUP

Follow the below steps to grant user permission for such users who are added or imported after running the assisted setup:

- 1. Enter "Users" in the search box of Dynamics 365 Business Central home.
- 2. Click on **Users** from "Go to Pages and Tasks".

TELL ME WHAT YOU WANT TO DO	$ \ \ \ \ \ \ \ \ \ \ \ \ \$
users	
Go to Pages and Tasks	Show all (16)
> Users	Lists
> ADCS Users	Lists
> User Groups	Lists
Documentation	Show all (20)
⑦ Manage users and roles Learn how to manage users and Role Centers in Bus	iness Central.
How to Set Up Approval Users Before you can create workflows that involve approv	val steps, you must set up the workflo
⑦ How to Set Up Workflow Users Before you can create workflows, you must set up the	ne users who take part in workflows. T
Get from Microsoft AppSource	Show all (33)
Popdock Interactive SmartLists that gives users their data bac	k
Loans Allows users to perform a financial management or	simulation of different types of loans
Journal Controls Establish Maker - Checker control in Journals by ass	igning specific permissions to users.
Didn't find what you were looking for? Try exploring	



- 3. It shall load the list of all the users in the Dynamics 365 Business Central.
- 4. Click on the **User Name** to open the user card.

O Search + New	🐺 Edit List 🔋 Delete 🖌 Edit 👔	Kiew Process Navigate	Page More o	ptions	Y
User Name 1	Full Name	State	✓ License Type	Authentication Email	
→ HICONIDON	Holly Condon	Enabled	Full User	hcondon@sales.papersave.com	Permission Sets ~
HPATEL	Himal Patel	Enabled	Full User	hpatel@sales.papersave.com	remission sets v
TEOWER	Tammy Bower	Enabled	Full User	tbower@sales.papersave.com	Permission Set † Company †
					D365 BUS FULL E CRONUS USA, Inc.
					D365 BUS PREMI CRONUS USA, Inc.
					LOCAL CRONUS USA, Inc.
					SUPER
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					D365 BUS PREMI CRONUS USA, Inc.
					D365 TROUBLES CRONUS USA, Inc.
					User Setup
					Allow Posting From

5. It shall open the user card with user details. Add **"PaperSave"** in the User Permission Set with relevant description, Company, and Permission Scope to grant the PaperSave access to the new user.

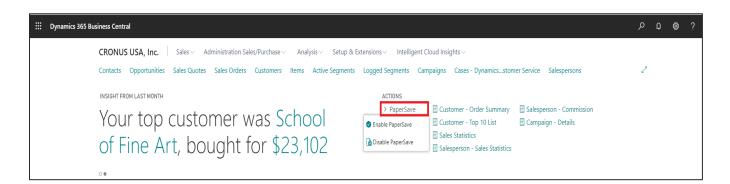
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🐺 Cha	nge Web Service Key 🛛 🖶 Effective Permissio	ns More options				0
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Office	e 365 Authentication >				_	
Office	e 365 Authentication >				_	
Office User Gr						
					82	
		Name		Company Name †		
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User Gr	Code ? D365 BUS FULL ACCESS	Full business access exclu		CRONUS USA, Inc.	53	
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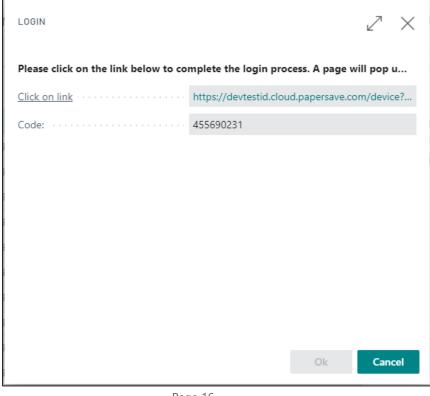
4 USER LOGIN STEPS FOR PAPERSAVE

Following are one-time steps that a user needs to perform when accessing the PaperSave functionalities for the first time from within Dynamics 365 Business Central:

 Enable PaperSave using the PaperSave tab from Actions on the Dynamics 365 Business Central Home if it is currently disabled.



2) Now, PaperSave prompts the user (for the first time) to complete the login process as shown in the below screenshot:





Click on the given link to proceed. It will navigate you to the following screen. Now, Copy the Code from the above dialog and paste it in the User Code text box as shown in the below screen. Click on Submit upon entering the Code.



4) Now, you can access PaperSave functionalities from within Dynamics 365 Business Central.



5 USER SCENARIOS

PaperSave extension offers following functionalities for various user scenarios in Dynamics 365 Business Central:

- 1) **Add Document**: You can add documents by dragging or selecting the files to desired records in various Record types from the record list or the record card.
- 2) **Show Document**: You can view the documents for desired records in various Record types from the record list or the record card.
- 3) **Show Interrelated Documents**: You can view documents associated with the desired record in various Record types from the record list or the record card.

The above PaperSave functionalities can be divided into further User Scenarios based on the various Record Types as follows:

5.1 PURCHASE INVOICE

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Purchasing** dropdown.
- 2. Click on Purchase Invoices.

 Dynamics 365 Business Central		Sandbox Q	مر	0	? SP
CRONUS USA, Inc. Finance ~	Cash Management V Sales V Purchasing V Setup & Extensions V Intelligent Cloud Insights V				
5	Purchase Orders Purchase Invoices Purchase Return Orders Posted Purchase Credit Memos Posted Purchaseeturn Shipments Blanket Purchase Orders Purchase Credit Memos Posted Purchase Invoices Posted Purchase Receipts	-t¤			



PURCHASE INVOICE LIST

Clicking on **Purchase Invoices** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and interrelated documents for all the records in the list.

CRONUS	AU Financ	e∨ Cash Manag	jement∨ Sales	· • • • • • • • • • • • • • • • • • • •	ensions ~	Intelligent Cloud	ר בי גר גע
Purchase Inv	voices: All 🗸		ew 📋 Delete	${\sf Process} \lor {\sf Invoice} \lor {\sf Posting} \lor$	Release \vee	Navigate \smallsetminus .	
No. 1	Buy-from Vendor No.	Due Date Buy-	from Vendor Name	Vendor Invoice No. Location Code	Assigned ID		
108210	20000	5/31/2019 Firs	t Up Consultants	108210		(i) Details	🛙 Attachments (0)
108420	10000	12/31/2019 Fab	rikam, Inc.	101			
108421	10000	12/31/2019 Fab	rikam, Inc.	101		Incoming Docu	iment Files 🗸
108422	10000	12/31/2019 Fab	rikam, Inc.	101		Name	Туре
108423	10000	12/31/2019 Fab	rikam, Inc.	101			
108424	10000	12/31/2019 Fab	rikam, Inc.	101		(There is	nothing to show in this view)
108425	10000	12/31/2019 Fab	rikam, Inc.	101			
108426	10000	12/31/2019 Fab	rikam, Inc.	101			
108427	10000	12/31/2019 Fab	rikam, Inc.	101			
108428	10000	12/31/2019 Fab	rikam, Inc.	101		Vendor Details	\sim
108429	10000	12/31/2019 Fab	rikam, Inc.	101		Vendor No.	20000
108430	10000	12/31/2019 Fab	rikam, Inc.	101		Name	First Up Consultants

- 1. Click on the "Process" Tab from the Purchase Invoices list.
- 2. You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".

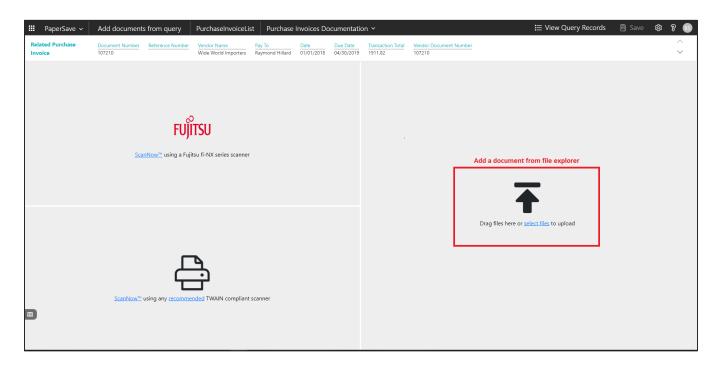
CRONUS AU	Finance	e∨ Cash M	lanagement ~ Sal	es V Purchasing V Setup & Extensions V	Intelligent Cloud Insights $\!$	=
Purchase Invoices:	All 🗸	,	+ New 📋 Delete	Process \checkmark Invoice \checkmark Posting \checkmark Release \checkmark	Navigate \lor ···· \checkmark	'≣ 0 ∏ .
No. 1	Buy-from Vendor No.	Due Date	Buy-from Vendor Name	Add Document Assigned e ID		
108210 :	20000	5/31/2019	First Up Consultants	Show Documents	() Details () Attachments	; (0)
108420	10000	12/31/2019	Fabrikam, Inc.	Show Interrelated Documents		
108421	10000	12/31/2019	Fabrikam, Inc.	101	Incoming Document Files \vee	
108422	10000	12/31/2019	Fabrikam, Inc.	101	Name	Туре
108423	10000	12/31/2019	Fabrikam, Inc.	101		
108424	10000	12/31/2019	Fabrikam, Inc.	101	(There is nothing to show in	this view)
108425	10000	12/31/2019	Fabrikam, Inc.	101		
108426	10000	12/31/2019	Fabrikam, Inc.	101		
108427	10000	12/31/2019	Fabrikam, Inc.	101		
108428	10000	12/31/2019	Fabrikam, Inc.	101	Vendor Details \smallsetminus	
	10000	12/31/2019	Fabrikam, Inc.	101	Vendor No.	20000



ADD DOCUMENTS FROM PURCHASE INVOICE LIST

Follow the below steps to test the PaperSave functionality "**Add Document**" from the Purchase Invoice list:

- 1. On the Process Tab of Purchase Invoice list, click on "Add Document".
- If you are not already logged in, then it will open the PaperSave login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".



- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will open the document preview screen. You can **select** the relevant "document type" in the checkbox, **enter** the "date received" and **add** a comment for the document.
- 6. Click on **Save** to add the document to all the records in the Purchase Invoice list.



🗰 PaperSave 🗸 🛛 Add documen	s from query PurchaseInvoiceList Purchas	e Invoices Documentation ×	田 🗄 View Query Records 📑 Save 🕸 💡 📧
Related Purchase Document Number Invoice 107210	Reference Number Vendor Name Pay To Wide World Importers Raymond Hillard	Date Due Date Transaction Total Vendor Document Number 01/01/2018 04/30/2019 1911.82 107210	 △ ID: 1379015 ✓ Batch: INVOICE_TMP1582482674955491422.pdf
	Invoice Address GPS Hoopflatty, LLC 2010 RVZPREDGE PK/VY A JSA Bitway Address Brager King 1318 Brager King 1318 Comment: Lines Fart & Dock 101 Mit Mark 101 USA Comment: Lines Fart & Data 2017 To Rubber Feet (Set of 4) 26 et et 2017 To Ro, Rubber Feet (Set of 4) 26 et et 2017 Stapping Sales Tax Total Including Tax Invoice ms: \$94945850 197-96-b016	Image: Non-optimized State Non-optimized State Image: Non-optimized State Non-optimized State PO #: 13181 Control form: 13181 Control form: State State State State State State State State State State State	Document Profile Doc Type : Invoice Purchase Order Receiving Ticket Contract Date Received : Enter Value Comments : Enter Value Lookup for 365 : Enter Value
	Customer no: 11062-018811 Sold To: OPS Hospitality, LLC. 2100 RIVEREDGE PKWY	Franke Foodervice Supply, Inc 807 DNOVATION WAY CHICAGO, IL 60682-0080	

 Upon successful submission, it will show the toast notification in the upper right corner "1 Document(s) successfully submitted."

SHOW DOCUMENTS FROM PURCHASE INVOICE LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Purchase Invoice list:

- 1. On the Process Tab of Purchase Invoice list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will show the **available documents** for all the records in Purchase Invoice list.

	Pape	rSave 🗸	Documents related to query	Purcha	aselnvoiceList			
₹ FII	LTER	₿ REFRESH	🕅 SHOW GROUPING 🔲 CHOOSE	FIELDS 🖹	EXPORT TO EXCEL			
		ID	File Name	Created	Created By	Parent Id	Record Type	Document Type
		1368470	choptank electric.tiff	09/13/2019 05:49:27 AM	PS\bshahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
		1368471	choptank electric.tiff	09/13/2019 05:49:27 AM	PS\bshahhvtest9stg	107211	Purchase Invoice	Purchase Invoices Documentation
		1368472	choptank electric.tiff	09/13/2019 05:49:27 AM	PS\bshahhvtest9stg	107210	Purchase Invoice	Purchase Invoices Documentation
), Terr	1369030	3PaperSave1.pdf	09/13/2019 10:12:42 AM	PS\bshahhvtest9stg	107210	Purchase Invoice	Interrelated doc Purchase inovice
	<u>ل</u> م عد	1379001	3PaperSave1.pdf	09/14/2019 03:09:53 AM	PS\bshahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
	2	1379005	King.jpg	09/14/2019 03:18:08 AM	PS\bshahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
). 1996	1379016	INVOICE_TMP1582482674955491422.pdf	09/14/2019 04:04:55 AM	PS\bshahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
	<u>ل</u> م 1997	1379017	INVOICE_TMP1582482674955491422.pdf	09/14/2019 04:04:55 AM	PS\bshahhvtest9stg	107211	Purchase Invoice	Purchase Invoices Documentation
	لم Ref	1379018	INVOICE_TMP1582482674955491422.pdf	09/14/2019 04:04:55 AM	PS\bshahhvtest9stg	107210	Purchase Invoice	Purchase Invoices Documentation



SHOW INTERRELATED DOCUMENTS FROM PURCHASE INVOICE LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Purchase Invoice list:

1. Select the desired record from the list. On the Process Tab of Purchase Invoice list, click on "**Show**

Interrelated Documents".

- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will show the available Interrelated documents for the selected record in Purchase Invoice list.

	Раре	rSave 🗸	Documents	that are interrela	ated to this root	Purchase Inv	oice			Q Search within document list	ĝ	ନ୍ତ 📀
	ot Purch voice	Docu 1072			Vendor Name First Up Consultants			Transaction Total 265.49	Vendor Document Number VEN: 111			
ø	REFRESH	√ FILTER	SHOW GROU	JPING 🔲 CHOOS	e fields 🔀 expor	T TO EXCEL						
-		Created	Created By	Doc Type	Date Received	Comments	Lookup for 365					
		12-09-2019 03:48:34 AM	Bhavya Shah	Invoice								*
		12-09-2019 07:36:13 AM	Vivek Soni	Correspondence								
		12-09-2019 07:37:56 AM	Vivek Soni	Invoice								
												1

PURCHASE INVOICE CARD

Clicking on the **Purchase Invoice card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of desired record in the Purchase Invoices list.
- 2. This will launch the **Purchase Invoice** record.



PUR	RCHASE INVOICE WORK [DATE: 2/12/201	9		Ø) +	Û				√ SAVED , , [⊭]
1(07213 · Fir	st Up	Consultants								
Invo	oice Posting Reque	st Approval	Release Navigate Mo	re options							0
Ge	eneral								Show more	Vendor Statistics	
	ndor Name		Jp Consultants		Date		8/31/2018 /EN: 111		<u> </u>	Vendor No. Balance (\$)	20000 6,134.60
	sting Date			ven	UCH INVOICE INC.		-Liv. 111			Outstanding Orders (\$) Amt. Rcd. Not Invd. (\$) Outstanding Invoices (\$) Total (\$)	16,440.33 0.00 2,144.80 24,719,73
Line	n es Manage Mo	ne options	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX AREA CODE	TAX GROUF CODE	Overdue Amounts (\$) as of 0 Invoiced Prepayment Amoun Payments (\$) Last Payment Date	6,284.60 0.00 84,634.25 2/12/2019
	Item :	1960-S	ROME Guest Chair, green		2	PCS	125.23	ATLANTA, GA	FURNITURE		2/12/2019
										5	
Inv.	stotal Excl. Tax (USD) Discount Amount (USD) oice Discount %			0.00 Tota	al Excl. Tax (USD) · · · · · · · · · · · · · · · · · · ·				250.46 15.03 265.49	4 3 2 1 1 6 6 10 ¹⁰ 01 ¹⁰ 01 ¹⁰ 01 ¹⁰	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1

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

Dynamics 365 Bu	siness Central										Sandbox Q	م	٢	? SP
÷	PURCHASE INVOICE WORK DAT	E: 2/12/2019			Ø) +	1				√ SAVED , ×			
	107213 · First	t Up C	Consultants											
	Invoice Posting Request A	Approval Re	lease Navigate More	options							0			
	Statistics 🎝 Dimension:	s 🎦 Add D	ocument 🛛 🛅 Show Documen	ts 🗋 Show Inte	errelated Docume	ents 👎 Con	nments				-(3			
	Vendor Name													
					or Invoice No. · ·		VEN: 111		Outstanding Orders (\$)	16,440.33				
	Posting Date	8/22/2018								Amt. Rcd. Not Invd. (\$) Outstanding Invoices (\$) Total (\$)	0.00 2.144.80 24.719.73			
	Lines Manage More	options							Ež	Overdue Amounts (\$) as of 0	6,284.60			
	TYPE N	0. 1	DESCRIPTION/COMMENT	LOCATION	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX AREA CODE	TAX GROUF CODE	Invoiced Prepayment Amoun Payments (\$) Last Payment Date	0.00 84,634.25 2/12/2019		6	
	Item : 19	60-S F	ROME Guest Chair, green		2	PCS	125.23	ATLANTA, GA	FURNITURE		2/12/2019			
										Forecast >				

ADD DOCUMENTS FROM PURCHASE INVOICE CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Purchase Invoice card:

- 1. On the Invoice tab of Purchase Invoice Card, click on "Add Document".
- 2. This will open PaperSave Cloud login prompt (on the first login). Enter login credentials.



3. On login success, it will **open** the "Add Document" page.

iii PaperSave ~	Add a New	PaperSave Docur	nent Purchase	e Invoices Do	cumentatio	n ~ +	New <	\rightarrow		¢\$? 🚳
Related Purchase Invoice	Document Number 107213	Reference Number	Vendor Name First Up Consultants	Pay To Evan McIntosh	Date 22-08-2018	Due Date 31-08-2018	Transaction Total 265.49	Vendor Document Number VEN: 111		
			o JITSU Tujitsu fi-NX series sca	anner					Add a document from file explorer	
Ħ	<u>ScanNo</u>	w ^m using any recom	mended TWAIN comp	oliant scanner				<u>Click to</u> (Generate a barcode to scan this document in a batch at a later time	

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will open the document preview screen. You can **select** the relevant "document type" in the checkbox, **enter** the "date received" and **add** a comment for the document.
- 6. Click "Save" to add the document to the selected record.



III PaperSave ~	Add a New PaperSave Docur	nent Purchase Invoices De	ocumentation ~ + N	ew < > 🖨		🛱 Save 🕸 🎖 🍛
Related Purchase Invoice	Document Number Reference Number 107213	Vendor Name Pay To First Up Consultants Evan McIntosh		Transaction Total 265.49 Vendor Docur VEN: 111	nent Number	ID: 1358430 Batch:
≥ A Ø O - O □ ↔ 0			yurvetolecan 2/POC			Document Profile Doc Type : Imvice Purchase Order Receiving Ticket Contract Date Received : Enter Value
		Contraining Specific Contraini	100 mm \$4520.0 100 mm 00.00 mm 100 100 mm 00.00 mm 100 100 mm 100 100 100 mm 1 100 100 mm 100 100			Comments : Enter Value
III	generic.png				≓ % D D B 0O+	

 Upon successful submission, it will show the toast notification in the upper right corner "1 Document(s) successfully submitted."

SHOW DOCUMENTS FROM PURCHASE INVOICE CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Purchase Invoice card:

- 1. On the Invoice tab of Purchase Invoice Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

III Pap	erSave 🗸	Document	Purchase Inv	oices Doc	umentatio	on Y					Q Search within document list	8 🔇
Related Po Invoice	urchase	Document Number 107213	Reference Number			Pay To Evan McIntosh	Date 22-08-2018	Due Date 31-08-2018	Transaction Total 265.49	Vendor Document Number VEN: 111		
+ NEW	√ FILTER	💭 REFRESH 🔲	CHOOSE FIELDS	SHOW GRO	UPING 🔀	EXPORT TO EXCE	L 😂 INTER	RELATED				
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	12-09-20 03:48:34	19 M Bhavya Shah II	nvoice									^
	12-09-20 07:36:13 /	19 Vivek Soni C	Correspondence									
	12-09-20 07:37:56	19 Vivek Soni II	nvoice									
<u>لم</u>	12-09-20 07:40:27	19 Vivek Soni C	Contract									



SHOW INTERRELATED DOCUMENTS FROM PURCHASE INVOICE CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Purchase Invoice card:

- 1. On the Invoice tab of Purchase Invoice Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave Cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

	Раре	rSave 🗸	Documents	that are interrel	ated to this root I	Purchase Inv	oice				Q Search within document list	©	ନ୍ତ	3
	ot Purch oice	ase Docu 1072		Reference Number	Vendor Name First Up Consultants		Date 22-08-2018	Due Date 31-08-2018	Transaction Total 265.49	Vendor Document Number VEN: 111				
S	REFRESH	V FILTER	SHOW GRO	UPING 🔲 CHOOS	e fields 🕅 export	T TO EXCEL								
-		Created	Created By	Doc Type	Date Received	Comments	Lookup for 365							
		12-09-2019 03:48:34 AM	Bhavya Shah	Invoice										*
		12-09-2019 07:36:13 AM	Vivek Soni	Correspondence										
		12-09-2019 07:37:56 AM	Vivek Soni	Invoice										



5.2 POSTED PURCHASE INVOICE

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Purchasing** dropdown.
- 2. Click on **Posted Purchase Invoices**.

CRONUS USA, Inc. Finance v Cash Management v Sales v1 Purchasing v Setup & Extensions v Intelligent Cloud Insights v Vendors Item Charges Purchase Orders Purchase Invoices Purchase Return Orders Posted Purchase Credit Memos Posted Purchase Credits Posted Purchase Credits Posted Purchase Receipts Posted Purchase Receipts Purchase Receipts Posted Purchase Credit Memos Posted Purchase Receipts Purchase Receipts Posted Purchase Receipts Purchase Receipt	Dynamics 365 Business Central	Sandbox (ב	Q	0	?	SP
	CRONUS USA, Inc. Finance Cash Management Sales Purchasing Setup & Extensions Intelligent Cloud Insights Setup						
		ıts	-12				

POSTED PURCHASE INVOICE LIST

Clicking on **Posted Purchase Invoices** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

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	CRONUS AU	Finan	ce∨ Cash M	1anagement∨ Sales∨ I	Purchasing \smallsetminus	Setup & Extensions	∨ Int	elligent Clo	ud Insights	~ ≡				
	Posted Purchase I	nvoices: All	~ ,0 s	earch 📋 Delete 🛛 Process 🗸	$Correct \lor$	Invoice V Print/Send	d \lor N	avigate \smallsetminus		\ ≡	() [2		
	No.	Vendor Invoice No.	Vendor No.	Vendor	Currency Code	Am Amount	nou							
	<u>108681</u> :	1452MH	V00110	Fujitsu & Company		0.00	(i Details	🛙 Attach	nments (0)				
	108643	108211	30000	Graphic Design Institute		8,044.00		n coming D	ocument Fi	les				
	108646	D-304	40000	Wide World Importers		20,672.00		ncoming D	ocument Fi	iles V				
	108645	23047	20000	First Up Consultants		3,976.00		Name		Ту	pe			
	108642	108209	10000	Fabrikam, Inc.		1,863.00								
	108419	108208	30000	Graphic Design Institute		6,400.00		(The	re is nothing to	show in this view)			
	108418	108207	30000	Graphic Design Institute		2,240.00								
	108417	108206	40000	Wide World Importers		1,988.00								
	108416	108205	40000	Wide World Importers		24,744.00								
	108415	108204	30000	Graphic Design Institute		1,296.00								
	108414	108203	20000	First Up Consultants		2,556.00								
	108413	108202	50000	Nod Publishers		26,586.00								

- 1. Click on "Process" Tab from the Posted Purchase Invoices list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



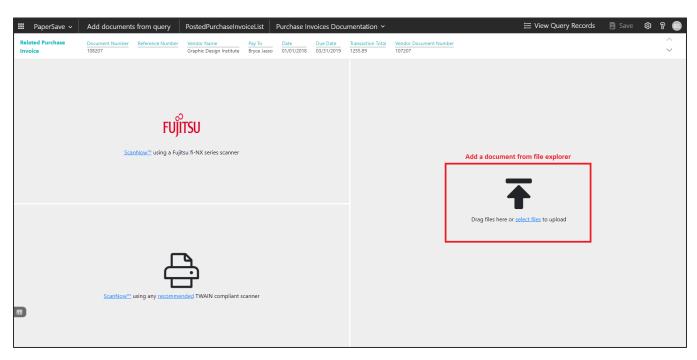
namics 365 Bus	siness Central				۵ ۵ ۵
CRONUS /	AU Finan	ce∨ Cash	Management – Sales – Purcha	sing ~ Setup & Extensions	\sim Intelligent Cloud Insights \sim \equiv
Posted Purcha	ase Invoices: All	م v	Search 📋 Delete 🛛 Process 🗸 🛛 Cor	rect	d∨ Navigate∨ ···
No.	Vendor Invoice No.	Vendor No.	Vendor	Amount	ou
108681	: 1452MH	V00110	Fujitsu & Company	0.00	① Details ① Attachments (0)
108643	108211	30000	Graphic Design Inst	ted Documents 8,044.00	
108646	D-304	40000	Wide World Import	ent 20,672.00	Incoming Document Files \vee
108645	23047	20000	First Up Consultants	3,976.00	Name Type
108642	108209	10000	Fabrikam, Inc.	1,863.00	
108419	108208	30000	Graphic Design Institute	6,400.00	(There is nothing to show in this view)
108418	108207	30000	Graphic Design Institute	2,240.00	
108417	108206	40000	Wide World Importers	1,988.00	
108416	108205	40000	Wide World Importers	24,744.00	
108415	108204	30000	Graphic Design Institute	1,296.00	
108414	108203	20000	First Up Consultants	2,556.00	
108413	108202	50000	Nod Publishers	26,586.00	

ADD DOCUMENTS FROM POSTED PURCHASE INVOICE LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Posted Purchase Invoice list:

- 1. On the Process Tab of Posted Purchase invoice list, click on "Add Document".
- If you are not already logged in, then it will open the PaperSave login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".





- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will open the document preview screen. You can **select** the relevant "document type" in the checkbox, **enter** the "date received" and **add** a comment for the document.
- 6. Click on **Save** to add the document to all the records in the Posted Purchase Invoice list.

🗰 PaperSave 🗸	Add documents from	m query Pos	stedPurchaseInvoi	ceList P	urchase Inv	voices Docu	mentation \sim			⊞	≣ View 0	Query Records	🖹 Save	🅸 ? 📧
Related Purchase Invoice	Document Number Refe			Pay To Bryce Jasso	Date 01/01/2018	Due Date 03/31/2019	Transaction Total 1255.89	Vendor D 107207	Ocument Number		^ ~	ID: 1379024 Batch: Invoice 0000	080307.PDF	
₽ ₽					100 C							Document Profile		
A											î	Doc Type :		
□ Ø		AFP					INVOICE				_	Receiving Tic	ket	*
0		REST INVERSE FOULPMENT SERV		Atlanta Drive 30084	I	DATE 2/17/2016	INVOICE #	CUST #			_	Contract		
-		Becc 1101	Phone: 770-44 Fax: 770-446	46-1282		2/17/2016	DISPATCH	0005683			_	Corresponde	nce	
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Ŷ		Atlanta GA 30328	8									Enter Value		***
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C.			45ECSD 0105GA010	Type 03 Fryer		Warran	ty Location Agr	ement						
		2	Cooking - 2/4/2016 9:44:18 AM - JGAYL vill not open to drain the grea		ill not pump the gr	ease out. And a fr	ver that							l.
		N	Notes added by tech Chris Br Jpon arrival, I made contact to no legible information on the	rown on 2/4/2016 with Ray. Inspect	ed portable filter p	oump and found th	at it has					Lookup for 365 :		
		ri I	equested a quote on replacir also inspected the last fryer	ng the pump and and found the sp	also a quote for re pring in the locking	eplacing the entire mechanism is go	unit. ing bad.					Enter Value		
		1.00 T	We need to order a new hand will have to replace the drain Frip Charge Discounted Rate	valve.	a mechanism if it is	s sold separately. I	55	00 55.0	00					
		1.25 D	Discounted Labor Rate Notes added by tech Chris Br Returned to customer's site a	rown on 2/16/201		the last forer lests	85	00 106.2	25					
		d	drain handle and checked. Ur was Cadesia.				r on site							
		1.00 FRY810-15 D	Discounted Labor Rate Drain Valve Freight and Delivery				85 102 15	32 102.8	32					
			nvoice Prepared by Annette											
											•			



 Upon successful submission, it will show the toast notification in the upper right corner "1 Document(s) successfully submitted."

SHOW DOCUMENTS FROM POSTED PURCHASE INVOICE LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Posted Purchase Invoice list:

- 1. On the Process Tab of Posted Purchase invoice list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in the Posted Purchase Invoice list.

III P	apers	Save 🗸	Document	ts related t	o query Pos	tedPurcha	selnvoiceList						E View Query F	Records 🔞	8 (
√ FILTE	ER 🖌	C REFRESH	SHOW GR		CHOOSE FIELDS	EXPORT TO	EXCEL								
		ID	File Name	Create	Created By	Parent Id	Record Type	Document Type	Doc Type	Date Received	Comments	Lookup for 365			
	<u>لم</u>	1358196	Tax Invoice.pdf	09/12/201 06:03:57 AM		108151	Purchase Invoice	Purchase Invoices Documentation							
	<u>لم</u>	1358197	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108152	Purchase Invoice	Purchase Invoices Documentation							
	يل Test	1358198	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108154	Purchase Invoice	Purchase Invoices Documentation							
	<u>لم</u>	1358199	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108153	Purchase Invoice	Purchase Invoices Documentation							
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	J.	1358201	Tax Invoice.pdf	09/12/201 06:03:57 AM		108001	Purchase Invoice	Purchase Invoices Documentation							
	A.	1358203	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108002	Purchase Invoice	Purchase Invoices Documentation							
	A.	1358204	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108005	Purchase Invoice	Purchase Invoices Documentation							
	A.	1358205	Tax Invoice.pdf	09/12/201 06:03:57 AM		108004	Purchase Invoice	Purchase Invoices Documentation							
	A.	1358206	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108003	Purchase Invoice	Purchase Invoices Documentation							
	A.	1358207	Tax Invoice.pdf	09/12/201 06:03:57 AM		108006	Purchase Invoice	Purchase Invoices Documentation							
	<u>لم</u>	1358208	Tax Invoice.pdf	09/12/201 06:03:57 AM		108007	Purchase Invoice	Purchase Invoices Documentation							
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	يل Test	1358210	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108012	Purchase Invoice	Purchase Invoices Documentation							
	<u>لم</u>	1358211	Tax Invoice.pdf	09/12/201 06:03:57 AM	PS\bshahhvtest9stg	108008	Purchase Invoice	Purchase Invoices Documentation							
	<u>}</u>	1358212 2 3 4	Tax Invoice.pdf 5 6 7 >	09/12/201		108011	Purchase Invoice	Purchase Invoices Documentation						1 of 7 pa	ages (624

SHOW INTERRELATED DOCUMENTS FROM POSTED PURCHASE INVOICE LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Posted Purchase Invoice list:

1. Select the desired record from the list. On the Process Tab of Posted Purchase invoice list, click on

"Show Interrelated Documents".



- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available Interrelated documents for the selected record in the Posted Purchase Invoice list.

	Раре	rSave ~	Document	ts that are inte	errelated to th	nis root Pur	chase Invoice	;				Q Search within document list	¢	ନ୍ଧ 🛐
Roo	t Purch bice	ase Doc	iment Number	Reference Num			Pay To Toby Rhode	Date 3-04-2018	Due Date 30-04-2018	Transaction Total 11584.10	Vendor Document Number D-304			
S P	REFRESH	√ FILTER	D SHOW GR	ROUPING 🔲 CH	HOOSE FIELDS	EXPORT TO	EXCEL							
		Created	Created By	Doc Type	Date Received	Comments	Lookup for 365							
		12-09-2019 07:07:30 AM	Bhavya Shah	Invoice										^
		12-09-2019 07:56:14 AM	Bhavya Shah	Purchase Order										
), Post	12-09-2019 08:12:15 AM	Vivek Soni	Contract	10-04-2019									
	Д. Feet	12-09-2019 08:18:07 AM	Vivek Soni	Invoice										
), FBE	12-09-2019 08:18:07 AM	Vivek Soni	Purchase Order										

POSTED PURCHASE INVOICE CARD

Clicking on the **Posted Purchase Invoice card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of the desired record in the Posted Purchase Invoices list.
- 2. This will launch the **Posted Purchase Invoice** record.

Dynamics 365 Business Central Sa	ndbox		<u>ب</u> م	8	?	SP.
C POSTED PURCHASE INVOICE WORK DATE: 2/12/2019 C + 1	VED	~ ⁴				
108231 · Graphic Design Institute						
Process Correct Invoice Print/Send Navigate Actions Navigate Fewer options						
General	Show more					
Vendor Graphic Design Institute Due Date 2/28/2019						
Contact						
Posting Date 2/12/2019						
Lines Manage More options	62					
UNIT OF DIRECTUNIT LINE MEASURE COSTEXCL UNITPRICE TAX AREA TAX GROUP LINE AMOUNT TYPE NO. DESCRIPTION QUANTITY CODE TAX (\$) CODE CODE DISCOUNT % EXCL.TAX JI	DB N0.			6		
G/L Account 10 HOUR 121.00 0.00 MIAMI, FL NONTAXABLE 1.210.00				-		
G/LAccount 10300 Petty Cash 14 HOUR 150.00 0.00 N.ATL. GA NONTAXABLE 2.100.00						
Comment 0.00						
Invoice Discount Amount Excl. Tax · · · · · · 0.00 Total Tax (USD) · · · · · · ·	0.00	I.				
Total Excl. Tax (USD)	3,310.00					



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

 POSTED PURCHASE INVOICE 	WORK DATE: 2/12/2019	🥟 + 🛍			√ SAVED , ×
108231 · Gra	aphic Design Institu	ite			
Process Correct Invoice	, .	lavigate Fewer options			
	how Documents 🗋 Show Interrelated Docume		🖗 Comments 🛛 🕅 Approvals		4
Vendor	Graphic Design Institute	Due Date · · ·	2/28	/2019	_
Contact · · · · · · · · · · · · · · · · · · ·	Bryce Jasso	Vendor Invoi	e No	02	_
Posting Date	2/12/2019				
2					
Lines Manage N	Nore options				E
TYPE	NO. DESCRIPTION	UNIT OF DIRECT MEASURE COST E QUANTITY CODE	CL. UNIT PRICE TAX AREA		LINE MOUNT CL. TAX JOB NO.
G/L Account	: 10200 Saving account	10 HOUR 1	1.00 0.00 MIAMI, FL	NONTAXABLE 1	1.210.00
G/L Account	10300 Petty Cash	14 HOUR 1	0.00 0.00 N.ATL., GA	NONTAXABLE 2	2,100.00
Comment			0.00		

ADD DOCUMENTS FROM POSTED PURCHASE INVOICE CARD

Follow the below steps to test the PaperSave functionality "Add document" from Posted Purchase Invoice card:

- 1. On the Invoice tab of Posted Purchase Invoice Card, click on "Add Document".
- 2. This will open PaperSave Cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.



III PaperSave 🗸	Add a New	PaperSave Docur	nent Purchase	Invoices Do	cumentatio	n ~ +	New <	> 🗟 🖂 🔻		¢\$ 8 🔇
Related Purchase Invoice	Document Number	Reference Number	Vendor Name Wide World Importers	Pay To Toby Rhode	Date 13-04-2018	Due Date 30-04-2018	Transaction Tota 11584.10	Vendor Document Number D-304		
			© IJITSU ≂ujitsu fi-NX series scan	ner					Add a document from file explorer	
	<u>ScanNo</u>	w [™] using any <u>recom</u>	mended TWAIN compli	ant scanner				<u>Click to</u>	Generate a barcode to scan this document in a batch at a l	later time

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will open the document preview screen. You can **select** the relevant "document type" in the checkbox, **enter** the "date received" and **add** a comment for the document.
- 6. Click on "Save" to add the document to the selected record.

PaperSave v	Add a New Pa		dor Name	Pay To	Date	Due Date	New <		ocument Num	<u>↓</u>			D: 1358441	ନ୍ତ 🔮
Invoice		Wide	e World Importers	Toby Rhode	13-04-2018	30-04-2018	11584.10	D-304					Batch:	
3													Document Profile	
	10 492434	First Aid Bu	rn Cream (10 pa	ick)			1	1	EA	2.09	2.09	^	Doc Type :	
8	20 618562	Ointment, F	irst Aid Antibiotic	(10) Pack	(S		1	1	EA	2.09	2.09		Invoice Purchase Order	ĺ
	30 492433	Gel, Burn R	elief 3.5gm (6 pe	er pack)			2	2	EA	2.09	4.18		Receiving Ticket	
	40 618561	Pad, Alcoho	ol Cleansing (20				1	1	EA	2.09	2.09		Contract	
	50 492420	Bandage, B	lue 1" x 3" (25 p	er pack)			2	2	EA	2.09	4.18		Date Received : Enter Value	Ē
0	60 618563	Eye Wash (1) 1oz. Bottle				1	1	EA	2.09	2.09		Comments :	
R	70 492425	Pad, Gauze	e 3" x 3"				1	1	EA	2.09	2.09		Enter Value	
∃	80 618558	Pad, Gauze	e 2" x 2" (5) Pa	cks of 2			1	1	EA	2.09	2.09			
	Misc												Lookup for 365 : Enter Value	
	10 SHIPPING	Shipping					1	0	EA	11.53	11.53			
											32.43			
	Sales Tax										1.95			
	Total Including T	ax									34.38			
2 /2 INVOICE_TMP	3348591930573								11 # X	: A A A	0 -	-0-+		



 Upon successful submission, it will show the toast notification in the upper right corner "1 Document(s) successfully submitted."

SHOW DOCUMENTS FROM POSTED PURCHASE INVOICE CARD

Follow the below steps to test the PaperSave functionality "Show documents" from Posted Purchase Invoice card:

- 1. On the Invoice tab of Posted Purchase Invoice Card, click on "Show Documents".
- 2. This will open PaperSave Cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

	Раре	rSave 🗸	Document	Purchase	Invoices Do	cumentatio	on Y					Q Search within document list	ŵ	ନ୍ତ	3
Rela		rchase	Document Numb	er Reference Nur			Pay To Toby Rhode			Transaction Total 11584.10	Vendor Document Number D-304				
+ N	EW 7	7 FILTER	C REFRESH	CHOOSE FIELDS	SHOW GR	OUPING 🔀	EXPORT TO EXCE	L 📮 INTE	RRELATED						
		Creat	ed Created By	Doc Type	Date Received	Comments	Lookup for 365								
		12-09-20 07:07:30 A	19 M Bhavya Shah	Invoice											*
		12-09-20 07:56:14 A	19 Bhavya Shah M	Purchase Order											
	<u>ل</u> م 1997	12-09-20 08:12:15 A	19 M Vivek Soni	Contract	10-04-2019										

SHOW INTERRELATED DOCUMENTS FROM POSTED PURCHASE INVOICE CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Posted Purchase Invoice card:

- 1. On the Invoice tab of Posted Purchase Invoice Card, click on "Show Interrelated Documents".
- 2. This will open the PaperSave Cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

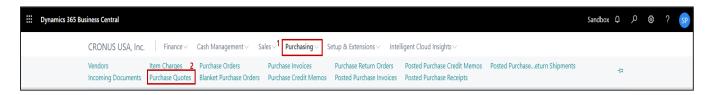
-	Paper	Save 🗸	Documen	ts that are inte	errelated to th	nis root Pur	chase Invoice					Q Search within document list	ଡ଼ ବୃ	3
Roo Invo	t Purcha bice	se <u>Docu</u>	iment Number	Reference Num			Pay To Toby Rhode Da	-04-2018	Due Date 30-04-2018	Transaction Total 11584.10	Vendor Document Number D-304			
8 P	EFRESH	√ FILTER	SHOW G	ROUPING 🔲 CI	HOOSE FIELDS	EXPORT TO	EXCEL							
		Created	Created By	Doc Type	Date Received	Comments	Lookup for 365							
	1111 	12-09-2019 07:07:30 AM	Bhavya Shah	Invoice										*
	-	12-09-2019 07:56:14 AM	Bhavya Shah	Purchase Order										
	ж.	12-09-2019 08:12:15 AM	Vivek Soni	Contract	10-04-2019									
	ж. тап	12-09-2019 08:18:07 AM	Vivek Soni	Invoice										
), Fait	12-09-2019 08:18:07 AM	Vivek Soni	Purchase Order										



5.3 PURCHASE QUOTE

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Purchasing** dropdown.
- 2. Click on Purchase Quotes.



PURCHASE QUOTE LIST

Clicking on **Purchase Quotes** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

Dynamics 365 B	usiness Central				? © م ج
CRONUS	AU Financ	ce \checkmark Cash Management \checkmark	Sales V Purchasing V Setup & E	xtensions ~ Intelligent Clou	ıd Insights∨ 📃 🗮
Purchase Qu	iotes: All 🗸	🔎 Search 🕂 New 📋 De	elete Process ~ Request Approval ~	Print/Send ∨ Quote ∨ Pag	ge 🗸 \cdots 🝸 🔳 🛈 🎵 🖍
No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorization Ass No. Location Code ID	igned User	
<u>1001</u>	10000	Fabrikam, Inc.		i) Details	Attachments (0)
1003	V00070	Citrix		Vendor Deta	ils∨
1005	V00070	Citrix		V 1 N	10000
1006	V00110	Fujitsu & Company		Vendor No. Name	10000 Fabrikam, Inc.
1007	V00100	mbaf		Phone No.	raonkan, me.
				Email	krystal.york@contoso.com
				Fax No.	
				Contact	Krystal York

- 1. Click on "Process" Tab from the Purchase Quote list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



Purchase Quo	otes: All 🗸	🔎 Search 🕂 New 📋 Delete	e Process \vee Request Approval \vee	Print/Send \lor	Quote \lor Page \lor	··· \7 🗏 🛈 🛛 🖌
No. 1	Buy-from Vendor No.	Buy-from Vendor Name	*) Add Document	signed User		
1001	: 10000	Fabrikam, Inc.	Show Interrelated Documents		🛈 Details 🛛 🛛 At	tachments (0)
1003	V00070	Citrix	🔠 Make Order		Vendor Details $\!$	
1005	V00070	Citrix			Vendor No.	10000
1006	V00110	Fujitsu & Company			Name	Fabrikam, Inc.
1007	V00100	mbaf			Phone No.	
					Email	krystal.york@contoso.com
					Fax No.	
					Contact	Krystal York

ADD DOCUMENTS FROM PURCHASE QUOTE LIST

Follow the below steps to test the PaperSave functionality "Add Document" from the Purchase Invoice list

- 1. On the Process Tab of Purchase Quote list, click on "Add Document".
- 2. If you are not already logged in, then it will open the PaperSave cloud login prompt (on the first login). **Enter** your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".





- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will open the document preview screen. You can **add** a comment for the document.
- 6. Click **Save** to add the document to all the records in the Purchase Quote list.

III PaperSave - Add documents t	rom query PurchaseQuoteList Purchase Quote Documentation ~	田 ≔ View Query Records 🔋 Save 🕸 위 🔞
	Occument Date Order Date Total Contact 04/08/2019 04/08/2019 0.00 Evan McIntosh	 △ ID: 1379234 ✓ Batch: INVOICE_TMP4535577695376957713.pdf
8		Document Profile
	Franke Foddervice Supply, Inc. Bit MARTON J PAVY Bit MARTON J PAVY Bit Pavy Bit Marton J PAVY Bit Pavy Bit Marton J PAVY Bit Pavy Bit Pavy Bi	Comments : Enter Value
	Altr: CAROL Comment: Page # 1/2	
	Line # Part # Description Total Qy Day UOM Unit price Totals Oldered Shipped USD USD	
	Parts 10 492421 Bandage, Blue Knuckle (20 per pack) 3 3 EA 2.09 6.27	
	20 331616 Spoon, 8° Solid Salad 0.5 oz, Black 2 2 EA 1.30 2.60	
	E46697350 30 241271 Container, 19 Gallon White 1 1 EA 9,59 9,59	
	E4964V177 40 611288-1 Pan, 1/6 Size x 4" D, Black l l L EA 2.98 2.98	
	50 621760 Pan, 1/2 Size 2-1/2 Deep Amber Carifisie - High 5 5 EA 10.10 50.50 Temperature	
	80 619565 Label, BK 1" Frozen Ready (E) General Use, Roll of 500 3 3 R5C 2.92 8.76	*



SHOW DOCUMENTS FROM PURCHASE QUOTE LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Purchase Quote list:

- 1. On the Process Tab of Purchase Quote list, click on "Show Documents".
- 2. This will open the PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will show the available documents for all the records in the Purchase Quote list.

III Pape	rSave 🗸	Documents related to query	PurchaseQu	oteList							🗄 View C	uery Recc	ords	¢ ? 🗈
T FILTER	⊖ REFRESH	🖾 SHOW GROUPING 🔲 CHOOSE FIELDS	EXPORT	TO EXCEL										
	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Comments	Record Number	Vendor Name	Document Date	Order Date	Total	Contact
	1358419	1421704891790.jpg	09/12/2019 06:21:05 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation	test value	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
	1358420	Quotation.tif	09/12/2019 06:22:12 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
	1358421	HELLO.tif	09/12/2019 06:30:48 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation	abc	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
J. FEE	1358422	ReQlogic.pdf	09/12/2019 06:34:40 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation	stu	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
<u>لم</u> 1821	1358454	INVOICE_TMP334859193057320292.pdf	09/12/2019 08:37:28 AM	PS\vsonihvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
<u>لم</u>	1358455	INVOICE_TMP8193730966268360722.pdf	09/12/2019 08:46:40 AM	PS\vsonihvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
	1358456	INVOICE_TMP4435956351906090752.pdf	09/12/2019 08:46:47 AM	PS\vsonihvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
<u>لم</u>	1358457	INVOICE_TMP4535577695376957713.pdf	09/12/2019 08:46:49 AM	PS\vsonihvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
J. J.	1358458	uri_1116961_20160218_6646928_1638690811.pdf	09/12/2019 08:46:51 AM	PS\vsonihvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
	1368474	Computer Training Systems 2600.00.tif	09/13/2019 05:58:55 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
	1368475	Computer Training Systems 2600.00.tif	09/13/2019 05:58:55 AM	PS\bshahhvtest9stg	1002	Purchase Quote	Purchase Quote Documentation		1002	First Up Consultants	04/08/2019	04/08/2019	0	Evan McIntosh
	1368476	Computer Training Systems 2600.00.tif	09/13/2019 05:58:55 AM	PS\bshahhvtest9stg	1003	Purchase Quote	Purchase Quote Documentation		1003	Graphic Design Institute	04/08/2019	04/08/2019	0	Bryce Jasso
لم 1920	1379002	3PaperSave1.pdf	09/14/2019 03:11:22 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
	1379003	King.jpg	09/14/2019 03:15:51 AM	PS\bshahhvtest9stg	1001	Purchase Quote	Purchase Quote Documentation	Lion	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York
														Þ
< < 1	> х Е	100 🗸											1	of 1 pages (14 item

SHOW INTERRELATED DOCUMENTS FROM PURCHASE QUOTE LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Purchase Quote list:

 Select the desired record from the list. On the Process Tab of Purchase Quote list, click on "Show Interrelated Documents".



- 2. This will open the PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will show the available Interrelated documents for the selected record in the Purchase Quote list.

