



PaperSave

Microsoft Dynamics 365 Business Central User Scenario Guide

3150 SW 38th Avenue,
12th Floor, Miami, Florida 33146. USA
☎ 877 727 3799 📠 305 373 0056
www.papersave.com

PaperSave is a product of WhiteOwl

Contents

1	INTRODUCTION	6
2	PAPERSAVE SETUP & CONFIGURATION STEPS.....	6
2.1	ENABLE/DISABLE PAPERSAVE	11
3	USER PERMISSIONS REQUIRED IN DYNAMICS 365 BUSINESS CENTRAL	12
3.1	GRANT PERMISSIONS TO THE USER WHO RUNS THE ASSISTED SETUP FOR PAPERSAVE	12
3.2	GRANT PERMISSIONS TO THE USERS ADDED OR IMPORTED IN DYNAMICS 365 BUSINESS CENTRAL AFTER RUNNING THE ASSISTED SETUP	14
4	USER LOGIN STEPS FOR PAPERSAVE.....	16
5	USER SCENARIOS	18
5.1	PURCHASE INVOICE	18
	PURCHASE INVOICE LIST.....	19
	ADD DOCUMENTS FROM PURCHASE INVOICE LIST	20
	SHOW DOCUMENTS FROM PURCHASE INVOICE LIST	21
	SHOW INTERRELATED DOCUMENTS FROM PURCHASE INVOICE LIST	22
	PURCHASE INVOICE CARD	22
	ADD DOCUMENTS FROM PURCHASE INVOICE CARD.....	23
	SHOW DOCUMENTS FROM PURCHASE INVOICE CARD	25
	SHOW INTERRELATED DOCUMENTS FROM PURCHASE INVOICE CARD.....	26
5.2	POSTED PURCHASE INVOICE	27
	POSTED PURCHASE INVOICE LIST	27
	ADD DOCUMENTS FROM POSTED PURCHASE INVOICE LIST	28
	SHOW DOCUMENTS FROM POSTED PURCHASE INVOICE LIST.....	30
	SHOW INTERRELATED DOCUMENTS FROM POSTED PURCHASE INVOICE LIST.....	30
	POSTED PURCHASE INVOICE CARD	31
	ADD DOCUMENTS FROM POSTED PURCHASE INVOICE CARD	32
	SHOW DOCUMENTS FROM POSTED PURCHASE INVOICE CARD	34
	SHOW INTERRELATED DOCUMENTS FROM POSTED PURCHASE INVOICE CARD	34

5.3 PURCHASE QUOTE	35
PURCHASE QUOTE LIST	35
ADD DOCUMENTS FROM PURCHASE QUOTE LIST.....	36
SHOW DOCUMENTS FROM PURCHASE QUOTE LIST	38
SHOW INTERRELATED DOCUMENTS FROM PURCHASE QUOTE LIST	38
PURCHASE QUOTE CARD.....	39
ADD DOCUMENTS FROM PURCHASE QUOTE CARD.....	41
SHOW DOCUMENTS FROM PURCHASE QUOTE CARD	42
SHOW INTERRELATED DOCUMENTS FROM PURCHASE QUOTE CARD.....	43
5.4 PURCHASE ORDER	44
PURCHASE ORDER LIST.....	44
ADD DOCUMENTS FROM PURCHASE ORDER LIST	45
SHOW DOCUMENTS FROM PURCHASE ORDER LIST	47
SHOW INTERRELATED DOCUMENTS FROM PURCHASE ORDER LIST	47
PURCHASE ORDER CARD	48
ADD DOCUMENTS FROM PURCHASE ORDER CARD	49
SHOW DOCUMENTS FROM PURCHASE ORDER CARD	51
SHOW INTERRELATED DOCUMENTS FROM PURCHASE ORDER CARD	52
5.5 VENDOR	53
VENDOR LIST	53
ADD DOCUMENTS FROM VENDOR LIST	54
SHOW DOCUMENTS FROM VENDOR LIST.....	56
SHOW INTERRELATED DOCUMENTS FROM VENDOR LIST	56
VENDOR CARD	57
ADD DOCUMENTS FROM VENDOR CARD	58
SHOW DOCUMENTS FROM VENDOR CARD	60
SHOW INTERRELATED DOCUMENTS FROM VENDOR CARD	60
5.6 SALES ITEM.....	62
SALES ITEM LIST	62
ADD DOCUMENTS FROM SALES ITEM LIST.....	63

SHOW DOCUMENTS FROM SALES ITEM LIST	65
SHOW INTERRELATED DOCUMENTS FROM SALES ITEM LIST.....	65
SALES ITEM CARD	66
ADD DOCUMENTS FROM SALES ITEM CARD.....	67
SHOW DOCUMENTS FROM SALES ITEM CARD	69
SHOW INTERRELATED DOCUMENTS FROM SALES ITEM CARD.....	69
5.7 SALES INVOICE	70
SALES INVOICE LIST	70
ADD DOCUMENTS FROM SALES INVOICE LIST.....	71
SHOW DOCUMENTS FROM SALES INVOICE LIST	73
SHOW INTERRELATED DOCUMENTS FROM SALES INVOICE LIST.....	73
SALES INVOICE CARD.....	74
ADD DOCUMENTS FROM SALES INVOICE CARD.....	75
SHOW DOCUMENTS FROM SALES INVOICE CARD	77
SHOW INTERRELATED DOCUMENTS FROM SALES INVOICE CARD.....	78
5.8 SALES ORDER.....	79
SALES ORDER LIST	79
ADD DOCUMENTS IN SALES ORDER LIST	80
SHOW DOCUMENTS IN SALES ORDER LIST	81
SHOW INTERRELATED DOCUMENTS IN SALES ORDER LIST	82
SALES ORDER CARD.....	83
ADD DOCUMENTS IN SALES ORDER CARD.....	85
SHOW DOCUMENTS IN SALES ORDER CARD	86
SHOW INTERRELATED DOCUMENTS IN SALES ORDER CARD	87
5.9 SALES QUOTE.....	88
SALES QUOTE LIST	88
ADD DOCUMENTS FROM SALES QUOTE LIST.....	89
SHOW DOCUMENTS FROM SALES QUOTE LIST	90
SHOW INTERRELATED DOCUMENTS FROM SALES QUOTE LIST.....	91

SALES QUOTE CARD	92
ADD DOCUMENTS FROM SALES QUOTE CARD	93
SHOW DOCUMENTS FROM SALES QUOTE CARD	94
SHOW INTERRELATED DOCUMENTS FROM SALES QUOTE CARD	95
5.10 CUSTOMER.....	96
CUSTOMER LIST.....	96
ADD DOCUMENTS FROM CUSTOMER LIST	97
SHOW DOCUMENTS FROM CUSTOMER LIST	99
SHOW INTERRELATED DOCUMENTS FROM CUSTOMER LIST	99
CUSTOMER CARD	100
ADD DOCUMENTS FROM CUSTOMER CARD	101
SHOW DOCUMENTS FROM CUSTOMER CARD	103
SHOW INTERRELATED DOCUMENTS FROM CUSTOMER CARD	103
5.11 GENERAL JOURNALS	105
GENERAL JOURNAL BATCH	105
ADD DOCUMENTS FROM GENERAL JOURNAL BATCH	106
SHOW DOCUMENTS FROM GENERAL JOURNAL BATCH	107
SHOW INTERRELATED DOCUMENTS FROM GENERAL JOURNAL BATCH	108
5.12 GENERAL LEDGER ENTRIES.....	109
GENERAL LEDGER ENTRIES LIST	109
ADD DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST	110
SHOW DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST	112
SHOW INTERRELATED DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST	112
5.13 ASSOCIATE DOCUMENT FROM SIDE BY SIDE ENTRY VIEWER	113
6 DYNAMICS 365 BUSINESS CENTRAL WEB SERVICES FOR PAPERSAVE	116
6.1 HOW TO ACCESS THESE WEB SERVICES WITHIN DYNAMICS 365 BUSINESS CENTRAL ..	116

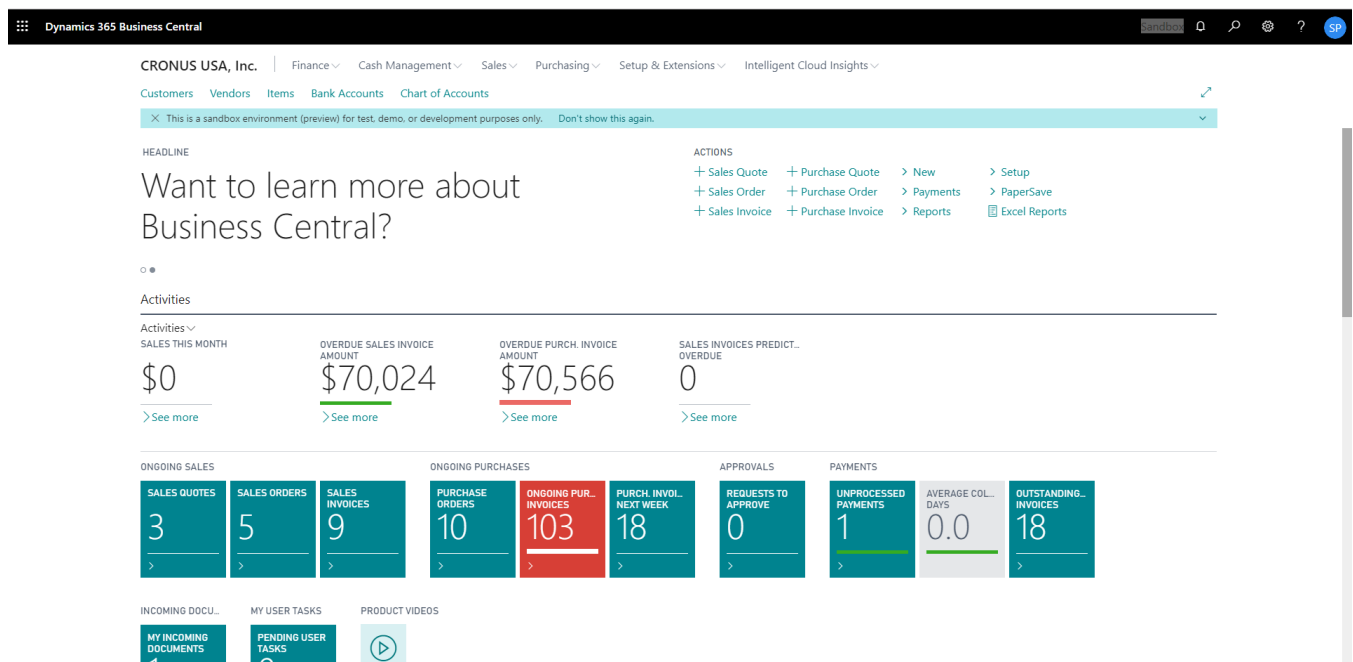
1 INTRODUCTION

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 [this](#) 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.

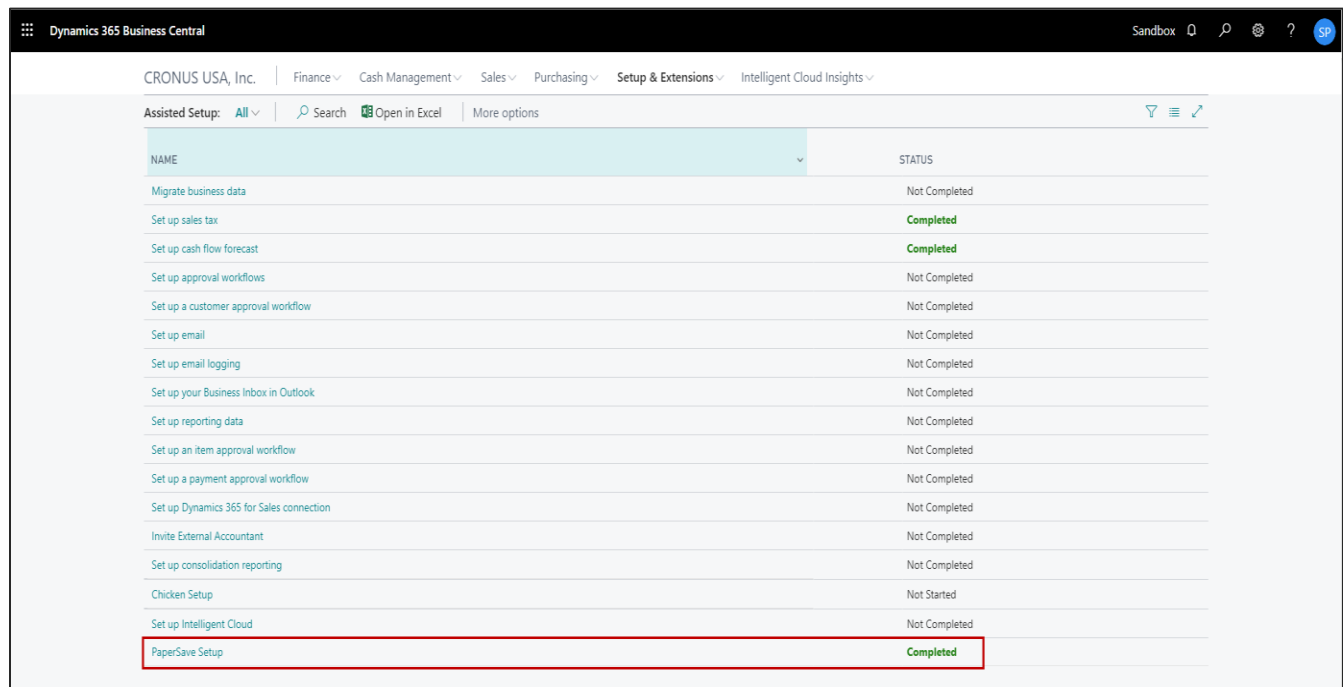
The following steps will guide you through the assisted setup for PaperSave. Below is the Dynamics 365 Business Central Home page.



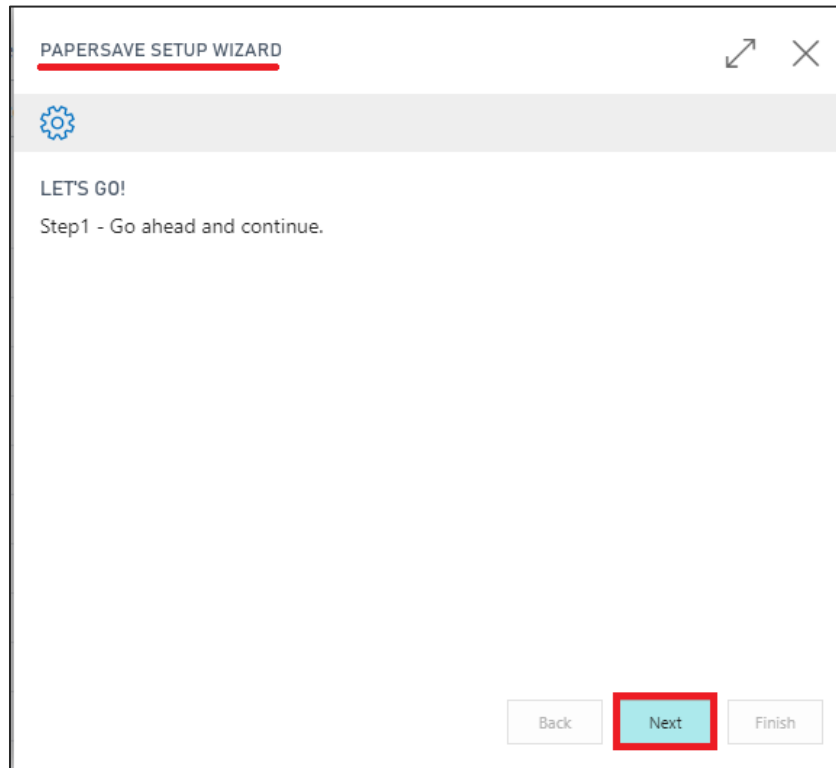
1. On the Dynamics 365 Business Central Home Page, click on the **Setup & Extensions** dropdown.
2. Click on **Assisted Setup**.



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



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



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

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.

USER CARD | WORK DATE: 08/04/2019

Himal Patel

Change Web Service Key Effective Permissions More options

General

User Name: HIMAPTEL State: Enabled

Full Name: Himal Patel Contact Email: hpatel@sales.papersave.com

Web Service Access

Web Service Access Key: [REDACTED] Web Service Expiry Date: [REDACTED]

Office 365 Authentication

User Groups Manage

Code ↑	Name	Company Name ↑
→ D365 BUS FULL ACCESS	Full business access excluding user management	CRONUS USA, Inc.
D365 BUS PREMIUM	D365 Premium Business Access	CRONUS USA, Inc.
D365 TROUBLESHOOT	D365 Troubleshoot	CRONUS USA, Inc.

User Permission Sets Manage

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
------------------	-------------	-----------	----------------	------------------

Notes +
(There is nothing to show in this view)

Links +
(There is nothing to show in this view)

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

PAPERSAVE SETUP WIZARD

✓

Step3 - You are ready.

THAT'S IT!

Choose Finish to exit the wizard.

Back Next **Finish**

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

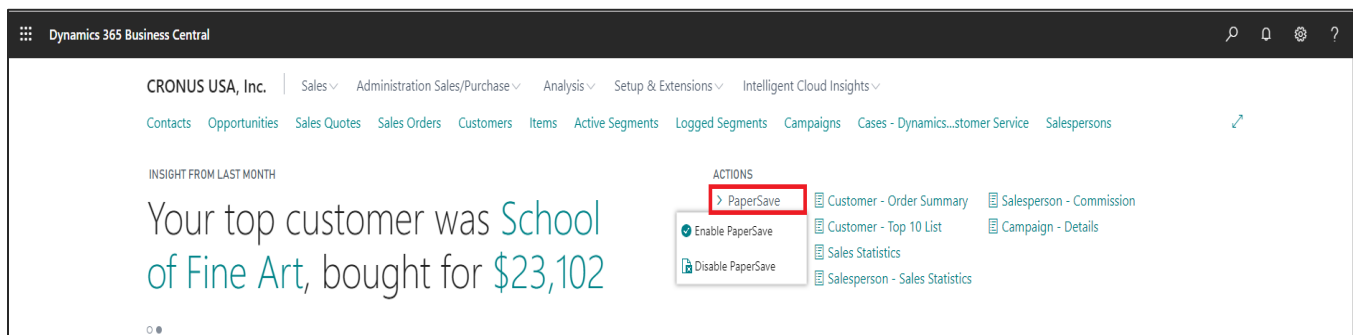
NOTE: The new users added or imported in Dynamics 365 Business Central after running the Assisted setup would require the permissions to access the PaperSave functionalities. Please refer to [this](#) section for more details.

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:



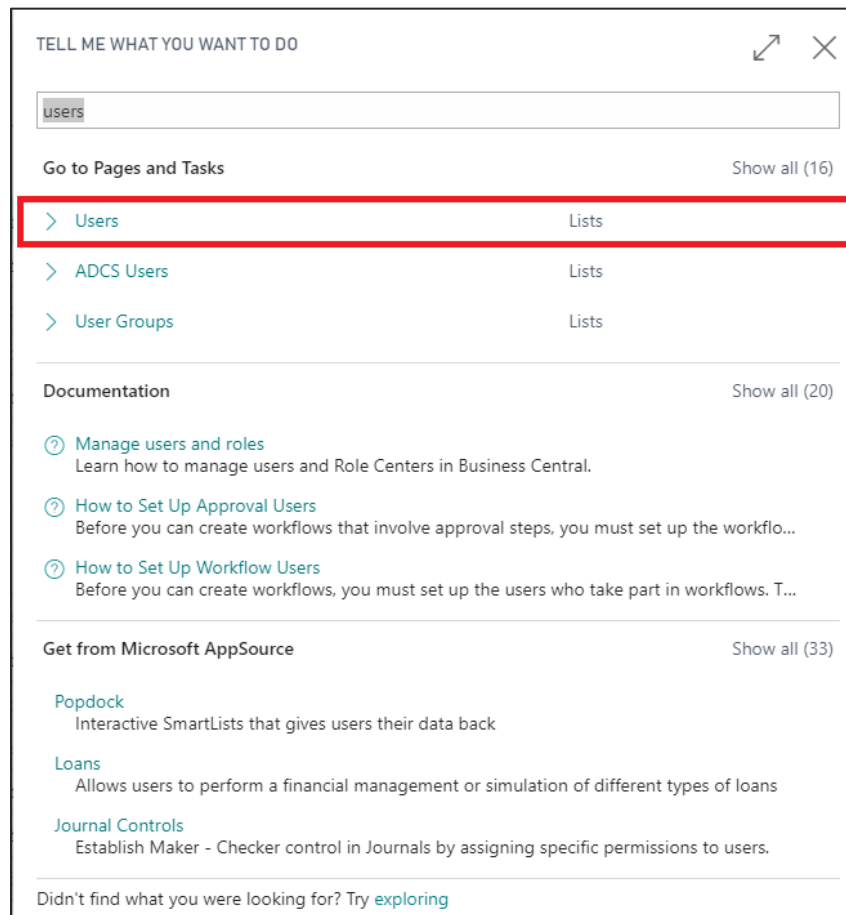
NOTE: Enable/Disable PaperSave option is available on Dynamics 365 Business Central Home for all the user roles.

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".



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.

User Name ↑	Full Name	State	License Type	Authentication Email
HCONDON	Holly Condon	Enabled	Full User	hcondon@sales.papersave.com
HPATEL	Hemal Patel	Enabled	Full User	hpatel@sales.papersave.com
TBOWER	Tammy Bower	Enabled	Full User	tbower@sales.papersave.com

Permission Sets

Permission Set ↑	Company ↑
D365 BUS FULL ...	CRONUS USA, Inc.
D365 BUS PREMI...	CRONUS USA, Inc.
LOCAL	CRONUS USA, Inc.
SUPER	
TROUBLESHOOT...	CRONUS USA, Inc.

User Group Memberships

User Group Code ↑	Company Name ↑
D365 BUS FULL ...	CRONUS USA, Inc.
D365 BUS PREMI...	CRONUS USA, Inc.
D365 TROUBLES...	CRONUS USA, Inc.

User Setup

Allow Posting From	Allow Posting To	Register Time	Time Sheet Admin.
No	No	No	No

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).