	Paper	Save 🗸	Documen	ts that are ir	nterrelated to	this roo	t Purchase Quote	;				Q Searc	h within docum	ent list	¢	8 🧯	
Roo Que	t Purcha ote		Name Consultants	Document Dat	e Order Date 09-04-2018	Total 159.32	Contact Evan McIntosh										
C F	REFRESH	√ FILTER	DI SHOW G	ROUPING	CHOOSE FIELDS	EXPC	RT TO EXCEL										
		Created	Created By	Comments													
		12-09-2019 06:21:05 AM	Bhavya Shah	test value													^
		12-09-2019 06:22:12 AM	Bhavya Shah														
		12-09-2019 06:30:48 AM	Bhavya Shah	abc													
	<u>لم</u>	12-09-2019 06:34:40 AM	Bhavya Shah	stu													
	<u>لم</u>	12-09-2019 08:37:28 AM	Vivek Soni														
	<u>لم</u>	12-09-2019 08:46:40 AM	Vivek Soni														
	ير Test	12-09-2019 08:46:47 AM	Vivek Soni														
	لم. Tee	12-09-2019 08:46:49 AM	Vivek Soni														
	لم. 1990	12-09-2019 08:46:51 AM	Vivek Soni														

PURCHASE QUOTE CARD

Clicking on the **Purchase Quote card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of the desired record in the Purchase Quote list.
- 2. This will launch the **Purchase Quote** record.

ics 365 Bu	siness Central										Sandbox	Q	Q	ø	
÷	PURCHASE QUOTE WORK DAT	E: 2/12/2019	,		Ø) +	Î.				√ SAVED	, ⁴			Ĩ
	1001 · First L	Јр С	onsultants												
	Process Request Approval	Print/Ser	nd Quote Release Naviga	te M	fore options							0			
	General								Show more	Vendor Statistics					
	Vendor Name		Up Consultants McIntosh	~	Order Date		4/9/2018			Vendor No. Balance (\$) Outstanding Orders (\$)	2000 17,574.93 5,000.00	3			
	Document Date	4/10	/2018		Vendor Shipment No.					Amt. Rcd. Not Invol. (\$) Outstanding Invoices (\$) Total (\$)	0.00 2,144.80 24,719.73	0		l	
	Lines Manage Mor	e options				UNIT OF	DIRECT UNIT		E	Overdue Amounts (\$) as of 0 Invoiced Prepayment Amoun	8.536.09 0.00	0			
		NO.	DESCRIPTION	LOCATI CODE	QUANTITY	MEASURE CODE	COST EXCL. TAX		LI DISCOUN	Payments (\$) Last Payment Date	84,634.25 2/12/2019			0	
	Item	900-S	PARIS Guest Chair, black		1	PCS	150.30	ATLANTA, GA		Buy-from Vendor History	1				
										Vendor No.	20000	0			
										1 0	1				
										Quotes Blanket Orders C	rders	1			
	Subtotal Excl. Tax (USD)			150.30	Total Excl. Tax (USD)				150.30	6 0	0				
	Inv. Discount Amount (USD)			0.00	Total Tax (USD)				9.02	Invoices Return Orders C	redit Memos				
	Invoice Discount %			0	Total Incl. Tax (USD) · ·				159.32	0 56	56				
										Pstd. Return Shipments Pstd. Receipts P	std. Invoices				



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

	WORK DATE: 2/12/201			e) +	1				√ SAVED
1001 · F	irst Up C	onsultants								
Process Reques	Approval Print/Se	nd Quote Release Navig	ate More op	tions						
1 Add Documer	t 🛗 Show Docum	ents 📋 Show Interrelated Docu	ments 🔠 Make	Order 🗈 Cop	Document					
Contact · · · · · ·	Evar	McIntosh	··· Requ	er Date	e [4/9/2018			Vendor No. Balance (\$) Outstanding Orders (\$) Amt. Rcd. Not Invd. (\$) Outstanding Invoices (\$) Total (\$) Overdue Amounts (\$) as of 0	20000 17.574.93 5,000.00 2.144.80 24,719.73 8.536.09
Lines Man	ge More options				UNIT OF	DIRECT UNIT		E2	Invoiced Prepayment Amoun	0.00
TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	MEASURE CODE	COST EXCL. TAX	TAX AREA CODE	LI DISCOUN	Payments (\$) Last Payment Date	84,634.25 2/12/2019
ltem	1900-S	PARIS Guest Chair, black		1	PCS	150.30	ATLANTA, GA		Buy-from Vendor History	
									Vendor No.	20000
					_			_	1 0 Quotes Blanket Orders Ord	1 ders 0
Subtotal Excl. Tax (l				Excl. Tax (USD)				150.30 9.02		



ADD DOCUMENTS FROM PURCHASE QUOTE CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Purchase Quote card:

- 1. On the Process tab of Purchase Quote Card, click on "Add Document".
- 2. This will open the PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.

PaperSave ~ Add a New PaperSave Document Purchase Quote Documentation ~ + New	< > 🖶 🖂 🕌
Related Purchase Vendor Name Document Date Order Date Total Contact Quote First Up Consultants 10-04-2018 09-04-2018 159.32 Evan McImosh	
FUJITSU ScanNow ^m using a Fujitsu fi-NX series scanner	Add a document from file explorer
ScanNov ²⁴ using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time

- 4. Drag or select files to upload the desired document.
- 5. This will open the document preview screen. You can **add** a comment for the document.
- 6. Click on "Save" to add the document to the selected record.



III Pa	aperSave	~	Add a New	/ PaperSave D	ocument	Purcha	se Quote Docume	entation ~	+ New <	: >	đ		\mathbf{F}				🖹 Save	r 🕸 8 😵
Related Quote	l Purchase	Vendor First Up	Name Consultants	Document Date 10-04-2018	Order Date 09-04-2018	Total 159.32	Contact Evan McIntosh									ID: 1358454 Batch:		
₽																Document Profi	le	
A D									Customer no: Customer sto			-018811			-	Comments :		
¢			ivery Addre ger King 7						Reference:	ie no.	/ 100					Enter Value		
0 - 0			OMISSIN	SHIRE BLVD G, PA 19610-	1245				Payment tern Delivery term Ship via: GST #: Tracking #:	is:	UPS (86957) Shipping F Ground 75928RT(E0W30334	0001					
67 67 181			nment:	aurant Mange									Page #	1/2				
⊗		Line	# Part#	De	scription				Total Qty Ordered	Ship	Qty ped	UOM	Unit price USD	Totals USD				
		Pa	rts															
		10	492434	Fi	rst Aid Burn	Cream (10 pack)		1		1	EA	2.09	2.09				
		20	618562	Oi	ntment, First	t Aid Anti	biotic (10) Packs		1		1	EA	2.09	2.09				
		30	492433	G	el, Burn Reli	ef 3.5gm	(6 per pack)		2		2	EA	2.09	4.18				
		40	618561	Pa	ad, Alcohol C	Cleansing	g (20) Pads		1		1	EA	2.09	2.09				
		50	492420	Ba	andage, Blue	e 1" x 3"	(25 per pack)		2		2	EA	2.09	4.18				
1	/2 INVOICE_T	IMP334859	1930573									t: æ	x 8 8 8		0-+			

SHOW DOCUMENTS FROM PURCHASE QUOTE CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Purchase Quote card:

- 1. On the Invoice tab of Purchase Quote Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

III PaperSave - Document Purchas	se Quote Documentation > Q Search within document list	¢ ? 🚯
Related Purchase Vendor Name Document Dat Quote First Up Consultants 10-04-2018	te Order Date Total Contact 09-04-2018 159.32 Evan McIntosh	
+ NEW 🛛 FILTER 📿 REFRESH 🖽 CHOOSE FIELDS	S 📴 SHOW GROUPING 🗈 EXPORT TO EXCEL 그는 INTERRELATED	
Created By Comments		
12-09-2019 Bhavya Shah test value 06:21:05 AM		*
12-09-2019 Bhavya Shah		
12-09-2019 Bhavya Shah abc		
12-09-2019 06:34:40 AM Bhavya Shah stu		
12-09-2019 08:37:28 AM Vivek Soni		



SHOW INTERRELATED DOCUMENTS FROM PURCHASE QUOTE CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Purchase Quote card:

- 1. On the Invoice tab of Purchase Quote Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

	Раре	erSave 🗸	Documer	its that are inte	errelated to	this	s roo
Roo Qu	ot Purch ote		or Name Ip Consultants	Document Date 10-04-2018	Order Date 09-04-2018		Total 159.32
C	REFRESH	√ FILTER	SHOW G	ROUPING 🔲 CI	HOOSE FIELDS	EXP(0
		Created	Created By	Comments			
		12-09-201 06:21:05 AN	Bhavya Shah	test value			
	600A	12-09-201 06:22:12 AN	Bhavya Shah				
			Bhavya Shah	abc			
	j.		Bhavya Shah				
	ي بر 1990		Vivek Soni				
	<u>لل</u> 1926	12-09-201 08:46:40 AN	Vivek Soni				
	<u>д</u> .	12-09-201 08:46:47 AN	Vivek Soni				
	<u>لر</u>	12-09-201 08:46:49 AN	Vivek Soni				
	<u>لم</u>	12-09-201 08:46:51 AN	Vivek Soni				



5.4 PURCHASE ORDER

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Purchasing** dropdown.
- 2. Click on **Purchase Order**.

CRONUS USA, Inc. Finance v Cash Management v Sales v1 Purchasing v Setup & Extensions v Intelligent Cloud Insights v Vendors Item Charges 2 Purchase Orders Purchase Invoices Purchase Return Orders Posted Purchase Credit Memos Posted Purchaseeturn Shipments -= Incoming Documents Purchase Orders Purchase Credit Memos Posted Purchase Receipts -=	 Dynamics 365 Business Central							Sandbox	Q	Q	۲	?	SP
	CRONUS USA, Inc.	Finance \lor	Cash Management 🗸 🛛 Sa	ales ~ 1 Purchasing ~ S	etup & Extensions ~ Intel	lligent Cloud Insights \smallsetminus							
							Posted Purchaseeturn Shipments		무				

PURCHASE ORDER LIST

Clicking on **Purchase Order** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

Dynamics 365 Busines	s Central							۶ ¢ ¢ ؟ (
CRONUS AU	Finance	✓ Cash Management ✓ S	ales 🗸 🛛 Pu	rchasing \smallsetminus	Setup & Exten	sions \vee	ntelligent Clou	d Insights – 📔 🚍
Purchase Orders:	All 🗸 🕴	🔎 Search 🕂 New 📋 Delete	Process \lor	Print/Send \	Order 🗸	Release \smallsetminus	Posting \lor	··· \(\nabla \) \(\begin{array}{c} 0 \) \(\nabla \) \(\nabla \)
No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati No.	Location Code	Assigned User ID	Docum: Date		
<u>106001</u>	10000	Fabrikam, Inc.				4/8/	i) Details	Attachments (0)
106004	30000	Graphic Design Institute				5/1/	Vendor Deta	ils∨
106006	10000	Fabrikam, Inc.				4/1/	Vendor No.	10000
106007	40000	Wide World Importers				5/1/	Name	Fabrikam, Inc.
106008	40000	Wide World Importers				5/1/	Phone No.	Pablikani, me.
106009	50000	Nod Publishers				5/1/	Email	krystal.york@contoso.com
106010	V00070	Citrix				5/1/	Fax No.	
106011	V00110	Fujitsu & Company				5/1/	Contact	Krystal York
106012	V00210	Reliance				5/1/		
106013	V00200	TATA				5/1/		
106014	40000	Wide World Importers				5/1/		
106015	40000	Wide World Importers				7/14		

- 1. Click on "**Process**" Tab from Purchase Order list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



CRONUS AU	J Finan	ce \checkmark Cash Management \checkmark Sa	les V Purchasing V Setup &	Exter	nsions \vee	Intelligent Clou	d Insights \smallsetminus 📃 🗮
Purchase Orders	s: All 🗸	✓ Search + New	Process ∨ Print/Send ∨ Ord	er 🗸	Release \smallsetminus	✓ Posting ∨	··· \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
No. 1	Buy-from Vendor No.	Buy-from Vendor Name	v 🎦 Add Document A N 🛅 Show Documents	User	Docum: Date		
106001	10000	Fabrikam, Inc.	B Show Interrelated Documents		4/8/	() Details	Attachments (0)
106004	30000	Graphic Design Institute			5/1/	Vendor Deta	ils ∨
106006 106007	10000 40000	Fabrikam, Inc. Wide World Importers			4/1/ 5/1/	Vendor No.	10000
106008	40000	Wide World Importers			5/1/	Name Phone No.	Fabrikam, Inc.
106009	50000	Nod Publishers			5/1/	Email	krystal.york@contoso.com
106010	V00070	Citrix			5/1/	Fax No.	
106011	V00110	Fujitsu & Company			5/1/	Contact	Krystal York
106012	V00210	Reliance			5/1/		

ADD DOCUMENTS FROM PURCHASE ORDER LIST

Follow the below steps to test the PaperSave functionality "Add document" from Purchase Order list

- 1. On the Process Tab of Purchase Order list, click on "Add document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".



₩ PaperSave ~	Add documen	ts from query	PurchaseOrc	lerList F	urchase (Order Documentation	n Y				⊞ Vie	w Query R	lecords	🖹 Save	ŵ	8 BS
Related Purchase Order	Document Number 106003	Vendor Name Wide World Importers	Order Date 04/13/2019	Due Date 04/30/2019	Total 11584.10	Contact Toby Rhode										~ ~
	Sc	FUII anNow ^{**} using a Fujits		canner					Add a	documen	t from file	e explorer				
Ħ	<u>ScanNow</u> "	using any recommen	ded TWAIN cor	npliant scann	er				Drag	files here o	r <u>select files</u>	to upload				

- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will open the document preview screen. You can **enter** the "date" in the document.
- 6. Click on "**Save**" to add the document to all the records in the Purchase Order list.

🗰 PaperSave 🗸	Add documen	ts from query	PurchaseOrd	derList P	Purchase C	Order Document	ation ~				8	🗄 🗄 Viev	v Query Records	🖹 Save 🕸 🎖 📧
Related Purchase Order	Document Number 106003	Vendor Name Wide World Importers	Order Date 04/13/2019	Due Date 04/30/2019	Total 11584.10	Contact Toby Rhode						\sim	ID: 1379239 Batch: INVOICE_T	MP4435956351906090752.pdf
₽ A													Document Profile	
Ø		800 AVIATIO SMYRNA, TN Acct Rec (P): Acct Rec (F):	ervice Supply, Inc N PKWY I 37167-2581 1-888-800-0623 (P): 1-877-700-0623 1-800-877-5178 (P):			Invoid			FRA	NKE			Enter Value	<u>.</u>
- 0		Cust Svc (F): Invoic GPS 2100	Address Hospitality, LLC RIVEREDGE ANTA, GA 30326). PKWY		Invoice no: Invoice date: Order no: PO #: Order from:	8494 19-Fel 37532			=			Enter Value	8
□ ↔ ₽ ♥		USA Delivery Addre Burger King 8 4410 WADE		-4033		Shipping date: Cust Service I Store no: Customer no: Customer stor Reference: Payment term Delivery term Ship via: GST #: Tracking #:	50218 11062 e no: 8054 e: Net 30 c: FOB 5 UPS 0 86957	Couyoum 73 -018811	oint 001					
		Attn: Horni Comment:	ung, Donna						Page #	1/1				
		Line# Part#	Descriptio	n		Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD				
		Parts 10 270231	08 Shield, I	PHU Pan Splash f/	Duke Broiler	1	1	EA	18.87	18.87				
		20 613894	Tong, 9'	Forest Green		6	6	EA	1.84	11.04				
		Misc 10 SHIPPI	NG Shipping	I		1	0	EA	11.25	11.25				
		Sales Tax Total Includin	ng Tax							41.16 2.47 43.63				



SHOW DOCUMENTS FROM PURCHASE ORDER LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Purchase Order list:

- 1. On the Process Tab of Purchase Order list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in Purchase Order list.

	Paper	Save ~	Documents related	to query	PurchaseOrde	erList							⊞ View	Query	Records @ ඉ	8
¶ FIL	TER	⊖ REFRESH	SHOW GROUPING	CHOOSE FIEL	.DS 🖹 EXPORT TO	D EXCEL										
		ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Vendor Name	Order Date	Due Date	Total	Contact	
	20.5	1358423	4.xls	09/12/2019 06:44:07 AM	PS\bshahhvtest9stg	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
	 ,	1358424	Krowrie Metal Corporation.tif	09/12/2019 06:52:20 AM	PS\bshahhvtest9stg	106003	Purchase Order	Test Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
		1358425	6161 BLUE LAGOON.tif	09/12/2019 06:57:39 AM	PS\bshahhvtest9stg	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
		1358426	King.jpg	09/12/2019 06:57:40 AM	PS\bshahhvtest9stg	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
	J.	1358427	TEST.pdf	09/12/2019 06:57:51 AM	PS\bshahhvtest9stg	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
	<u>لم</u> 1998	1358432	test (2).pdf	09/12/2019 07:51:05 AM	PS\bshahhvtest9stg	106004	Purchase Order	Purchase Order Documentation	106004	106004	Graphic Design Institute	05/01/2019	05/31/2019	3880	Bryce Jasso	
	2	1358433	King.jpg	09/12/2019 07:51:05 AM	PS\bshahhvtest9stg	106004	Purchase Order	Purchase Order Documentation	106004	106004	Graphic Design Institute	05/01/2019	05/31/2019	3880	Bryce Jasso	
	E	1368480	HELLO.tif	09/13/2019 06:03:50 AM	PS\bshahhvtest9stg	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
		1368481	HELLO.tif	09/13/2019 06:03:50 AM	PS\bshahhvtest9stg	106004	Purchase Order	Purchase Order Documentation	106004	106004	Graphic Design Institute	05/01/2019	05/31/2019	3880	Bryce Jasso	
		1368482	HELLO.tif	09/13/2019 06:03:50 AM	PS\bshahhvtest9stg	106002	Purchase Order	Purchase Order Documentation	106002	106002	First Up Consultants	04/09/2019	04/30/2019	2230	Evan McIntosh	
	 ,	1368483	HELLO.tif	09/13/2019 06:03:50 AM	PS\bshahhvtest9stg	106001	Purchase Order	Purchase Order Documentation	106001	106001	Fabrikam, Inc.	04/08/2019	04/30/2019	5793	Krystal York	
	J.	1368484	TEST.pdf	09/13/2019 06:04:01 AM	PS\bshahhvtest9stg	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode	
	J.	1368485	TEST.pdf	09/13/2019 06:04:01 AM	PS\bshahhvtest9stg	106004	Purchase Order	Purchase Order Documentation	106004	106004	Graphic Design Institute	05/01/2019	05/31/2019	3880	Bryce Jasso	
	j. FEE	1368486	TEST.pdf	09/13/2019 06:04:01 AM	PS\bshahhvtest9stg	106002	Purchase Order	Purchase Order Documentation	106002	106002	First Up Consultants	04/09/2019	04/30/2019	2230	Evan Mcintosh	
	J.	1368487	TEST.pdf	09/13/2019 06:04:01 AM	PS\bshahhvtest9stg	106001	Purchase Order	Purchase Order Documentation	106001	106001	Fabrikam, Inc.	04/08/2019	04/30/2019	5793	Krystal York	
	1	1368488	Kina.ipa 100 V	09/13/2019	PS\bshahhvtest9sta	106003	Purchase Order	Purchase Order Documentation	106003	106003	Wide World Importers	04/13/2019	04/30/2019	11584	Toby Rhode 1 of 1 pages ((19 iter

SHOW INTERRELATED DOCUMENTS FROM PURCHASE ORDER LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Purchase Order list:

- Select the desired record from the list. On the Process Tab of Purchase Order list, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.



 On login success, it will **show** the available Interrelated documents for the selected record in Purchase Order list.

	Paper	Save ~	Document	ts that are i	interrelate	d to this rool	Purchase (Order			Q Search w	vithin document list
Root Orde	Purcha r	Documer 106008	nt Number	Vendor Name Apache Systen	ns 0rder D	ate Due Date 019 12-03-20	19 Total 1000.00	Contact				
₿ R	FRESH	T FILTER	SHOW GR		CHOOSE FIE	LDS 🕅 EXPO	RT TO EXCEL					
		Created	Created By	Date box	Number							
		12-09-2019 07:58:41 AM	Bhavya Shah									
	ж. жа	12-09-2019 07:58:57 AM	Bhavya Shah									
	K.	12-09-2019 09:25:12 AM	Vivek Soni									
	يل Real	12-09-2019 09:28:35 AM	Vivek Soni									
	1 Test	12-09-2019 09:28:35 AM	Vivek Soni									
	Å	12-09-2019 09:28:35 AM	Vivek Soni									
	A.	12-09-2019 09:28:35 AM	Vivek Soni									
	J.	12-09-2019 09:28:36 AM	Vivek Soni									
	A.	12-09-2019 09:58:19 AM	Vivek Soni									
	A.	12-09-2019 09:58:19 AM	Vivek Soni									
) PCOT	12-09-2019 09:58:19 AM	Vivek Soni									
	1 Test	12-09-2019 09:58:20 AM	Vivek Soni									

PURCHASE ORDER CARD

Clicking on the **Purchase Order card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of desired record in the Purchase Order list.
- 2. This will launch the **Purchase Order** record.

ynamics 365 Bu	siness Central										Sandbox (م د	۲	?	1
÷	PURCHASE ORDER WORK D	IATE: 2/12/2019			Ø	+ 🗊					√SAVED ,	, e			
	106008 · A	oache	e Systems												
	Process Release Posti	ng Order	Request Approval Print/S	end Navigate	More options						(D			
	General								Show more	Vendor Statistics					
	Vendor Name	Apac	ne Systems	√ Vend	or Invoice No.		4547			Vendor No.	V00110				
	Contact · · · · · · · · · · · · · · · · · · ·			··· Vend	or Shipment No.					Balance (\$) Outstanding Orders (\$)	26,782.10 1,000.00				
	Document Date	2/12/	2019	1						Amt. Rcd. Not Invd. (\$)	1.000.00				
										Outstanding Invoices (\$) Total (\$)	314.50 29,096.60				
	Lines Manage M	ore options							ß	Overdue Amounts (\$) as of 0	0.00				
	TYPE	NO.	DESCRIPTION	LOCATION	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE	DIRECT UNIT COST EXCL. TAX	TAX ARE CODE	Invoiced Prepayment Amoun Payments (\$)	0.00 1.530.17			$\mathbf{\Sigma}$	
	Item :	NU. 1001	Anks TEST Item	WEST	UUANTITY 10		PCS		MIAMI, F	Last Payment Date	2/12/2019				
										Buy-from Vendor History		1			
										Vendor No.	V00110				
										0 0	2				
											2				
										Quotes Blanket Orders Ord	ers				
	Subtotal Excl. Tax (USD)				Excl. Tax (USD)				1,000.00	1 0	0				
	Inv. Discount Amount (USD)				Tax (USD)				0.00	Invoices Return Orders Cre	dit Memos				
	Invoice Discount %			0 Total	Incl. Tax (USD)				1,000.00	0 4	3				



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

(PURCHASE ORDER WOF	RK DATE: 2/12/201	9) + 🛍					√ SAVED , K	
	106008 · /	Apache	e Systems		Ŭ							
	Process Release P	osting Order	Request Approval Print	/Send Navigate	More options						0	
	1 Add Document	🛅 Show Docum	ents 🗋 Show Interrelated (Documents 🖻 Copy	Document	Create Inventory	t-away/Pick				-0	
	Vendor Name		che Systems /2019		dor Invoice No. · · ·		4547			Vendor No. Balance (\$) Outstanding Orders (\$) Amt. Rcd. Not Invd. (\$) Outstanding Invoices (\$)	V00110 26,782.10 1,000.00 1,000.00 314.50	
	Lines Manage	More options	DESCRIPTION	LOCATION	QUANTITY	RESERVED	UNIT OF MEASURE	DIRECT UNIT COST EXCL. TAX	TAX ARE CODE	Total (\$) Overdue Amounts (\$) as of 0 Invoiced Prepayment Amoun Payments (\$)	29.096.60 0.00 0.00 1,530.17	6
	Item	1001	Anks TEST Item	WEST	10		PCS		MIAMI, F	Last Payment Date	2/12/2019	
										Buy-from Vendor History		
										Vendor No.	V00110	
	Subtotal Excl. Tax (USD) Inv. Discount Amount (US Invoice Discount % · · · ·	D)		0.00 Tot	al Excl. Tax (USD) · · · · · · · · · · · · · · · · · · ·				1,000.00 0.00 1,000.00	0 0 0 Quotes 0 0 0 Blanket Orden 0 0 1 0 Invoices Return Orden 0 0	3 Jers O dit Memos	

ADD DOCUMENTS FROM PURCHASE ORDER CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Purchase Order card:

- 1. On the Process tab of Purchase Order Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.