Effective Permissions

Code ↑	Name	Company Name ↑
D365 BUS PREMIUM	D365 Premium Business Access	CRONUS AU
D365 EXTENSION MGT	Dynamics 365 Extension management	CRONUS AU
D365 TROUBLESHOOT	D365 Troubleshoot	CRONUS AU
EXCEL EXPORT ACTION	D365 Excel Export Action	CRONUS AU

User Permission Sets

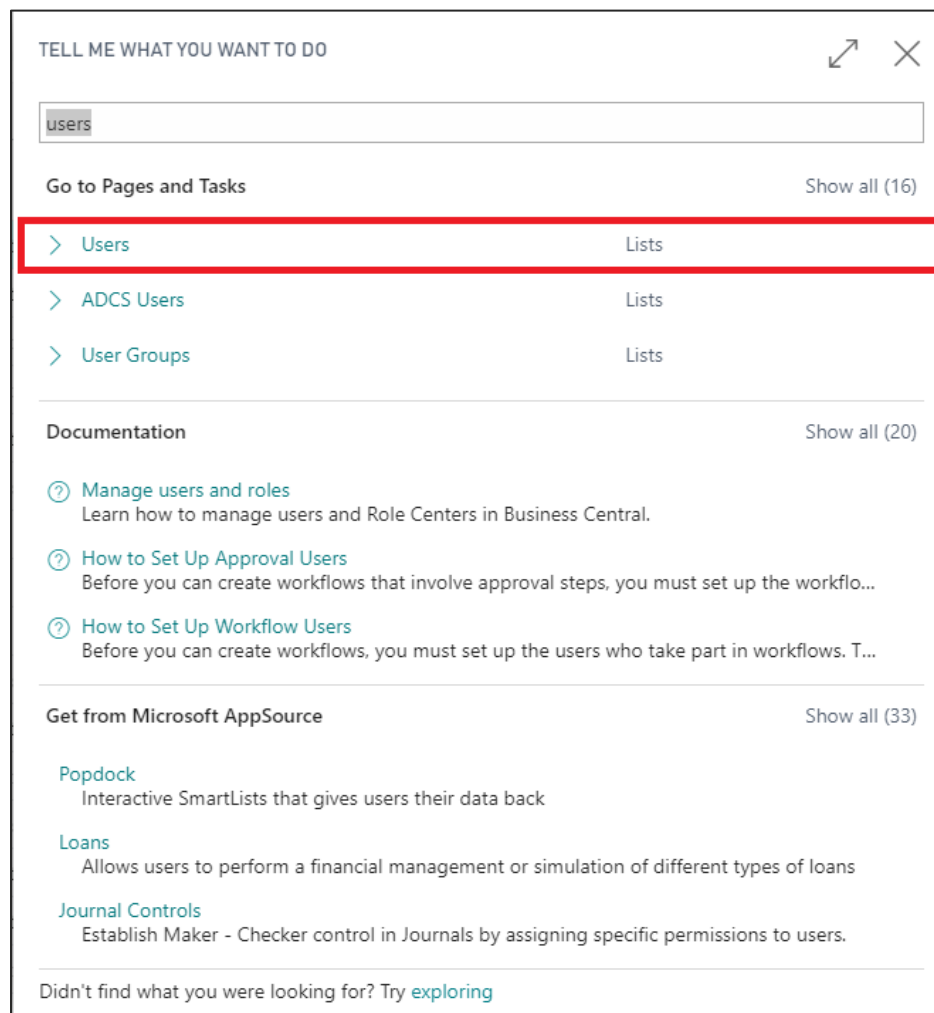
Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 EXTENSION MGT	Dynamics 365 Extension M...	CRONUS AU		System
EXCEL EXPORT ACTION	D365 Excel Export Action	CRONUS AU		System
LOCAL	Country/region-specific fu...	CRONUS AU		System
PAPERSAVE	PaperSave	CRONUS AU	PaperSave for Dynamics 365 Business Central	Tenant
SECURITY	Dynamics 365 User setup			System

Extension Name
Specifies the name of the extension.
Learn more

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".



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

USERS | WORK DATE: 08/04/2019

User Name ↑	Full Name	State	License Type	Authentication Email
HCONDON	Holly Condon	Enabled	Full User	hcondon@sales.paper-save.com
HPATEL	Himal Patel	Enabled	Full User	hpatel@sales.paper-save.com
TBOWER	Tammy Bower	Enabled	Full User	tbower@sales.paper-save.com

Permission Sets

Permission Set ↑	Company ↑
D365 BUS FULL ...	CRONUS USA, Inc.
D365 BUS PREMI...	CRONUS USA, Inc.
LOCAL	CRONUS USA, Inc.
SUPER	
TROUBLESHOOT...	CRONUS USA, Inc.

User Group Memberships

User Group Code ↑	Company Name ↑
D365 BUS FULL ...	CRONUS USA, Inc.
D365 BUS PREMI...	CRONUS USA, Inc.
D365 TROUBLES...	CRONUS USA, Inc.

User Setup

Allow Posting From	Allow Posting To	Register Time	Time Sheet Admin.
		No	No

- 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.

USER CARD | WORK DATE: 08/04/2019

Holly Condon

Change Web Service Key Effective Permissions More options

General

User Name: HCONDON State: Enabled

Full Name: Holly Condon Contact Email: hcondon@sales.paper-save.com

Web Service Access

Office 365 Authentication

User Groups Manage

Code ↑	Name	Company Name ↑
D365 BUS FULL ACCESS	Full business access excluding user management	CRONUS USA, Inc.
D365 BUS PREMIUM	D365 Premium Business Access	CRONUS USA, Inc.
D365 TROUBLESHOOT	D365 Troubleshoot	CRONUS USA, Inc.

User Permission Sets Manage

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 BUS FULL AC...	Dyn. 365 Full Business ...	CRONUS USA, Inc.		System
D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Ful...	CRONUS USA, Inc.		System

Notes

(There is nothing to show in this view)

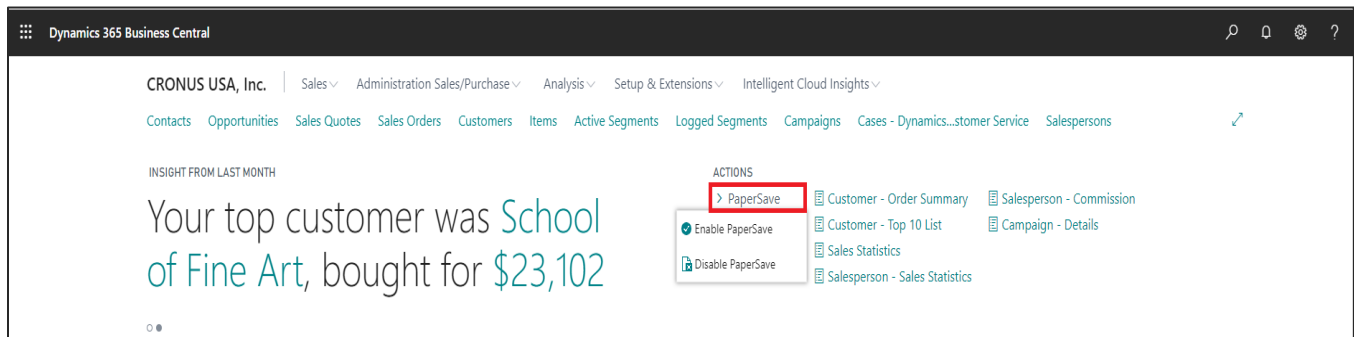
Links

(There is nothing to show in this view)

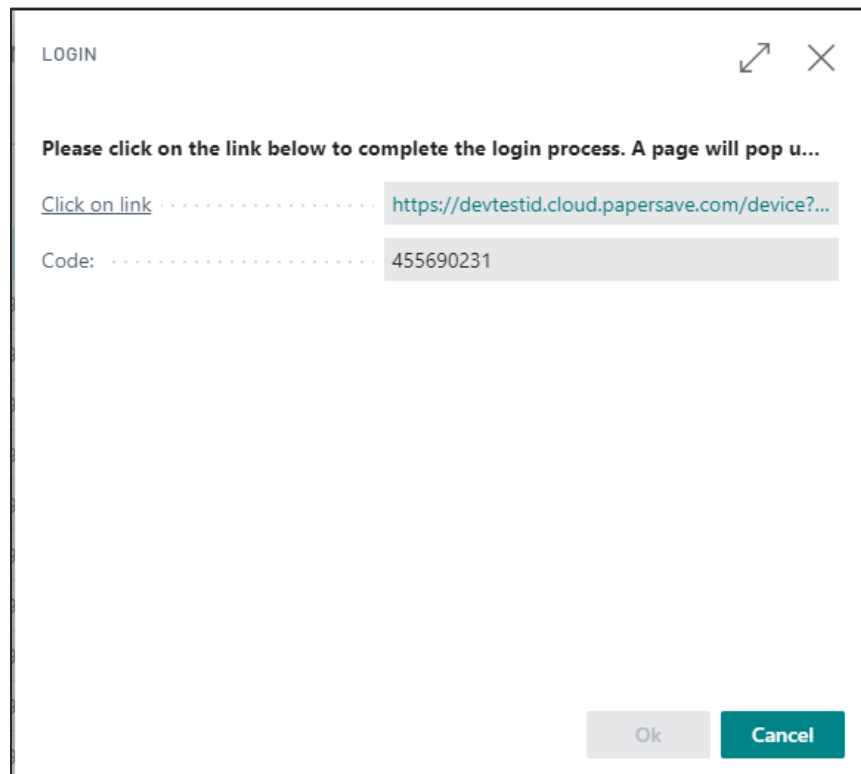
4 USER LOGIN STEPS FOR PAPERSAVE

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:

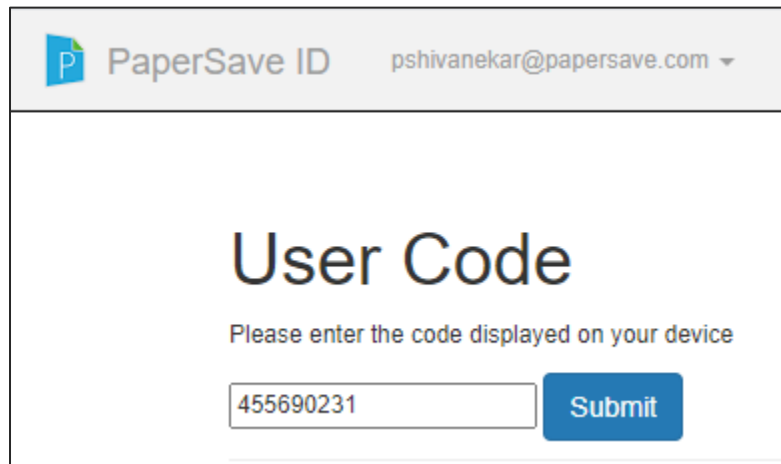
- 1) **Enable** PaperSave using the PaperSave tab from Actions on the Dynamics 365 Business Central Home if it is currently disabled.



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



- 3) **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.



The screenshot shows a web interface for PaperSave ID. At the top, there is a header bar with the PaperSave logo (a blue square with a white 'P'), the text 'PaperSave ID', and the email address 'pshivanekar@papersave.com' with a dropdown arrow. Below the header, the main content area has the title 'User Code' in a large, bold font. Underneath the title, it says 'Please enter the code displayed on your device'. There is a text input field containing the code '455690231' and a blue 'Submit' button to its right.

- 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:

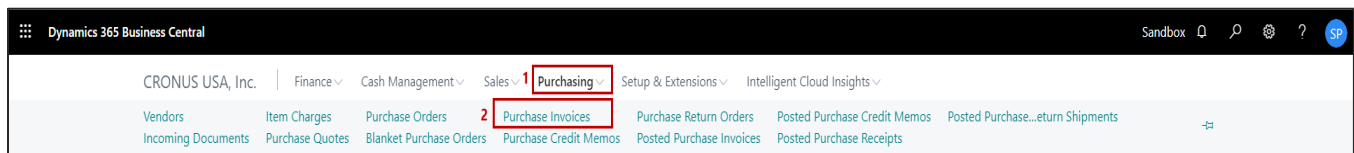
- 1) **Add Document:** You can add documents by dragging or selecting the files to desired records in various Record types from the record list or the record card.
- 2) **Show Document:** You can view the documents for desired records in various Record types from the record list or the record card.
-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



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.

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | Sales | **Purchasing** | Setup & Extensions | Intelligent Cloud Insights

Purchase Invoices: All | Search | + New | Delete | Process | Invoice | Posting | Release | Navigate

No. ↑	Buy-from Vendor No.	Due Date	Buy-from Vendor Name	Vendor Invoice No.	Location Code	Assigned ID
108210	20000	5/31/2019	First Up Consultants	108210		
108420	10000	12/31/2019	Fabrikam, Inc.	101		
108421	10000	12/31/2019	Fabrikam, Inc.	101		
108422	10000	12/31/2019	Fabrikam, Inc.	101		
108423	10000	12/31/2019	Fabrikam, Inc.	101		
108424	10000	12/31/2019	Fabrikam, Inc.	101		
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		
108429	10000	12/31/2019	Fabrikam, Inc.	101		
108430	10000	12/31/2019	Fabrikam, Inc.	101		

Details | Attachments (0)

Incoming Document Files

Name	Type
(There is nothing to show in this view)	

Vendor Details

Vendor No. 20000
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"**.

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | Sales | **Purchasing** | Setup & Extensions | Intelligent Cloud Insights

Purchase Invoices: All | Search | + New | Delete | **Process** | Invoice | Posting | Release | Navigate

No. ↑	Buy-from Vendor No.	Due Date	Buy-from Vendor Name	Vendor Invoice No.	Location Code	Assigned ID
108210	20000	5/31/2019	First Up Consultants	108210		
108420	10000	12/31/2019	Fabrikam, Inc.	101		
108421	10000	12/31/2019	Fabrikam, Inc.	101		
108422	10000	12/31/2019	Fabrikam, Inc.	101		
108423	10000	12/31/2019	Fabrikam, Inc.	101		
108424	10000	12/31/2019	Fabrikam, Inc.	101		
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		
108429	10000	12/31/2019	Fabrikam, Inc.	101		
108430	10000	12/31/2019	Fabrikam, Inc.	101		

Add Document
Show Documents
Show Interrelated Documents

Details | Attachments (0)

Incoming Document Files

Name	Type
(There is nothing to show in this view)	

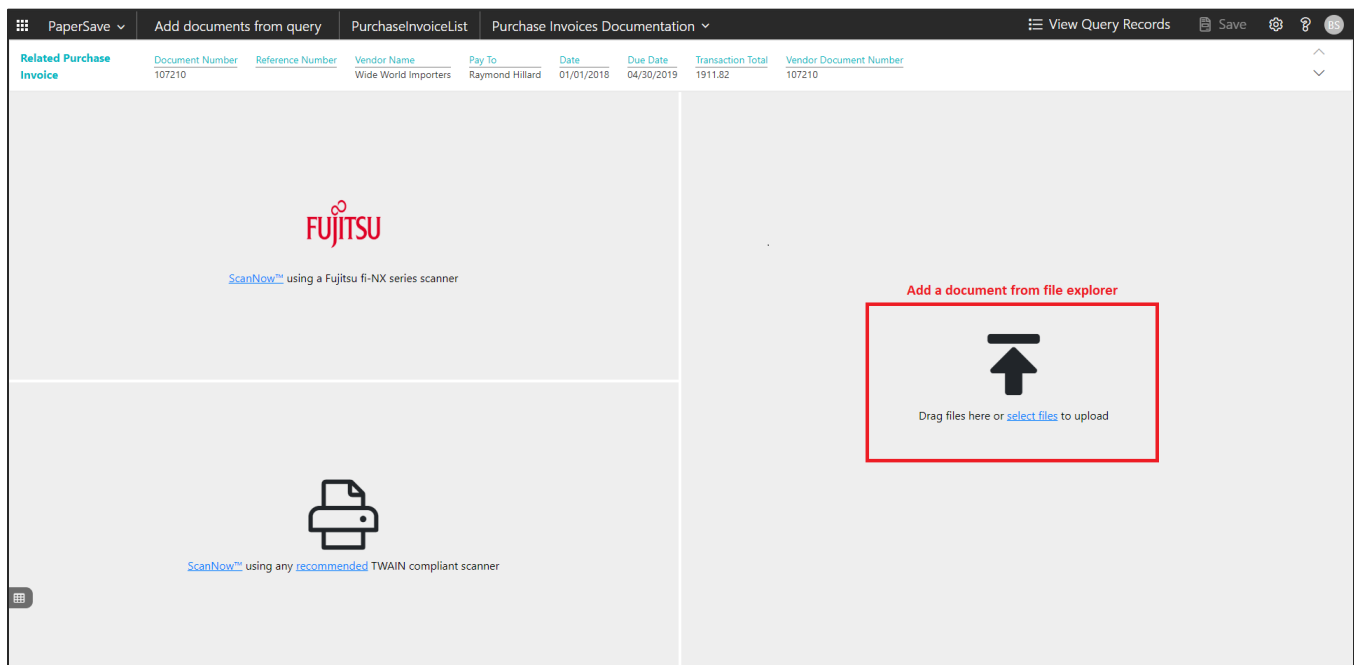
Vendor Details

Vendor No. 20000
Name First Up Consultants

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**".
2. 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 documents from query | PurchaseInvoiceList | Purchase Invoices Documentation | View Query Records | **Save**

Related Purchase Invoice | Document Number: 107210 | Reference Number: | Vendor Name: Wide World Importers | Pay To: Raymond Hillard | Date: 01/01/2018 | Due Date: 04/30/2019 | Transaction Total: 1911.82 | Vendor Document Number: 107210

ID: 1379015
Batch: INVOICE_TMP1582482674955491422.pdf

Document Profile
Doc Type:
☐ Invoice
☐ Purchase Order
☐ Receiving Ticket
☐ Contract

Date Received:
Enter Value

Comments:
Enter Value

Lookup for 365:
Enter Value

Invoice Address:
GPS Hospitality, LLC.
2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

Delivery Address:
Burger King 13161
1205 W HUNTER ST
LOGAN, OH 43138-1011
USA

Invoice date: 19-Feb-2016
Order no: 37532094
PO #: 13161
Order from: |
Shipping date: 02/19/16
Cust Service Rep: Myles Couyoumjan
Store no: 5020600
Customer no: 11062-018811
Customer store no: 13161
Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
OST #: 869575828RT0001
Tracking #: 1218EDV30334788785

Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UCM	Unit price USD	Totals USD
10	421725	Tip, Rubber Feet (Set of 4)	3	3	P4	6.96	20.88
20	610972	TONG, LIFT AND GRIP S/S 12"	3	3	EA	5.16	15.48
10	SHIPPING	Shipping	1	0	EA	13.45	13.45
							49.81
Sales Tax							1.46
Total Including Tax:							51.27

Invoice no: 84949880
Invoice date: 19-Feb-2016
Customer no: 11062-018811
Sold To: GPS Hospitality, LLC.
2100 RIVEREDGE PKWY

REMIT PAYMENT TO:
Frankie Foodservice Supply, Inc.
8007 INNOVATION WAY
CINCINNATI, OH 45242-0080

- 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:

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

PaperSave | Documents related to query | PurchaseInvoiceList | View Query Records

FILTER | 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\bsahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
1368471	choptank electric.tiff	09/13/2019 05:49:27 AM	PS\bsahhvtest9stg	107211	Purchase Invoice	Purchase Invoices Documentation
1368472	choptank electric.tiff	09/13/2019 05:49:27 AM	PS\bsahhvtest9stg	107210	Purchase Invoice	Purchase Invoices Documentation
1369030	3PaperSave1.pdf	09/13/2019 10:12:42 AM	PS\bsahhvtest9stg	107210	Purchase Invoice	Interrelated doc Purchase invoice
1379001	3PaperSave1.pdf	09/14/2019 03:09:53 AM	PS\bsahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
1379005	King.jpg	09/14/2019 03:18:08 AM	PS\bsahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
1379016	INVOICE_TMP1582482674955491422.pdf	09/14/2019 04:04:55 AM	PS\bsahhvtest9stg	107209	Purchase Invoice	Purchase Invoices Documentation
1379017	INVOICE_TMP1582482674955491422.pdf	09/14/2019 04:04:55 AM	PS\bsahhvtest9stg	107211	Purchase Invoice	Purchase Invoices Documentation
1379018	INVOICE_TMP1582482674955491422.pdf	09/14/2019 04:04:55 AM	PS\bsahhvtest9stg	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.

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.

107213 · First Up Consultants

Invoice | Posting | Request Approval | Release | Navigate | More options

General

Vendor Name: First Up Consultants | Due Date: 8/31/2018
 Contact: Evan McIntosh | Vendor Invoice No.: VEN: 111
 Posting Date: 8/22/2018

Lines | Manage | More options

TYPE	NO.	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX AREA CODE	TAX GROUP CODE
Item	1960-S	ROME Guest Chair, green		2	PCS	125.23	ATLANTA, GA	FURNITURE

Subtotal Excl. Tax (USD): 250.46 | **Total Excl. Tax (USD): 250.46**
Inv. Discount Amount (USD): 0.00 | **Total Tax (USD): 15.03**
Invoice Discount %: 0 | **Total Incl. Tax (USD): 265.49**

Vendor Statistics

Vendor No.: 20000
 Balance (\$): 6,134.60
 Outstanding Orders (\$): 16,440.33
 Amt. Rcd. Not Invd. (\$): 0.00
 Outstanding Invoices (\$): 2,144.80
 Total (\$): 24,719.73
 Overdue Amounts (\$ as of 0...): 6,284.60
 Invoiced Prepayment Amount...: 0.00
 Payments (\$): 84,634.25
 Last Payment Date: 2/12/2019

Forecast

5
4
3
2
1
0

01/13/19 03/13/19 04/13/19 05/13/19 06/13/19 07/13/19

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

107213 · First Up Consultants

Invoice | Posting | Request Approval | Release | Navigate | More options

Invoice | Statistics | Dimensions | **Add Document** | Show Documents | Show Interrelated Documents | Comments

Vendor Name: First Up Consultants | Due Date: 8/31/2018
 Contact: Evan McIntosh | Vendor Invoice No.: VEN: 111
 Posting Date: 8/22/2018

Lines | Manage | More options

TYPE	NO.	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX AREA CODE	TAX GROUP CODE
Item	1960-S	ROME Guest Chair, green		2	PCS	125.23	ATLANTA, GA	FURNITURE

Subtotal Excl. Tax (USD): 250.46 | **Total Excl. Tax (USD): 250.46**
Inv. Discount Amount (USD): 0.00 | **Total Tax (USD): 15.03**
Invoice Discount %: 0 | **Total Incl. Tax (USD): 265.49**

Vendor Statistics

Vendor No.: 20000
 Balance (\$): 6,134.60
 Outstanding Orders (\$): 16,440.33
 Amt. Rcd. Not Invd. (\$): 0.00
 Outstanding Invoices (\$): 2,144.80
 Total (\$): 24,719.73
 Overdue Amounts (\$ as of 0...): 6,284.60
 Invoiced Prepayment Amount...: 0.00
 Payments (\$): 84,634.25
 Last Payment Date: 2/12/2019

Forecast

5
4
3
2
1
0

01/13/19 03/13/19 04/13/19 05/13/19 06/13/19 07/13/19

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.

PaperSave ▾ Add a New PaperSave Document Purchase Invoices Documentation ▾ + New < > 🖨️ 📧 ⬇️ ⚙️ ? 👤

Related Purchase Invoice	Document Number	Reference Number	Vendor Name	Pay To	Date	Due Date	Transaction Total	Vendor Document Number
	107213		First Up Consultants	Evan McIntosh	22-08-2018	31-08-2018	265.49	VEN: 111

FUJITSU

[ScanNow™](#) using a Fujitsu fi-NX series scanner

Add a document from file explorer

⬆️

Drag files here or [select files](#) to upload

🖨️

[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. 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.

7. 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.

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			
12-09-2019 07:40:27 AM	Vivek Soni	Contract			

SHOW INTERRELATED DOCUMENTS FROM PURCHASE INVOICE CARD

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

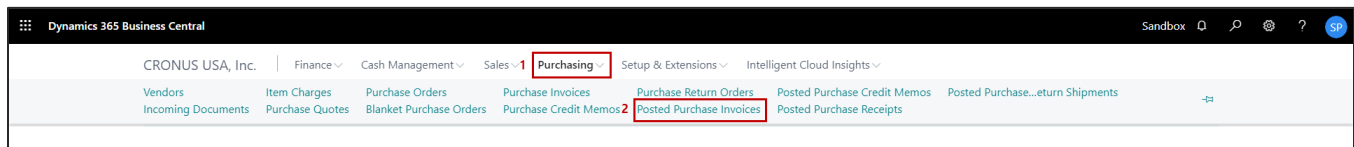
1. On the Invoice tab of Purchase Invoice Card, click on “**Show Interrelated Documents**”.
2. This will open PaperSave Cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available Interrelated documents to the record.

PaperSave ▾ Documents that are interrelated to this root Purchase Invoice									
Root Purchase Invoice		Document Number	Reference Number	Vendor Name	Pay To	Date	Due Date	Transaction Total	Vendor Document Number
		107213		First Up Consultants	Evan McIntosh	22-08-2018	31-08-2018	265.49	VEN: 111
REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL									
		Created	Created By	Doc Type	Date Received	Comments	Lookup for 365		
<input type="checkbox"/>		12-09-2019 03:48:34 AM	Bhavya Shah	Invoice					
<input type="checkbox"/>		12-09-2019 07:36:13 AM	Vivek Soni	Correspondence					
<input type="checkbox"/>		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**.



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.

No.	Vendor Invoice No.	Vendor No.	Vendor	Currency Code	Amount
108681	1452MH	V00110	Fujitsu & Company		0.00
108643	108211	30000	Graphic Design Institute		8,044.00
108646	D-304	40000	Wide World Importers		20,672.00
108645	23047	20000	First Up Consultants		3,976.00
108642	108209	10000	Fabrikam, Inc.		1,863.00
108419	108208	30000	Graphic Design Institute		6,400.00
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.
2. You will see the PaperSave options such as "**Add Document**", "**Show Documents**", and "**Show Interrelated Documents**".