Related Purchase Occument Number Vendor Name Order Document ation + Related Purchase Document Number Vendor Name Order Date Due Date Total Contact	New < < > ⊕ ⊠ ± < ô ? 3
FUITSU ScanNow ^{~~} using a Fujitsu fi-Nx series scanner	Add a document from file explorer
ScanNow ²⁴ using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will open the document preview screen. You can **enter** the "date received" for the document.
- 6. Click on "**Save**" to add the document to the selected record.

Related Purchase	Add a New PaperS Document Number 106008 Vendor N Apache S	lame Order Date Due Date Total Contact	tion ~ + New < >	- 4 🖂	Ŧ			Bave 段 段 ③ ID: 1358467 Batch:
Image: Second	Delivery Address Burger King 9911 3215 Peachtree Corners Circle Norcross, GA 30092 USA		Cust Service Rep: Store no: Customer no: Customer store no: Reference: Payment terms: Delivery terms: Ship via: GST #: Tracking #:	Myles Couyour 5939551 11062-018811 9911 Net 30 FOB Shipping UPS Ground 869575928RT 1219E0W3033	Point 0001			Decument Profile Date box : Enter Value Enter Value Enter Value Enter Value
& 	Comment: Line # Part #	Description	Total Qty Ordered S	Qty UOM	Page # Unit price USD	1 / 2 Totals USD		
	Parts				000			
	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		
	MP1088948245530			0 =	* • •		-0-+	



SHOW DOCUMENTS FROM PURCHASE ORDER CARD

Follow the below steps to test the PaperSave functionality "Show documents" from Purchase Order card:

- 1. On the Process tab of Purchase Invoice Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available document/s.





SHOW INTERRELATED DOCUMENTS FROM PURCHASE ORDER CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Purchase Order card:

- 1. On the Process tab of Purchase Invoice Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

🗰 Pap	perSave	e 🗸 🛛 Documen	ts that are int	errelated to	this root Pu	rchase C	rder	Q Search within document list	\$ \$
Root Pur Order	rchase	Document Number	Vendor Name Apache Systems				Contact		
	сн 🗸	FILTER SHOW G							
		Created Created By			E DATORI IC	ENCLE			
		-09-2019 58:41 AM Bhavya Shah							
		-09-2019 58:57 AM Bhavya Shah							
		-09-2019 25:12 AM Vivek Soni							
		-09-2019 28:35 AM Vivek Soni							
		-09-2019 28:35 AM Vivek Soni							
<u>لر</u>		-09-2019 28:35 AM Vivek Soni							
X	12-09:2	2-09-2019 28:35 AM Vivek Soni							
	12-	2-09-2019 28:36 AM Vivek Soni							
	12-	-09-2019 58:19 AM Vivek Soni							
K	12- 09:5	-09-2019 58:19 AM Vivek Soni							
4	12-	-09-2019 58:19 AM Vivek Soni							
4	12-	-09-2019 58:20 AM Vivek Soni							



5.5 VENDOR

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Purchasing** dropdown.
- 2. Click on Vendors.

 Dynamics 365 Business Central			Sar	ndbox Q	<u>ه</u> م	₿?	SP
CRONUS USA, Inc. Finance ~	Cash Management < Sales <->1 Purchasing < Sales <->1 Sales <	ietup & Extensions \lor Intelligent Cloud Insights \lor					
		Purchase Return Orders Posted Purchase Credit Memos Posted Purchase Invoices Posted Purchase Receipts	Posted Purchaseeturn Shipments	-t¤			

VENDOR LIST

Clicking on **Vendors** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

ynamics 365 Busine	ess Central					۵ م م
CRONUS AU	Finance 🗸 🦳 Cash M	anagement \lor Sales \lor	Purchasing > Setup & Ext	tensions \vee In	itelligent Cloud Insights $\!$	
Vendors: All 🗸		📋 Delete 🛛 Process 🗸 🛛 N	New Document \smallsetminus Vendor \checkmark	Navigate \smallsetminus	Page \lor	7 🗉 🛈 📕 🖉
No. ↑	Name	Location Code Phone No.	Contact	٤		
<u>10000</u> :	Fabrikam, Inc.		Krystal York		Details Attachmen	ts (0)
20000	First Up Consultants		Aaron Loton			
30000	Graphic Design Institute		Bryce Jasso		Vendor Statistics	
40000	Wide World Importers		Blake Springthorpe		Vendor No.	10000
50000	Nod Publishers		Patrick Cochran		Balance (LCY)	42,739.00
V00010					Outstanding Orders (LCY)	0.00
V00070	Citrix				Amt. Rcd. Not Invd. (LCY)	10,439.00
V00080	Citrix & Company				Outstanding Invoices (LCY) Total (LCY)	128,898.37 182,076.37
V00090					Overdue Amounts (LCY) as of	40,876.00
V00100	mbaf				Invoiced Prepayment Amoun	0.00
V00110	Fujitsu & Company				Payments (LCY)	0.00
V00120	Abisoft				Refunds (LCY)	0.00
					Last Payment Date	_

- 1. Click on "**Process**" Tab from Vendor list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



amics 365 Busin	ess Central				چ ¢ ¢
CRONUS AL	J Finance Cash Management	\checkmark Sales \checkmark Purchasing \checkmark	Setup & Extensions \smallsetminus	Intelligent Cloud Insights \smallsetminus	=
Vendors: All \	✓ ✓ Search + New	Process \vee New Document \vee	Vendor 🗸 🛛 Navigate 🗸	Page -> ···· 🖓	≣ 0 ∎ ∠
		🖺 Add Document			
No. 1	Name Location Cr	Bod 🛅 Show Documents	5		
10000	Fabrikam, Inc.			🛈 Details 🛛 🔋 Attachments (0)
20000	First Up Consultants	Show Interrelated Documents			
30000	Graphic Design Institute	C Apply Template		Vendor Statistics	
40000	Wide World Importers	🛃 Pay Vendor	thorpe	Vendor No.	10000
50000	Nod Publishers	Patrick Coc	thran	Balance (LCY)	42,739.00
				Outstanding Orders (LCY)	0.00
V00010				Amt. Rcd. Not Invd. (LCY)	10,439.00
V00070	Citrix			Outstanding Invoices (LCY)	128,898.37
V00080	Citrix & Company			Total (LCY)	182,076.37
V00090				Overdue Amounts (LCY) as of	40,876.00
V00100	mbaf			Invoiced Prepayment Amoun	0.00
V00110	Fujitsu & Company			Payments (LCY)	0.00
V00120	Abisoft			Refunds (LCY)	0.00

ADD DOCUMENTS FROM VENDOR LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Vendor list

- 1. On the Process Tab of Vendor list, click on "Add Document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".



Related Vendor ID Vendor Name Address City State Zip Contact Vendor 50000 Nod Publisher Address City State Zip Contact	ion ∽	8 🚳 ^ ~
Vendor 50000 Nod Publishers 172 Field Green Atlanta GA 31772 Raymond Hillard	Add a document from file explorer	~
ScanNow [™] using any <u>recommended</u> TWAIN compliant scanner	Drag files here or <u>select files</u> to upload	

- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will **open** the document preview screen.
- 6. Click on **Save** to add the document to all the records in the Vendor list.

III PaperSave	e v Add documents from query VendorList Vendor Documentation v		🖽 🛛 🗮 View Query Records	🖹 Save	© 8	2 🚳
	Wendor ID Vendor Name Address Chy State Zip Contact 50000 Nod Publishers 172 Field Green Atlanta GA 31772 Raymond Hillard					\sim
ß						
	Franke Foodservice Supply, Inc 800 AVIATION PKWY SMYRNA, TN 37167-2581 Acct Rec (P):1-888-800-0623 (P):615-462-5460 Acct Rec (F):1-877-700-0623 Cust Svc (P):1-807-5178 (P):615-462-4000 Cust Svc (F):1-877-538-6882 Invoice Address GPS Hospitality, LLC, 2100 RIVEREDGE PKWY ATLANTA, GA 30328-4693 USA Delivery Address Burger King 9911 3215 Peachtree Corners Circle Norcross, GA 30092 USA	Invoice no: Invoice date: Order no: PO #: Order from: Shipping date: Cust Service Rep: Store no: Customer no: Customer no: Customer store no: Reference: Payment terms: Delivery terms: Ship via: GST #: Tracking #:	B4949918 19-Feb-2016 37532338 MELISSA.LINDSEY 02/19/16 Myles Couyoumjian 5939551 11062-018811 9911 Net 30 FOB Shipping Point UPS Ground 869575928RT0001 1Z19E0W30334789186			



SHOW DOCUMENTS FROM VENDOR LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Vendor list:

- 1. On the Process Tab of Vendor list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in Vendor list.

7 FILTER	C REFRESH ID 1358442 1358443 1358444	Image: Story GROUPING CHOOSE FIELDS File Name Phone billpdf test (2)pdf Signature pages.pdf	Created 09/12/2019 08:12:52 AM 09/12/2019 08:15:10 AM	Created By	Parent Id	Record Type Vendor	Document Type	Record Number	Vendor ID	Vendor Name	Address	City	State	Zip	Contact
	1358442 1358443	Phone bill.pdf test (2).pdf	09/12/2019 08:12:52 AM 09/12/2019 08:15:10 AM	PS\bshahhvtest9stg				Record Number	Vendor ID	Vendor Name	Address	City	State	Zip	Contact
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Å			08:15:10 AM	PS\hshabhytest9stg			Vendor Documentation	10000	10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York
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Å	1358486	uri_1116961_20160218_6646928_1638690811.pdf	09/12/2019 10:22:07 AM	PS\vsonihvtest9stg	10000	Vendor	Vendor Documentation	10000	10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York
<u>لم</u>	1358487	INVOICE_TMP8193730966268360722.pdf	09/12/2019 10:22:33 AM	PS\vsonihvtest9stg	10000	Vendor	Vendor Documentation	10000	10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York
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2	1368497	King.jpg	09/13/2019 06:07:43 AM	PS\bshahhvtest9stg	30000	Vendor	Vendor Documentation	30000	30000	Graphic Design Institute	33 Hitech Drive	Miami	FL	37125	Bryce Jasso
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< 1		100 🗸													of 1 pages (23 item

SHOW INTERRELATED DOCUMENTS FROM VENDOR LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Vendor list:

- 1. Select the desired record from the list. On the Process Tab of Vendor list, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.



3. On login success, it will **show** the Interrelated documents for the selected record in Vendor list.

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	Paper	Save 🗸	Documen	ts that are interrela	ted to this root V	endor					Q Search within	document list	ţ.	8 📀
Roo	t Vendo	r Vendor ID	Vendor Nar Fabrikam, Ir	ne Address 10 North Lake Ave	nue Atlanta GA	Zip 31772	Contact Krystal York							
<i>C</i> F	EFRESH	√ FILTER	🖾 SHOW GF	OUPING 🔲 CHOOSE	FIELDS 🕅 EXPORT 1	TO EXCEL								
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) FOR	12-09-2019 10:22:34 AM	Vivek Soni											

VENDOR CARD

Clicking on the **Vendor card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of desired record in the Vendor list.
- 2. This will launch the **Vendor** record.

E Dynamics 365 Bus	siness Central						Sandbox 🗘	م	÷	? SP
÷	VENDOR CARD WORK DATE: 2/12/20	019	Ø +	Û			√SAVED →			
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	Name	Fabrikam, Inc.	Balance Due (\$)		-1,200.00					
	Blocked · · · · · · · · · · · · · · · · · · ·	T				1.25	4 1			
	Address & Contact				Show more	and the second	ſ			
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	Address	10 North Lake Avenue	Primary Contact Code			vendor Statistics			Ć	·
	Address 2		Contact · · · · · · · · · · · · · · · · · · ·	Krystal York		Balance (\$) Outstanding Orders (\$)	-1,200.00			
	Country/Region Code	US 🗸	Phone No.	4255550101		Amt. Rcd. Not Invd. (\$)	0.00			
	City · · · · · · · · · · · · · · · · · · ·	Atlanta	Email · · · · · · · · · · · · · · · · · · ·	krystal.york@contoso.com		Outstanding Invoices (\$)	0.00			
	State	GA	Home Page	www.royalmail.co.uk		Total (\$) Overdue Amounts (\$) as of 0	-1,200.00 -1,200.00			
	ZIP Code	31772	Our Account No.			Invoiced Prepayment Amoun	0.00			
	Show on Map					Payments (\$)	30,264.64			
						Last Payment Date	2/12/2019			
	Invoicing >					Buy-from Vendor History				
	Payments >				CM BANK	O O Quotes Bianket Orders Orde	1			



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

 VENDOR CARD WORK DATE: 2/12/2019 	 + II 		√ SAVED , K									
10000 · Fabrikam, Inc.												
Process Report Request Approval New Document Navigate	Vendor More options		O									
C Apply Template 🗈 Add Document 💼 Show Documents 🗈	다 Apply Template 🗈 Add Document 🗈 Show Documents 🗈 Show Interrelated Documents 35 Pay Vendor 3명 Create Payments ㅋㅋ											
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ADD DOCUMENTS FROM VENDOR CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Vendor card:

- 1. On the Process tab of Vendor Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **open** the "Add Document" page.



PaperSave > Add a New PaperSave Document Vendor Documentation > + New <	♦ [□] ±
FUJITSU ScanNow [™] using a Fujitsu fi-NX series scanner	Add a document from file explorer
ScanNov [™] using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will open the document preview screen.
- 6. Click on "**Save**" to add the document to the selected record.

🗰 PaperSave 🗸 🛛 Add a New	PaperSave Document Ver	dor Documentation ~	+ New < >	₿ 🛛 🔸				🖹 Save	¢\$ 8 🚯
Related Vendor ID Vendor Name Vendor 10000 Fabrikam, Inc.	e Address City Atlanta	State GA Zip 31772 Contact Krystal York							
₽ A ₽	Invoice Addres	-	2 - 13 - 2 - 2 - 2	Invoice date: Order no:	19-Feb-2016 37532094				
Ø 0 -		ality, LLC. REDGE PKWY GA 30328-4693		PO #: Order from: Shipping date: Cust Service Rep: Store no:	13161 02/19/16 Myles Couyoun 5020680	njian			
○ □ � &	Delivery Address Burger King 13161 1205 W HUNTER ST LOGAN, OH 43138-10)11		Customer no: Customer store no: Reference: Payment terms: Delivery terms:	11062-018811 13161 Net 30 FOB Shipping I	Point			
₩ ₩ ₩	USA			Ship via: GST #: Tracking #:	UPS Ground 869575928RT 1Z19E0W3033	0001			
	Comment:					Page #	1/1		
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SHOW DOCUMENTS FROM VENDOR CARD

Follow the below steps to test the PaperSave functionality "Show documents" from Vendor card:

- 1. On the Process tab of Vendor Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available document/s.



SHOW INTERRELATED DOCUMENTS FROM VENDOR CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Vendor card:

- 1. On the Process tab of Vendor Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.



	Paper	Save 🗸	Document	ts that are interrel	ated to this root '	/endor					Q s	earch within do	cument list	Ę	े १ 🤅	
Root	t Vendo	r <u>Vendor ID</u> 10000	Vendor Nar Fabrikam, Ir	ne Address nc. 10 North Lake Ave	nue Atlanta GA	z Zip 31772	Contact Krystal York									
₿ R	EFRESH	Trilter	SHOW GR	OUPING 🔲 CHOOS	E FIELDS 🕅 EXPORT	TO EXCEL										
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	يل Res	12-09-2019 08:15:10 AM	Bhavya Shah													
	100	12-09-2019 10:13:02 AM	Vivek Soni													
	A.	12-09-2019 10:22:06 AM	Vivek Soni													
	يل Rea	12-09-2019 10:22:07 AM	Vivek Soni													
	10	12-09-2019 10:22:33 AM	Vivek Soni													
	لي 1928	12-09-2019 10:22:34 AM	Vivek Soni													



5.6 SALES ITEM

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

- 1. On the Dynamics 365 Business Central Home Page, click on the Sales dropdown.
- 2. Click on **Items**.

CRONUS USA, Inc.	Finance Cash Management Sales	Purchasing V Setup & Extensions V I	ntelligent Cloud Insights \vee	
Customers Item Charges 2 Items Sales Quotes	Sales Orders Sales Invoices Blanket Sales Orders Sales Credit Memos	Sales Return OrdersFinance Charge MemoryRemindersPosted Sales Invoices	os Posted Sales Credit Memos Issued Reminders Posted Sales Return Receipts Issued Finance Ch	-t¤

SALES ITEM LIST

Clicking on **Sales Item List** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

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CRONUS AU	J Finance - Cash M	anagement \vee Sa	les∨ Pure	chasing \	Setu	p & Extensions \smallsetminus	Intelligent Cloud Insights \smallsetminus	≡
Items: All 🗸		Delete Process	Report \	/ Item	∨ Req	uest Approval \smallsetminus	Inventory V ···· V	■ 0 📕 2
No. ↑	Description	Туре	Inventory	Substi Exist	Assem BOM	(Base Unit of i: Measure /		
1000	Fujitsu 7180	Inventory	30	No	No	PCS	Details Attachments (0)
1001	Fujitsu Chronos Scanner	Inventory	0	No	No	PCS	Item Details - Invoicing	
1002	Fujitsu ScanSnap	Inventory	0	No	No	PCS	Item No.	1000
1003	Test item	Inventory	0	No	No	PCS	Costing Method	FIFO
1004	Test	Inventory	0	No	No	PCS	Cost is Adjusted	Yes
1896-S	ATHENS Desk	Inventory	11	No	No	PCS	Cost is Posted to G/L	Yes
1900-S	PARIS Guest Chair, black	Inventory	8	No	No	PCS	Standard Cost	0.000
1906-S	ATHENS Mobile Pedestal	Inventory	25	No	No	PCS	Unit Cost	100.000
1908-S	LONDON Swivel Chair, blue	Inventory	23	No	No	PCS	Overhead Rate	0.000
1920-S	ANTWERP Conference Table	Inventory	15	No	No	PCS	Indirect Cost %	0
1925-W	Conference Bundle 1-6	Inventory	0	No	Yes	PCS	Last Direct Cost Profit %	0.000
1928-S	AMSTERDAM Lamp	Inventory	31	No	No	PCS	Unit Price	100.100

- 1. Click on "Process" Tab from Sales Item list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



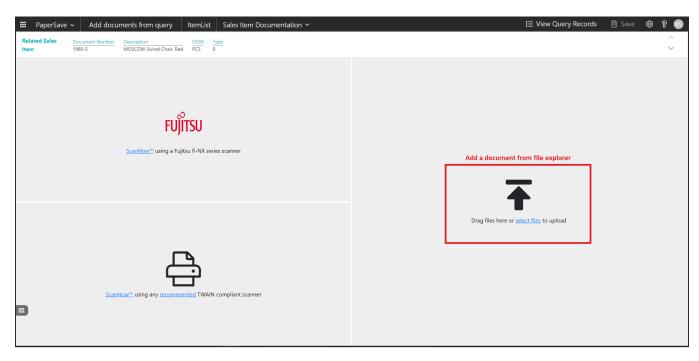
<u>CRONUS AL</u>	J Finance∨ Cash Ma	anagement v Sal	es – Purchasing –	Setu	p & Extensions ~	Intelligent Cloud Insights \smallsetminus	≡
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1001	Fujitsu Chronos Scanner	Inventor Item Jo		lo	PCS	Item Details - Invoicing	
1002	Fujitsu ScanSnap	Inventor	eclassification Journal	lo	PCS	Item No.	1000
1003	Test item	Inventory	eclassification Journal	No	PCS	Item No. Costing Method	FIFO
1004	Test	Inventory	0 No	No	PCS	Cost is Adjusted	Yes
1896-S	ATHENS Desk	Inventory	11 No	No	PCS	Cost is Posted to G/L	Yes
1900-S	PARIS Guest Chair, black	Inventory	8 No	No	PCS	Standard Cost	0.000
1906-S	ATHENS Mobile Pedestal	Inventory	25 No	No	PCS	Unit Cost	100.000
1908-S	LONDON Swivel Chair, blue	Inventory	23 No	No	PCS	Overhead Rate	0.000
1920-S	ANTWERP Conference Table	Inventory	15 No	No	PCS	Indirect Cost %	0
1925-W	Conference Bundle 1-6	Inventory	0 No	Yes	PCS	Last Direct Cost	0.000

ADD DOCUMENTS FROM SALES ITEM LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Item list

- 1. On the Process Tab of Sales Item list, click on "Add Document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".





- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will **open** the document preview screen.
- 6. Click on **Save** to add the document to all the records in the Sales Item list.

III PaperSave - Add documents from query ItemList	Sales Item Documentation Y	🖽 🛛 🗮 View Query Records	🖹 Save 🕸 🖇 📧
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	1 Lines Shipped Total 1 Tend 14.03 0.15 Cash Discount IS.80		



SHOW DOCUMENTS FROM SALES ITEM LIST

Follow the below steps to test the PaperSave functionality "Show Document" from Sales Item list:

- 1. On the Process Tab of Sales Item list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in Sales Item list.

II Pap	erSave 🗸	Documents related to query	temList		_						≣ Vi	ew Query Records	
√ FILTER	₿ REFRESH	B SHOW GROUPING 🔲 CHOOSE FIELDS	EXPORT T	O EXCEL									
	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Description	UOM	Туре	
لم 100	1358489	INVOICE_TMP1582482674955491422.pdf	09/12/2019 10:30:08 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1358491	INVOICE_TMP8193730966268360722.pdf	09/12/2019 10:32:01 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1358492	uri_1116961_20160218_6646928_1638690811.pdf	09/12/2019 10:32:03 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1358493	INVOICE_TMP4265068694222479491.pdf	09/12/2019 10:33:23 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1358494	INVOICE_TMP4535577695376957713.pdf	09/12/2019 10:33:23 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u> 100	1358495	INVOICE_TMP8193730966268360722.pdf	09/12/2019 10:33:23 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1358496	INVOICE_TMP4435956351906090752.pdf	09/12/2019 10:33:24 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>ل</u> ا	1358497	uri_1116961_20160218_6646928_1638690811.pdf	09/12/2019 10:33:25 AM	PS\vsonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1368505	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0	
<u>لم</u>	1368506	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	2000-S	Sales Item	Sales Item Documentation	2000-S	2000-S	SYDNEY Swivel Chair, green	PCS	0	
<u>لم</u>	1368507	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	1980-S	Sales Item	Sales Item Documentation	1980-S	1980-S	MOSCOW Swivel Chair, red	PCS	0	
	1368508	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	1988-S	Sales Item	Sales Item Documentation	1988-S	1988-S	SEOUL Guest Chair, red	PCS	0	
<u>لم</u>	1368509	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	1972-S	Sales Item	Sales Item Documentation	1972-S	1972-S	MUNICH Swivel Chair, yellow	PCS	0	
<u>ل</u> ا	1368510	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	1996-S	Sales Item	Sales Item Documentation	1996-S	1996-S	ATLANTA Whiteboard, base	PCS	0	
	1368511	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PS\bshahhvtest9stg	1960-S	Sales Item	Sales Item Documentation	1960-S	1960-S	ROME Guest Chair, green	PCS	0	
	1368512	3PaperSave1.pdf	09/13/2019	PS\bshahhvtest9sto	1965-W	Sales Item	Sales Item Documentation	1965-W	1965-W	Conference Bundle 2-8	PCS	0	1 of

SHOW INTERRELATED DOCUMENTS FROM SALES ITEM LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Item list:

- Select the desired record from the list. On the Process Tab of Sales Item list, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.