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | Sales | **Purchasing** | Setup & Extensions | Intelligent Cloud Insights

Posted Purchase Invoices: All | Search | Delete | **Process** | Correct | Invoice | Print/Send | Navigate | Filter | Info | Link

No.	Vendor Invoice No.	Vendor No.	Vendor	Amount
108681	1452MH	V00110	Fujitsu & Company	0.00
108643	108211	30000	Graphic Design Inst	8,044.00
108646	D-304	40000	Wide World Import	20,672.00
108645	23047	20000	First Up Consultants	3,976.00
108642	108209	10000	Fabrikam, Inc.	1,863.00
108419	108208	30000	Graphic Design Institute	6,400.00
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

Process Menu Options:

- Add Document
- Show Documents
- Show Interrelated Documents
- Update Document

Details Panel:

Details | Attachments (0)

Incoming Document Files

Name	Type
(There is nothing to show in this view)	

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"**.
2. 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"**.

PaperSave ▾ Add documents from query PostedPurchaseInvoiceList Purchase Invoices Documentation ▾ View Query Records Save ?

Related Purchase Invoice

Document Number	Reference Number	Vendor Name	Pay To	Date	Due Date	Transaction Total	Vendor Document Number
108207		Graphic Design Institute	Bryce Jasso	01/01/2018	03/31/2019	1255.89	107207

FUJITSU

ScanNow™ using a Fujitsu fi-NX series scanner

Add a document from file explorer

Drag files here or [select files](#) to upload

ScanNow™ using any [recommended](#) TWAIN compliant scanner

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 query PostedPurchaseInvoiceList Purchase Invoices Documentation ▾ View Query Records **Save** ?

Related Purchase Invoice

Document Number	Reference Number	Vendor Name	Pay To	Date	Due Date	Transaction Total	Vendor Document Number
108207		Graphic Design Institute	Bryce Jasso	01/01/2018	03/31/2019	1255.89	107207

Restaurant Equipment Services
5119 South Royal Atlanta Drive
Tucker GA 30084
Phone: 770-446-1202
Fax: 770-446-5269

BILL TO:

GPS Hospitality, LLC
2100 Riveredge Parkway
Suite 850
Atlanta GA 30328

INVOICE

DATE	INVOICE #	CUST #
2/17/2016	0000080307	0005683

DISPATCH

187523

SHIP TO:

Burger King #13887 (Suwanee)
1045 Peachtree Industrial Blvd
Suwanee GA 30024

P.O. NUMBER		TERMS		SALES PERSON	
		NET 30		Chris Brown	
QTY	DESCRIPTION	PRICE	AMOUNT		
1.00	Manufacturer Model Serial # Type Mfg Code Warranty Location Agreement				
1.25	Notes added by tech Chris Brown on 2/4/2016 12:15:40 PM				
0.50	Discounted Labor Rate	85.00	42.50		
1.00	Discounted Labor Rate	102.82	102.82		
1.00	Freight and Delivery	15.00	15.00		

ID: 1379024
Batch: Invoice 0000080307.PDF

Document Profile

Doc Type:

☐ Receiving Ticket

☐ Contract

☐ Correspondence

☐ Other

Date Received:

Enter Value

Comments:

Enter Value

Lookup for 365:

Enter Value

- 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:

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

PaperSave Documents related to query PostedPurchaseInvoiceList View Query Records												
FILTER REFRESH SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL												
<input type="checkbox"/>	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Doc Type	Date Received	Comments	Lookup for 365	
<input type="checkbox"/>	1358196	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108151	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358197	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108152	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358198	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108154	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358199	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108153	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358200	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108155	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358201	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108001	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358203	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108002	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358204	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108005	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358205	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108004	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358206	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108003	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358207	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108006	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358208	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108007	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358209	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108009	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358210	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108012	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358211	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108008	Purchase Invoice	Purchase Invoices Documentation					
<input type="checkbox"/>	1358212	Tax Invoice.pdf	09/12/2019 06:03:57 AM	PS\bsshahhvtest9stg	108011	Purchase Invoice	Purchase Invoices Documentation					

1 of 7 pages (624 items)

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:

- 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.

PaperSave

Documents that are interrelated to this root Purchase Invoice

Search within document list

Root Purchase Invoice

Document Number

Reference Number

Vendor Name

Pay To

Date

Due Date

Transaction Total

Vendor Document Number

Wide World Importers

Toby Rhode

13-04-2018

30-04-2018

11584.10

D-304






REFRESH

FILTER

SHOW GROUPING

CHOOSE FIELDS

EXPORT TO EXCEL

<input type="checkbox"/>		Created	Created By	Doc Type	Date Received	Comments	Lookup for 365
<input type="checkbox"/>		12-09-2019 07:07:30 AM	Bhavya Shah	Invoice			
<input type="checkbox"/>		12-09-2019 07:56:14 AM	Bhavya Shah	Purchase Order			
<input type="checkbox"/>		12-09-2019 08:12:15 AM	Vivek Soni	Contract	10-04-2019		
<input type="checkbox"/>		12-09-2019 08:18:07 AM	Vivek Soni	Invoice			
<input type="checkbox"/>		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										Sandbox	
POSTED PURCHASE INVOICE WORK DATE: 2/12/2019										<input type="button" value="EDIT"/> <input type="button" value="+"/> <input type="button" value="DELETE"/>	
108231 · Graphic Design Institute										✓ SAVED	
Process Correct Invoice Print/Send Navigate Actions Navigate Fewer options											
General Show more											
Vendor		Graphic Design Institute				Due Date		2/28/2019			
Contact		Bryce Jasso				Vendor Invoice No.		V09102			
Posting Date		2/12/2019									
Lines Manage More options											
TYPE	NO.	DESCRIPTION	QUANTITY	UNIT OF MEASURE	DIRECT UNIT COST EXCL. TAX	UNIT PRICE (\$)	TAX AREA CODE	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX	JOB NO.
G/L Account	10200	Saving account	10	HOUR	121.00	0.00	MIAMI, FL	NONTAXABLE		1,210.00	
G/L Account	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 Total Excl. Tax (USD) 3,310.00 Total Incl. Tax (USD) 3,310.00											

- 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

108231 · Graphic Design Institute

Process Correct **Invoice** Print/Send Navigate Actions Navigate Fewer options

Add Document Show Documents Show Interrelated Documents Statistics Dimensions Navigate Comments Approvals

Vendor Graphic Design Institute Due Date 2/28/2019

Contact Bryce Jasso Vendor Invoice No. V09102

Posting Date 2/12/2019

TYPE	NO.	DESCRIPTION	QUANTITY	UNIT OF MEASURE	DIRECT UNIT COST EXCL. TAX	UNIT PRICE (\$)	TAX AREA CODE	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX	JOB NO.
G/L Account	10200	Saving account	10	HOUR	121.00	0.00	MIAMI, FL	NONTAXABLE		1,210.00	
G/L Account	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

Total Excl. Tax (USD) 3,310.00 Total Incl. Tax (USD) 3,310.00

ADD DOCUMENTS FROM POSTED PURCHASE INVOICE CARD


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

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

PaperSave ▾ Add a New PaperSave Document Purchase Invoices Documentation ▾ + New < > 🖨️ 📧 ⬇️


Related Purchase Invoice

Document Number	Reference Number	Vendor Name	Pay To	Date	Due Date	Transaction Total	Vendor Document Number
		Wide World Importers	Toby Rhode	13-04-2018	30-04-2018	11584.10	D-304




ScanNow™ using a Fujitsu fi-NX series scanner


Add a document from file explorer



Drag files here or [select files](#) to upload



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. 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 ▾ Add a New PaperSave Document Purchase Invoices Documentation ▾ + New < > 🖨️ 📧 ⬇️ Save ⚙️ ? 🧑

Related Purchase Invoice

Document Number	Reference Number	Vendor Name	Pay To	Date	Due Date	Transaction Total	Vendor Document Number
		Wide World Importers	Toby Rhode	13-04-2018	30-04-2018	11584.10	D-304

	QTY	DESCRIPTION	UNIT	PRICE	TOTAL
10	492434	First Aid Burn Cream (10 pack)	EA	2.09	2.09
20	618562	Ointment, First Aid Antibiotic (10) Packs	EA	2.09	2.09
30	492433	Gel, Burn Relief 3.5gm (6 per pack)	EA	2.09	4.18
40	618561	Pad, Alcohol Cleansing (20) Pads	EA	2.09	2.09
50	492420	Bandage, Blue 1" x 3" (25 per pack)	EA	2.09	4.18
60	618563	Eye Wash (1) 1oz. Bottle	EA	2.09	2.09
70	492425	Pad, Gauze 3" x 3"	EA	2.09	2.09
80	618558	Pad, Gauze 2" x 2" (5) Packs of 2	EA	2.09	2.09
Misc					
10	SHIPPING	Shipping	EA	11.53	11.53
					32.43
Sales Tax					1.95
Total Including Tax					34.38

ID: 1358441
Batch:

Document Profile

Doc Type :

☐ Invoice

☐ Purchase Order

☐ Receiving Ticket

☒ Contract

Date Received :

Enter Value

Comments :

Enter Value

Lookup for 365 :

Enter Value

2 / 2 INVOICE_TMP3348591930573...

- 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:

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

PaperSave

Document

Purchase Invoices Documentation

Search within document list

Related Purchase Invoice

Document Number

Reference Number

Vendor Name

Pay To

Date

Due Date

Transaction Total

Vendor Document Number

Wide World Importers

Toby Rhode

13-04-2018

30-04-2018

11584.10

D-304

+ NEW

FILTER

REFRESH

CHOOSE FIELDS

SHOW GROUPING

EXPORT TO EXCEL

INTERRELATED

☐

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

☐

12-09-2019 08:12:15 AM

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:

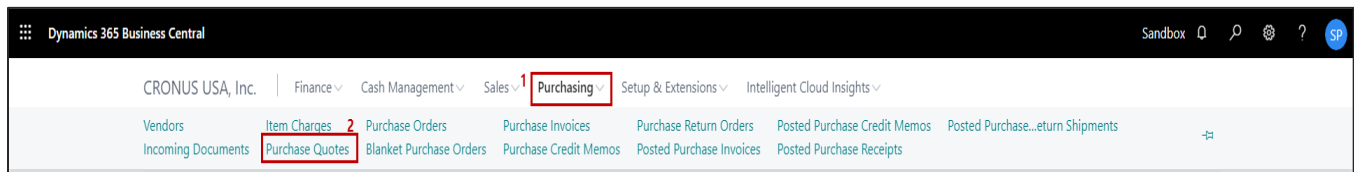
- On the Invoice tab of Posted Purchase Invoice Card, click on "**Show Interrelated Documents**".
- This will open the PaperSave Cloud login prompt (on the first login). **Enter** login credentials.
- On login success, it will **show** the available Interrelated documents to the record.

</

5.3 PURCHASE QUOTE

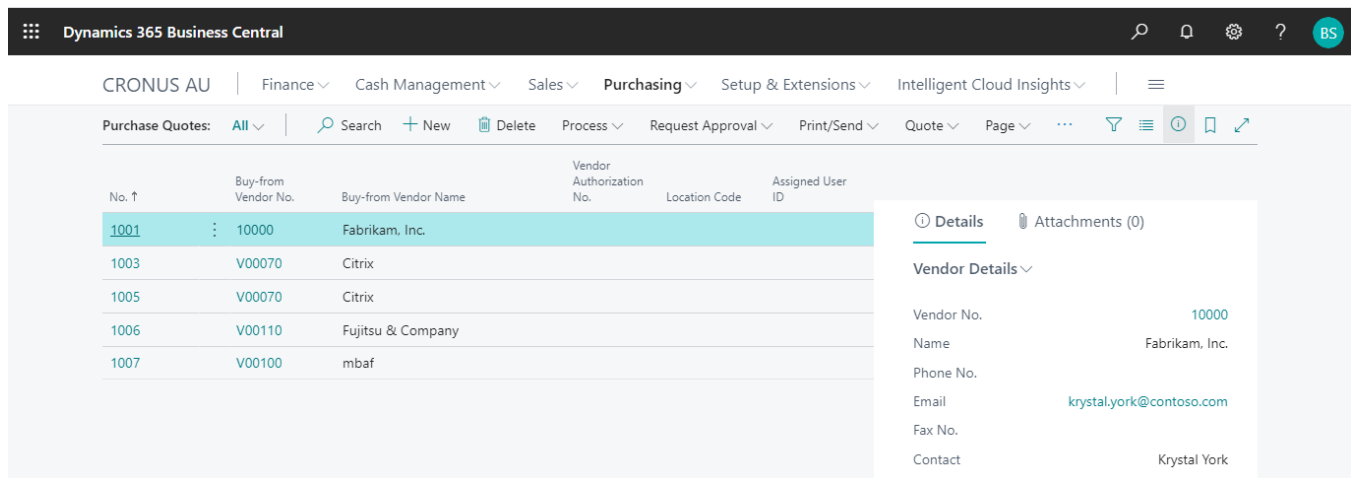
The following steps describe how to interact with PaperSave within the “Purchase Quote” record type’s main screen:

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

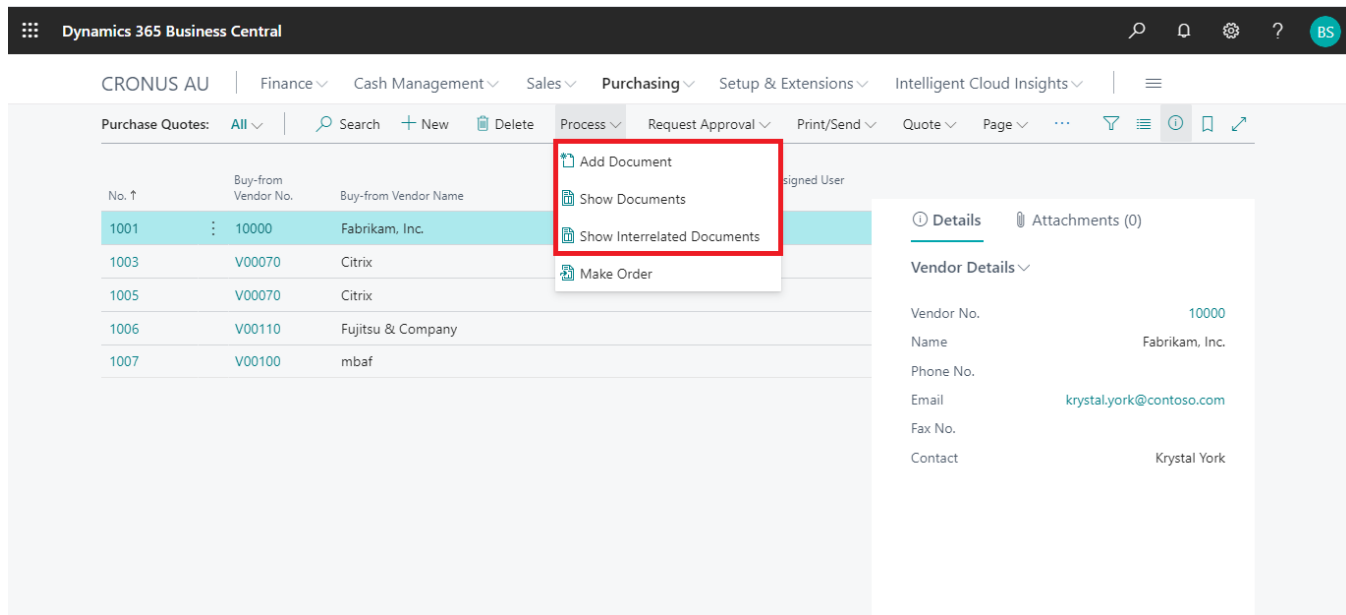


PURCHASE QUOTE LIST

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.



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




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**".


PaperSave ▾ Add documents from query PurchaseQuoteList Purchase Quote Documentation ▾ View Query Records Save ?

Related Purchase Quote Vendor Name Document Date Order Date Total Contact
First Up Consultants 04/08/2019 04/08/2019 0.00 Evan McIntosh


ScanNow™ using a Fujitsu fi-NX series scanner


ScanNow™ using any recommended TWAIN compliant scanner

Add a document from file explorer


Drag files here or [select files](#) to upload

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.

PaperSave ▾ Add documents from query PurchaseQuoteList Purchase Quote Documentation ▾ View Query Records **Save** ?

Related Purchase Quote Vendor Name Document Date Order Date Total Contact
First Up Consultants 04/08/2019 04/08/2019 0.00 Evan McIntosh

ID: 1379234
Batch: INVOICE_TMP4535577695376957713.pdf

Document Profile

Comments:

Altin: CAROL
Comment:

Invoice

Invoice no: 04349000
Invoice date: 19-Feb-2016
Order no: 37531023
PO #
Order from: 02/19/16
Cost Service Rep: Myles Couyoumjan
Store no: 5019157
Customer no: 11602-018811
Customer store no: 331

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1219EDV30334784494

Invoice Address
GPS Hospitality, LLC
2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

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

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UCM	Unit price USD	Total USD
10	492421	Bandage, Blue Knuckle (20 per pack)	3	3	EA	2.09	6.27
20	331618	Spoon, 8" Solid Salad 0.5 oz, Black	2	2	EA	1.30	2.60
30	241271	Container, 10 Gallon White	1	1	EA	9.59	9.59
40	611288-1	Pan, 1/8 Size x 4" D, Black	1	1	EA	2.98	2.98
50	621760	Pan, 1/2 Size 2-1/2 Deep Amber Castile - High Temperature	5	5	EA	10.10	50.50
60	619565	Label, BK 1" Frozen Ready (E) General Use, Roll of 500	3	3	RSC	2.92	8.76

Page # 1 / 2

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

SHOW DOCUMENTS FROM PURCHASE QUOTE LIST

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

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

PaperSave Documents related to query PurchaseQuoteList View Query Records															
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\bsahhvtst9stg	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\bsahhvtst9stg	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\bsahhvtst9stg	1001	Purchase Quote	Purchase Quote Documentation	abc	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York	
	1358422	ReQlogic.pdf	09/12/2019 06:34:40 AM	PS\bsahhvtst9stg	1001	Purchase Quote	Purchase Quote Documentation	stu	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York	
	1358454	INVOICE_TMP334859193057320292.pdf	09/12/2019 08:37:28 AM	PS\vsionhvtst9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York	
	1358455	INVOICE_TMP8193730966268360722.pdf	09/12/2019 08:46:40 AM	PS\vsionhvtst9stg	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\vsionhvtst9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York	
	1358457	INVOICE_TMP4535577695376957713.pdf	09/12/2019 08:46:49 AM	PS\vsionhvtst9stg	1001	Purchase Quote	Purchase Quote Documentation		1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York	
	1358458	url_1116961_20160218_6646928_1638690811.pdf	09/12/2019 08:46:51 AM	PS\vsionhvtst9stg	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\bsahhvtst9stg	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\bsahhvtst9stg	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\bsahhvtst9stg	1003	Purchase Quote	Purchase Quote Documentation		1003	Graphic Design Institute	04/08/2019	04/08/2019	0	Bryce Jasso	
	1379002	3PaperSave1.pdf	09/14/2019 03:11:22 AM	PS\bsahhvtst9stg	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\bsahhvtst9stg	1001	Purchase Quote	Purchase Quote Documentation	Lion	1001	Fabrikam, Inc.	04/08/2019	04/08/2019	0	Krystal York	

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.

PaperSave Documents that are interrelated to this root Purchase Quote				
Root Purchase Quote	Vendor Name	Document Date	Order Date	Total
	First Up Consultants	10-04-2018	09-04-2018	159.32
Contact: Evan McIntosh				
REFRESH	FILTER	SHOW GROUPING	CHOOSE FIELDS	EXPORT 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		
12-09-2019 06:34:40 AM	Bhavya Shah	stu		
12-09-2019 08:37:28 AM	Vivek Soni			
12-09-2019 08:46:40 AM	Vivek Soni			
12-09-2019 08:46:47 AM	Vivek Soni			
12-09-2019 08:46:49 AM	Vivek Soni			
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.

Dynamics 365 Business Central		Sandbox						
PURCHASE QUOTE WORK DATE: 2/12/2019		SAVED						
1001 · First Up Consultants								
Process Request Approval Print/Send Quote Release Navigate More options								
General Show more								
Vendor Name First Up Consultants		Order Date 4/9/2018						
Contact Evan McIntosh		Requested Receipt Date						
Document Date 4/10/2018		Vendor Shipment No.						
Lines Manage More options								
TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX AREA CODE	LI DISCOUNT
Item	1900-S	PARIS Guest Chair, black		1	PCS	150.30	ATLANTA, GA	
Subtotal Excl. Tax (USD)				150.30	Total Excl. Tax (USD)			
Inv. Discount Amount (USD)				0.00	Total Tax (USD)			
Invoice Discount %				0	Total Incl. Tax (USD)			

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

Dynamics 365 Business Central

PURCHASE QUOTE | WORK DATE: 2/12/2019

1001 · First Up Consultants

Process Request Approval Print/Send Quote Release Navigate More options

Add Document Show Documents Show Interrelated Documents Make Order Copy Document..

Vendor Name: First Up Consultants Order Date: 4/9/2018

Contact: Evan McIntosh Requested Receipt Date:

Document Date: 4/10/2018 Vendor Shipment No.:

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX AREA CODE	LI	DISCOUN
Item	1900-S	PARIS Guest Chair, black		1	PCS	150.30	ATLANTA, GA		

Subtotal Excl. Tax (USD): 150.30 Total Excl. Tax (USD): 150.30

Inv. Discount Amount (USD): 0.00 Total Tax (USD): 9.02

Invoice Discount %: 0 Total Incl. Tax (USD): 159.32

Vendor No.: 20000

Balance (\$): 17,574.93

Outstanding Orders (\$): 5,000.00

Amt. Rcd. Not Invd. (\$): 0.00

Outstanding Invoices (\$): 2,144.80

Total (\$): 24,719.73

Overdue Amounts (\$ as of 0...): 8,536.09

Invoiced Prepayment Amoun...: 0.00

Payments (\$): 84,634.25

Last Payment Date: 2/12/2019

Buy-from Vendor History

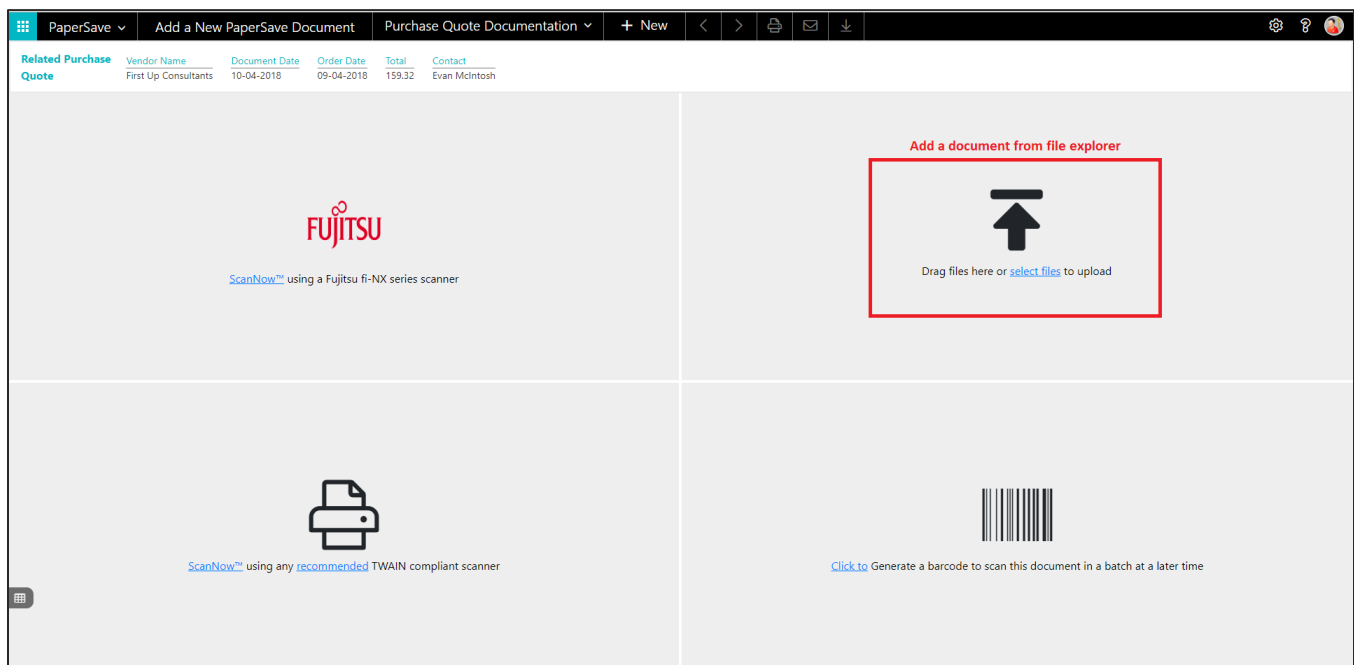
Vendor No.: 20000

1	0	1
Quotes	Blanket Orders	Orders
6	0	0
Invoices	Return Orders	Credit Memos
0	56	56
Ptd. Return Shipments	Ptd. Receipts	Ptd. Invoices

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.



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.

PaperSave | Add a New PaperSave Document | Purchase Quote Documentation | + New | < | > | [Icons] | [Save] | [Settings] | [Help]

Related Purchase Quote

Vendor Name	Document Date	Order Date	Total	Contact
First Up Consultants	10-04-2018	09-04-2018	159.32	Evan McIntosh

Delivery Address
Burger King 7166
1197 BERKSHIRE BLVD
WYOMISSING, PA 19610-1245
USA

Customer no: 11062-018811
Customer store no: 7166

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334789953

Attn: Restaurant Manger
Comment:

Document Profile
ID: 1358454
Batch:
Comments:
Enter Value

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 (10) Packs	1	1	EA	2.09	2.09
30	492433	Gel, Burn Relief 3.5gm (6 per pack)	2	2	EA	2.09	4.18
40	618561	Pad, Alcohol Cleansing (20) Pads	1	1	EA	2.09	2.09
50	492420	Bandage, Blue 1" x 3" (25 per pack)	2	2	EA	2.09	4.18

1 / 2 | INVOICE_TMP3348591805073...

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

SHOW DOCUMENTS FROM PURCHASE QUOTE CARD

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

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

PaperSave | Document | Purchase Quote Documentation | Search within document list | [Settings] | [Help]

Related Purchase Quote

Vendor Name	Document Date	Order Date	Total	Contact
First Up Consultants	10-04-2018	09-04-2018	159.32	Evan McIntosh

+ NEW | FILTER | REFRESH | CHOOSE FIELDS | SHOW GROUPING | EXPORT TO EXCEL | INTERRELATED

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
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:

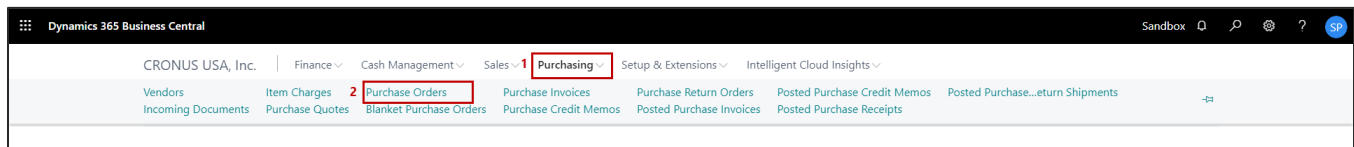
1. On the Invoice tab of Purchase Quote Card, click on “**Show Interrelated Documents**”.
2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available Interrelated documents to the record.

PaperSave ▾ Documents that are interrelated to this root Purchase Quote					
Search within document list					
<div> <div>Root Purchase Quote</div> <div> <div>Vendor Name</div> <div>First Up Consultants</div> </div> <div> <div>Document Date</div> <div>10-04-2018</div> </div> <div> <div>Order Date</div> <div>09-04-2018</div> </div> <div> <div>Total</div> <div>159.32</div> </div> <div> <div>Contact</div> <div>Evan McIntosh</div> </div> </div>					
<div> <div>REFRESH</div> <div>FILTER</div> <div>SHOW GROUPING</div> <div>CHOOSE FIELDS</div> <div>EXPORT TO EXCEL</div> </div>					
<input type="checkbox"/>	Created	Created By	Comments		
<input type="checkbox"/>	12-09-2019 06:21:05 AM	Bhavya Shah	test value		
<input type="checkbox"/>	12-09-2019 06:22:12 AM	Bhavya Shah			
<input type="checkbox"/>	12-09-2019 06:30:48 AM	Bhavya Shah	abc		
<input type="checkbox"/>	12-09-2019 06:34:40 AM	Bhavya Shah	stu		
<input type="checkbox"/>	12-09-2019 08:37:28 AM	Vivek Soni			
<input type="checkbox"/>	12-09-2019 08:46:40 AM	Vivek Soni			
<input type="checkbox"/>	12-09-2019 08:46:47 AM	Vivek Soni			
<input type="checkbox"/>	12-09-2019 08:46:49 AM	Vivek Soni			
<input type="checkbox"/>	12-09-2019 08:46:51 AM	Vivek Soni			

5.4 PURCHASE ORDER

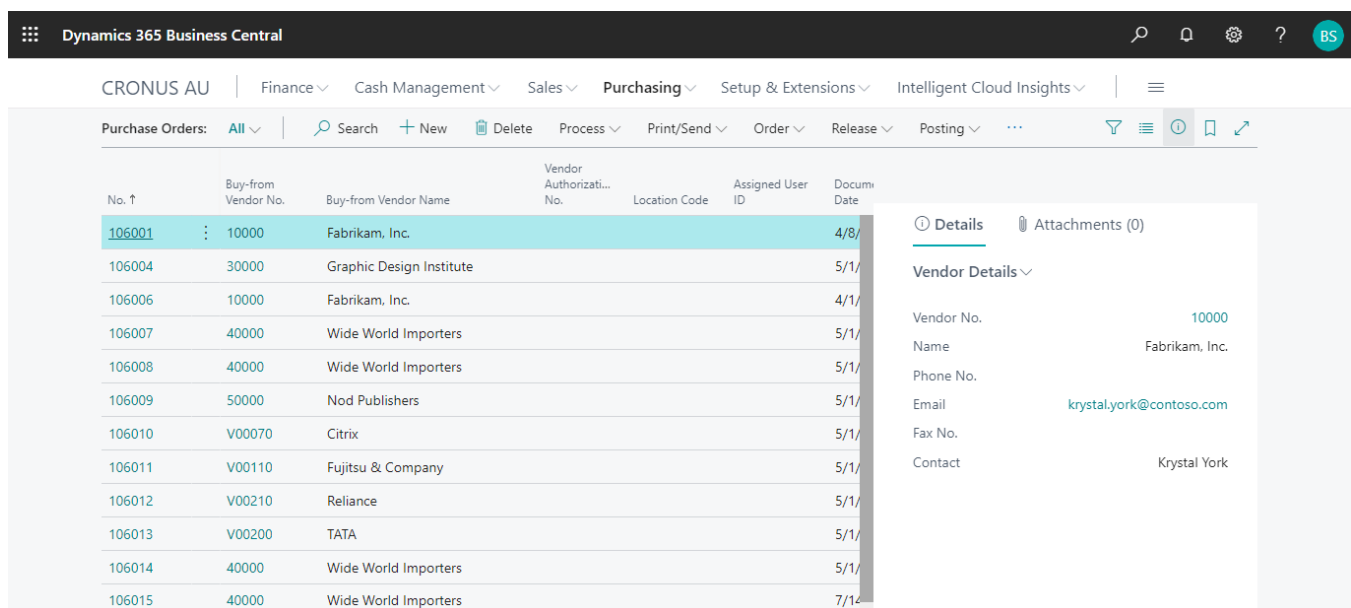
The following steps describe how to interact with PaperSave within the "Purchase Order" record type's main screen:

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



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.



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

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | Sales | **Purchasing** | Setup & Extensions | Intelligent Cloud Insights

Purchase Orders: All | Search | + New | Delete | **Process** | Print/Send | Order | Release | Posting | ...

No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	User	Docum. Date
106001	10000	Fabrikam, Inc.		4/8/
106004	30000	Graphic Design Institute		5/1/
106006	10000	Fabrikam, Inc.		4/1/
106007	40000	Wide World Importers		5/1/
106008	40000	Wide World Importers		5/1/
106009	50000	Nod Publishers		5/1/
106010	V00070	Citrix		5/1/
106011	V00110	Fujitsu & Company		5/1/
106012	V00210	Reliance		5/1/
106013	V00200	TATA		5/1/

Process Tab Actions:

- Add Document
- Show Documents
- Show Interrelated Documents

Details | Attachments (0)

Vendor Details

Vendor No. 10000
 Name Fabrikam, Inc.
 Phone No.
 Email krystal.york@contoso.com
 Fax No.
 Contact Krystal York

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"**.
2. 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 documents from query PurchaseOrderList Purchase Order Documentation ▾ View Query Records Save ?

Related Purchase Order


Document Number	Vendor Name	Order Date	Due Date	Total	Contact
106003	Wide World Importers	04/13/2019	04/30/2019	11584.10	Toby Rhode

FUJITSU

ScanNow™ using a Fujitsu fi-NX series scanner

ScanNow™ using any [recommended](#) TWAIN compliant scanner

Add a document from file explorer



Drag files here or [select files](#) 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 documents from query PurchaseOrderList Purchase Order Documentation ▾ View Query Records **Save** ?

Related Purchase Order

Document Number	Vendor Name	Order Date	Due Date	Total	Contact
106003	Wide World Importers	04/13/2019	04/30/2019	11584.10	Toby Rhode

Invoice

Invoice no: 84945874
Invoice date: 19-Feb-2016
Order no: 3752393
PO #: —
Order from: —
Shipping date: 02/19/16
Cust Service Rep: Myles Couyoumjian
Store no: 5021873
Customer no: 11902-018811
Customer store no: 8954

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 889575928RT0001
Tracking #: 1Z18EDV30334789122

Invoice Address
GPS Hospitality, LLC
2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

Delivery Address
Burger King 8054
4410 WACE GREEN RD NW
KENNESAW, GA 30144-1254
USA

Attn: Hornung, Donna
Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit Price USD	Total USD
10	27023108	Shield, PHU Pan Splash II Duke Broiler	1	1	EA	18.87	18.87
20	613884	Tong, 9" Forest Green	6	6	EA	1.84	11.04
10	SHIPPING	Shipping	1	0	EA	11.25	11.25
							41.16
Sales Tax							2.47
Total Including Tax:							43.63

ID: 1379239
Batch: INVOICE_TMP4435956351906090752.pdf

Document Profile

Date box:

Number:

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.

SHOW INTERRELATED DOCUMENTS FROM PURCHASE ORDER LIST

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

1. 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.

PaperSave Documents that are interrelated to this root Purchase Order

Search within document list

Document Number	Vendor Name	Order Date	Due Date	Total	Contact
106008	Apache Systems	12-02-2019	12-03-2019	1000.00	

REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL

Created	Created By	Date box	Number
12-09-2019 07:58:41 AM	Bhavya Shah		
12-09-2019 07:58:57 AM	Bhavya Shah		
12-09-2019 09:25:12 AM	Vivek Soni		
12-09-2019 09:28:35 AM	Vivek Soni		
12-09-2019 09:28:35 AM	Vivek Soni		
12-09-2019 09:28:35 AM	Vivek Soni		
12-09-2019 09:28:35 AM	Vivek Soni		
12-09-2019 09:28:35 AM	Vivek Soni		
12-09-2019 09:28:36 AM	Vivek Soni		
12-09-2019 09:58:19 AM	Vivek Soni		
12-09-2019 09:58:19 AM	Vivek Soni		
12-09-2019 09:58:19 AM	Vivek Soni		
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:

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

Dynamics 365 Business Central

PURCHASE ORDER | WORK DATE: 2/12/2019

106008 · Apache Systems

Process Release Posting Order Request Approval Print/Send Navigate More options

General

Vendor Name: Apache Systems Vendor Invoice No.: VIN4547

Contact: Vendor Shipment No.:

Document Date: 2/12/2019

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX ARE CODE
Item	1001	Anks TEST Item	WEST	10		PCS	100.00	MIAMI F

Subtotal Excl. Tax (USD) 1,000.00 Total Excl. Tax (USD) 1,000.00

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 1,000.00

Vendor Statistics

Vendor No. V00110

Balance (\$) 26,782.10

Outstanding Orders (\$) 1,000.00

Amt. Rcd. Not Invd. (\$) 1,000.00

Outstanding Invoices (\$) 314.50

Total (\$) 29,096.60

Overdue Amounts (\$) as of 0... 0.00

Invoiced Prepayment Amount... 0.00

Payments (\$) 1,530.17

Last Payment Date 2/12/2019

Buy-from Vendor History

Vendor No. V00110

0	0	3
Quotes	Blanket Orders	Orders
1	0	0
Invoices	Return Orders	Credit Memos
0	4	3

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

PURCHASE ORDER | WORK DATE: 2/12/2019

106008 · Apache Systems

Process | Release | Posting | Order | Request Approval | Print/Send | Navigate | More options

Add Document | Show Documents | Show Interrelated Documents | Copy Document... | Create Inventory...t-away/Pick...

Vendor Name: Apache Systems | Vendor Invoice No.: VIN4547 | Document Date: 2/12/2019

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX ARE CODE
Item	1001	Anks TEST Item	WEST	10		PCS	100.00	MIAMI F

Summary:

Subtotal Excl. Tax (USD)	1,000.00	Total Excl. Tax (USD)	1,000.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	1,000.00

Buy-from Vendor History

Vendor No.: V00110

0	0	3
Quotes	Blanket Orders	Orders
1	0	0
Invoices	Return Orders	Credit Memos
0	4	3

ADD DOCUMENTS FROM PURCHASE ORDER CARD

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

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

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.

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
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

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

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.

PaperSave

Document

Purchase Order Documentation

Search within document list

Related Purchase Order

Document Number

Vendor Name

Order Date

Due Date

Total

Contact

106008

Apache Systems

12-02-2019

12-03-2019

1000.00

+ NEW

FILTER




REFRESH

CHOOSE FIELDS

SHOW GROUPING

EXPORT TO EXCEL

INTERRELATED

<input type="checkbox"/>		Created	Created By	Date box	Number
<input type="checkbox"/>		12-09-2019 07:58:41 AM	Bhavya Shah		
<input type="checkbox"/>		12-09-2019 07:56:57 AM	Bhavya Shah		
<input type="checkbox"/>		12-09-2019 09:25:12 AM	Vivek Soni		

SHOW INTERRELATED DOCUMENTS FROM PURCHASE ORDER CARD

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

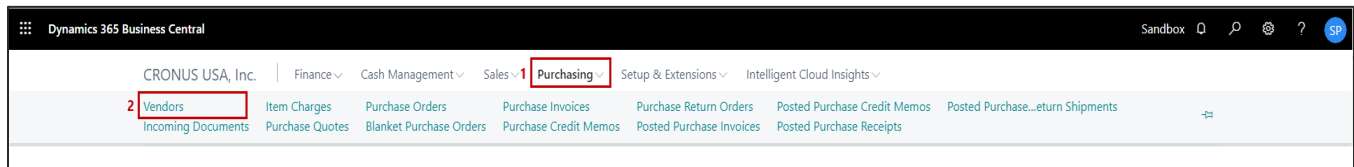
1. On the Process tab of Purchase Invoice Card, click on “**Show Interrelated Documents**”.
2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available Interrelated documents to the record.

PaperSave Documents that are interrelated to this root Purchase Order						
Search within document list						
Root Purchase Order	Document Number	Vendor Name	Order Date	Due Date	Total	Contact
	106008	Apache Systems	12-02-2019	12-03-2019	1000.00	
REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL						
<input type="checkbox"/>	Created	Created By	Date box	Number		
<input type="checkbox"/>	12-09-2019 07:58:41 AM	Bhavya Shah				
<input type="checkbox"/>	12-09-2019 07:58:57 AM	Bhavya Shah				
<input type="checkbox"/>	12-09-2019 09:25:12 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:28:35 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:28:35 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:28:35 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:28:35 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:28:36 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:58:19 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:58:19 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:58:19 AM	Vivek Soni				
<input type="checkbox"/>	12-09-2019 09:58:20 AM	Vivek Soni				

5.5 VENDOR

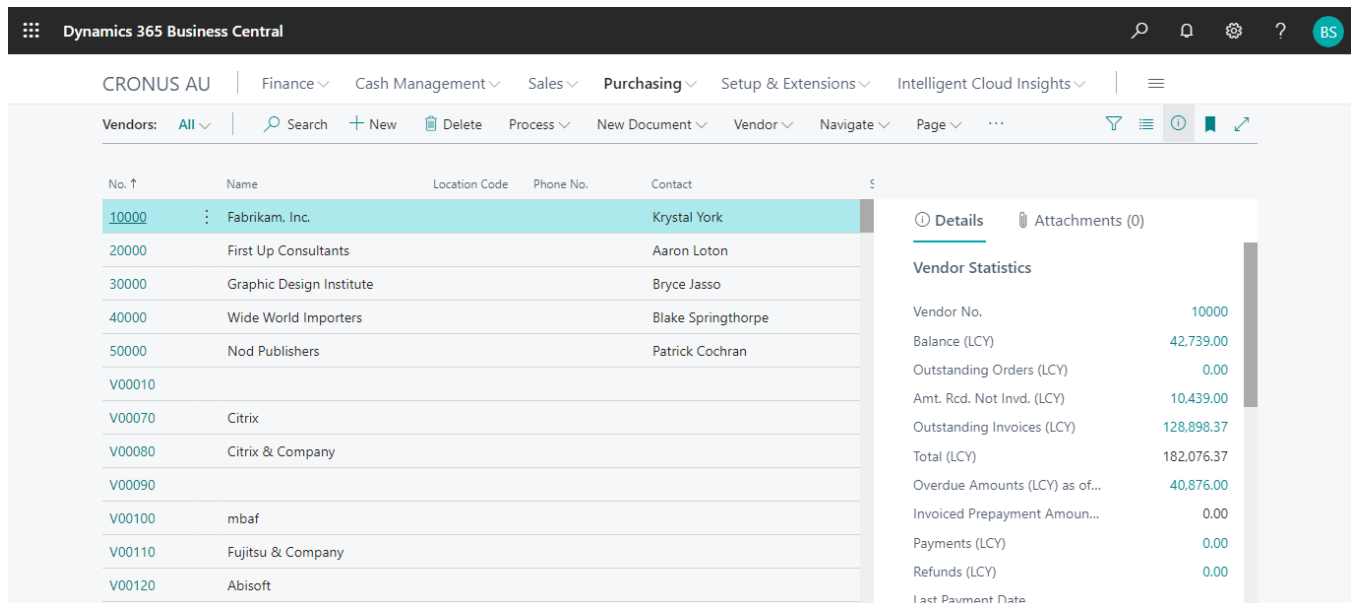
The following steps describe how to interact with PaperSave within the “Vendor” record type’s main screen:

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



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.



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

The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'CRONUS AU' and various functional areas like Finance, Cash Management, Sales, Purchasing, Setup & Extensions, and Intelligent Cloud Insights. Below this, the 'Vendors' list is displayed with columns for No., Name, and Location Code. The vendor 'Fabrikam, Inc.' (No. 10000) is selected. A context menu is open over the selected vendor, with the 'Add Document' option highlighted by a red rectangle. Other options in the menu include 'Show Documents', 'Show Interrelated Documents', 'Apply Template...', and 'Pay Vendor'. On the right side of the screen, the 'Vendor Statistics' panel is visible, showing various financial metrics for the selected vendor.

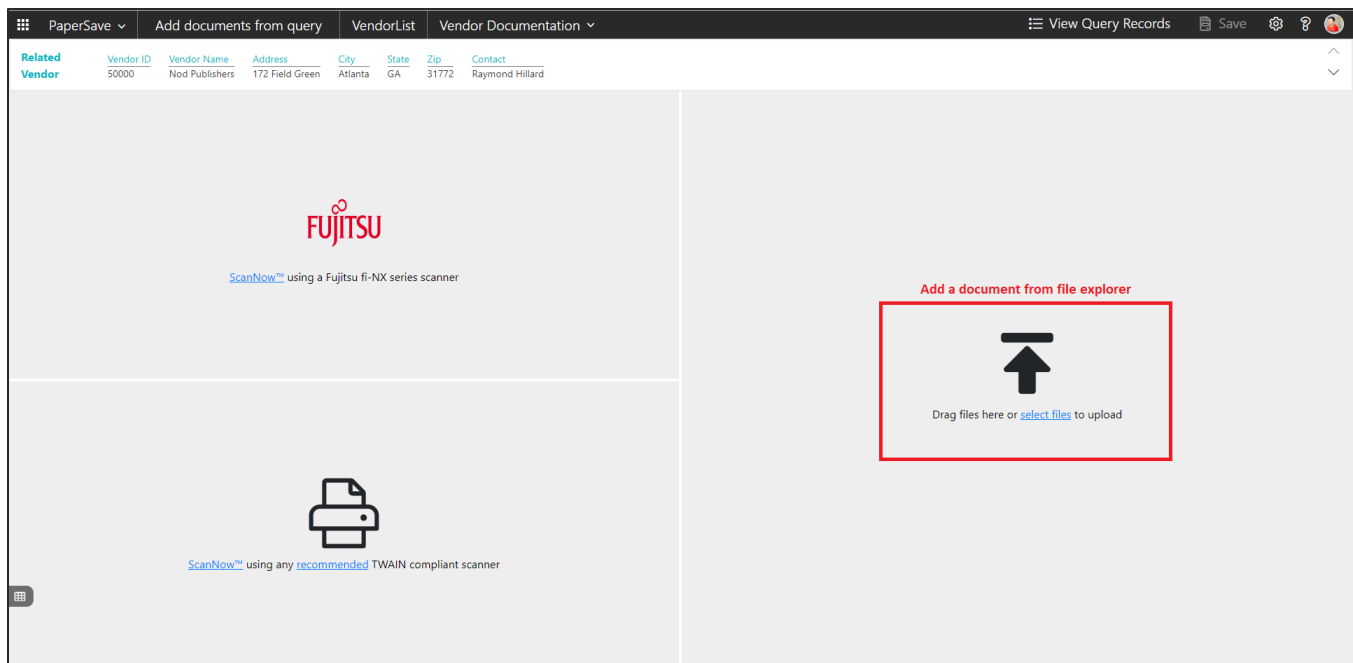
No.	Name	Location Code
10000	Fabrikam, Inc.	
20000	First Up Consultants	
30000	Graphic Design Institute	
40000	Wide World Importers	
50000	Nod Publishers	Patrick Cochran
V00010		
V00070	Citrix	
V00080	Citrix & Company	
V00090		
V00100	mbaf	
V00110	Fujitsu & Company	
V00120	Abisoft	

Vendor Statistics	
Vendor No.	10000
Balance (LCY)	42,739.00
Outstanding Orders (LCY)	0.00
Amt. Rcd. Not Invd. (LCY)	10,439.00
Outstanding Invoices (LCY)	128,898.37
Total (LCY)	182,076.37
Overdue Amounts (LCY) as of...	40,876.00
Invoiced Prepayment Amoun...	0.00
Payments (LCY)	0.00
Refunds (LCY)	0.00
Last Payment Date	-

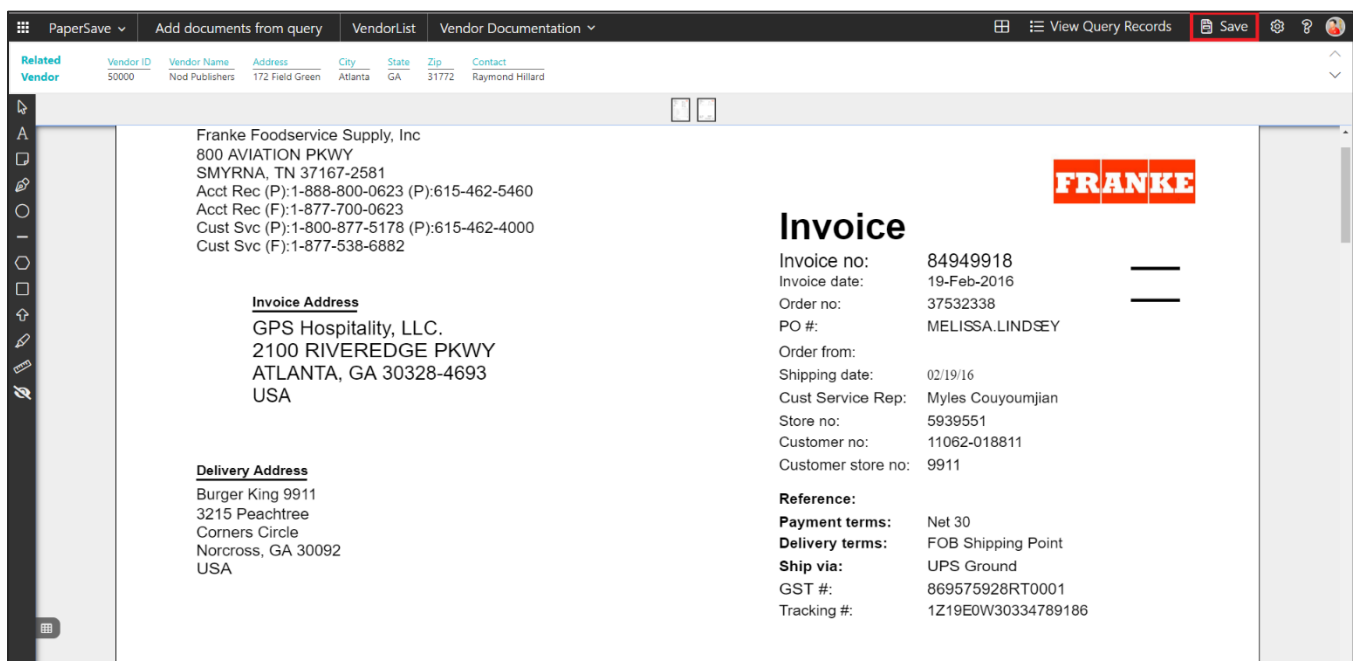
ADD DOCUMENTS FROM VENDOR LIST

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**".
2. 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 Vendor list.