3. On login success, it will **show** the Interrelated documents for the selected record in Sales Item list.

	Paper	Save 🗸 🛛 Documen	nts that are interrelated to	o this root Sales Item		Q Search within document list	¢ ? 🔇
Roo Item	t Sales 1	Document Number A	Description UOM Type THENS Desk PCS Invento	- y			
₿ R	EFRESH	√ FILTER ■ SHOW G	ROUPING 🔲 CHOOSE FIELDS	EXPORT TO EXCEL			
		Created Created By					
	<u>ل</u>	12-09-2019 10:30:08 AM Vivek Soni					*
	A.	12-09-2019 10:32:01 AM Vivek Soni					
	يلم Real	12-09-2019 10:32:03 AM Vivek Soni					
	يلم Tee	12-09-2019 10:33:23 AM Vivek Soni					
	يل التقا	12-09-2019 10:33:23 AM Vivek Soni					
	A.	12-09-2019 10:33:23 AM Vivek Soni					
	A.	12-09-2019 10:33:24 AM Vivek Soni					
	A.	12-09-2019 10:33:25 AM Vivek Soni					

SALES ITEM CARD

Clicking on **the Sales Item card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of desired record in the Sales Item list.
- 2. This will launch the **Sales Item** record.

	isiness Central		\sim					Sandbox Q	~ •	¢
\leftarrow	ITEM CARD WORK DATE: 2/12/2019		 (2) + 	Û				√ SAVED ,×		
	1896-S · ATHEN	NS Desk								
	Process Item History Special	Sales Pces & Discounts Request Approval	More options					0		
	Item					Show more	Picture ~			
	No	896-S	Туре	Inventory		•				
	Description A	THENS Desk	Base Unit of Measure	PCS		\sim				
	Blocked · · · · · · · · · · · ·		Item Category Code	TABLE		~				
	Inventory					Show more	1	4		
	Shelf No.		Stockout Warning	Default (Yes)		•				
	Quantity on Hand	64 …	Unit Volume			1.2				
	Qty. on Purch. Order	0	SAT Item Classification			\sim	Item Attributes			
	Qty. on Sales Order	0				- 1	ATTRIBUTE	VALUE		
	Costs & Posting >			780.70 RETAIL	FURNITURE	RESALE	Color	Black		
	costs & Posting /			780.70 RETAIL	FURNITURE	RESALE	Depth	60 CM		
	Prices & Sales >					1,000.80	Width	200 CM		
							Height Material Description	170 CM Wood		
	Replenishment >					Purchase				
	Planning >					None	$Forecast \lor$			
	Planning >					None	80			



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

+	Business Central			Sandbox Q	\$ م	
				V SAVED *		
	1896-S · ATHENS Desk					
	Process Item History Special Sales Pces & Discounts Request Approva	More options		0		
	Add Document Show Documents Show Interrelated Documents	I Item Journal I Item Reclassification Journal		-		
	No	Type · · · · · · · · · · · · · · · · · · ·	•			
	Description · · · · · · · ATHENS Desk	Base Unit of Measure · · · · · · PCS · · ·				
	Blocked · · · · · · · · · ·	Item Category Code · · · · · · · TABLE · ·				
				11		
	Inventory	Show mor	re	-1		
	Shelf No. · · · · · · · · · · ·	Stockout Warning · · · · · · · Default (Yes)	-			l
	Quantity on Hand · · · · · · · · · · · · · · · · · · ·	Unit Volume	2	_		l
	Qty. on Purch. Order · · · · · · 0	SAT Item Classification	Item Attributes			
	Qty. on Sales Order · · · · · · 0		ATTRIBUTE	VALUE		
			Color	Black		
	Costs & Posting >	780.70 RETAIL FURNITURE RESALE	Depth	60 CM		
			Width	200 CM		
	Prices & Sales >	1,000.80	Height	170 CM		
	Declaridary and		Material Description	Wood		
	Replenishment >	Purchase				

ADD DOCUMENTS FROM SALES ITEM CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Item card:

- 1. On the Process tab of Purchase Invoice Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **open** the "Add Document" page.



Image: PaperSave v Add a New PaperSave Document Sales Item Documentation v + New <	> ₽ ⊠ ¥ \$\$ \$ \$
FUJITSU <u>ScanNow</u> ^{**} using a Fujitsu fi-NX series scanner	Add a document from file explorer
ScanNow ²⁴ using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will **open** the document preview screen.
- 6. Click "**Save**" to add the document to the selected record.

III PaperSav	ve 🗸 🛛 Add a l	New PaperSa	ve Doc	ument	Sales Item Documentation $$	+ New	$\langle \rangle$	₿						🖹 Save	¢	ନ୍ଧ ያ
Related Sales Item	Document Number 1896-S	Description ATHENS Desk	UOM PCS	Type Inventory												
₽ A																
				Invoice / GPS H	Address Iospitality, LLC.				Invoice date: Order no: PO #:		Feb-2016 32094 61		—			•
□ ∅ ○ −					RIVEREDGE PKWY ITA, GA 30328-4693				Order from: Shipping date: Cust Service Rep Store no: Customer no:	502	9/16 es Couyoum 0680 62-018811	ijian				
0 0 0			Burger	Address King 131	61				Customer store no Reference:): 131	61					
- () () () () () () () () () () () () () (V HUNTE N, OH 43					Payment terms: Delivery terms: Ship via: GST #: Tracking #:	UP: 869	30 3 Shipping F 3 Ground 1575928RT0 9E0W30334	0001				
			Comme	nt:								Page #	1/1			
			Line # F	Part #	Description				Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD			
			Parts 10 4	21728	Tip, Rubber Feet (Set of	4)			3	3	P4	6.96	20.88			
1_/1 INVO	DICE_TMP1582482674955]	20 6	10972	TONG, LIFT AND GRIF	P S/S 12"			3	3	EA	5.16	15.48	8 8 8 0 -		•



SHOW DOCUMENTS FROM SALES ITEM CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Sales Item card:

- 1. On the Invoice tab of Sales Item Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

PaperSave Document Sales Item Documentation	Q Search within document list	¢\$ 8 🚯
Related Sales Document Number Description UOM Type Item 1896-S ATHENS Desk PCS Inventory		
+ NEW 🖓 FILTER 😅 REFRESH 🔲 CHOOSE FIELDS 🔄 SHOW GROUPING 🗈 EXPORT TO EXCEL 😫 INTERRELATED		
Created By		
12-09-2019 Vivek Soni		A
Image: 12-09-2019 Vvek Soni		
La 12-09-2019 Vivek Soni		

SHOW INTERRELATED DOCUMENTS FROM SALES ITEM CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Item card:

item card:

- 1. On the Process tab of Sales Item Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

	Paper	Save 🗸	Documer	nts that are interrelated to this root Sales Item	Q Search within document list	ŝ	ନ୍ତ 🗿
Roo Iter	ot Sales n	Documen 1896-S	t Number A	Obscription UOM Type VITHENS Desk PCS Inventory			
ø	REFRESH	T FILTER	🛐 SHOW G	ROUPING I CHOOSE FIELDS 🕃 EXPORT TO EXCEL			
		Created	Created By				
	<u>لم</u>	12-09-2019 10:30:08 AM	Vivek Soni				A
	<u>لم</u> 1928	12-09-2019 10:32:01 AM	Vivek Soni				
	<u>لم</u> 1928	12-09-2019 10:32:03 AM	Vivek Soni				
	A.	12-09-2019 10:33:23 AM	Vivek Soni				
	<u>لم</u>	12-09-2019 10:33:23 AM	Vivek Soni				
	<u>لم</u>	12-09-2019 10:33:23 AM	Vivek Soni				
	<u>لم</u>	12-09-2019 10:33:24 AM	Vivek Soni				
	<u>لم</u>	12-09-2019 10:33:25 AM	Vivek Soni				



5.7 SALES INVOICE

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

- 1. On the Dynamics 365 Business Central Home Page, click on the Sales dropdown.
- 2. Click on Sales Invoices.



SALES INVOICE LIST

Clicking on **Sales Invoices** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

CRONUS /	AU Financ	e \checkmark Cash Management \checkmark	Sales V Pu	urchasing \lor Setup & E	xtensions \lor	Intelligent Cloud Insights $\!$	\equiv
Sales Invoices	: All 🗸 📔 🖇	🔾 Search 🕂 New 📋 Delete	$Process \lor$	Release \lor Posting \lor	Invoice \lor	Navigate \lor ···· \searrow	7 🗉 🛈 🎵 🖉
No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sell-to Contact	Post		
<u>103199</u>	10000	Adatum Corporation		Anthony Lording	4/4	i Details 🛛 Attachment	s (0)
103200	10000	Adatum Corporation		Anthony Lording	5/1	Customer Statistics	
103201	20000	Trey Research		Mary Kumm	4/3	Customer No.	10000
103202	30000	School of Fine Art		Meagan Bond	4/5	Customer No. Balance (LCY)	264.00
103203	30000	School of Fine Art		Meagan Bond	5/1		204.00
103204	40000	Alpine Ski House		lan Deberry	5/1	SALES	
103205	50000	Relectoud		Mason Kingsley	4/2	Outstanding Orders (LCY) Shipped Not Invd. (LCY)	41,450.60 0.00
103405	10000	Adatum Corporation		Anthony Lording	4/1	Outstanding Invoices (LCY)	39,486.40
103406	50000	Relectoud		Mason Kingsley	5/1	PAYMENTS	
				5 7		Payments (LCY)	466.701.05

- 1. Click on "Process" Tab from Sales Invoices list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



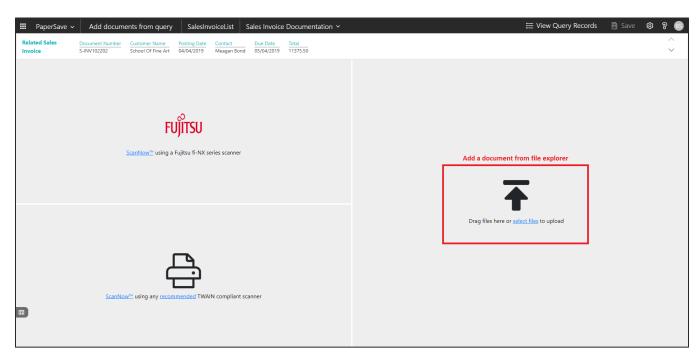
	AU Finance	e∨ Cash Management∨	Sales V Purchasing V Setup & Ext	ensions \sim	Intelligent Cloud Insights $\!$	=
Sales Invoices:	. All ~ , ∕	🛛 Search 🕂 New 🗎 De	lete Process V Release V Posting V	Invoice \lor	Navigate \lor ···· \bigtriangledown	7 ≣ 0 ∏ ∠
	Sell-to		1 Add Document			
No. 1	Sell-to Customer No.	Sell-to Customer Name	🛅 Show Documents	Post		
103199	10000	Adatum Corporation	Show Interrelated Documents	4/4	① Details ① Attachments	s (0)
103200	10000	Adatum Corporation	Anthony Lording	5/1	Customer Statistics	
103201	20000	Trey Research	Mary Kumm	4/3		
103202	30000	School of Fine Art	Meagan Bond	4/5	Customer No.	10000
103203	30000	School of Fine Art	Meagan Bond	5/1	Balance (LCY)	264.00
103204	40000	Alpine Ski House	lan Deberry	5/1	SALES	
					Outstanding Orders (LCY)	41,450.60
103205	50000	Relectoud	Mason Kingsley	4/2	Shipped Not Invd. (LCY)	0.00
103405	10000	Adatum Corporation	Anthony Lording	4/1	Outstanding Invoices (LCY)	39,486.40
103403				5.44	PAYMENTS	
103405	50000	Relectoud	Mason Kingsley	5/1	TAIMENTS	

ADD DOCUMENTS FROM SALES INVOICE LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Invoices list

- 1. On the Process Tab of Sales invoice list, click on "Add Document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".





- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will **open** the document preview screen.
- 6. Click **Save** to add the document to all the records in the Sales Invoices list.

🗰 PaperSave 🗸	Add docume	ents from query	SalesInv	oiceList S	ales Invoice	Documentation ~							⊞	₩ View Query Records	🖹 Save	¢ ? 🕓
Related Sales Invoice	Document Number S-INV102202	Customer Name School Of Fine Art	Posting Date 04/04/2019	Contact Meagan Bond	Due Date 05/04/2019	Total 11375.50										~
ß																
A D & O - O D & V V V				800 AVIA SMVTRNA Acct Ree Cost Svc Cust		1 (P) 815-462-5480 1 (P) 915-462-4000 2 LLC GE PKVVY 328-4693		Invoice no: Invoice ade: O of no: O offer form: Shipping date: Calsto no: Reference: Payment terms: Delivery terms: Delivery terms: Ship via: Cart director terms: Delivery terms: Ship via:	Scheid 021916 Myles 0 502233 11062-1 7166 Net 30 FOB SI UPS G 86957	-2016 168 ipment-66(legger, Mil Couyoumji 33 018811 hipping Po	ke ian cint 001	N <mark>ik E</mark>				Î
				Attn: R Comment: Line# Par	estaurant Manger	cription		Total Qty	Qty	UOM	Page #	1/2 Totals				
				Parts		·		Ordered S	hipped		USD	USD				
				10 492		t Aid Burn Cream (10 pack) tment, First Aid Antibiotic (10) Pa	cks	1	1	EA	2.09	2.09				
				30 492		, Burn Relief 3.5gm (6 per pack)		2	2	EA	2.09	4.18				
				40 618	561 Pac	l, Alcohol Cleansing (20) Pads		1	1	EA	2.09	2.09				
				50 492		ndage, Blue 1" x 3" (25 per pack)		2	2	EA	2.09	4.18				
				60 618 70 492		t Wash (1) 1oz. Bottle		1	1	EA EA	2.09	2.09				



SHOW DOCUMENTS FROM SALES INVOICE LIST

Follow the below steps to test the PaperSave functionality "Show Document" from Sales Invoices list:

- 1. On the Process Tab of Sales invoices list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in Sales Invoice list.

	Paper	Save 🗸	Documents rel	ated to que	ery SalesInv	oiceList							≡	View Quer	y Records	ŵ	8 B
¶ ₽	LTER	C REFRESH	SHOW GROUPIN	ид 🔲 СНО	OSE FIELDS 🖹 EXF	PORT TO EXCEL											
		ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Customer Name	Posting Date	Contact	Due Date	Total		
	J.	1358450	5_Pages_PDF_I-9.pdf	09/12/2019 08:34:16 AM	PS\bshahhvtest9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relectoud	04/04/2019	Jesse Homer	05/04/2019	11376		
). Esta	1358452	mcpr.pdf	09/12/2019 08:35:56 AM	PS\bshahhvtest9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relectoud	04/04/2019	Jesse Homer	05/04/2019	11376		
	<u>لم</u>	1358453	mcpr.pdf	09/12/2019 08:36:06 AM	PS\bshahhvtest9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relectoud	04/04/2019	Jesse Homer	05/04/2019	11376		
	 ,	1368526	W229 NI 477.tif	09/13/2019 06:15:49 AM	PS\bshahhvtest9stg	S-INV102199	Sales Invoice	Sales Invoice Documentation	S-INV102199	S-INV102199	Adatum Corporation	04/04/2019	Robert Townes	05/04/2019	11376		
	E	1368527	W229 NI 477.tif	09/13/2019 06:15:49 AM	PS\bshahhvtest9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relectoud	04/04/2019	Jesse Homer	05/04/2019	11376		

SHOW INTERRELATED DOCUMENTS FROM SALES INVOICE LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Invoices list:

- Select the desired record from the list. On the Process Tab of Sales invoices list, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for the selected record in Sales Invoice list.

	Раре	Save v Documents that are interrelated to this root Sales Invoice	Q Search within document list	ŝ	ଃ 🚳
	ot Sales /oice	Document Number Customer Name Posting Date Contact Due Date Order Date Total S-ORD101001 Adatum Corporation 02-04-2019 Robert Townes 02-05-2019 02-04-2019 17773.66			
Ø	REFRESH	¬ FILTER ■ SHOW GROUPING □ CHOOSE FIELDS B EXPORT TO EXCEL			
		Created By			
) POT	12-09-2019 Bhavya Shah 08:50:40 AM			*
	1 TOT	12-09-2019 0852:51 AM Bhaya Shah			
	ж.	12-09-2019 Bhavya Shah 0852:59 AM			



SALES INVOICE CARD

Clicking on the **Sales Invoice card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of desired record in the Sales Invoices list.
- 2. This will launch the **Sales Invoice** record.

Image: Dynamics 365 Business Central Sandbox Sandbox	ο μ	۲	? SP
← SALES INVOICE I WORK DATE 2/1/2/2019	Ľ.		
S-INV102199 · Adatum Corporation			
Posting Prepare Invoice Release Request Approval Navigate More options	D		
General Show more			
Customer Name Adatum Corporation Posting Date 4/5/2018 Customer No. 10000 Contact Robert Townesedit Due Date 5/5/2018 Pone No. Adatum Corporation Phone No. Email roberttownes@contoso.com		I	
Lines Manage More options Fax No. Credit Limit (5) 0.00			
UNIT OF Available Credit (\$) Available Credit (\$) 0.00 TYPE N0. DESCRIPTION CODE QUANTITY CODE EXCL_TAX CODE CODE Payment Terms Code 1M(BD)			
Item 1968-5 MEXICO Swivel Chair, black 5 PCS 190.0 ATLANTA, GA FUNTURE Item 1996-5 ATLANTA Whiteboard, base 7 PCS 1.397.30 ATLANTA, GA FUNTURE			
Comment Thank you for ordering Item Details - Invoicing Item Details - Invoicing			
Item No			
Cott is Adjusted Cott is Posted to G/L Standard Cost			
Subtotal Excl. Tax (USD) 10,731.60 Total Excl. Tax (USD) 10,731.60 Unit Cost Overhead Rate 0			
Inv. Discount Amount Exc. Tax () 0.00 Total Tax (USD)			
Invoice Discount % ······ 0 Total Incl. Tax (USD) ····· 11,375.50 Last Direct Cost Profit % Unit Price			

3. Click on "**Prepare**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".



SALES INVOICE WORK	DATE: 2/12/2019			Ø) +	۵.				√ SAVED → K		
S-INV102	199 · A	datum Corpo	ration									
Posting Prepare	Invoice Releas	e Request Approval Navigate	More opti	More options								
🖼 Get Recurring Sale	s Lines 📴 Ci	ppy Document 🚹 Add Documer	nt 🛗 Show Do	ocuments 🗋 Si	now Interrelated	Documents	Predict Payme	nt		-12		
Customer Name · · · · ·		tum Corporation ert Townesedit		ing Date		4/5/2018 5/5/2018				10000 Adatum Corporation ert.townes@contoso.com		
Lines Manage	More options				UNIT OF			Ež	Fax No. Credit Limit (\$) Available Credit (\$)	0.00		
TYPE	N0.	DESCRIPTION	LOCATION CODE	QUANTITY		UNIT PRICE EXCL. TAX		TAX GROUF CODE	Payment Terms Code Contact	1M(8D) Robert Townes		
Item Item Comment	1968-S 1996-S	MEXICO Swivel Chair, black ATLANTA Whiteboard, base Thank you for ordering			PCS		ATLANTA, GA ATLANTA, GA		Item Details - Invoic	ing		
									ltem No. Costing Method Cost is Adjusted	1968-S FIFO Yes		
	-								Cost is Posted to G/L Standard Cost Unit Cost	Yes 0.00 148.10		
Subtotal Excl. Tax (USD)		10,		I Excl. Tax (USD)				10,731.60 643.90	Overhead Rate Indirect Cost %	0.00		
				I Incl. Tax (USD)				11.375.50	Last Direct Cost Profit %	148.10 22.09363		

ADD DOCUMENTS FROM SALES INVOICE CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Invoice card:

- 1. On the Prepare tab of Purchase Invoice Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **open** the "Add Document" page.



Image: PaperSave > Add a New PaperSave Document Sales Invoice Documentation > + New Related Sales Document Number Customer Name Posting Date Contact Due Date Total Invoice S-INV/02199 Adatum Corporation 04-04-2019 Robert Towner 04-05-2019 1137.5.0	< > ₽ ¤ ¥ \$\$
Invoice S-INV102199 Adatum Corporation 04-04-2019 Robert Townes 04-05-2019 11375.50	Add a document from file explorer
ScanNow ²⁴ using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will **open** the document preview screen. You can **select** the relevant "document type" in the checkbox and **add** a comment for the document.
- 6. Click "**Save**" to add the document to the selected record.

🗰 PaperSave 🗸 Add a New PaperSave Document 🛛 Purchase Invoices Documentation 🗸 + New 🖽 🤇 > 🖨 🖾 🛓 🛍	🖹 Save 🕸 🎖 🕚
Related Sales Document Number Reference Number Vendor Name Pay To Date Due Date Transaction Total Vendor Document Number Invoice 107209 Fabrikam, Inc. Krystal York 01/01/2018 04/30/2019 226.84 107209	ID: 263016 Batch: invoice-hero-generic.png
	Document Profile Doc Type : Receiving Ticket Contract Other Comments : Enter Value
1 /1 invice-hero-generic pg	



SHOW DOCUMENTS FROM SALES INVOICE CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Sales Invoice card:

- 1. On the Prepare tab of Sales Invoice Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

	Paper	Save ~ [Document	Sales Invoid	e Documentat	on 🗸							Q	Search with	in docume	nt list	٤	ត្រ វ	8 🧕	•
Rela Invo	ted Salo	S-ORD101		Customer Name Adatum Corporation		Contact Robert Townes	Due Date 02-05-2019	Order Date 02-04-2019	Total 17773.66											
+ N	EW 7	7 FILTER 📿 R	EFRESH	CHOOSE FIELDS	B SHOW GROUPI	NG 🔀 EXPC	RT TO EXCEL	다. INTERRELA	ED											
		Created	Created By																	
	يلر Ref	12-09-2019 08:50:40 AM	lhavya Shah																	4
	يل Ref	12-09-2019 08:52:51 AM	lhavya Shah																	
	<u>لم</u>	12-09-2019 08:52:59 AM	lhavya Shah																	
	14 1900	13-09-2019 06:19:27 AM	lhavya Shah																	



SHOW INTERRELATED DOCUMENTS FROM SALES INVOICE CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Invoice card:

- 1. On the Prepare tab of Sales Invoice Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

	Рар	erSave v Documents that are interrelated to this root Sales Invoice	Q Search within document list	¢ 8	ا
	oot Sale woice	Document Number Customer Name Posting Date Contact Due Date Order Date Total S-ORD101001 Adatum Corporation 02-04-2019 Robert Townes 02-05-2019 02-04-2019 17773.66			
R	REFRESI	T FILTER 🙀 SHOW GROUPING 🔟 CHOOSE FIELDS 🔀 EXPORT TO EXCEL			
		Created By			
), Port	12-09-2019 Bescvad AM Bhavya Shah			-
) Part	12-08-2019 Bhavya Shah			
	K.	12-09-2019 Bhavya Shah 08:32:59 AM			



5.8 SALES ORDER

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Sales** dropdown.
- 2. Click on **Sales Orders**.

CRONUS USA, Inc.	Finance v Cash Management v	Sales V Purchasing V	Setup & Extensions ~ Intelliger	nt Cloud Insights \lor	
· · · · · · · · · · · · · · · · · · ·	s 2 Sales Orders Sales Invoi Blanket Sales Orders Sales Credi		Finance Charge Memos Pos Posted Sales Invoices Pos		4

SALES ORDER LIST

Clicking on **Sales Order** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

Sales Orders:	All 🗸 🛛 🔎	Search + New 📋 Delete	Process 🗸	Report \lor Or	der 🗸 🛛 Relea:	se v Pos	iting \lor	ਲ਼ ≡ 0 Д 2
No. 1	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Docum: Date		
101001	10000	Adatum Corporation				4/2/20	🛈 Details 🛛 🔋 Attachmer	nts (0)
101002	10000	Adatum Corporation				5/1/20	Customer Statistics	
101003	30000	School of Fine Art				4/22/2		10000
101004	40000	Alpine Ski House				5/13/2	Customer No. Balance (LCY)	10000 264.00
							SALES	
							Outstanding Orders (LCY)	41,450.60
							Shipped Not Invd. (LCY)	0.00
							Outstanding Invoices (LCY)	39,486.40
							PAYMENTS	
							Payments (LCY)	466,701.05
							Refunds (LCY)	0.00
							Refunds (LCY) Last Payment Receipt Date	0.00 3/21/2019

- 1. Click "Process" Tab from Sales Order list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".