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

SHOW DOCUMENTS FROM VENDOR LIST

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

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

<

SHOW INTERRELATED DOCUMENTS FROM VENDOR LIST

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

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

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

Documents that are interrelated to this root Vendor							
Root Vendor	Vendor ID	Vendor Name	Address	City	State	Zip	Contact
	10000	Fabrikam, Inc.	10 North Lake Avenue	Atlanta	GA	31772	Krystal York
<div> <div>REFRESH</div> <div>FILTER</div> <div>SHOW GROUPING</div> <div>CHOOSE FIELDS</div> <div>EXPORT TO EXCEL</div> </div>							
	Created	Created By					
<input type="checkbox"/>	12-09-2019 08:12:52 AM	Bhavya Shah					
<input type="checkbox"/>	12-09-2019 08:15:10 AM	Bhavya Shah					
<input type="checkbox"/>	12-09-2019 08:15:10 AM	Bhavya Shah					
<input type="checkbox"/>	12-09-2019 10:13:02 AM	Vivek Soni					
<input type="checkbox"/>	12-09-2019 10:22:06 AM	Vivek Soni					
<input type="checkbox"/>	12-09-2019 10:22:07 AM	Vivek Soni					
<input type="checkbox"/>	12-09-2019 10:22:33 AM	Vivek Soni					
<input type="checkbox"/>	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:

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

Dynamics 365 Business Central

Sandbox

VENDOR CARD | WORK DATE: 2/12/2019

10000 · Fabrikam, Inc.

Process

Report

Request Approval

New Document

Navigate

Vendor

More options

General

No. 10000

Balance (\$) -1,200.00

Name Fabrikam, Inc.

Balance Due (\$) -1,200.00

Blocked

Address & Contact

ADDRESS

Address 10 North Lake Avenue

Address 2

Country/Region Code US

City Atlanta

State GA

ZIP Code 31772

CONTACT

Primary Contact Code

Contact Krystal York

Phone No. 4255550101

Email krystal.york@contoso.com

Home Page www.royalmail.co.uk

Our Account No.

Vendor Picture

Vendor Statistics

Balance (\$) -1,200.00

Outstanding Orders (\$) 0.00

Amt. Rcd. Not Invd. (\$) 0.00

Outstanding Invoices (\$) 0.00

Total (\$) -1,200.00

Overdue Amounts (\$) as of 0... -1,200.00

Invoiced Prepayment Amoun... 0.00

Payments (\$) 30,264.64

Last Payment Date 2/12/2019

Buy-from Vendor History

0

0

1

Quotes

Blanket Orders

Orders

Invoicing >

Payments >

CM BANK

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

10000 · Fabrikam, Inc.

Process | Report | Request Approval | New Document | Navigate | Vendor | More options

Apply Template... | **Add Document** | Show Documents | Show Interrelated Documents | Pay Vendor | Create Payments...

No. 10000 Balance (\$) -1,200.00
 Name Fabrikam, Inc. Balance Due (\$) -1,200.00
 Blocked

Address & Contact Show more

ADDRESS
 Address 10 North Lake Avenue
 Address 2
 Country/Region Code US
 City Atlanta
 State GA
 ZIP Code 31772

CONTACT
 Primary Contact Code
 Contact Krystal York
 Phone No. 4255550101
 Email krystal.york@contoso.com
 Home Page www.royalmail.co.uk
 Our Account No.

Vendor Statistics

Balance (\$)	-1,200.00
Outstanding Orders (\$)	0.00
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	-1,200.00
Overdue Amounts (\$) as of 0...	-1,200.00
Invoiced Prepayment Amoun...	0.00
Payments (\$)	30,264.64
Last Payment Date	2/12/2019

Buy-from Vendor History

Invoicing


ADD DOCUMENTS FROM VENDOR CARD

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

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


PaperSave ▾ Add a New PaperSave Document Vendor Documentation ▾ + New < > 📄 📧 ⬇

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




ScanNow™ using a Fujitsu fi-NX series scanner


Add a document from file explorer



Drag files here or [select files](#) to upload



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 on **"Save"** to add the document to the selected record.

PaperSave ▾ Add a New PaperSave Document Vendor Documentation ▾ + New < > 📄 📧 ⬇ **Save** ⚙️ ? 🖱

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

Invoice Address
GPS Hospitality, LLC.
2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

Delivery Address
Burger King 13161
1205 W HUNTER ST
LOGAN, OH 43138-1011
USA

Comment:

Invoice date: 19-Feb-2016
Order no: 37532094
PO #: 13161
Order from:
Shipping date: 02/19/16
Cust Service Rep: Myles Couyoumjan
Store no: 5020680
Customer no: 11062-018811
Customer store no: 13161

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

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	421728	Tip, Rubber Feet (Set of 4)	3	3	P4	6.96	20.88
20	610972	TONG, LIFT AND GRIP S/S 12"	3	3	EA	5.16	15.48

1 /1 INVOICE_TMP1582482674955...

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

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.

PaperSave ▾

Document

Vendor Documentation ▾

Search within document list

Related Vendor

Vendor ID

Vendor Name

Address

City

State

Zip

Contact

10000

Fabrikam, Inc.

10 North Lake Avenue

Atlanta

GA

31772

Krystal York

+ NEW

FILTER

REFRESH

CHOOSE FIELDS

SHOW GROUPING

EXPORT TO EXCEL

INTERRELATED

Created

Created By

12-09-2019 08:12:52 AM

Bhavya Shah

12-09-2019 08:15:10 AM

Bhavya Shah

12-09-2019 08:15:10 AM

Bhavya Shah

12-09-2019 10:13:02 AM

Vivek Soni

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.

PaperSave

Documents that are interrelated to this root Vendor

Search within document list

Root Vendor

Vendor ID

Vendor Name

Address

City

State

Zip

Contact

10000

Fabrikam, Inc.

10 North Lake Avenue

Atlanta

GA

31772

Krystal York

REFRESH

FILTER

SHOW GROUPING

CHOOSE FIELDS

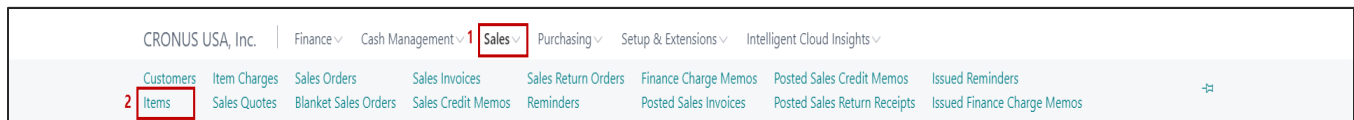
EXPORT TO EXCEL

	Created	Created By
<input type="checkbox"/>	12-09-2019 08:12:52 AM	Bhavya Shah
<input type="checkbox"/>	12-09-2019 08:15:10 AM	Bhavya Shah
<input type="checkbox"/>	12-09-2019 08:15:10 AM	Bhavya Shah
<input type="checkbox"/>	12-09-2019 10:13:02 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:22:06 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:22:07 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:22:33 AM	Vivek Soni
<input type="checkbox"/>	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**.



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.

No. ↑	Description	Type	Inventory	Subst... Exist	Assem... BOM	Base Unit of Measure
1000	Fujitsu 7180	Inventory	30	No	No	PCS
1001	Fujitsu Chronos Scanner	Inventory	0	No	No	PCS
1002	Fujitsu ScanSnap	Inventory	0	No	No	PCS
1003	Test item	Inventory	0	No	No	PCS
1004	Test	Inventory	0	No	No	PCS
1896-S	ATHENS Desk	Inventory	11	No	No	PCS
1900-S	PARIS Guest Chair, black	Inventory	8	No	No	PCS
1906-S	ATHENS Mobile Pedestal	Inventory	25	No	No	PCS
1908-S	LONDON Swivel Chair, blue	Inventory	23	No	No	PCS
1920-S	ANTWERP Conference Table	Inventory	15	No	No	PCS
1925-W	Conference Bundle 1-6	Inventory	0	No	Yes	PCS
1928-S	AMSTERDAM Lamp	Inventory	31	No	No	PCS

Details Attachments (0)

Item Details - Invoicing

Item No. 1000

Costing Method FIFO

Cost is Adjusted Yes

Cost is Posted to G/L Yes

Standard Cost 0.000

Unit Cost 100.000

Overhead Rate 0.000

Indirect Cost % 0

Last Direct Cost 0.000

Profit % -14.88511

Unit Price 100.100

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

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | **Sales** | Purchasing | Setup & Extensions | Intelligent Cloud Insights

Items: All | Search | + New | Delete | Process | Report | Item | Request Approval | Inventory

No. ↑	Description	Type	Assembly	Base Unit of Measure
1000	Fujitsu 7180	Inventory		PCS
1001	Fujitsu Chronos Scanner	Inventory		PCS
1002	Fujitsu ScanSnap	Inventory		PCS
1003	Test item	Inventory		PCS
1004	Test	Inventory	0	No
1896-S	ATHENS Desk	Inventory	11	No
1900-S	PARIS Guest Chair, black	Inventory	8	No
1906-S	ATHENS Mobile Pedestal	Inventory	25	No
1908-S	LONDON Swivel Chair, blue	Inventory	23	No
1920-S	ANTWERP Conference Table	Inventory	15	No
1925-W	Conference Bundle 1-6	Inventory	0	No
1928-S	AMSTERDAM Lamp	Inventory	31	No

Process dropdown menu:

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

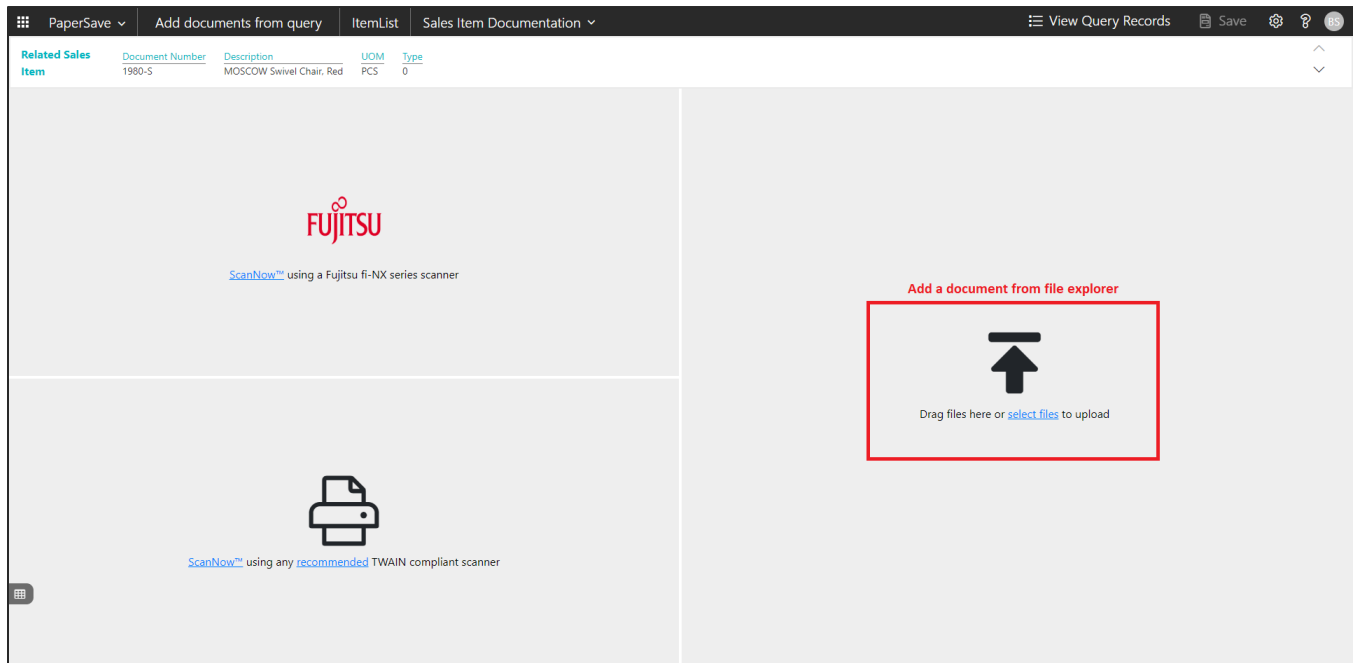
Details pane: Item Details - Invoicing

Item No.	1000
Costing Method	FIFO
Cost is Adjusted	Yes
Cost is Posted to G/L	Yes
Standard Cost	0.000
Unit Cost	100.000
Overhead Rate	0.000
Indirect Cost %	0
Last Direct Cost	0.000
Profit %	-14.88511
Unit Price	100.100

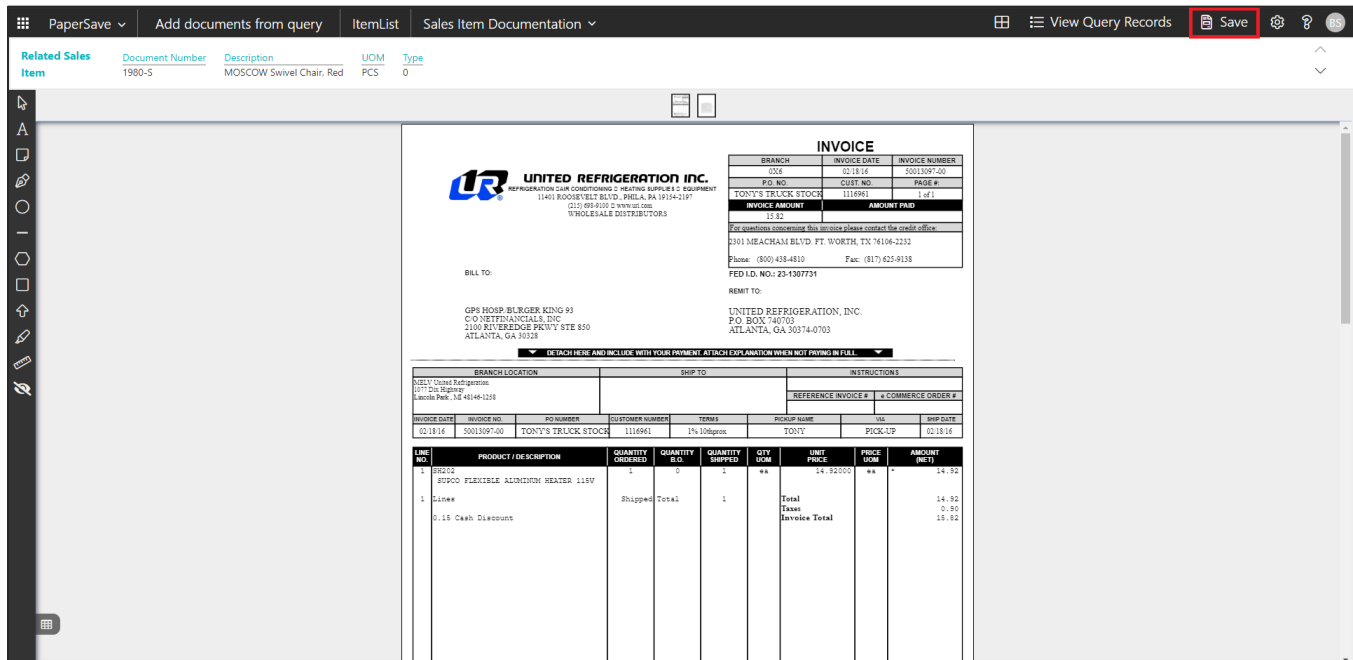
ADD DOCUMENTS FROM SALES ITEM LIST

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"**.
2. 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.



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

SHOW DOCUMENTS FROM SALES ITEM LIST

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

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

PaperSave Documents related to query ItemList View Query Records												
FILTER REFRESH SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL												
	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Description	UOM	Type
<input type="checkbox"/>	1358489	INVOICE_TMP1582482674855491422.pdf	09/12/2019 10:30:08 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358491	INVOICE_TMP193730966268360722.pdf	09/12/2019 10:32:01 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358492	url_1116961_20160218_6646928_1638690811.pdf	09/12/2019 10:32:03 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358493	INVOICE_TMP4265068694222479491.pdf	09/12/2019 10:33:23 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358494	INVOICE_TMP4353577695376957713.pdf	09/12/2019 10:33:23 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358495	INVOICE_TMP193730966268360722.pdf	09/12/2019 10:33:23 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358496	INVOICE_TMP4435956351906090752.pdf	09/12/2019 10:33:24 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1358497	url_1116961_20160218_6646928_1638690811.pdf	09/12/2019 10:33:25 AM	PSlysonihvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1368505	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	1896-S	Sales Item	Sales Item Documentation	1896-S	1896-S	ATHENS Desk	PCS	0
<input type="checkbox"/>	1368506	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	2000-S	Sales Item	Sales Item Documentation	2000-S	2000-S	SYDNEY Swivel Chair, green	PCS	0
<input type="checkbox"/>	1368507	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	1980-S	Sales Item	Sales Item Documentation	1980-S	1980-S	MOSCOW Swivel Chair, red	PCS	0
<input type="checkbox"/>	1368508	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	1988-S	Sales Item	Sales Item Documentation	1988-S	1988-S	SEOUL Guest Chair, red	PCS	0
<input type="checkbox"/>	1368509	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	1972-S	Sales Item	Sales Item Documentation	1972-S	1972-S	MUNICH Swivel Chair, yellow	PCS	0
<input type="checkbox"/>	1368510	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	1996-S	Sales Item	Sales Item Documentation	1996-S	1996-S	ATLANTA Whiteboard, base	PCS	0
<input type="checkbox"/>	1368511	3PaperSave1.pdf	09/13/2019 06:11:19 AM	PSlyshahhvtest9stg	1960-S	Sales Item	Sales Item Documentation	1960-S	1960-S	ROME Guest Chair, green	PCS	0
<input type="checkbox"/>	1368512	3PaperSave1.pdf	09/13/2019	PSlyshahhvtest9stg	1965-W	Sales Item	Sales Item Documentation	1965-W	1965-W	Conference Bundle 2-8	PCS	0

1 of 1 pages (48 items)

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**".
- This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.

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

Root Sales Item		Document Number	Description	UOM	Type
		1896-S	ATHENS Desk	PCS	Inventory
<div> <div>REFRESH</div> <div>FILTER</div> <div>SHOW GROUPING</div> <div>CHOOSE FIELDS</div> <div>EXPORT TO EXCEL</div> </div>					
		Created	Created By		
<input type="checkbox"/>		12-09-2019 10:30:08 AM	Vivek Soni		
<input type="checkbox"/>		12-09-2019 10:32:01 AM	Vivek Soni		
<input type="checkbox"/>		12-09-2019 10:32:03 AM	Vivek Soni		
<input type="checkbox"/>		12-09-2019 10:33:23 AM	Vivek Soni		
<input type="checkbox"/>		12-09-2019 10:33:23 AM	Vivek Soni		
<input type="checkbox"/>		12-09-2019 10:33:23 AM	Vivek Soni		
<input type="checkbox"/>		12-09-2019 10:33:24 AM	Vivek Soni		
<input type="checkbox"/>		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:

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

Dynamics 365 Business Central

Sandbox

ITEM CARD | WORK DATE: 2/12/2019

1896-S · ATHENS Desk

Process Item History Special Sales P...ces & Discounts Request Approval More options

Item

No. 1896-S

Type Inventory

Description ATHENS Desk

Base Unit of Measure PCS

Blocked

Item Category Code TABLE

Inventory

Shelf No.

Quantity on Hand 64

Qty. on Purch. Order 0

Qty. on Sales Order 0

Stockout Warning Default (Yes)

Unit Volume 1.2

SAT Item Classification

Costs & Posting

780.70 RETAIL FURNITURE RESALE

Prices & Sales

1,000.80

Replenishment

Purchase

Planning

None

Picture

Item Attributes

ATTRIBUTE	VALUE
Color	Black
Depth	60 CM
Width	200 CM
Height	170 CM
Material Description	Wood

Forecast

80

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

The screenshot displays the Dynamics 365 Business Central interface for the '1896-S · ATHENS Desk' item card. The 'Process' tab is active, and the 'Add Document' button is highlighted with a red box. The interface includes fields for item number, description, type, and various inventory and pricing details.

Inventory	
Shelf No.	
Quantity on Hand	64
Qty. on Purch. Order	0
Qty. on Sales Order	0

Item Attributes	
ATTRIBUTE	VALUE
Color	Black
Depth	60 CM
Width	200 CM
Height	170 CM
Material Description	Wood

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.

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.

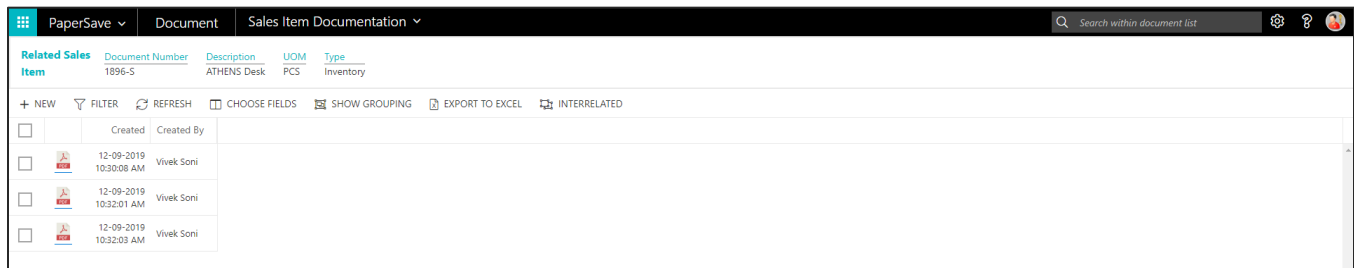
Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
Parts							
10	421728	Tip, Rubber Feet (Set of 4)	3	3	P4	6.96	20.88
20	610972	TONG, LIFT AND GRIP S/S 12"	3	3	EA	5.16	15.48

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

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.



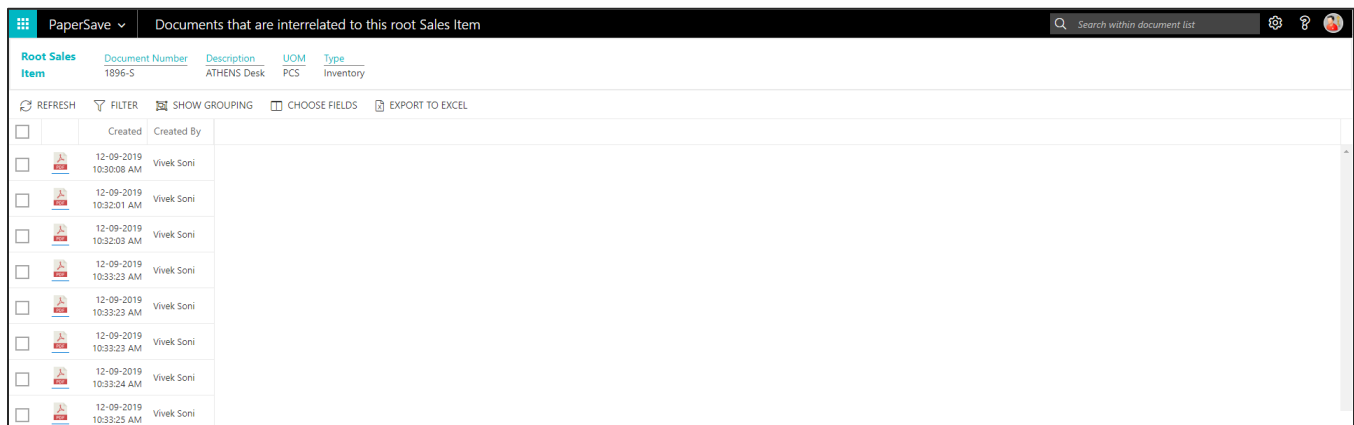
Related Sales Item		Document Number	Description	UOM	Type
		1896-S	ATHENS Desk	PCS	Inventory

	Created	Created By
<input type="checkbox"/>	12-09-2019 10:30:08 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:32:01 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:32:03 AM	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:

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.



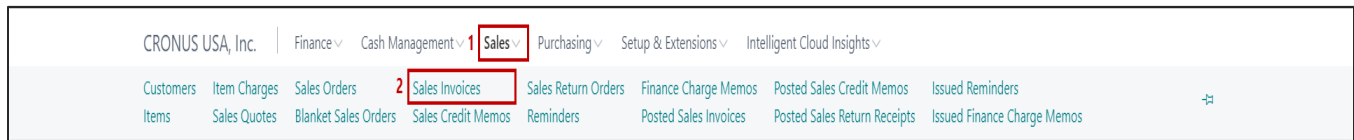
Root Sales Item		Document Number	Description	UOM	Type
		1896-S	ATHENS Desk	PCS	Inventory

	Created	Created By
<input type="checkbox"/>	12-09-2019 10:30:08 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:32:01 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:32:03 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:33:23 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:33:23 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:33:23 AM	Vivek Soni
<input type="checkbox"/>	12-09-2019 10:33:24 AM	Vivek Soni
<input type="checkbox"/>	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.

No.	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sell-to Contact	Post
103199	10000	Adatum Corporation		Anthony Lording	4/4
103200	10000	Adatum Corporation		Anthony Lording	5/1
103201	20000	Trey Research		Mary Kumm	4/3
103202	30000	School of Fine Art		Meagan Bond	4/5
103203	30000	School of Fine Art		Meagan Bond	5/1
103204	40000	Alpine Ski House		Ian Deberry	5/1
103205	50000	Relecloud		Mason Kingsley	4/2
103405	10000	Adatum Corporation		Anthony Lording	4/1
103406	50000	Relecloud		Mason Kingsley	5/1

Details Attachments (0)

Customer Statistics

Customer No. 10000

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

Last Payment Receipt Date 3/21/2019

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

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | **Sales** | Purchasing | Setup & Extensions | Intelligent Cloud Insights

Sales Invoices: All | Search | New | Delete | **Process** | Release | Posting | Invoice | Navigate

Add Document
Show Documents
Show Interrelated Documents

No. ↑	Sell-to Customer No.	Sell-to Customer Name	Post
103199	10000	Adatum Corporation	4/4
103200	10000	Adatum Corporation	5/1
103201	20000	Trey Research	4/3
103202	30000	School of Fine Art	4/5
103203	30000	School of Fine Art	5/1
103204	40000	Alpine Ski House	5/1
103205	50000	Relecloud	4/2
103405	10000	Adatum Corporation	4/1
103406	50000	Relecloud	5/1

Details | Attachments (0)

Customer Statistics

Customer No. 10000
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
Last Payment Receipt Date 3/21/2019


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**".
2. 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 documents from query SalesInvoiceList Sales 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




ScanNow™ using a Fujitsu fi-NX series scanner



ScanNow™ using any recommended TWAIN compliant scanner

Add a document from file explorer



Drag files here or [select files](#) 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 Invoices list.

PaperSave ▾ Add documents from query SalesInvoiceList Sales 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

Frankie Foodservice Supply, Inc
800 AVIATION PKWY
SMYRNA, TN 37167-2581
Acct Rec (P) 1-888-866-0623 (P) 615-462-5480
Acct Rec (F) 1-877-790-0623
Cust Svc (P) 1-888-877-5178 (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 7166
1197 BERSHIRE BLVD
WYOMISSING, PA 19610-1245
USA

Attn: Restaurant Manger
Comment:

FRANKIE

Invoice

Invoice no: 64949073
Invoice date: 18-Feb-2016
Order no: 37496168
PO #: AutoShipment-6602
Order from: Schneiderger, Mike
Shipping date: 01/18/16
Cust Service Rep: Myles Couyoumjan
Store no: 5022353
Customer no: 11062-618311
Customer store no: 7166

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1219EDVH30334789953

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
10	492434	First Aid Burn Cream (10 pack)	1	1	EA	2.09	2.09
20	618562	Ointment, First Aid Antibiotic (10) Packs	1	1	EA	2.09	2.09
30	492433	Gel, Burn Relief 3.5gm (6 per pack)	2	2	EA	2.09	4.18
40	618561	Pad, Alcohol Cleansing (20) Pads	1	1	EA	2.09	2.09
50	492420	Bandage, Blue 1" x 3" (25 per pack)	2	2	EA	2.09	4.18
60	618563	Eye Wash (1) 1oz. Bottle	1	1	EA	2.09	2.09
70	492425	Pad, Gauze 3" x 3"	1	1	EA	2.09	2.09

Page # 1 / 2

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

SHOW DOCUMENTS FROM SALES INVOICE LIST

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

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

PaperSave Documents related to query SalesInvoiceList View Query Records														
	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Record Number	Document Number	Customer Name	Posting Date	Contact	Due Date	Total
<input type="checkbox"/>	1358450	S_Pages_PDF_1-9.pdf	09/12/2019 08:34:16 AM	PS\bsahhvtst9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relecloud	04/04/2019	Jesse Homer	05/04/2019	11376
<input type="checkbox"/>	1358452	mcpr.pdf	09/12/2019 08:35:56 AM	PS\bsahhvtst9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relecloud	04/04/2019	Jesse Homer	05/04/2019	11376
<input type="checkbox"/>	1358453	mcpr.pdf	09/12/2019 08:36:06 AM	PS\bsahhvtst9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relecloud	04/04/2019	Jesse Homer	05/04/2019	11376
<input type="checkbox"/>	1368526	W229 NI 477.tif	09/13/2019 06:15:49 AM	PS\bsahhvtst9stg	S-INV102199	Sales Invoice	Sales Invoice Documentation	S-INV102199	S-INV102199	Adatum Corporation	04/04/2019	Robert Townes	05/04/2019	11376
<input type="checkbox"/>	1368527	W229 NI 477.tif	09/13/2019 06:15:49 AM	PS\bsahhvtst9stg	S-INV102205	Sales Invoice	Sales Invoice Documentation	S-INV102205	S-INV102205	Relecloud	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**".
- This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
- On login success, it will **show** the available documents for the selected record in Sales Invoice list.

PaperSave

Documents that are interrelated to this root Sales Invoice

Search within document list

Root Sales Invoice

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

REFRESH

FILTER

SHOW GROUPING

CHOOSE FIELDS

EXPORT TO EXCEL

Created

Created By

12-09-2019 08:50:40 AM

Bhavya Shah

12-09-2019 08:52:51 AM

Bhavya Shah

12-09-2019 08:52:59 AM

Bhavya Shah

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.

Dynamics 365 Business Central

Sales Invoice | WORK DATE: 2/12/2019

S-INV102199 · Adatum Corporation

Posting Prepare Invoice Release Request Approval Navigate More options

General

Customer Name: Adatum Corporation Posting Date: 4/5/2018

Contact: Robert Townesedit Due Date: 5/5/2018

Customer Details

Customer No. 10000

Name Adatum Corporation

Phone No.

Email robert.townes@contoso.com

Fax No.

Credit Limit (\$) 0.00

Available Credit (\$) 0.00

Payment Terms Code 1M(BD)

Contact Robert Townes

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX AREA CODE	TAX GROUP CODE
Item	1968-S	MEXICO Swivel Chair, black		5	PCS	190.10	ATLANTA, GA	FURNITURE
Item	1996-S	ATLANTA Whiteboard, base		7	PCS	1,397.30	ATLANTA, GA	FURNITURE
Comment		Thank you for ordering						

Subtotal Excl. Tax (USD) 10,731.60 Total Excl. Tax (USD) 10,731.60

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 643.90

Invoice Discount % 0 Total Incl. Tax (USD) 11,375.50

Item Details - Invoicing

Item No. -

Costing Method -

Cost is Adjusted -

Cost is Posted to G/L -

Standard Cost

Unit Cost

Overhead Rate

Indirect Cost %

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

S-INV102199 · Adatum Corporation

Posting: **Prepare** Invoice Release Request Approval Navigate More options

Get Recurring Sales Lines... Copy Document... **Add Document** Show Documents Show Interrelated Documents Predict Payment

Customer Name: Adatum Corporation Posting Date: 4/5/2018
Contact: Robert Townesedit Due Date: 5/5/2018

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX AREA CODE	TAX GROUP CODE
Item	1968-S	MEXICO Swivel Chair, black		5	PCS	190.10	ATLANTA, GA	FURNITURE
Item	1996-S	ATLANTA Whiteboard, base		7	PCS	1,397.30	ATLANTA, GA	FURNITURE
Comment		Thank you for ordering						

Subtotal Excl. Tax (USD) 10,731.60 Total Excl. Tax (USD) 10,731.60
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 643.90
Invoice Discount % 0 Total Incl. Tax (USD) 11,375.50

Invoice Details Show more

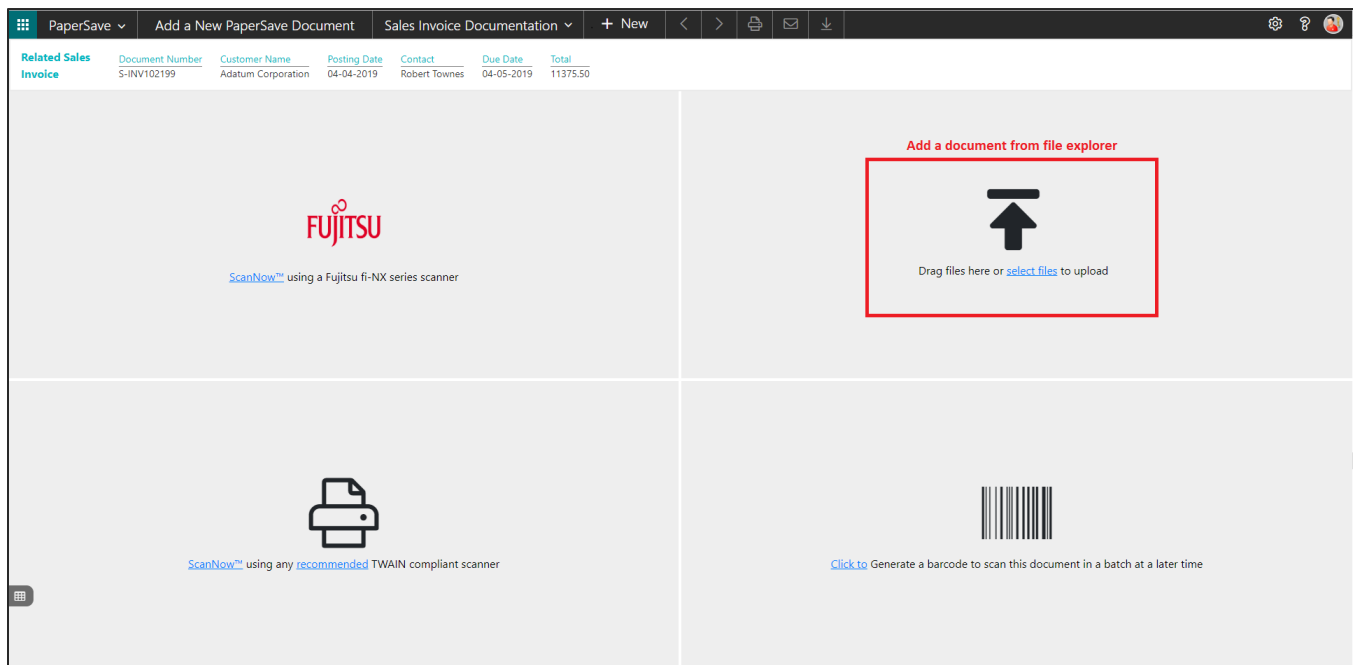
Customer No. 10000
Name Adatum Corporation
Phone No.
Email robert.townes@contoso.com
Fax No.
Credit Limit (\$) 0.00
Available Credit (\$) 0.00
Payment Terms Code 1M/(8D)
Contact Robert Townes

Item Details - Invoicing
Item No. 1968-S
Costing Method FIFO
Cost is Adjusted Yes
Cost is Posted to G/L Yes
Standard Cost 0.00
Unit Cost 148.10
Overhead Rate 0.00
Indirect Cost % 0
Last Direct Cost 148.10
Profit % 22.09363
Unit Price 190.10

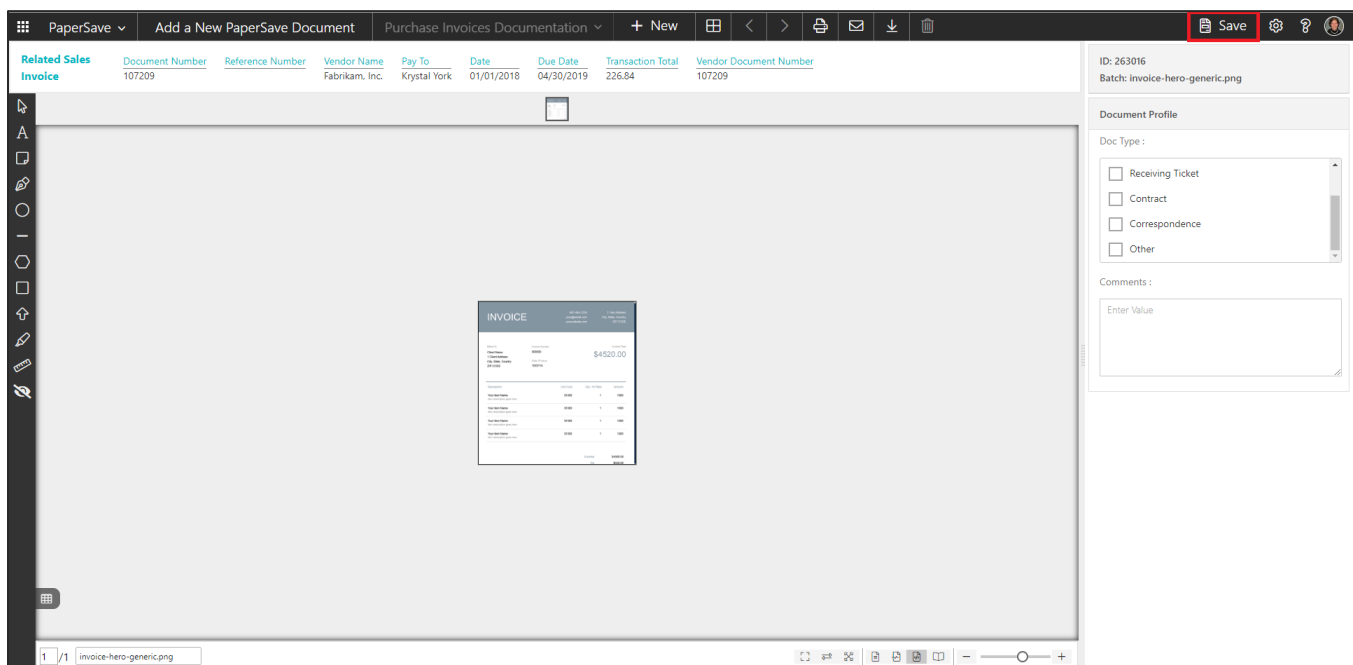
ADD DOCUMENTS FROM SALES INVOICE CARD

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.



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.



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

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.

PaperSave Document Sales Invoice Documentation							
Search within document list							
Related Sales Invoice	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
+ NEW FILTER REFRESH CHOOSE FIELDS SHOW GROUPING EXPORT TO EXCEL INTERRELATED							
<input type="checkbox"/>	Created	Created By					
<input type="checkbox"/>	12-09-2019 08:50:40 AM	Bhavya Shah					
<input type="checkbox"/>	12-09-2019 08:52:51 AM	Bhavya Shah					
<input type="checkbox"/>	12-09-2019 08:52:59 AM	Bhavya Shah					
<input type="checkbox"/>	13-09-2019 06:19:27 AM	Bhavya Shah					

SHOW INTERRELATED DOCUMENTS FROM SALES INVOICE CARD

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

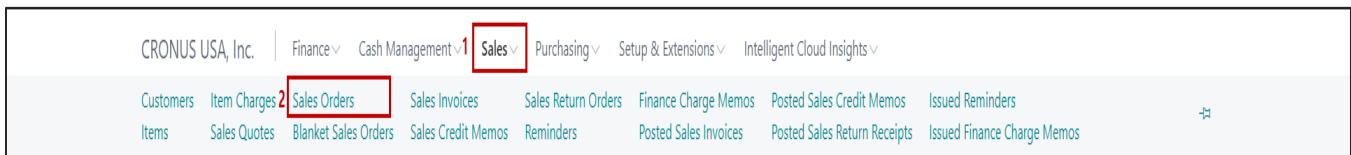
1. On the Prepare tab of Sales Invoice Card, click on “**Show Interrelated Documents**”.
2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available Interrelated documents to the record.

Root Sales Invoice		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
<div> REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL </div>								
<input type="checkbox"/>		Created	Created By					
<input type="checkbox"/>		12-09-2019 08:50:40 AM	Bhavya Shah					
<input type="checkbox"/>		12-09-2019 08:52:51 AM	Bhavya Shah					
<input type="checkbox"/>		12-09-2019 08:52:59 AM	Bhavya Shah					

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**.



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.

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date
101001	10000	Adatum Corporation				4/2/20
101002	10000	Adatum Corporation				5/1/20
101003	30000	School of Fine Art				4/22/2
101004	40000	Alpine Ski House				5/13/2

Details Attachments (0)

Customer Statistics

Customer No. 10000

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

Last Payment Receipt Date 3/21/2019

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

Dynamics 365 Business Central

CRONUS AU | Finance | Cash Management | **Sales** | Purchasing | Setup & Extensions | Intelligent Cloud Insights

Sales Orders: All | Search | + New | Delete | **Process** | Report | Order | Release | Posting

No. ↑	Sell-to Customer No.	Sell-to Customer Name	Assigned User	Document Date
101001	10000	Adatum Corporation		4/2/20
101002	10000	Adatum Corporation		5/1/20
101003	30000	School of Fine Art		4/22/20
101004	40000	Alpine Ski House		5/13/20

Details | Attachments (0)

Customer Statistics

Customer No. 10000
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
Last Payment Receipt Date 3/21/2019

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**".
2. 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 documents from query | SalesOrderList | Sales Order Documentation | View Query Records | Save

Related Sales Order	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	

FUJITSU
ScanNow™ using a Fujitsu fi-NX series scanner

Add a document from file explorer

Drag files here or [select files](#) to upload

ScanNow™ using any [recommended](#) TWAIN compliant scanner

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.

Related Sales Order

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

2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

Delivery Address
Burger King 7166
1197 BERKSHIRE BLVD
WYOMISSING, PA 19610-1245
USA

Order from: Scheidegger, Mike
Shipping date: 02/19/16
Cust Service Rep: Myles Couyoumjan
Store no: 5022333
Customer no: 11062-018811
Customer store no: 7166

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575928RT0001
Tracking #: 1Z19E0W30334789953

Attn: Restaurant Manger
Comment:

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 (10) Packs	1	1	EA	2.09	2.09

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

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.

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.

PaperSave

Documents that are interrelated to this root Sales Order

Search within document list

Root Sales Order		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
<div><div>REFRESH</div><div>FILTER</div><div>SHOW GROUPING</div><div>CHOOSE FIELDS</div><div>EXPORT TO EXCEL</div></div>								
<input type="checkbox"/>		Created	Created By					
<input type="checkbox"/>		12-09-2019 08:50:40 AM	Bhavya Shah					
<input type="checkbox"/>		12-09-2019 08:52:51 AM	Bhavya Shah					
<input type="checkbox"/>		12-09-2019 08:52:59 AM	Bhavya Shah					
<input type="checkbox"/>		13-09-2019 06:19:27 AM	Bhavya Shah					
<input type="checkbox"/>		13-09-2019 10:40:01 AM	Vivek Soni					

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.

Dynamics 365 Business Central

Sales Order | WORK DATE: 2/12/2019

S-ORD101004 · Alpine Ski House

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate More options

General

Customer Name: Alpine Ski House Due Date: 6/13/2018

Contact: Ian Deberry Requested Delivery Date: 5/14/2018

Posting Date: 5/13/2018 External Document No.

Order Date: 5/13/2018

Lines

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX ARE CODE
Item	2000-S	SYDNEY Swivel Chair, green		3		PCS	190.10	N.ATL. G

Subtotal Excl. Tax (USD): 570.30 Total Excl. Tax (USD): 570.30

Inv. Discount Amount Excl. Tax (USD): 0.00 Total Tax (USD): 39.92

Invoice Discount %: 0 Total Incl. Tax (USD): 610.22

Sell-to Customer Sales History

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	1
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Return Memos
1	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
28	28	0
Posted Sales Credit Memos		
0		

Customer Details

Customer No.: 40000

Name: Alpine Ski House

Phone No.

Email: ian.deberry@contoso.com

Fax No.

Credit Limit (\$): 0.00

Available Credit (\$): 0.00

Payment Terms Code: 1M(BD)

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

Dynamics 365 Business Central

Sales Order | WORK DATE: 2/12/2019

S-ORD101004 · Alpine Ski House

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate More options

Add Document Show Documents Show Interrelated Documents Create Inventory...t-away/Pick...

Customer Name Alpine Ski House Due Date 6/13/2018

Contact Ian Deberry Requested Delivery Date 5/14/2018

Posting Date 5/13/2018 External Document No.

Order Date 5/13/2018

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX ARE CODE
Item	2000-S	SYDNEY Swivel Chair, green		3		PCS	190.10	N-ATL. G

Subtotal Excl. Tax (USD) 570.30 Total Excl. Tax (USD) 570.30

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 39.92

Invoice Discount % 0 Total Incl. Tax (USD) 610.22

Customer Details

Customer No. 40000

Name Alpine Ski House

Phone No.

Email ian.deberry@contoso.com

Fax No.