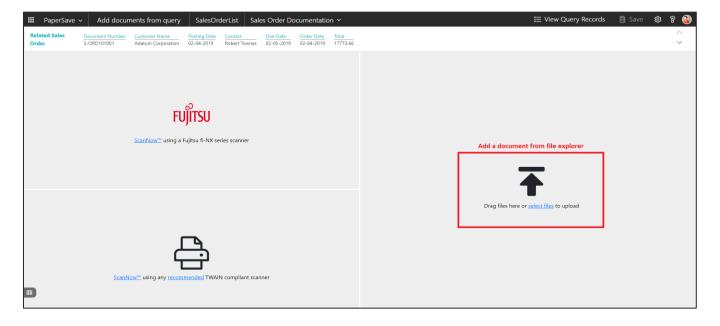


CRONUS		Finance	5	5	p & Exter		Intelligent Cloud Insights ~	
Sales Orders	: А	II ✓ ♀ Sell-to	Search + New 🗎 Delete	Process V Report V Order	Relearing Rel	Documi	sting∨ ··· ⊽	″≣ □ □ ⊭
No. 1		Customer No.	Sell-to Customer Name	🛅 Show Documents	inco osci	Date		
101001	:	10000	Adatum Corporation	B Show Interrelated Documents		4/2/20	Details Attachments	s (0)
101002		10000	Adatum Corporation			5/1/20	Customer Statistics	
101003		30000	School of Fine Art			4/22/2		
							Customer No.	10000
101004		40000	Alpine Ski House			5/13/2	Balance (LCY)	264.00
							SALES	
							Outstanding Orders (LCY)	41,450.60
							Shipped Not Invd. (LCY)	0.00
							Outstanding Invoices (LCY)	39,486.40
							PAYMENTS	
							Payments (LCY)	466,701.05
							Refunds (LCY)	0.00

ADD DOCUMENTS IN SALES ORDER LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Orders list

- 1. On the Process Tab of Sales Order list, click on "Add Document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".





- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will **open** the document preview screen.
- 6. Click **Save** to add the document to all the records in the Sales Orders list.

H PaperSave	 Add documents from query 	SalesOrderList Sales Order Documer	ntation ~			:	E View Query	Records 🛛 🛢) Save හි	3 8 🚳
Related Sales Order	Document Number Customer Name S-ORD101001 Adatum Corporation	Posting Date Contact Due Date Order I 02-04-2019 Robert Townes 02-05-2019 02-04-								~
ß										
A D & O I O D & A & M X				Order from: Shipping date: Cust Service Rey Store no: Customer no: Customer store n Reference: Payment terms: Delivery terms: Ship via: GST #: Tracking #:	02/19/16 p: Myles 50223 11062 no: 7166 Net 30 FOB S UPS 0 86957	Couyoum 33 -018811 Shipping F	njian ⊃oint 0001			
	Attn: Restauran Comment:	t Manger					Page #	1/2		
	Line # Part #	Description		Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD		
	Parts									
	10 492434	First Aid Burn Cream (10 pack)	1	1	EA	2.09	2.09		
	20 618562	Ointment, First Aid Antibiotic (1	0)Packs	1	1	EA	2.09	2.09		-

SHOW DOCUMENTS IN SALES ORDER LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Sales Orders list:

- 1. On the Process Tab of Sales Order list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available documents for the selected record in Sales Order list.



	Раре	rSave 🗸	Documents related to query SalesOrc	lerList							i≡ '	/iew Query	Records ई	\$? BS
¶ FIL	TER	C REFRESH	। 🔄 SHOW GROUPING 🔲 CHOOSE FIELDS 🔀 EXF	PORT TO EXCEL										
		ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Customer Name	Posting Date	Contact	Due Date
	<u>لم</u>	1358459	Payables Transaction Document.pdf	09/12/2019 08:50:40 AM	PS\bshahhvtest9stg	S-ORD101001	Sales Order	Sales Order Documentation	S-ORD101001	S-ORD101001	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	A.	1358460	3PaperSave1.pdf	09/12/2019 08:52:51 AM	PS\bshahhvtest9stg	S-ORD101001	Sales Order	Sales Order Documentation	S-ORD101001	S-ORD101001	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	يل EEE	1358461	4Notecard to George Roberts Student Imperative 6-14-14.pdf	09/12/2019 08:52:59 AM	PS\bshahhvtest9stg	S-ORD101001	Sales Order	Sales Order Documentation	S-ORD101001	S-ORD101001	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	يل BEE	1358462	ReQlogic.pdf	09/12/2019 08:58:14 AM	PS\bshahhvtest9stg	S-ORD101003	Sales Order	Sales Order Documentation	S-ORD101003	S-ORD101003	School of Fine Art	04/02/2019	Meagan Bond	05/02/2019
	لم Tee	1368534	ReQlogic.pdf	09/13/2019 06:19:27 AM	PS\bshahhvtest9stg	S-ORD101001	Sales Order	Sales Order Documentation	S-ORD101001	S-ORD101001	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	لم EEE	1368535	ReQlogic.pdf	09/13/2019 06:19:27 AM	PS\bshahhvtest9stg	S-ORD101002	Sales Order	Sales Order Documentation	S-ORD101002	S-ORD101002	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	<u>لم</u>	1368536	ReQlogic.pdf	09/13/2019 06:19:27 AM	PS\bshahhvtest9stg	S-ORD101003	Sales Order	Sales Order Documentation	S-ORD101003	S-ORD101003	School of Fine Art	04/02/2019	Meagan Bond	05/02/2019
	J.	1368537	ReQlogic.pdf	09/13/2019 06:19:27 AM	PS\bshahhvtest9stg	S-ORD101004	Sales Order	Sales Order Documentation	S-ORD101004	S-ORD101004	Alpine Ski House	04/02/2019	lan Deberry	05/02/2019
	J. PER	1369062	INVOICE_TMP1088948245530689268.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101001	Sales Order	Sales Order Documentation	S-ORD101001	S-ORD101001	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	14 1999	1369063	INVOICE_TMP1088948245530689268.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101002	Sales Order	Sales Order Documentation	S-ORD101002	S-ORD101002	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	<u>لم</u>	1369064	INVOICE_TMP1088948245530689268.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101003	Sales Order	Sales Order Documentation	S-ORD101003	S-ORD101003	School of Fine Art	04/02/2019	Meagan Bond	05/02/2019
	J.	1369065	INVOICE_TMP1088948245530689268.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101004	Sales Order	Sales Order Documentation	S-ORD101004	S-ORD101004	Alpine Ski House	04/02/2019	lan Deberry	05/02/2019
	يل eee	1369066	INVOICE_TMP334859193057320292.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101001	Sales Order	Sales Order Documentation	S-ORD101001	S-ORD101001	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	<u>لم</u>	1369067	INVOICE_TMP334859193057320292.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101002	Sales Order	Sales Order Documentation	S-ORD101002	S-ORD101002	Adatum Corporation	04/02/2019	Robert Townes	05/02/2019
	<u>لم</u>	1369068	INVOICE_TMP334859193057320292.pdf	09/13/2019 10:40:01 AM	PS\vsonihvtest9stg	S-ORD101003	Sales Order	Sales Order Documentation	S-ORD101003	S-ORD101003	School of Fine Art	04/02/2019	Meagan Bond	05/02/2019
	1	5 8 [100 V										1.05	1 pages (17 items)

SHOW INTERRELATED DOCUMENTS IN SALES ORDER LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Orders list:

1. Select the desired record from the list. On the Process Tab of Sales Order list, click on "Show Interrelated Documents".

2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.

3. On login success, it will **show** the available Interrelated documents for the selected record in Sales Order list.





SALES ORDER CARD

Clicking on the **Sales Order card** opens the selected record in card view with all the record details:

- 1. Click on the **number field** of desired record in the Purchase Invoices list.
- 2. This will launch the **Sales Order** record.

5 Bu	siness Central									Sandbo	рх Q	Q	
\leftarrow	SALES ORDER WORK DATE: 2/12,	2019			Ø	+ 🗊				√ SAVED	, ⁴		
	S-ORD101004	4 · A	Alpine Ski Hou	lse									
	Process Report Release	Posting	Prepare Order Request A	oproval Print/S	end Navigate	More optic	ns				0		
	General								Show more	Sell-to Customer Sales History	T		
	Customer Name	Alpine	Ski House	→ Due I	Date		/2018			1 0 1			
Proce Gen Custe Orde	Contact	lan De	berry	··· Requ	ested Delivery Date		J/2018			Ongoing Sales Ongoing Sales Ongoing Sales			
	Posting Date	5/13/2	018	Extern	nal Document No. ·					Quotes Blanket Orders Orders			
	Order Date	5/13/2	2018							1 0 0			
										Ongoing Sales Invoices Ongoing Sales Ongoing Sales Credit Memos			
	Lines Manage More o	otions					UNIT OF	28 28 0					
	TYPE NO		DESCRIPTION	LOCATION	QUANTITY	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX ARE CODE	Posted Sales Shipments Invoices Posted Sales Return Receipts	- 1		
	Item 200	D-S	SYDNEY Swivel Chair, green		3	-	PCS	190.10	N.ATL, G	0			
										Posted Sales Credit Memos			
											-		
									Customer Details \vee				
										Customer No. 40 Name Alpine Ski He	0000 Duse		
	Subtotal Excl. Tax (USD)		5	i70.30 Total	Excl. Tax (USD) · · · ·				570.30	Phone No.			
	Inv. Discount Amount Excl. Tax (0.00 Total	Tax (USD)				39.92	Email ian.deberry@contoso. Fax No.	:om		
	Invoice Discount %			0 Total	Incl. Tax (USD)				610.22		0.00		
										Available Credit (\$)	0.00		

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



Business Central										Sandbox Q 刘
- SALES ORDER WOR	K DATE: 2/12/2019			Ø	+ 🗊					√ SAVED , K
S-ORD1	01004 · /	Alpine Ski Ho	ise	_						
	-	Prepare Order Request /		t/Send Navigate	More optio	ns				0
1 Add Document	🛗 Show Docume	nts 🗋 Show Interrelated Docum	ents 🔮 Crea	ite Inventoryt-away/	Pick					-13
Customer Name	Alpin	e Ski House	~ D.	e Date · · · · · · · · ·	6/13	/2018			1 0	1
Contact · · · · · ·	Ian D	eberry	Re	quested Delivery Date	5/14	/2018			, v	· · · · ·
Posting Date		2018	Ē Ex	ternal Document No.					Ongoing Sales Quotes Blanket Orders O	ngoing Sales rders
Order Date		2018				1 0	0			
						Ongoing Sales Ongoing Sales O Invoices Return Orders C	ngoing Sales redit Memos			
Lines Manag	e More options			Ež	28 28	0				
			LOCATION		050501/50	UNIT OF MEASURE	UNIT PRICE			0
TYPE	N0.	DESCRIPTION	CODE	QUANTITY	QUANTITY		EXCL. TAX			osted Sales eturn Receipts
Item	2000-S	SYDNEY Swivel Chair, green		3	-	PCS	190.10	N.ATL., G	0	
									Posted Sales Credit Memos	
									Customer Details \smallsetminus	
									Customer No.	40000
									Name	Alpine Ski House
Subtotal Excl. Tax (US	D)		570.30 To	tal Excl. Tax (USD) · · ·				570.30	Phone No. Email ian.deb	erry@contoso.com
Inv. Discount Amoun	Excl. Tax (0.00 To	tal Tax (USD)				39.92	Fax No.	
Invoice Discount %			0 To	tal Incl. Tax (USD) · · ·				610.22	Credit Limit (\$) Available Credit (\$)	0.00



ADD DOCUMENTS IN SALES ORDER CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Order card:

- 1. On the Process tab of Sales Order Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.

III PaperSav	ve ~ Add a N	lew PaperSave Doo	ument	Sales Order D	ocumentati	on 🗸 🚽	⊢ New	<	> 🗛	×		¢	ନ୍ତ 📀
Related Sales Order	Document Number S-ORD101001	Customer Name Adatum Corporation	Posting Date 02-04-2019	Contact Robert Townes	Due Date 02-05-2019	Order Date 02-04-2019	Total 17773.66						
		S <u>canNow™</u> using	F <mark>UJITSU</mark>								Add a document from file explorer		
Ħ	Sca	nNow ^w using any rec	ommended TV	VAIN compliant s	canner					<u>Click to</u>	Generate a barcode to scan this document in a batch at a later time		

- 4. Drag or select files to upload the desired document.
- 5. This will **open** the document preview screen.
- 6. Click "Save" to add the document to the selected record.



III PaperSav	ve ~ Add a N	ew PaperSave Doc	ument	Sales Order D	ocumentati	on v 🛛 🕂	• New	< >	₿	$\boxtimes \overline{\mathbf{A}} \times$				🗎 Sav	e 😳	ଃ 🚳
Related Sales Order	Document Number S-ORD101001	Customer Name Adatum Corporation	Posting Date 02-04-2019	Contact Robert Townes	Due Date 02-05-2019	Order Date 02-04-2019	Total 17773.66									
₽ A Ø O - O O O O O O	В	2100 F ATLAN USA Helivery Address Hurger King 8054	TA, GA (DGE PK\ 30328-469						PO #: Order from: Shipping date: Cust Service Rep: Store no: Customer no: Customer no: Reference:	5021 11062	s Couyoum 873 2-018811	jian			
↔ ✔ ♥ ₩	ĸ	410 WADE GR ENNESAW, G/ JSA	A 30144-1							Payment terms: Delivery terms: Ship via: GST #: Tracking #:	UPS 8695	0 Shipping F Ground 75928RT0 E0W30334	0001			
		.ttn: Hornung comment:	, Donna													
	Ē	ine # Part #	D	escription						Total Qty Ordered S	Qty hipped	UOM	Page # Unit price USD	1 / 1 Totals USD		
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1_/1 INVO	ICE_TMP4435956351906												C) == %			O+

SHOW DOCUMENTS IN SALES ORDER CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Sales Order card:

- 1. On the Process tab of Sales Order Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

III PaperSave V Document Sales Order Documentation V	Q Search within document list	🕸 १ 🚳
Related Sales Document Number Customer Name Posting Date Contact Due Date Order Date Total Order S-ORD101001 Adatum Corporation 02-04-2019 Robert Towness 02-05-2019 02-04-2019 17773.66		
+ NEW 🖓 FILTER 🖉 REFRESH 🔟 CHOOSE FIELDS 🔄 SHOW GROUPING 🗈 EXPORT TO EXCEL 📮 INTERRELATED		
Created By		
Li 12-09-2019 Bhaya Shah		Â
Image: 12-09-2019 Bhavya Shah 0652:51 AM Bhavya Shah		
Image: Second		
Image: 13-09-2019 Bhavya Shah 061927 AM Bhavya Shah		
Image: 13-09-2019 Vivek Soni		
13-09-2019 Vivek Soni		
13-09-2019 Vivek Soni		



SHOW INTERRELATED DOCUMENTS IN SALES ORDER CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Order card:

- 1. On the Process tab of Sales Order Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

	Paper	ave V Documents that are interrelated to this root Sales Order	Q Search within document list	¢\$? 🚳
	ot Sales der	Document Number S-ORD101001 Customer Name Adatum Corporation Posting Date 02-04-2019 Contact Robert Townes Due Date 02-05-2019 Order Date 02-04-2019 Total 17773.66		
S	REFRESH	\[\] \		
		Created By		
	<u>بر</u>	12-09-2019 Bhavya Shah 08:50:40 AM		*
	<u>لر</u>	12-09-2019 Bhavya Shah 0852-51 AM		
	<u>لر</u>	12-09-2019 Bhavya Shah 0852-39 AM		
	4	13-06-2019 Bhavya Shah 06:19:27 AM		
	1	13-09-2019 Vivek Soni 104001 AM		



5.9 SALES QUOTE

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Sales** dropdown.
- 2. Click on Sales Quotes.



SALES QUOTE LIST

Clicking on **Sales Quotes** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

- 1. Click on "Process" Tab from Sales Quotes list.
- 2. You will see the PaperSave options such as "Add Document", "Show Documents", and "Show

Interrelated Documents".

citoritos	AU Fina	nce – Cash Management	Sales Purchasing Setup	& Extensions \lor	Intelligent Cloud Insights $\!$	=
Sales Quotes	: All ~	🔎 Search 🕂 New 📋 De	elete Process V Quote V Print/Sen	d \smallsetminus Navigate \lor	Page ~ ··· 5	7 ≡ 0 Ω ∠
			1 Add Document			
No. 1	Sell-to Customer N	o. Sell-to Customer Name	🛅 Show Documents	Post		
1001	20000	Trey Research	Show Interrelated Documents	4/2	🛈 Details 🛛 🔋 Attachment	ts (0)
1002	40000	Alpine Ski House	a Make Order	4/3	Customer Statistics	
1003	40000	Alpine Ski House				
			🚵 Make Invoice		Customer No.	20000
			🔁 Create Task		Balance (LCY)	6,296.25
					SALES	
					Outstanding Orders (LCY)	0.00
					Shipped Not Invd. (LCY)	0.00
					Outstanding Invoices (LCY)	2,176.95
					PAYMENTS	
					Payments (LCY)	100,155.80
					Refunds (LCY)	0.00
					Last Payment Receipt Date	3/21/2019



ADD DOCUMENTS FROM SALES QUOTE LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Quotes list

- 1. On the Process Tab of Sales Quotes list, click on "Add Document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".

III PaperSave ~	Add documents from quer	y SalesQuoteList	Sales Quote Docun	nentation ~	₩ View Query Records	🖹 Save	ŵ	8 🔇
Related Sales Quote	Document Number Customer Name S-QUO1001 Trey Research	Posting Date Contact 02-04-2019 Helen Ray	Due Date Order Date 16-04-2019 01-01-2018	Total 2024.40				~ ~
		UITSU a Fujitsu fi-NX series scann	er		Add a document from file explorer			
	ScanNow ²² using any reco	mmended TWAIN complia	nt scanner		Drag files here or <u>select files</u> to upload			

- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will **open** the document preview screen.
- 6. Click **Save** to add the document to all the records in the Sales Quotes list.



III PaperSave - Add documents from query SalesQuoteL	st Sales Quote Documentation ~	田 🗄 View Query Records 🗎 Save 🕸 😵 📧
Related Sales Document Number Customer Name Posting Date Contact Quote S-QUO1001 Trey Research 04/02/2019 Helen R	Due Date Order Date Total y 04/16/2019 01/01/2018 2024.40	^ ~
	Numerican Page 1 Connect Page 1010 USA Page 1010 USA Page 1010 Connect Page 1010 Pars 10 10 421723 10 Reference 10 42172 10 Reference 10 42172 10 Reference 11 0 12 13.45 13.45 14.6 14.6 14.6 10.0 EM Park 11.0	

SHOW DOCUMENTS FROM SALES QUOTE LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Sales Quotes list:

- 1. On the Process Tab of Sales Quotes list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in Sales Quotes list.



	PaperS	Save 🗸	Documents related to query	Sales	QuoteList							E	View Que	ry Records	¢ 1	8 🚯
🖓 FIL	TER 🖌	C REFRESH	🖾 SHOW GROUPING 🔲 CHOOSE	FIELDS 🕅	EXPORT TO EXCEL											
		ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	لم Tet	1358463	Signature pages.pdf	09/12/2019 09:07:17 AM	PS\bshahhvtest9stg	S-QUO1001	Sales Quote	Sales Quote Documentation	S-QUO1001	S-QUO1001	Trey Research	04/02/2019 H	Helen Ray	04/16/2019	01/01/2018	2024
	 ,	1358464	HELLO.tif	09/12/2019 09:09:19 AM	PS\bshahhvtest9stg	S-QUO1001	Sales Quote	Sales Quote Documentation	S-QUO1001	S-QUO1001	Trey Research	04/02/2019	Helen Ray	04/16/2019	01/01/2018	2024
	 ,	1368540	Anywhere Earth ABCI23.tif	09/13/2019 06:23:03 AM	PS\bshahhvtest9stg	S-QUO1001	Sales Quote	Sales Quote Documentation	S-QUO1001	S-QUO1001	Trey Research	04/02/2019 H	Helen Ray	04/16/2019	01/01/2018	2024
	 ,	1368541	Anywhere Earth ABCI23.tif	09/13/2019 06:23:03 AM	PS\bshahhvtest9stg	S-QUO1002	Sales Quote	Sales Quote Documentation	S-QUO1002	S-QUO1002	Alpine Ski House	04/02/2019	lan Deberry	04/16/2019	01/01/2018	2024
	لم ee	1368542	Signature pages.pdf	09/13/2019 06:23:03 AM	PS\bshahhvtest9stg	S-QUO1001	Sales Quote	Sales Quote Documentation	S-QUO1001	S-QUO1001	Trey Research	04/02/2019 H	Helen Ray	04/16/2019	01/01/2018	2024
	7	1368543	Signature pages.pdf	09/13/2019 06:23:03 AM	PS\bshahhvtest9stg	S-QUO1002	Sales Quote	Sales Quote Documentation	S-QUO1002	S-QUO1002	Alpine Ski House	04/02/2019	lan Deberry	04/16/2019	01/01/2018	2024
	<u>لم</u>	1369053	INVOICE_TMP4265068694222479491.pdf	09/13/2019 10:33:05 AM	PS\vsonihvtest9stg	S-QUO1001	Sales Quote	Sales Quote Documentation	S-QUO1001	S-QUO1001	Trey Research	04/02/2019 H	Helen Ray	04/16/2019	01/01/2018	2024
	<u>لم</u> 1921	1369054	INVOICE_TMP4265068694222479491.pdf	09/13/2019 10:33:05 AM	PS\vsonihvtest9stg	S-QUO1002	Sales Quote	Sales Quote Documentation	S-QUO1002	S-QUO1002	Alpine Ski House	04/02/2019	lan Deberry	04/16/2019	01/01/2018	2024
	<u>لم</u> 1997	1369056	INVOICE_TMP1582482674955491422.pdf	09/13/2019 10:34:26 AM	PS\vsonihvtest9stg	S-QUO1001	Sales Quote	Sales Quote Documentation	S-QUO1001	S-QUO1001	Trey Research	04/02/2019 H	Helen Ray	04/16/2019	01/01/2018	2024
	<u>ل</u> 1885	1369057	INVOICE_TMP1582482674955491422.pdf	09/13/2019 10:34:26 AM	PS\vsonihvtest9stg	S-QUO1002	Sales Quote	Sales Quote Documentation	S-QUO1002	S-QUO1002	Alpine Ski House	04/02/2019 1	lan Deberry	04/16/2019	01/01/2018	2024

SHOW INTERRELATED DOCUMENTS FROM SALES QUOTE LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Quote list:

- Select the desired record from the list. On the Process Tab of Sales Quote list, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- On login success, it will **show** the available Interrelated documents for the selected record in Sales Quote list.

	Раре	Save v Documents that are interrelated to this root Sales Quote	Q Search within document list	ŵ	8 🗿	
	ot Sales Iote	Document Number Cutomer Name Posting Date Contact Due Date Order Date Total 5-QU01001 Trey Research 02-04-2019 Helen Ray 16/04/2018 01/01/2017 2024.40				
C	REFRESH	¬ FILTER ■ SHOW GROUPING □ CHOOSE FIELDS A EXPORT TO EXCEL				
		Created By				
	يل PSE	12-09-2019 08:50:40 AM Bhavya Shah				*
	1	12-09-2019 0852:51 AM Bhavys Shah				
	1	12-09-2019 Bhaya Shah 0852:59 AM				



SALES QUOTE CARD

Clicking on the **Sales Quotes card** opens the selected record in card view with all the record details:

- 1. Click the **number field** of desired record in the Sales Quotes list.
- 2. This will launch the **Sales Quotes** record.