Credit Limit (\$) 0.00

Available Credit (\$) 0.00

Payment Terms Code 1M/8D

1 Ongoing Sales Quotes 0 Ongoing Sales Blanket Orders 1 Ongoing Sales Orders

1 Ongoing Sales Invoices 0 Ongoing Sales Return Orders 0 Ongoing Sales Credit Memos

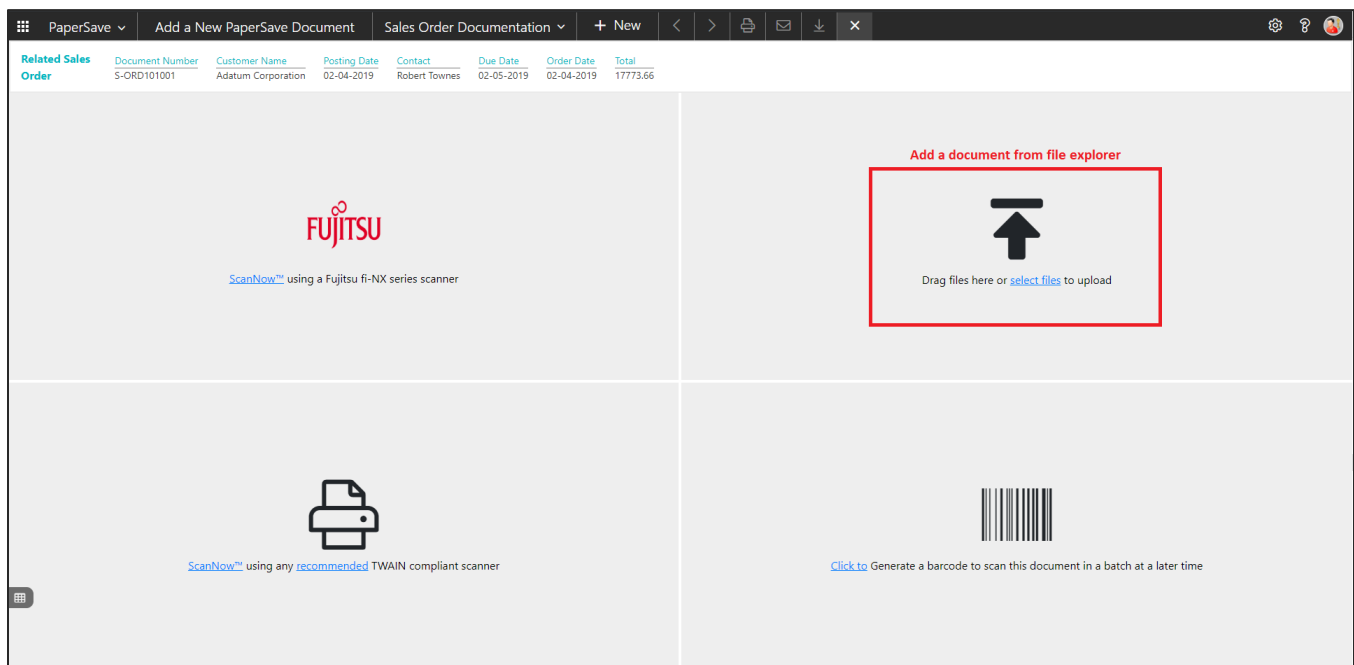
28 Posted Sales Shipments 28 Posted Sales Invoices 0 Posted Sales Return Receipts

0 Posted Sales Credit Memos

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.



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.

Related Sales Order

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

Customer Information:
 GPS Hospitality, LLC.
 2100 RIVEREDGE PKWY
 ATLANTA, GA 30328-4693
 USA

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

PO #:
 Order from:
 Shipping date: 02/19/16
 Cust Service Rep: Myles Couyoumjan
 Store no: 5021873
 Customer no: 11062-018811
 Customer store no: 8054

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

Attn: Hornung, Donna
 Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
10	27023108	Shield, PHU Pan Splash f/ Duke Broiler	1	1	EA	18.87	18.87

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

SHOW DOCUMENTS IN SALES ORDER CARD

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

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

Document






Search within document list

Created	Created By	Document Number
12-09-2019 08:50:40 AM	Bhavya Shah	S-ORD101001
12-09-2019 08:52:51 AM	Bhavya Shah	
12-09-2019 08:52:59 AM	Bhavya Shah	
13-09-2019 06:19:27 AM	Bhavya Shah	
13-09-2019 10:40:01 AM	Vivek Soni	
13-09-2019 10:40:01 AM	Vivek Soni	
13-09-2019 10:46:22 AM	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:

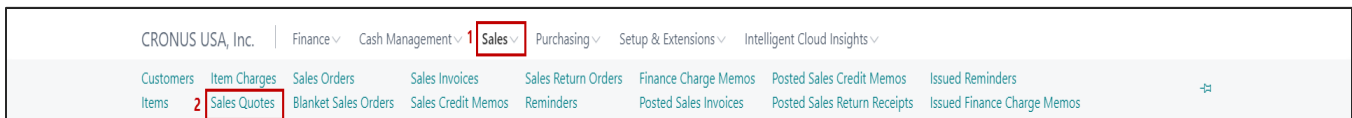
1. On the Process tab of Sales Order Card, click on “**Show Interrelated Documents**”.
2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available Interrelated documents to the record.

PaperSave Documents that are interrelated to this root Sales Order							
Search within document list							
Root Sales Order	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
REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL							
<input type="checkbox"/>		Created	Created By				
<input type="checkbox"/>		12-09-2019 08:50:40 AM	Bhavya Shah				
<input type="checkbox"/>		12-09-2019 08:52:51 AM	Bhavya Shah				
<input type="checkbox"/>		12-09-2019 08:52:59 AM	Bhavya Shah				
<input type="checkbox"/>		13-09-2019 06:19:27 AM	Bhavya Shah				
<input type="checkbox"/>		13-09-2019 10:40:01 AM	Vivek Soni				

5.9 SALES QUOTE

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

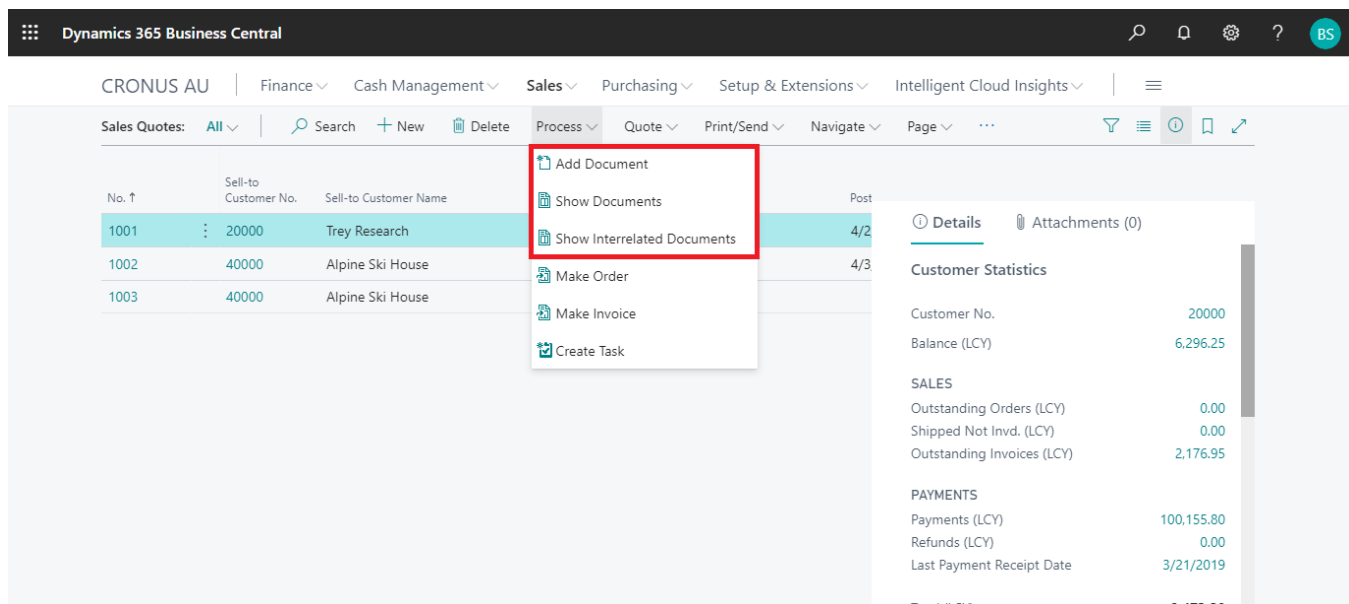
1. On the Dynamics 365 Business Central Home Page, click on the **Sales** dropdown.
2. Click on Sales Quotes.



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.

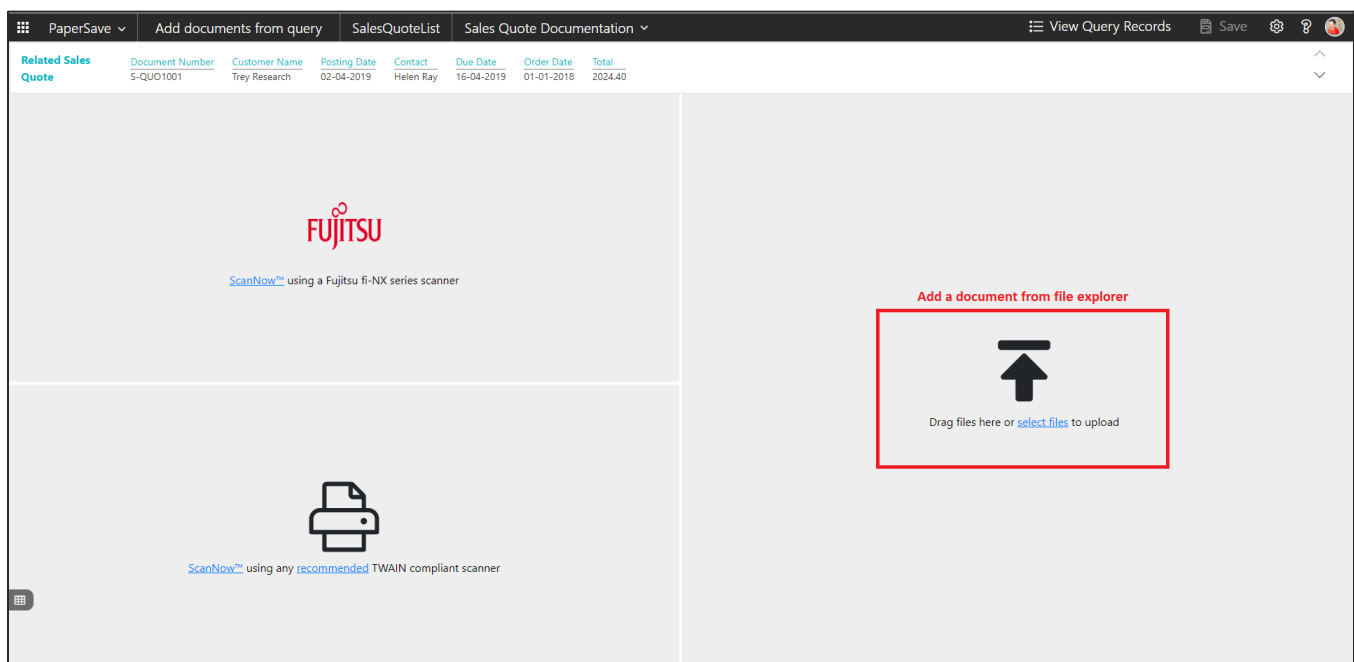
1. Click on "**Process**" Tab from Sales Quotes list.
2. You will see the PaperSave options such as "**Add Document**", "**Show Documents**", and "**Show Interrelated Documents**".



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**".
2. 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 Quotes list.

PaperSave ▾ Add documents from query SalesQuoteList Sales Quote Documentation ▾ View Query Records **Save** ⚙️ ?

Related Sales Quote

Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
S-QUO1001	Trey Research	04/02/2019	Helen Ray	04/16/2019	01/01/2018	2024.40

UNIVERSITY ADDRESS
Burger King 13161
1205 W HUNTER ST
LOSDAL, OH 43138-1011
USA

Reference:
Payment terms: Net 30
Delivery terms: FOB Shipping Point
Ship via: UPS Ground
GST #: 869575925RT0001
Tracking #: 1Z19E9W30334768785

Comment:

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

Invoice no: 84949680
Invoice date: 19-Feb-2016
Customer no: 11062-015511

Sold To:
OPS Hospitality, LLC
2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

REMIT PAYMENT TO:
Franks Foodservice Supply, Inc
8007 INNOVATION WAY
CHICAGO, IL 60682-0080

PLEASE PAY THIS AMOUNT 51.27

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

SHOW DOCUMENTS FROM SALES QUOTE LIST

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

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

<

SHOW INTERRELATED DOCUMENTS FROM SALES QUOTE LIST

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

1. 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.
3. On login success, it will **show** the available Interrelated documents for the selected record in Sales Quote list.

PaperSave

Documents that are interrelated to this root Sales Quote

Search within document list

Root Sales Quote

Document Number

Customer Name

Posting Date

Contact

Due Date

Order Date

Total

S-QUO1001

Trey Research

02-04-2019

Helen Ray

16/04/2018

01/01/2017

2024.40

REFRESH

FILTER

SHOW GROUPING

CHOOSE FIELDS

EXPORT TO EXCEL

Created

Created By

12-09-2019 08:50:40 AM

Bhavya Shah

12-09-2019 08:52:51 AM

Bhavya Shah

12-09-2019 08:52:59 AM

Bhavya Shah

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.

Dynamics 365 Business Central

SALES QUOTE | WORK DATE: 2/12/2019

S-QUO1001 · Trey Research

Process Quote Request Approval Print/Send Release Navigate More options

General Show more

Customer Name: Trey Research Due Date: 4/16/2018

External Document No. Requested Delivery Date

Contact: Helen Ray

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX ARE CODE
Item	1936-S	BERLIN Guest Chair, yellow		10	0	PCS	192.80	CHICAGO

Subtotal Excl. Tax (USD): 1,928.00 Total Excl. Tax (USD): 1,928.00

Inv. Discount Amount Excl. Tax (USD): 0.00 Total Tax (USD): 96.40

Invoice Discount %: 0 Total Incl. Tax (USD): 2,024.40

Sell-to Customer Sales History

Ongoing Sales Quotes	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	0	0	0
51	51	0	0
0	0	0	0

Sales Line Details

Item No. 1936-S

Required Quantity 10

ATTACHMENTS

Documents 0

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

Sales Quote Card: S-QUO1001 · Trey Research

Process: Quote, Request Approval, Print/Send, Release, Navigate, More options

Buttons: Make Order, Make Invoice, **Add Document**, Show Documents, Show Interrelated Documents, Copy Document...

Customer Name: Trey Research | Due Date: 4/16/2018

External Document No.: | Requested Delivery Date: |

Contact: Helen Ray

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX ARE CODE
Item	1936-S	BERLIN Guest Chair, yellow		10	0	PCS	192.80	CHICAGO

Summary Totals:

Subtotal Excl. Tax (USD)	1,928.00	Total Excl. Tax (USD)	1,928.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	96.40
Invoice Discount %	0	Total Incl. Tax (USD)	2,024.40

Sales Line Details:

Item No.: 1936-S
Required Quantity: 10
Attachments: 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.

Add a New PaperSave Document

Sales Quote Documentation | + New

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

FUJITSU
ScanNow™ using a Fujitsu fi-NX series scanner

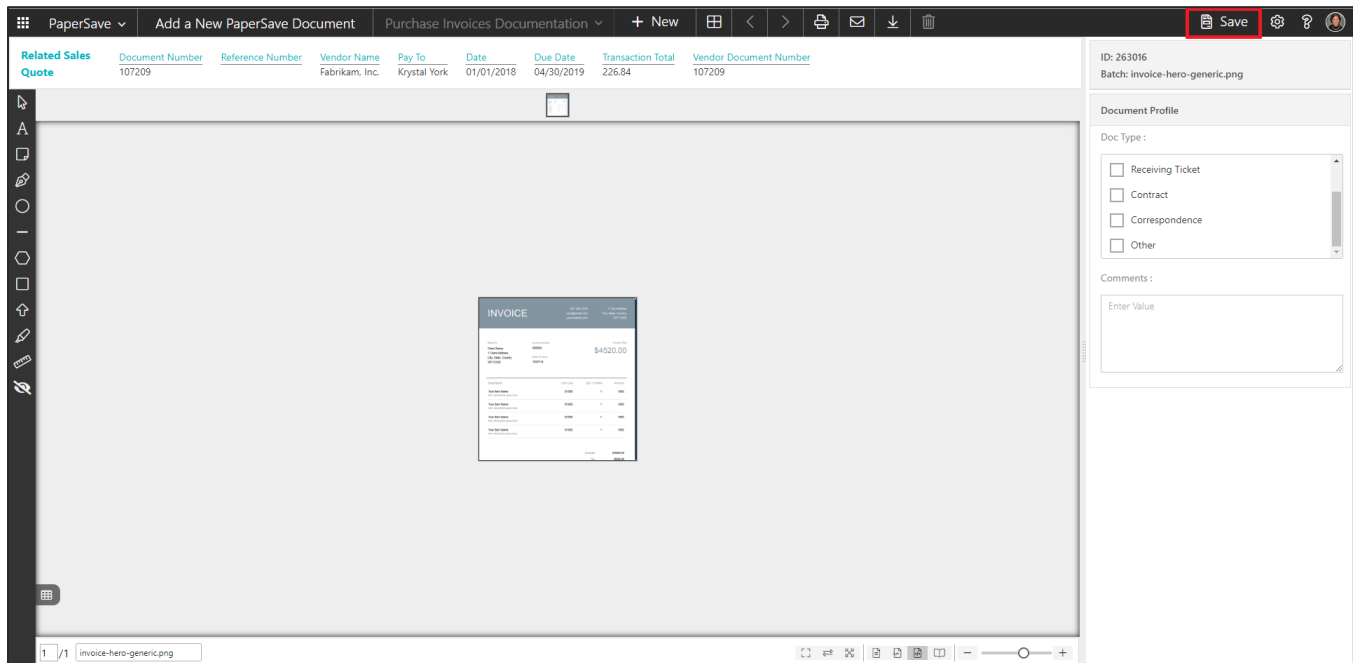
Add a document from file explorer

Drag files here or [select files](#) to upload

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. 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.








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

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.

PaperSave Document Sales Quote Documentation							
Search within document list							
Related Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QUO1001	Trey Research	02-04-2019	Helen Ray	16/04/2018	01/01/2017	2024.40
+ NEW FILTER REFRESH CHOOSE FIELDS SHOW GROUPING EXPORT TO EXCEL INTERRELATED							
<input type="checkbox"/>		Created	Created By				
<input type="checkbox"/>		12-09-2019 08:50:40 AM	Bhavya Shah				
<input type="checkbox"/>		12-09-2019 08:52:51 AM	Bhavya Shah				
<input type="checkbox"/>		12-09-2019 08:52:59 AM	Bhavya Shah				
<input type="checkbox"/>		13-09-2019 06:19:27 AM	Bhavya Shah				
<input type="checkbox"/>		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:

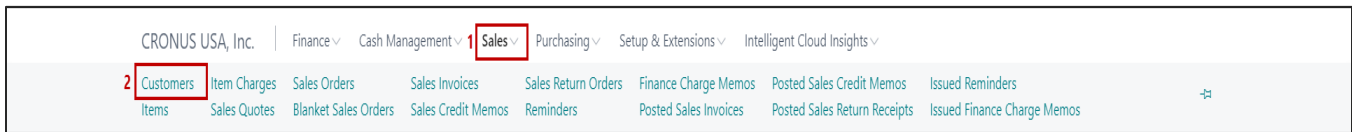
1. On the Process tab of Sales Quotes Card, click on "**Show Interrelated Documents**".
2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available interrelated documents to the record.

PaperSave Documents that are interrelated to this root Sales Quote							
Search within document list							
Root Sales Quote	Document Number	Customer Name	Posting Date	Contact	Due Date	Order Date	Total
	S-QUO1001	Trey Research	02-04-2019	Helen Ray	16/04/2018	01/01/2017	2024.40
REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL							
<input type="checkbox"/>		Created	Created By				
<input type="checkbox"/>		12-09-2019 08:50:40 AM	Bhavya Shah				
<input type="checkbox"/>		12-09-2019 08:52:51 AM	Bhavya Shah				
<input type="checkbox"/>		12-09-2019 08:52:59 AM	Bhavya Shah				

5.10 CUSTOMER

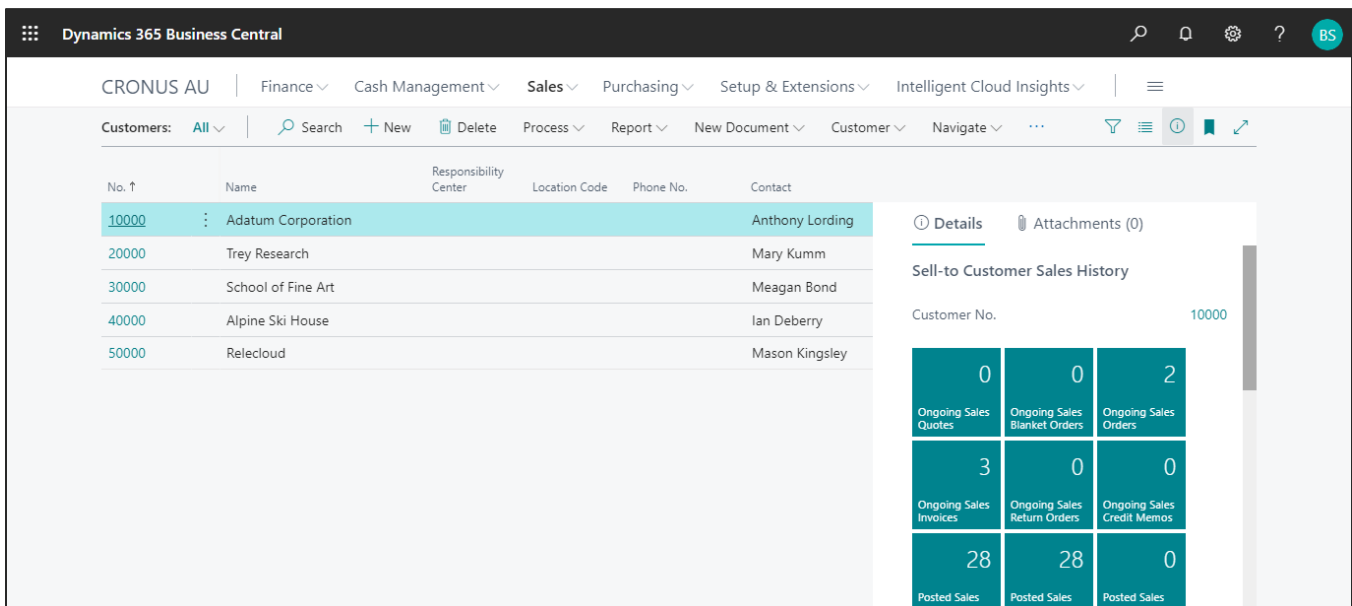
The following steps describe how to interact with PaperSave within the “Customer” record type’s main screen:

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

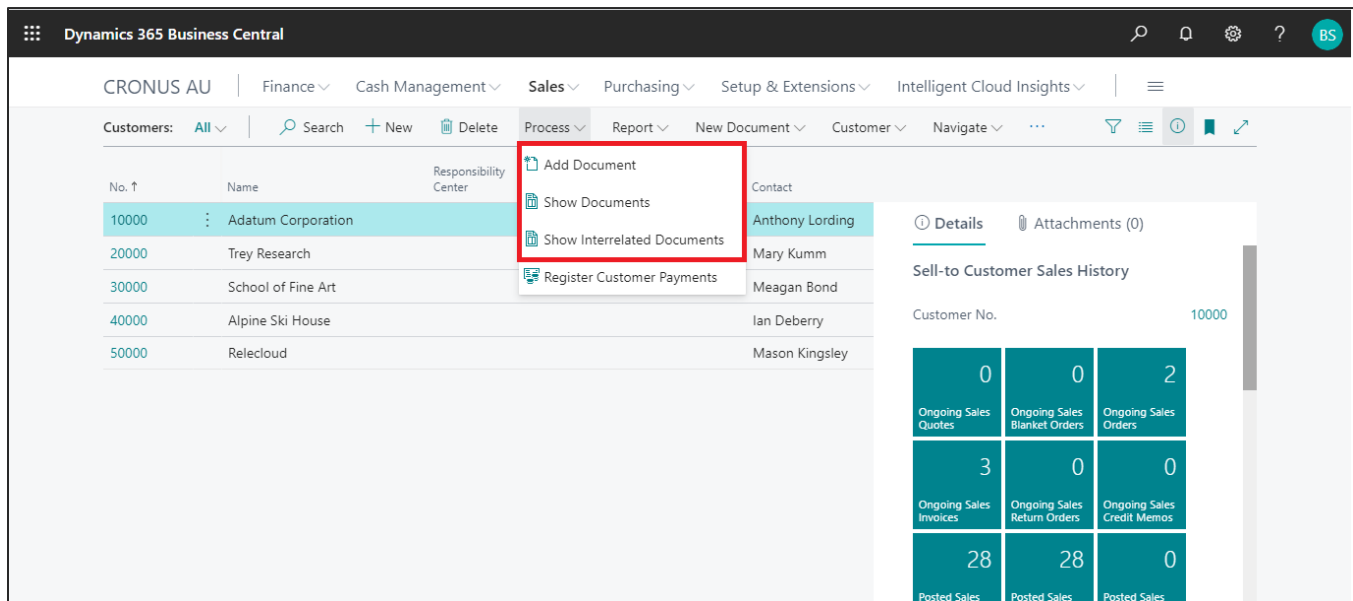


CUSTOMER LIST

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.