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\leftarrow	SALES QUOTE WORK DATE: 2/12/2	019			Ø) + 🗊				√ SAVED	, ⁴		
	S-QUO1001 ·	Trey	/ Research										
	Process Quote Request App	roval I	Print/Send Release Navigat	e More d	ptions						0		
	General								Show more	Sell-to Customer Sales History			
	Customer Name				e Date		/2018			1 0 0 Origong Sales Cuotes Origong Sales Ballet Dides Origong Sales Ordes 1 0 0			
	Lines Manage More op	tions	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX ARE CODE	Ongoing Sales Invoices Ongoing Sales Return Orders Ongoing Sales Credit Memos 51 51 0			6
	Item : 1936	S	BERLIN Guest Chair, yellow		10		PCS		CHICAG	Posted Sales Posted Sales Posted Sales Return Receipts			
										0 Posted Sales Credit Memos			
										Sales Line Details	1		
	Subtotal Excl. Tax (USD)		1.5	28.00 Tot	al Excl. Tax (USD)				1,928.00	Item No. 19 Required Quantity	86-S		
	Inv. Discount Amount Excl. Tax (al Tax (USD)				96.40	ATTACHMENTS			
	Invoice Discount %			0 Tot						Documents	0		

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



5 Busine	ess Central									Sandb	ox Q	م	۲	?
← s	ALES QUOTE WORK DATE: 2/	12/2019			Ø) + 🗊				√ SAVED	~ ^K			
0	5-QUO1001	· Trey	/ Research											
P	rocess Quote Request	Approval F	rint/Send Release Navigat	e More d	ptions						0			
	🗄 Make Order 🛛 🖓 Make	Invoice 🛍	Add Document 🛛 🛗 Show Doc	uments 🗋 Si	how Interrelated Doc	cuments 🕒 Co	py Document			_	-12			
Ð	ustomer Name				e Date		/2018			1 0 0 Crepting Sales Orgoing Sales Orgoing Sales Orgoing Sales 1 0 0 0				
Li	ines Manage Mon	e options							E2	Ongoing Sales Ongoing Sales Ongoing Sales Invoices Return Orders Credit Memos	- 1			
	ТҮРЕ	N0.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX		51 51 0			•	
	Item 1	1936-S	BERLIN Guest Chair, yellow		10	0	PCS	192.80	CHICAG	Posted Sales Shipments Invoices Posted Sales Return Receipts				
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										Sales Line Details	- 1			
											36-S			
Su	ubtotal Excl. Tax (USD)		1.5	28.00 Tot	al Excl. Tax (USD)				1,928.00	Required Quantity	10			
In	iv. Discount Amount Excl. Tax ((·		0.00 Tot	al Tax (USD)				96.40	ATTACHMENTS				
In	voice Discount %			0 Tot	al Incl. Tax (USD)				2.024.40	Documents	0			

ADD DOCUMENTS FROM SALES QUOTE CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Sales Quotes card:

- 1. On the Process tab of Sales Quotes Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.

III PaperSave - Add a New PaperSave Document	Sales Quote Documentation ~ + New		8 📧
Related Sales Document Number Customer Name Posting Date Quote S-QUO1001 Trey Research 02/04/2018	Contact Helen Ray Due Date 16/04/2018 Order Date 01/01/2017 Total 2024.40		
FUUTS <u>ScanNow</u> ^{**} using a Fujitsu fi		Add a document from file explorer	
ScanNow ^{**} using any recommender	TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time	



- 4. **Drag** or **select** files to upload the desired document.
- 5. This will open the document preview screen. You can **select** the relevant "document type" in the checkbox and **add** a comment for the document.
- 6. Click "**Save**" to add the document to the selected record.

H PaperSave	e 🗸 🛛 Add a New	PaperSave Doc	cument	^p urchase Inv	oices Docu	mentation	 + New 	⊞ < > €	} ⊠ ∓ [Ì	🛱 Save 🐯	8 🔞
Related Sales Quote	Document Number R 107209	Reference Number	Vendor Name Fabrikam, Inc.	Pay To Krystal York	Date 01/01/2018	Due Date 04/30/2019	Transaction Total 226.84	Vendor Document Number 107209			ID: 263016 Batch: invoice-hero-generic.png	
Quote Quote A	107209		Fabrikam, Inc.	Krystal York	INVOICE			107209			Batch: Invoice-hero-generic.png Document Profile Doc Type : Contract Correspondence Other Comments : Enter Value	*
1 /1 invoice-	hero-generic.png							0		III +		

SHOW DOCUMENTS FROM SALES QUOTE CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Sales Quotes card:

- 1. On the Process tab of Sales Quotes Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available document/s.



	Papers	Save 🗸 🛛 Document 🛛 Sales Qu	iote Documentation v	Q Search within document list	ŵ	ନ୍ତ	۵
Rela Quo	ted Sale: te	S-QUO1001 Customer Name S-QUO1001 Trey Research	Posting Date Contact Due Date Order Date Total 02-04-2019 Helen Ray 16/04/2018 01/01/2017 2024.40				
+ N	w V	FILTER 📿 REFRESH 🔲 CHOOSE FIELDS	SHOW GROUPING DEXPORT TO EXCEL				
		Created Created By					
	<u>لم</u>	12-09-2019 08:50:40 AM Bhavya Shah					-
	14 19	12-09-2019 08:52:51 AM Bhavya Shah					
	1 N	12-09-2019 08:52:59 AM Bhavya Shah					
	4	13-09-2019 06:19:27 AM Bhavya Shah					
	4	13-09-2019 10:40:01 AM Vivek Soni					

SHOW INTERRELATED DOCUMENTS FROM SALES QUOTE CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Sales Quotes card:

- 1. On the Process tab of Sales Quotes Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available interrelated documents to the record.





5.10 CUSTOMER

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Sales** dropdown.
- 2. Click on **Customer**.



CUSTOMER LIST

Clicking on **Customer** will display the list of all records for this record type. You can add documents to all the records in the list as well as view documents and Interrelated documents for all the records in the list.

amics 365 B			anagement 🗸	Sales 🗸 🛛	Purchasing ~	Setup & Extensions ~	Intelligent Clou	d Insights 🗸	م ≡	0 ®
Customers:			5	Process ~	5	ew Document \lor Custome	5			
No. ↑		Name	Responsibility Center	Location Code	Phone No.	Contact				
<u>10000</u>	:	Adatum Corporation				Anthony Lording	i Details	🛛 Attachm	ents (0)	
20000		Trey Research				Mary Kumm	Sell-to Custo	mar Calas Li	aton	
30000		School of Fine Art				Meagan Bond	Sell-to Custo	iner sales H	istory	
40000		Alpine Ski House				Ian Deberry	Customer No.			10000
50000		Relectoud				Mason Kingsley	0	0	2	
							Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	
							3	0	0	
							Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos	
							28	28	0	
							Posted Sales	Posted Sales	Posted Sales	

- 1. Click on "Process" Tab from Customer list.
- You will see the PaperSave options such as "Add Document", "Show Documents", and "Show Interrelated Documents".



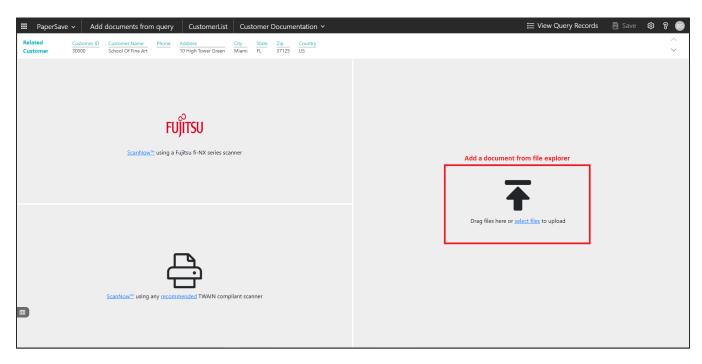
amics 365 Busir	ness Central						م	Q 🕸
CRONUS A	U Finance 🗸 Cash Ma	nagement \vee	Sales ∨ Purchasing ∨ Se	tup & Extensions \smallsetminus	Intelligent Clou	d Insights $\!$	=	
Customers: A	↓ Search + New	📋 Delete	Process ~ Report ~ New D	ocument \lor Custome	er 🗸 🛛 Navigate 🗸		7 ≡ 0	
No. †	Name	Responsibility Center	Add Document Show Documents	Contact				
10000	Adatum Corporation			Anthony Lording	(i) Details	🛛 Attachm	ents (0)	
20000	Trey Research		Show Interrelated Documents	Mary Kumm		6 L U		1
30000	School of Fine Art		당 Register Customer Payments	Meagan Bond	Sell-to Custo	omer Sales Hi	story	
40000	Alpine Ski House			lan Deberry	Customer No.			10000
50000	Relectoud			Mason Kingsley	0	0	2	
					Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	
					3	0	0	
					Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos	
					28	28	0	
					Posted Sales	Posted Sales	Posted Sales	

ADD DOCUMENTS FROM CUSTOMER LIST

Follow the below steps to test the PaperSave functionality "Add Document" from Customer list:

- 1. On the Process Tab of Customer list, click on "Add Document".
- If you are not already logged in, then it will open PaperSave cloud login prompt (on the first login).
 Enter your login credentials.
- 3. Upon login success, the system will navigate you to the "Add Document page".





- 4. **Drag** or **select** files to upload documents from your file explorer.
- 5. This will **open** the document preview screen.
- 6. Click **Save** to add the document to all the records in the Customer list.

III PaperSave ~ Add	documents from	query	CustomerList	Customer	Documentation Y						⊞≣	View Query Reco	rds	🖹 Save	¢) 8	8 🚯
Related Customer ID Customer 30000	Customer Name School Of Fine Art		<mark>ddress</mark> I High Tower Green	CityStateMiamiFL	Zip 37125 Country US											$\stackrel{\frown}{\sim}$
ß																
				30 241271 40 611288-1 50 621760 80 619565 Misc 10 SHIPPING Sales Tax	E4669/150 Container, 10 Galon White E4664/177 Pan, 16 Sece x 4* D, Back Pan, 16 Sece x 4* D, Bac	1 5 3 1	1 5 3 R	EA EA SC EA	9.59 2.98 10.10 2.92 20.74	9.59 2.98 50.50 8.76 20.74 101.44 4.84						Î
				Total Including Tax Back-ordered Orde 60 620930 70 142115	r Number 3753270 Lid, 13 Bie, Cleng Bold, so Medie, Universal Lid Assembly, 10 Galion	5 1				106.28						
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				Line# Part#	Description	Total Qty Ordered Sh	Oty U pped		Page # Unit price USD	2 / 2 Totals USD						



SHOW DOCUMENTS FROM CUSTOMER LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from Customer list:

- 1. On the Process Tab of Customer list, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available documents for all the records in Customer list.

II P	aper	Save 🗸	Documents related to query	EustomerLi	st								🗄 View Q	Jery Rec	ords	ŝ	8 📧
¶ FILTE	ER 💡	C REFRESH	🔯 SHOW GROUPING 🔲 CHOOSE FIELDS	EXPORT	TO EXCEL												
		ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Customer ID	Customer Name	Phone	Address	City	State	Zip	Count
		1358061	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bshahhvtest9stg	20000	Customer	Customer Documentation	20000	20000	Trey Research		153 Thomas Drive	Chicago	IL	61236	US
		1358063	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bshahhvtest9stg	30000	Customer	Customer Documentation	30000	30000	School of Fine Art		10 High Tower Green	Miami	FL	37125	US
		1358066	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bshahhvtest9stg	40000	Customer	Customer Documentation	40000	40000	Alpine Ski House		10 Deerfield Road	Atlanta	GA	31772	US
		1358068	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bshahhvtest9stg	50000	Customer	Customer Documentation	50000	50000	Relectoud		25 Water Way	Atlanta	GA	31772	US
		1358070	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bshahhvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
	2	1358465	King.jpg	09/12/2019 09:14:40 AM	PS\bshahhvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
	2	1358466	1421704891790.jpg	09/12/2019 09:14:44 AM	PS\bshahhvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
	20	1358482	King.jpg	09/12/2019 09:59:48 AM	PS\bshahhvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
	1. 1999	1368453	INVOICE_TMP8193730966268360722.pdf	09/13/2019 03:02:41 AM	PS\vsonihvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
	<u>لم</u> 1926	1368454	INVOICE_TMP4265068694222479491.pdf	09/13/2019 03:07:28 AM	PS\vsonihvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
	<u>لم</u> 1888	1368455	INVOICE_TMP4265068694222479491.pdf	09/13/2019 03:07:47 AM	PS\vsonihvtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
		1368545	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bshahhvtest9stg	20000	Customer	Customer Documentation	20000	20000	Trey Research		153 Thomas Drive	Chicago	IL	61236	US
		1368546	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bshahhvtest9stg	30000	Customer	Customer Documentation	30000	30000	School of Fine Art		10 High Tower Green	Miami	FL	37125	US
		1368547	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bshahhvtest9stg	40000	Customer	Customer Documentation	40000	40000	Alpine Ski House		10 Deerfield Road	Atlanta	GA	31772	US
		1368548	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bshahhvtest9stg	50000	Customer	Customer Documentation	50000	50000	Relectoud		25 Water Way	Atlanta	GA	31772	US
<	1		100 🗸												1	of 1 pages	s (58 iter

SHOW INTERRELATED DOCUMENTS FROM CUSTOMER LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Customer list:

- 1. Select the desired record from the list. On the Process Tab of Customer list, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.



3. On login success, it will **show** the available Interrelated documents for the selected record in Customer list.

	Paper	Save v Documents that are interrelated to this root Customer	Q Search within document list	ø ? 🚳
Roo Cus	t tomer	Customer ID 10000 Customer Name Phone Address City State Zip Country 10000 Addrum Corporation 192 Market Square Atlanta GA 31772 US		
Ø	EFRESH	T FILTER 🕅 SHOW GROUPING 🔲 CHOOSE FIELDS 🚯 EXPORT TO EXCEL		
		Created By		
	1221 F	12-09-2019 Bhavya Shah 03:40:02 AM		
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		12-09-2019 Bhavya Shah 09:1444 AM		
		12-09-2019 Bhavya Shah 095948 AM		
), POI	13-09-2019 Vivek Soni 03:02:41 AM		
), Fai	13-09-2019 Vivek Soni		
	<u>у</u> .	13-09-2019 Vivek Soni 03:07:47 AM		
	1922 7	13-09-2019 Bhavya Shah 0622809 AM		
	یکر 1920	13-09-2019 Vivek Soni 0651:23 AM		
	يل Par	13-09-2019 Vivek Soni 0651:23 AM		

CUSTOMER CARD

Clicking on the **Customer Card** opens the selected record in card view with all the record details:

- 1. Click the **number field** of desired record in the Customer list.
- 2. This will launch the **Customer** record.

Dynamics 365 Business Central			Sandbox	م q	8	?	SP
CUSTOMER CARD WORK DATE: 2/12/2019	\bigcirc	+ 🔟	√ SAVED	,×			
10000 · Adatum	Corporation						
New Document Request Approval	Navigate Customer More options			0			
General			Show more				
No	10000	Blocked	×				
Name	Adatum Corporation	Total Sales	18,098.30				
Balance (\$)	20,196.08	Costs (\$)	0.00				
Balance Due (\$)	20.196.08	CFDI Purpose	~				
Credit Limit (\$)	0.00	CFDI Relation	~				
Address & Contact			Show more	L		>	
ADDRESS		CONTACT					
Address	192 Market Square	Contact Name · · · · · Ro	obert Townes	÷.,			
Address 2		Phone No.					
Country/Region Code	US 🗸	Email rol	bert.townes@contoso.com				
City	Atlanta	Home Page					
State · · · · · · · · · · · · · · · · · · ·	GA						
ZIP Code	31772						
Show on Map							



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

Business Central		Sandbox Q , P
CUSTOMER CARD WORK DATE: 2/12/2019	(2) + 10	√ SAVED , ×
10000 · Adatum Corporation	-	
New Document Request Approval Navigate Customer More opt	tions	0
Add Document Show Interrelated Documents Ledger Entries B Show Documents Dimensions Statistics	副 Account Detail 建 Cross References 超 Approvals 国 Open Entries	¤-
	Blocked	
Name · · · · · Adatum Corporation	Total Sales	18,098.30
Balance (\$)	20.196.08 Costs (\$)	0.00
Balance Due (\$) · · · · · · · · · · · · · · · · · · ·	20,196.08 CFDI Purpose	~
Credit Limit (\$)	0.00 CFDI Relation	~
Address & Contact		Show more
ADDRESS	CONTACT	
Address 192 Market Square	Contact Name · · · · · · Robert Townes	
Address 2	Phone No.	
Country/Region Code US	Construction Const	contoso.com
City · · · · · Atlanta	Home Page	
State GA		

ADD DOCUMENTS FROM CUSTOMER CARD

Follow the below steps to test the PaperSave functionality "Add Document" from Customer card:

- 1. On the Customer tab of Customer Card, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.



III PaperSave > Add a New PaperSave Document Customer Documentation > + New <	> ⊖ ⊠ ± × \$\$ \$ 3
Related Customer Customer Name 10000 Pione Adatum Corporation Address 192 Market Square City Atlanta State GA Zip 31772 Country US FUID FUID ScanNow ^m using a Fujitsu fi-NX series scanner	Add a document from file explorer
ScanNow ²² using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time

- 4. **Drag** or **select** files to upload the desired document.
- 5. This will **open** the document preview screen.
- 6. Click "**Save**" to add the document to the selected record.

🔢 PaperSave 🗸 🛛 Add a New I	PaperSave Document	Customer Documentation $$	+ New < >	₿ ⊠ ±	×				🖹 Save	\$ ଃ 🚳
Related Customer ID Customer N Customer 10000 Adatum Co			intry							
ß										
A 2 2 2 0 -		VEREDGE PKWY A, GA 30328-4693		Order from: Shipping dat Cust Servic Store no: Customer no Customer st	te: 02 e Rep: M 59 p: 11	ethel, Nicole 2/18/16 Iyles Couyoun 952529 1062-018811 2476	njian			•
 ○ ↓ ↓	Burger King 12476 5388 HWY 129 N JEFFERSON, G USA			Reference: Payment ter Delivery ter Ship via: GST #: Tracking #:	mms: F(U 86	let 30 OB Shipping IPSCS 69575928RT 235957170				
₩	Attn: Bethel, N Comment:	icole					Page #	1/1		
	Line # Part #	Description		Total Qty Ordered	Qt Shippe		Unit price USD	Totals USD		
	Parts 10 624925	Freezer, U/C Reach-In 120	0/60/1 3" Casters	1		1 EA	1,169.55	1,169.55		
		SN: ALDP117	549A							
	Misc 10 Shipping	Shipping		1		0 EA	151.00	151.00		¥
1 /1 INVOICE_TMP8193730966268								: ≈ % 0 0	0 0	 0-+



SHOW DOCUMENTS FROM CUSTOMER CARD

Follow the below steps to test the PaperSave functionality "Show Documents" from Customer card:

- 1. On the Customer tab of Customer Card, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.

Image: PaperSave v Document Customer Documentation v	Q Search within document list	🛛 🅸 🖇 🚳
Related Customer Customer ID 10000 Customer Name Adatum Corporation Phone 192 Market Square City Alanta State GA Zip 31772 Country US		
+ NEW 🖓 FILTER 🛱 REFRESH 🔲 CHOOSE FIELDS 🐹 SHOW GROUPING 🗈 EXPORT TO EXCEL 🙀 INTERRELATED		
Created Created By		
12-09-2019 03:4002 AM Bhavya Shah		*
12-09-2019 09:14-40 AM Bhavya Shah		
12-09-2019 Bhavya Shah 09:14:44 AM Bhavya Shah		
12-09-2019 Bhavya Shah 09:55-48 AM Bhavya Shah		

SHOW INTERRELATED DOCUMENTS FROM CUSTOMER CARD

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from Customer card:

- 1. On the Customer tab of Customer Card, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.



	Paper	ave v Documents that are interrelated to this root Customer	Q Search within document list	¢ ? 🚳
Roo Cust	omer	Customer ID 10000 Customer Name Adatum Corporation Phone 192 Market Square City 192 Market Square State Atlanta Zip GA Country 31772		
C R	FRESH	¬ FILTER SI SHOW GROUPING □ CHOOSE FIELDS B EXPORT TO EXCEL		
		Created By		
	1923 P	12-05-2019 Bhavya Shah 03-0002 AM		^
		12-09-2019 Bhavya Shah 09:14-40 AM		
		12-09-2019 Bhavya Shah 09:14:44 AM		
		12-09-2019 Bhavya Shah 09:59:48 AM		
), Post	13-09-2019 Vivek Soni 03:02:41 AM		
	Ъ. Fait	13-09-2019 Vivek Soni 030728 AM		
). Post	13-09-2019 Vivek Soni 0307-X7 AM		
		13-09-2019 Bhavya Shah 062809 AM		
	4	13-09-2019 Vivek Soni 065123 AM		
	ж. Ref	13-09-2019 Vivek Soni 065123 AM		



5.11 GENERAL JOURNALS

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

- 1. On the Dynamics 365 Business Central Home Page, click on the **Finance** dropdown.
- 2. Click on **General Journals**.

Dynamics 365 Business Central								Sandbox Q	ہ م	? SP
CRONUS USA, I	Inc. 1 Finance \vee Cas	sh Management $\!$	Sales v Purchasin	ıg∨ Setup & Extensior	ns v 🛛 Intelligent Cloud Insig	hts \vee				
					Purchase Analysis Reports Inventory Analysis Reports		Dimensions	r;⊧		

GENERAL JOURNAL BATCH

Clicking on the **General Journal** batch opens the selected journal batches:

- 1. Click the **Name field** of desired journal batch in the General journals batch list.
- 2. This will launch the **General Journal** batch.

	siness Central Previe	w								Sandbox	_15 Q , A
\leftarrow	GENERAL JOURNALS	5							`	SAVED	Ľ x [€]
	× Reminder: your	work date is 4/8/2019 Use today	Change to Turn off reminder								~
	Batch Name	MONT	HLY		··· Posting	g Date		4/8/2019			
	Document No.	G0000	1		Curren	ncy Code					\sim
	Manage Process	Payroll Page Post/Print	Line Account More option	IS							70
	Account No.	Account Name		Tax	Tax Area Code		Debit Amount	Credit Amount	Dimensions	~	
	10100	Checking account	Description Checking account	Liable	lax Area Code	Tax Group Code	Debit Amount	Credit Amount	Dimension	Dimension	
\rightarrow		: Saving account	Saving account			NONTAXABLE			Code 1	Value Code	Dimension Val
									(There i	s nothing to show in t	this view)
									Incoming Do	ocument Files	~
										ocument Files	
									Incoming Do	ocument Files	Туре



- 3. **Select** the journal entry from the list.
- 4. Click on "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".

Dynamics 365	5 Busi	iness Central Previev	N									Sandbox_	15 Q	Q	
	\leftarrow	GENERAL JOURNALS									~ S	AVED	تر ^{ال}		
		× Reminder: your v	work date is 4/8/2019 U	se today Change to Turn off rem	inder								~		
		Batch Name		MONTHLY			··· Postin	g Date		4/8/2019			Ē		
		Document No.		G00001			Currer	icy Code					~		
		Manage Process	Payroll Page Post	/Print Line Account N	fore options								70		
		1 Add Document	🛗 Show Documents	Show Interrelated Documents	📰 Reconcile	🖪 Get Star	dard Journals	Apply Entries					-13		
		Account No.	Account Name	Description			Tax Area Code	Tax Group Code	Debit Amount	Credit Amount	Dimensions				
		10100	Checking account	Checking account				NONTAXABLE			Dimension Code ↑	Dimension Value Code	Dimens	ion Valu	
	\rightarrow	10200	Saving account	Saving account				NONTAXABLE							
											(There is no	thing to show in th	is view)		

ADD DOCUMENTS FROM GENERAL JOURNAL BATCH

Follow the below steps to test the PaperSave functionality "Add Document" from General Journal batch:

- 1. On the Process tab of General journals batch, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.

PaperSave ~ Add a New PaperSave Document Journal Documentation ~	+ New < > 🛱 🖂 😼 🗙
Related General Journals Batch Name DEFAULT Account No 10200 Account Name Saving Account Tax Area Code NONTAVABLE Total	
FUJITSU <u>ScanNow</u> ²⁴ using a Fujitsu fi-NX series scanner	Add a document from file explorer
ScanNow ^{**} using any recommended TWAIN compliant scanner	Click to Generate a barcode to scan this document in a batch at a later time



- 4. **Drag** or **select** files to upload the desired document.
- 5. This will **open** the document preview screen.
- 6. Click "Save" to add the document to the selected record.

🗰 PaperSave 🗸	Add a N	New PaperSa	ave Documen	t Journal Do	ocumentation ~	+ New	$\langle \rangle$	₿ 🖂	$\overline{\mathbf{\tau}}$ ×					B 9	Save	¢ ? (3
Related General Batch Journals DEFAU			Account Name Saving Account		ONTAXABLE 0												
l⊋																	
A □ Ø ○ - ○ □ ↔ Ø Ø Ш		Burg 120	2100 F ATLAN USA ger King 1316 5 W HUNTE GAN, OH 431	IOSpitality, LL RIVEREDGI ITA, GA 3032 61 SR ST	E PKWY			P O S C C C R P D S G	rder no: D #: rder from: nipping date: ust Service Re tore no: ustomer no: ustomer no: ustomer store r eference: ayment terms: ellvery terms: hip via: ST #: acking #:	131 02/19 502 1100 no: 131 Net FOE UPS 869	^{9/16} es Couyourr 0680 62-018811 61	Point 0001					
		Com	iment:									Page #	1/1				
		Line	# Part #	Descrip	otion				Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD				
		Par															
		10	421728	Tip, R	ubber Feet (Set o	f4)			3	3	P4	6.96	20.88				
1 /1 INVOICE_TMP158248	182674955	20	610972	TONG	S LIFT AND GRI	P.S/S.12"			3	~	FΔ	5 16	15 / 8 ∷ ≓ % Ē	990		-0	+

SHOW DOCUMENTS FROM GENERAL JOURNAL BATCH

Follow the below steps to test the PaperSave functionality "Show Documents" from General journals batch:

- 1. On the Process tab of General journals batch, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available document/s.



III PaperSave ~ Document Journal Documentation ~	Q Search within document list	r 🕸 🖇 🚳
Related General Journals Batch Name DEFAULT Account No 10200 Account Name Saving Account Tax Area Code Saving Account Tax Group Code NONTAXABLE Total		
+ NEW 🝸 FILTER 🖒 REFRESH 🔲 CHOOSE FIELDS 🔯 SHOW GROUPING 🕃 EXPORT TO EXCEL 🔁 INTERRELATED		
Created Created By		
13-09-2019 09:38:11 AM Vivek Soni		
13-09-2019 9941:44 AM Vivek Soni		

SHOW INTERRELATED DOCUMENTS FROM GENERAL JOURNAL BATCH

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from General journals batch:

- 1. On the Process tab of General journals batch, click on "Show Interrelated Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available Interrelated documents to the record.

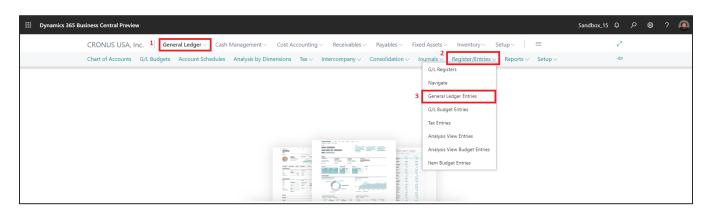
	Paper	Save 🗸	Documents that are interrelated to this root General Journals	Q Search within document list	ŝ	ଃ 蠽
	ot Genera Irnals	al Batch DEFA	Name Account No Account Name Tax Area Code Tax Group Code Total JUT 10200 Saving Account NONTAXABLE 0			
ø	REFRESH	∇ filter	🚉 SHOW GROUPING 🔲 CHOOSE FIELDS 📓 EXPORT TO EXCEL			
		Created	Created By			
	<u>لم</u> 555	13-09-2019 09:38:11 AM	Vivek Soni			
). ESS	13-09-2019 09:41:44 AM	Vivek Soni			
), Recei	13-09-2019 09:44:34 AM	Vivek Soni			
	يل. Test	13-09-2019 09:44:34 AM	Vivek Soni			
	<u>ل</u> 100	13-09-2019 09:44:35 AM	Vivek Soni			
	A	13-09-2019 09:44:36 AM	Vivek Soni			



5.12 **GENERAL LEDGER ENTRIES**

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

- 1. On the Dynamics 365 Business Central Home Page, click on the "General Ledger" dropdown.
- 2. Click on Register/Entries dropdown.
- 3. Click on "General Ledger Entries".



GENERAL LEDGER ENTRIES LIST

Clicking on the General Ledger Entries opens the General Ledger Entries list:

7	7190	COST OF RET	AIL S	SOLD WORK	DATE: 5/1/2019						
(Gen	eral Ledger Er	ntrie	s ,O Si	earch 🛛 🐺 Edit L	ist Process	Entry Page Actions	Navigate	Fewer	options	7 ≣ 0
		Posting Date ↓		Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gei Pos		
	\rightarrow	4/1/2019	÷		103403	7190	Direct Cost 30000 on 04/01/19			Incoming Document Files $\!$	
		4/1/2019			103403	7190	Direct Cost 30000 on 04/01/19				
		3/31/2019			103402	7190	Direct Cost 50000 on 03/31/19			Name	Туре
		3/31/2019			103402	7190	Direct Cost 50000 on 03/31/19				
		3/27/2019			103401	7190	Direct Cost 30000 on 03/27/19			(There is nothing to show in th	is view)
		3/27/2019			103401	7190	Direct Cost 30000 on 03/27/19				
		3/27/2019			103401	7190	Direct Cost 30000 on 03/27/19				
		3/27/2019			103401	7190	Direct Cost 30000 on 03/27/19				
		3/26/2019			103400	7190	Direct Cost 20000 on 03/26/19				
		3/24/2019			103399	7190	Direct Cost 40000 on 03/24/19				
		3/24/2019			103399	7190	Direct Cost 40000 on 03/24/19				
		3/24/2019			103399	7190	Direct Cost 40000 on 03/24/19				
		3/24/2019			103399	7190	Direct Cost 40000 on 03/24/19				



- 1. Select the desired General Ledger Entry from the list.
- Click on "Process" to access the PaperSave functionalities such as "Add Document", "Show Documents", and "Show Interrelated Documents".

7190 COST OF RETAIL S	SOLD WORK DATE: 5/1/2019						
General Ledger Entries	s 🛛 🔎 Search 🐺 Edit	t List Proces	s Entry Page Actions	Navigate	Fewer o	ptions	\ ≣
1 Add Document	🛅 Show Documents	🛅 Show Interre	elated Documents 📓 Reverse Tran	isaction			
Ļ	Type Document No	. No.	Description	Туре	Pos		
\rightarrow 4/1/2019 :	103403	7190	Direct Cost 30000 on 04/01/19			Incoming Document Files $\!$	
4/1/2019	103403	7190	Direct Cost 30000 on 04/01/19				
3/31/2019	103402	7190	Direct Cost 50000 on 03/31/19			Name	Туре
3/31/2019	103402	7190	Direct Cost 50000 on 03/31/19				
3/27/2019	103401	7190	Direct Cost 30000 on 03/27/19			(There is nothing to show in	this view)
3/27/2019	103401	7190	Direct Cost 30000 on 03/27/19				
3/27/2019	103401	7190	Direct Cost 30000 on 03/27/19				
3/27/2019	103401	7190	Direct Cost 30000 on 03/27/19				
3/26/2019	103400	7190	Direct Cost 20000 on 03/26/19				
3/24/2019	103399	7190	Direct Cost 40000 on 03/24/19				
3/24/2019	103399	7190	Direct Cost 40000 on 03/24/19				
	103399	7190	Direct Cost 40000 on 03/24/19				

ADD DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST

Follow the below steps to test the PaperSave functionality "Add Document" from General ledger entries list:

- 1. On the Process tab of General Ledger Entries list, click on "Add Document".
- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **open** the "Add Document" page.



PaperSave	~ Add d	ocuments fi	rom query	GeneralLed	gerEntriesList	Journa	l Documentation $ $		⊟ View 0	Query Records	🖹 Save	ŝ	8 S
Related General Journals	Batch Name CASH	Account No 2910	Account Name Cash	Tax Area Code	Tax Group Code	Total -777							
	<u>Scar</u>		UJITSU a Fujitsu fi-NX se	eries scanner					document fro	t files to upload			
Ħ	<u>ScanNow™</u> (using any reco	mmended TWAI	N compliant sca	nner		Click	<u>to</u> Generate a bar	code to scan this	document in a bate	h at a later tim	8	

- 4. Drag or select files to upload the desired document.
- 5. This will **open** the document preview screen.
- 6. Click "**Save**" to add the document to the selected record.

🗰 PaperSave 🗸 Add documents from query GeneralLedgerEntriesList Journal Documentation 🗸 🖽 🗄 View Query Rec	cords 🗎 Save 🐯 🎖 🕥
	ID: 42187 Batch: 5840.tiff
	Batch: 5840.tiff Document Profile Comments: Enter Value

 Upon successful submission, it will show the toast notification in the upper right corner "1 Document(s) successfully submitted."



SHOW DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST

Follow the below steps to test the PaperSave functionality "Show Documents" from General ledger entries list:

- 1. On the Process tab of General ledger entries, click on "Show Documents".
- 2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- 3. On login success, it will **show** the available document/s for General Ledger entries.

	Рарег	rSave 🗸	Docun	nents relate	d to query	GeneralLe	dgerEntriesList				E View Query Records	ŵ	8 🔊
¶ ₹	LTER	C REFRES	н 📺 ѕно	W GROUPING	CHOOSE FIEL	.DS 🔀 EXPO	RT TO EXCEL						
		ID	File Name	Created	Created By		Parent Id	Record Type	Document Type	Comments			
		42183	5840.tiff	09/19/2019 08:07:09 AM	spanchal@whiteow	lsolutions.com	{0B04E7DC-D5DA-E911-9678-00155D295C02}	General Journals	Journal Documentation				*
	1000 y	42187	5840.tiff	09/20/2019 03:52:02 AM	spanchal@whiteow	lsolutions.com	{0B04E7DC-D5DA-E911-9678-00155D295C02}	General Journals	Journal Documentation				

SHOW INTERRELATED DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST

Follow the below steps to test the PaperSave functionality "Show Interrelated Documents" from General ledger entries list:

1. Select a general ledger entry from the list. On the Process tab of General ledger entries, click on

"Show Interrelated Documents".

- 2. This will open PaperSave cloud login prompt (on the first login). Enter login credentials.
- 3. On login success, it will **show** the available Interrelated document/s for selected General Ledger entry.

	Pap	erSave	• •	Documer	nts that are interrelate	ed to this root General Jou	rnals		Q Se	earch within document list	ŵ	8 🕑
	t Gene rnals	eral	E		Total 2,240							C <u>Refresh</u>
S F	REFRESH	H V	FILTER	ច្រាំ SHOW G	ROUPING 🔲 CHOOSE F	IELDS 🖹 EXPORT TO EXCEL						
		ID	File Nar	ne Created	Created By	Parent Id	Record Type	Document Type	Comments			
		42183	5840.tiff	09/19/2019 08:07:09 AM	spanchal@whiteowlsolutions.com	{0804E7DC+D5DA+E911+9678+00155D295C02}	General Journals	Journal Documentation				*
	. ,	42187	5840.tiff	09/20/2019 03:52:02 AM	spanchal@whiteowlsolutions.com	{0804E7DC-D5DA-E911-9678-00155D295C02}	General Journals	Journal Documentation				



5.13 ASSOCIATE DOCUMENT FROM SIDE BY SIDE ENTRY VIEWER

PaperSave facilitates the user to associate the document which is in the side by side viewer to a specific record for a record type. Follow the below steps to associate a document with a desired record for a record type (For e.g. - Vendor)

- 1) On the Dynamics 365 Business Central Home Page, click on the **Purchasing** dropdown.
- 2) Click on **Vendors**.
- 3) Clicking on Vendors will display the **list** of all records for this record type.

Dynamics 365 Bu	isiness Central	<u>چ</u> کر	ŕ
CRONUS	AU Finance Cash Management Sales Purchasing Setup &	& Extensions \lor Intelligent Cloud Insights \lor \equiv	
Vendors:	All \sim \sim Search + New 📋 Delete Process \sim New Document \sim Vendor	or 🗸 Navigate 🗸 Page 🗸 \cdots 🛛 🍸 🖉	1
No. 1	Name Location Code Phone No. Contact	2	
<u>10000</u>	Fabrikam, Inc. Krystal York	① Details 🕼 Attachments (0)	
20000	First Up Consultants Aaron Loton		
30000	Graphic Design Institute Bryce Jasso	Vendor Statistics	
40000	Wide World Importers Blake Springthorpe	Vendor No. 10000	
50000	Nod Publishers Patrick Cochran	Balance (LCY) 42,739.00	
V00010		Outstanding Orders (LCY) 0.00	
V00070	Citrix	Amt. Rcd. Not Invd. (LCY) 10,439.00 Outstanding Invoices (LCY) 128.898.37	1.
V00080	Citrix & Company	Outstanding Invoices (LCY) 128.898.37 Total (LCY) 182.076.37	
V00090		Overdue Amounts (LCY) as of 40,876.00	
V00100	mbaf	Invoiced Prepayment Amoun 0.00	
V00110	Fujitsu & Company	Payments (LCY) 0.00	
		Refunds (LCY) 0.00	
V00120	Abisoft	Last Payment Date	

4) Click on the **number field** of desired record in the Vendor list. This will launch the **Vendor** record.



Dynar	nics 365 Business Cen	tral			م	Q	¢ (? 🛛 🛛 🖪
¢	vendor card I work i 10000 · Fabr			+ 🛍	√ SAVED	C',	, ^L	
	Process Request App	proval New Document Navi	gate Vendor More op	otions		(J	
	General			Show more	Details Details		_	
	No	10000	Post Dated Checks	0.00	Vendor Picture \smallsetminus			
-	Name · · · · · · · · · · · · · · · · · · ·	Fabrikam, Inc.	Provisional Balance	42,739.00	A State of the second s			
	Blocked · · · · · · · · ·	~	Balance Due (LCY)	40,876.00				\diamond
	Balance (LCY)	42,739.00						
	Address & Contact	t		Show more	Sale Contraction			
	ADDRESS		CONTACT					
	Address · · · · · · · · ·	10 McArthur Avenue	Primary Contact C		Vendor Statistics			
	Address 2		Contact · · · · · · Krys	stal York …				
	Country/Region Co	US \checkmark	Phone No.		Vendor No.	10000		- 11

- 5) Click on "**Process**" to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".
- 6) Click on "Add Document".
- 7) It will show the following prompt to associate the document with the current record in the vendor if side by side entry is enabled in PaperSave Workflow Area for the same record type. Click on "OK".



	Record Details:			
	Document Number:		1001	
	Reference Number:			
	Vendor Name:		American Wood Exports	
	Pay To:		Mr. Jeff D. Henshaw	
	Date:		2021-01-28	
	Due Date:		2021-01-31	
	Transaction Total:		0.00	
\rightarrow	Vendor Document Number:	÷		

8) Now, it will associate the document (which is in side by side viewer) with the current vendor record in Dynamics 365 Business Central.



6 DYNAMICS 365 BUSINESS CENTRAL WEB SERVICES FOR PAPERSAVE

The main objective of the Web Services is to return the data of the record type and includes the columns defined for the record type in PaperSave.

6.1 HOW TO ACCESS THESE WEB SERVICES WITHIN DYNAMICS 365 BUSINESS CENTRAL

Follow the below steps to access Dynamics 365 Business Central Web Services for PaperSave:

1. On the Dynamics 365 Business Central Home Page, click on the Search button

365 Business Central Barcharts Publishing	nance 🗸 🛛 Cash Management 🗸	Sales∨ Purchasing∨ Setup	& Extensions > / Intelligent (loud Insights ~		¢ ۵
5	Bank Accounts Chart of Accounts			iouu maignta v		2
NSIGHT FROM LAST WEEK Your top cus Selangorian 1,250 USD		ACTIONS + Sales + Sales + Sales	Quote + Purchase Quote	> New > Payments > Reports	> Setup E Excel Reports	
Activities Activities × SALES THIS MONTH	OVERDUE SALES INVOICE	OVERDUE PURCH. INVOICE	SALES INVOICES PREDICT			
USD21,059	USDO >See more	USD4,120	OVERDUE O > See more			
ONGOING SALES	ONGOING PU	RCHASES	APPROVALS			
SALES QUOTES SALES ORDERS	SALES PURCHASE INVOICES ORDERS	ONGOING PUR PURCH. II INVOICES NEXT WE				



- 2. Enter "Web services" in the search box of Dynamics 365 Business Central home.
- 3. Click on "Web Services" from "Go to Pages and Tasks".

TELL ME WHAT YOU WANT TO DO		∠ ×
Web Services		
Go to Pages and Tasks		Show all (4)
> Web Services	Lists	П
> PAC Web Services	Lists	
> Account Schedule KPI Web Service	Administration	
Documentation		Show all (20)
 Expose objects as web services Publish objects as web services to make them immed 	diately available for your Bus	siness
⑦ How to Set Up Goods and Services Tax Posting Describes the steps to start applying goods and servi	ices tax (GST) to goods and	services.
How to Set Up PAC Web Services Before you can send invoices and credit memos elect	tronically, you must specify	one or
Get from Microsoft AppSource		Show all (35)
EasyPost Services Connector Send shipments using over 100 carriers around the w	vorld within Dynamics 365 B	usines
ODT Service 365 RoW ODT Service 365 RoW enhances jobs adding service t	tickets, field service, and ma	intena
ODT Service 365		-
Didn't find what you were looking for? Try exploring		



4. It shall load a list of all the Web Services in the Dynamics 365 Business Central.

WEB SERVICES					Ц	
	🐯 Edit List	📋 Delete 🛛 Reload 🛛 📓	Open in Excel More opti	ons		\ ≣
Object Type ↑	Object ID	Object Name	Service Name 1	All Ten	Pub	OData V4
Query	58	Power BI GL Budgeted Amount	Power BI GL BudgetedAmount		×.	https:/
Query	52	Power BI Item Purchase List	Power BI Item Purchase List			https:/
Query	57	Power BI Item Sales List	Power BI Item Sales List		A.	https:/
Query	54	Power BI Jobs List	Power BI Jobs List		A.	https:/
Query	64	Power BI Purchase Hdr. Vendor	Power BI Purchase Hdr. Vendor			https:/
Query	56	Power BI Purchase List	Power BI Purchase List			https:/
Query	60	Power BI Sales Hdr. Cust.	Power BI Sales Hdr. Cust.		×.	https:/
Query	55	Power BI Sales List	Power BI Sales List		A.	https:/
Query	59	Power BI Top Cust. Overview	Power BI Top Cust. Overview		A.	https:/
Query	65	Vendor Item Ledger Entries	Power BI Vend. Item Ledg. Ent.		1	https:/
Query	63	Power BI Vendor Ledger Entries	Power BI Vendor Ledger Entries		1	https:/
Query	51	Power BI Vendor List	Power BI Vendor List		×.	https:/
Query	269	Res. Ledger Entries	Res.LedgerEntries		×.	https:/
Query	101	Sales Dashboard	SalesDashboard	4	×.	https:/
Query	105	Sales Opportunities	SalesOpportunities	4	1	https:/
Query	104	Sales Orders by Sales Person	SalesOrdersBySalesPerson	4	1	https:/
Query	100	Top Customer Overview	TopCustomerOverview		×.	https:/
Query	266	Value Entries	ValueEntries		1	https:/



 Now, enter "*papersave*" in the search box to get the list of all Dynamics 365 Business Central Web Services for PaperSave.

	× + N	ew 🛛 😨 Edit List 🔋 Delete	S Reload I Open in Excel			7 ≣
Object Type ↑	Object ID	Object Name	Service Name 1	All Ten	Pub	OData V
\rightarrow Page :	70166897	PaperSave General ledger Entry	PaperSave GLEntry		1	https:/
Page	70166895	PaperSave GLSetup	PaperSave GLSetup		1	https:/
Page	70166898	PaperSave Purchase Invoice	PaperSave Purchase Invoices		4	https:/
Page	70166896	PaperSave Return Journals	PaperSave Return Journals		$\langle \mathcal{A} \rangle$	https:/
Query	70166826	PaperSave Cash Rec. Journal	PaperSave Cash Reciept Journal		$\langle \mathcal{A} \rangle$	https:/
Query	70166831	PaperSave Customers	PaperSave Customer Details		(\mathcal{A})	https:/
Query	70166828	PaperSave IC G/L Account	PaperSave IC GLAccount		1	https:/
Query	70166827	PaperSave IC Partners	PaperSave IC Partners			https:/
Query	70166832	PaperSave Items	PaperSave Item Details		4	https:/
Query	70166829	PaperSave Job Details	PaperSave Job Details		(\mathcal{A})	https:/
Query	70166825	PaperSave Payment Journal	PaperSave Payment Journal		4	https:/
Query	70166830	PaperSave Vendors	PaperSave Vendor Details		1	https:/



Following is a brief description for a list of all the Dynamics 365 Business Central Web Services for PaperSave:

Web Service Name	Description			
PaperSave GLEntry	It returns the details for posted general ledger entry and includes			
	the columns defined for the posted general ledger entry in			
	PaperSave.			
PaperSave GLSetup	It returns the dimensions set by the user in G/L Setup and includes			
	the columns defined for G/L Setup in PaperSave.			
PaperSave Purchase Invoice	It returns the details of the purchase invoices and posted			
	purchase invoices but excludes the details of the purchase line			
	item.			
PaperSave Return Journals	It returns the details for general journal and includes the columns			
	defined for the general journal in PaperSave.			
PaperSave Cash Receipt	It returns the details for cash receipt journal and includes the			
Journal	columns defined for the cash receipt journal in PaperSave.			
PaperSave Customers	It returns the details for Customer and includes the columns			
	defined for the Customer in PaperSave.			
PaperSave IC G/L Account	It returns the details for an Inter Company G/L account and			
	includes the columns defined for an Inter Company G/L account			
	in PaperSave.			
PaperSave IC Partners	It returns the details for an Inter Company Partners and includes			
	the columns defined for an Inter Company Partners in PaperSave.			
PaperSave Items	It returns the details for an Item and includes the columns defined			
	for the Items in PaperSave.			
PaperSave Job Details	It returns the details for a job and includes the columns defined			
	for a job in PaperSave.			
PaperSave Payment Journal	It returns the details for payment journal and includes the			
	columns defined for Payment journal in PaperSave.			
PaperSave Vendors	It returns the details for vendor and includes the columns defined			
	for vendor in PaperSave.			
PaperSave PI Association	It returns the documents which are related to the Purchase			
	Invoice. It is used by PaperSave web application to get			
	information for Interrelated documents such as document			
	numbers of Purchase Order, Purchase Quotes, and Vendor.			
PaperSave PO Association	It returns the documents which are related to the Purchase Order.			
	It is used by PaperSave web application to get information for			
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	Interrelated documents such as document numbers of Vendor,
	Purchase Quotes, Purchase Invoice, and Posted Purchase Invoice.
PaperSave PO Header	This web service is used to create the Purchase Header() from
	PaperSave for Purchase Order.
PaperSave PO Line	This web service is used to create the Purchase Line() from
	PaperSave for Purchase Order.
PaperSave PQ Association	It returns the documents which are related to the Purchase Quote.
	It is used by PaperSave web application to get information for
	Interrelated documents such as document numbers of Purchase
	Order, Vendor, Purchase Invoice, and Posted Purchase Invoice.
PaperSave Vendor Association	It returns the documents which are related to the Vendor. It is
	used by PaperSave web application to get information for
	Interrelated documents such as document numbers of Purchase
	Order, Purchase Quotes, Purchase Invoice and Posted Purchase
	Invoice.
PaperSave Purchase Order	It returns the details for Purchase Order Header and includes the
	columns defined for Purchase Order in PaperSave (excluding the
	details for Purchase Order line).
PaperSave Purchase Quote	It returns the details for Purchase Quote Header and includes the
	columns defined for Purchase Quote in PaperSave (excluding the
	details for Purchase Quote line).
PaperSave Sales Invoice	It returns the details for Sales Invoice Header and includes the
	columns defined for Sales Invoice in PaperSave (excluding the
	details for Sales Invoice line).
PaperSave Sales Order	It returns the details for Sales Order Header and includes the
	columns defined for Sales Order in PaperSave (excluding the
Demos Cales Osiata	details for Sales Order line).
PaperSave Sales Quote	It returns the details for Sales Quote Header and includes the
	columns defined for Sales Quote in PaperSave (excluding the
	details for Sales Quote line).