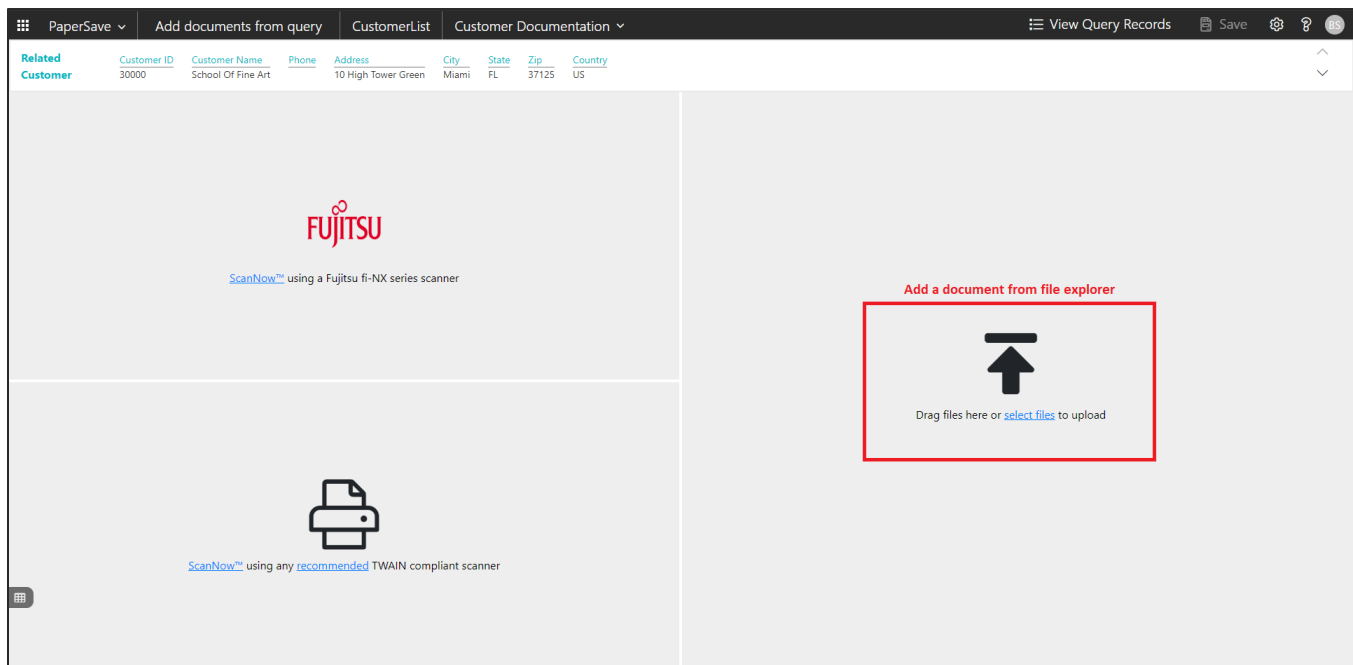
1. Click on **“Process”** Tab from Customer list.
2. You will see the PaperSave options such as **“Add Document”**, **“Show Documents”**, and **“Show Interrelated Documents”**.



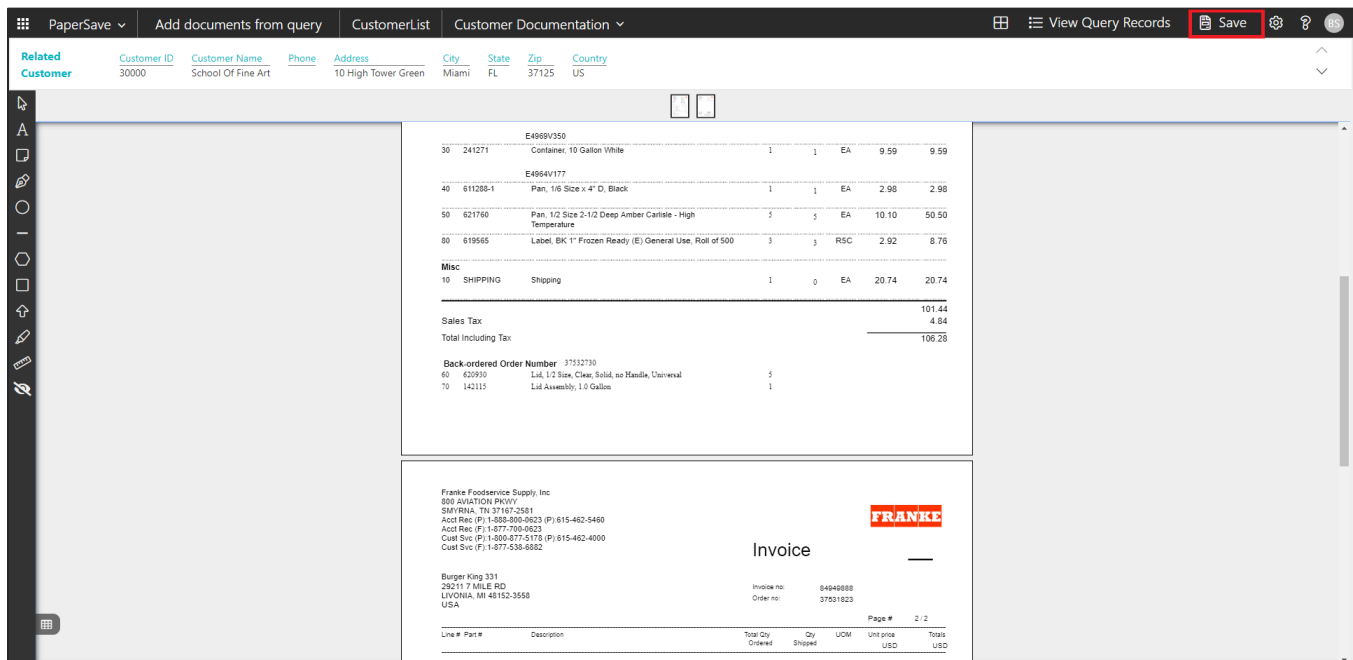
ADD DOCUMENTS FROM CUSTOMER LIST

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**".
2. 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.



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

SHOW DOCUMENTS FROM CUSTOMER LIST

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

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

PaperSave Documents related to query CustomerList View Query Records																
FILTER 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
<input type="checkbox"/>	1358061	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bsahhivtest9stg	20000	Customer	Customer Documentation	20000	20000	Trey Research		153 Thomas Drive	Chicago	IL	61236	US
<input type="checkbox"/>	1358063	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bsahhivtest9stg	30000	Customer	Customer Documentation	30000	30000	School of Fine Art		10 High Tower Green	Miami	FL	37125	US
<input type="checkbox"/>	1358066	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bsahhivtest9stg	40000	Customer	Customer Documentation	40000	40000	Alpine Ski House		10 Deerfield Road	Atlanta	GA	31772	US
<input type="checkbox"/>	1358068	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bsahhivtest9stg	50000	Customer	Customer Documentation	50000	50000	Relecloud		25 Water Way	Atlanta	GA	31772	US
<input type="checkbox"/>	1358070	6161 BLUE LAGOON.tif	09/12/2019 03:40:02 AM	PS\bsahhivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1358465	King.jpg	09/12/2019 09:14:40 AM	PS\bsahhivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1358466	1421704891790.jpg	09/12/2019 09:14:44 AM	PS\bsahhivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1358482	King.jpg	09/12/2019 09:59:48 AM	PS\bsahhivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1368453	INVOICE_TMP8193730966268360722.pdf	09/13/2019 03:02:41 AM	PS\vsnihiivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1368454	INVOICE_TMP4265068694222479491.pdf	09/13/2019 03:07:28 AM	PS\vsnihiivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1368455	INVOICE_TMP4265068694222479491.pdf	09/13/2019 03:07:47 AM	PS\vsnihiivtest9stg	10000	Customer	Customer Documentation	10000	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US
<input type="checkbox"/>	1368545	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bsahhivtest9stg	20000	Customer	Customer Documentation	20000	20000	Trey Research		153 Thomas Drive	Chicago	IL	61236	US
<input type="checkbox"/>	1368546	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bsahhivtest9stg	30000	Customer	Customer Documentation	30000	30000	School of Fine Art		10 High Tower Green	Miami	FL	37125	US
<input type="checkbox"/>	1368547	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bsahhivtest9stg	40000	Customer	Customer Documentation	40000	40000	Alpine Ski House		10 Deerfield Road	Atlanta	GA	31772	US
<input type="checkbox"/>	1368548	Krowrie Metal Corporation.tif	09/13/2019 06:28:09 AM	PS\bsahhivtest9stg	50000	Customer	Customer Documentation	50000	50000	Relecloud		25 Water Way	Atlanta	GA	31772	US

SHOW INTERRELATED DOCUMENTS FROM CUSTOMER LIST

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

- Select the desired record from the list. On the Process Tab of Customer list, click on "**Show Interrelated Documents**".
- 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 Customer list.

Documents that are interrelated to this root Customer									
Root Customer	Customer ID	Customer Name	Phone	Address	City	State	Zip	Country	
Customer	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US	
REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL									
<input type="checkbox"/>		Created	Created By						
<input type="checkbox"/>	12-09-2019 03:40:02 AM	Bhavya Shah							
<input type="checkbox"/>	12-09-2019 09:14:40 AM	Bhavya Shah							
<input type="checkbox"/>	12-09-2019 09:14:44 AM	Bhavya Shah							
<input type="checkbox"/>	12-09-2019 09:59:48 AM	Bhavya Shah							
<input type="checkbox"/>	13-09-2019 03:02:41 AM	Vivek Soni							
<input type="checkbox"/>	13-09-2019 03:07:28 AM	Vivek Soni							
<input type="checkbox"/>	13-09-2019 03:07:47 AM	Vivek Soni							
<input type="checkbox"/>	13-09-2019 06:28:09 AM	Bhavya Shah							
<input type="checkbox"/>	13-09-2019 06:51:23 AM	Vivek Soni							
<input type="checkbox"/>	13-09-2019 06:51:23 AM	Vivek Soni							

CUSTOMER CARD

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

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

Dynamics 365 Business Central		Sandbox			
CUSTOMER CARD WORK DATE: 2/12/2019		SAVED			
10000 · Adatum Corporation					
New Document Request Approval Navigate Customer More options					
General					
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					
ADDRESS		CONTACT			
Address	192 Market Square	Contact Name	Robert Townes		
Address 2		Phone No.			
Country/Region Code	US	Email	robert.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".

The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The card is for '10000 · Adatum Corporation'. The 'Customer' tab is selected, and a menu is open showing options like 'Add Document', 'Show Interrelated Documents', 'Ledger Entries', 'Account Detail', 'Cross References', 'Approvals', 'Show Documents', and 'Dimensions'. The 'Add Document' and 'Show Documents' options are highlighted with a red box. The card displays financial data such as 'Total Sales' (18,098.30), 'Balance (\$)' (20,196.08), and 'Balance Due (\$)' (20,196.08). It also includes an 'Address & Contact' section with fields for address, city, state, and contact information for Robert Townes.

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.

PaperSave Add a New PaperSave Document Customer Documentation + New

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

FUJITSU
ScanNow™ using a Fujitsu fi-NX series scanner

Add a document from file explorer
Drag files here or [select files](#) to upload

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 New PaperSave Document Customer Documentation + New **Save**

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

2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

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

Attn: Bethel, Nicole
Comment:

Order from: Bethel, Nicole
Shipping date: 02/18/16
Cust Service Rep: Myles Couyoumjian
Store no: 5952529
Customer no: 11062-018811
Customer store no: 12476

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

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

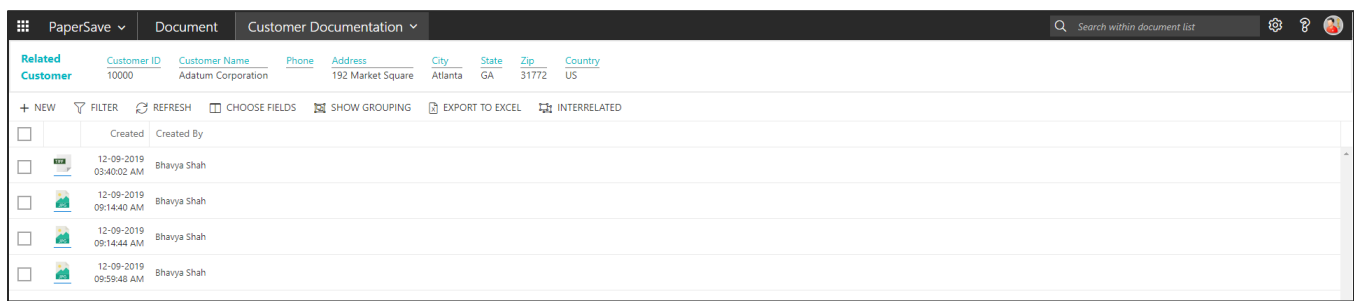
1 /1 INVOICE_TMP8193730966368...

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

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.



PaperSave - Document - Customer Documentation									
Search within document list									
Related Customer	Customer ID	Customer Name	Phone	Address	City	State	Zip	Country	
	10000	Adatum Corporation		192 Market Square	Atlanta	GA	31772	US	
+ NEW FILTER REFRESH CHOOSE FIELDS SHOW GROUPING EXPORT TO EXCEL INTERRELATED									
<input type="checkbox"/>		Created	Created By						
<input type="checkbox"/>		12-09-2019 05:40:02 AM	Bhavya Shah						
<input type="checkbox"/>		12-09-2019 09:14:40 AM	Bhavya Shah						
<input type="checkbox"/>		12-09-2019 09:14:44 AM	Bhavya Shah						
<input type="checkbox"/>		12-09-2019 09:59:48 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.

PaperSave

Documents that are interrelated to this root Customer

Search within document list

Root Customer

Customer ID

Customer Name

Phone

Address

City

State

Zip

Country

10000

Adatum Corporation

192 Market Square

Atlanta

GA

31772

US











REFRESH

FILTER

SHOW GROUPING

CHOOSE FIELDS

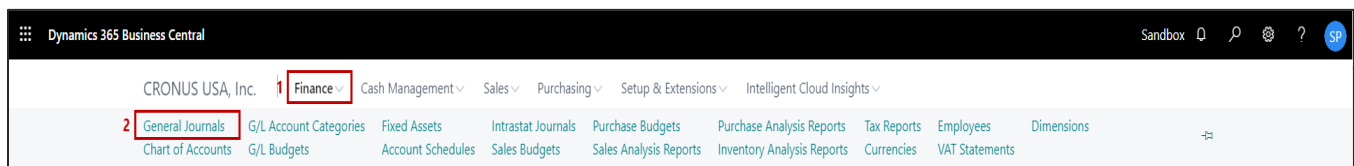
EXPORT TO EXCEL

	Created	Created By
<input type="checkbox"/>	 12-09-2019 03:40:02 AM	Bhavya Shah
<input type="checkbox"/>	 12-09-2019 09:14:40 AM	Bhavya Shah
<input type="checkbox"/>	 12-09-2019 09:14:44 AM	Bhavya Shah
<input type="checkbox"/>	 12-09-2019 09:59:48 AM	Bhavya Shah
<input type="checkbox"/>	 13-09-2019 03:02:41 AM	Vivek Soni
<input type="checkbox"/>	 13-09-2019 03:07:28 AM	Vivek Soni
<input type="checkbox"/>	 13-09-2019 03:07:47 AM	Vivek Soni
<input type="checkbox"/>	 13-09-2019 06:28:09 AM	Bhavya Shah
<input type="checkbox"/>	 13-09-2019 06:51:23 AM	Vivek Soni
<input type="checkbox"/>	 13-09-2019 06:51:23 AM	Vivek Soni

5.11 GENERAL JOURNALS

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

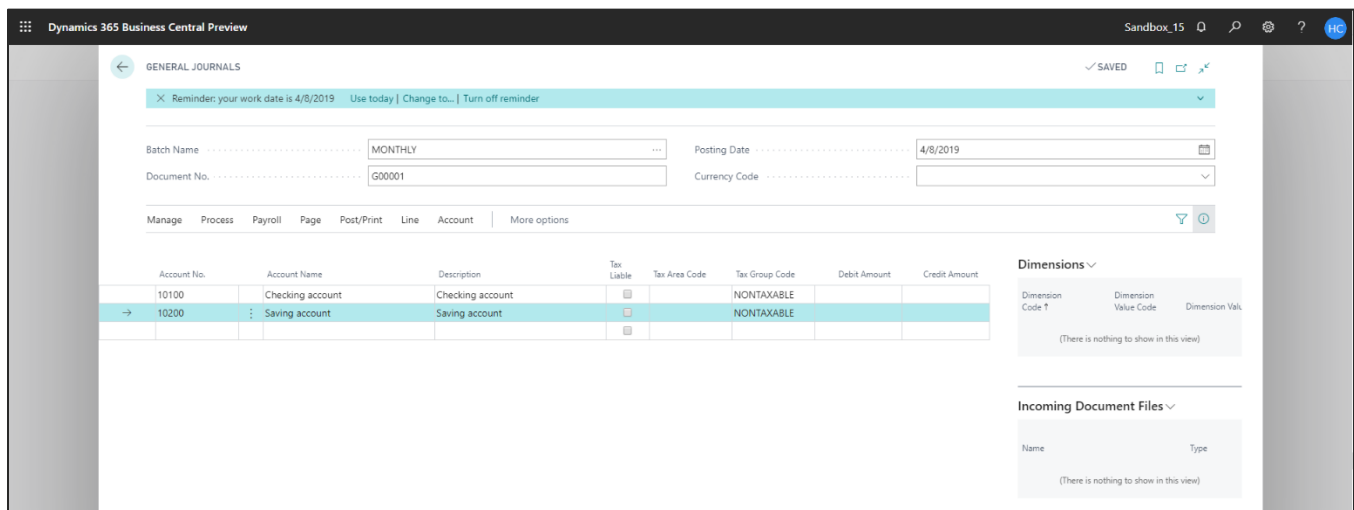
1. On the Dynamics 365 Business Central Home Page, click on the **Finance** dropdown.
2. Click on **General Journals**.



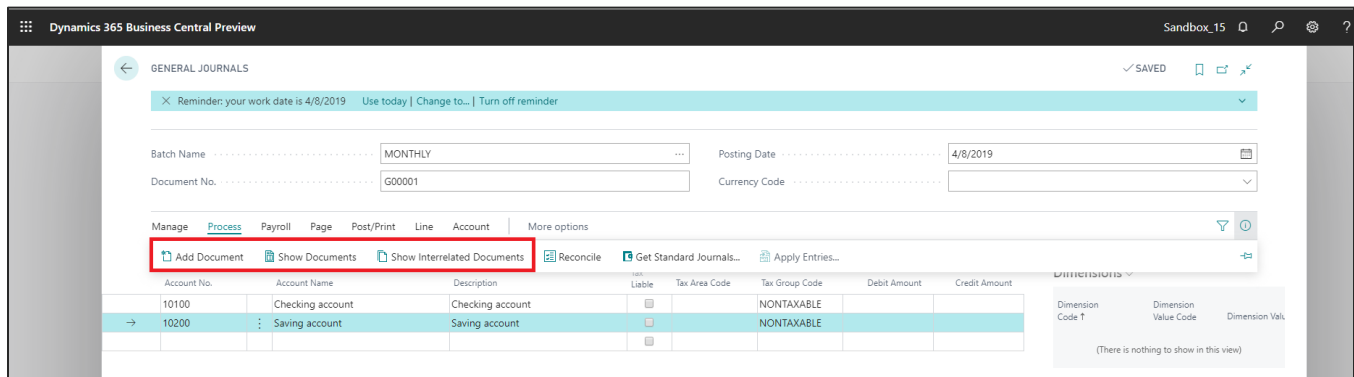
GENERAL JOURNAL BATCH

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.



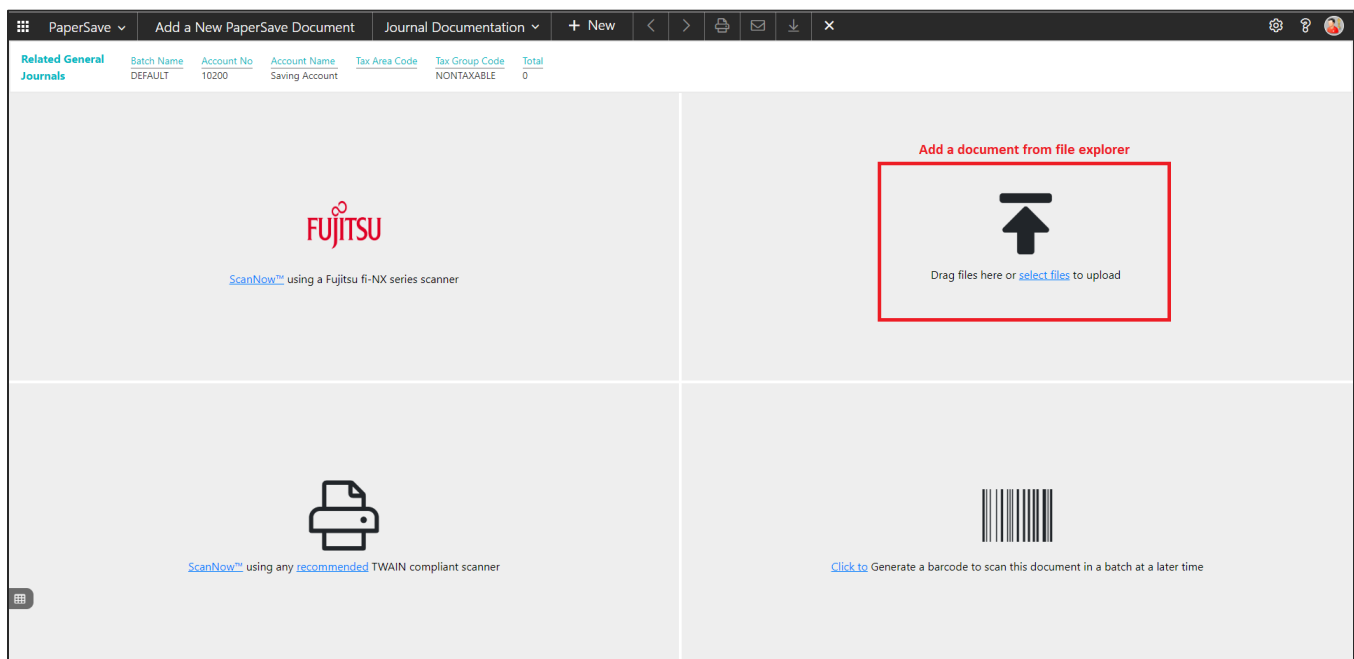
3. **Select** the journal entry from the list.
4. Click on **"Process"** to access the PaperSave functionalities such as "Add Document", "Show Documents" and "Show Interrelated Documents".



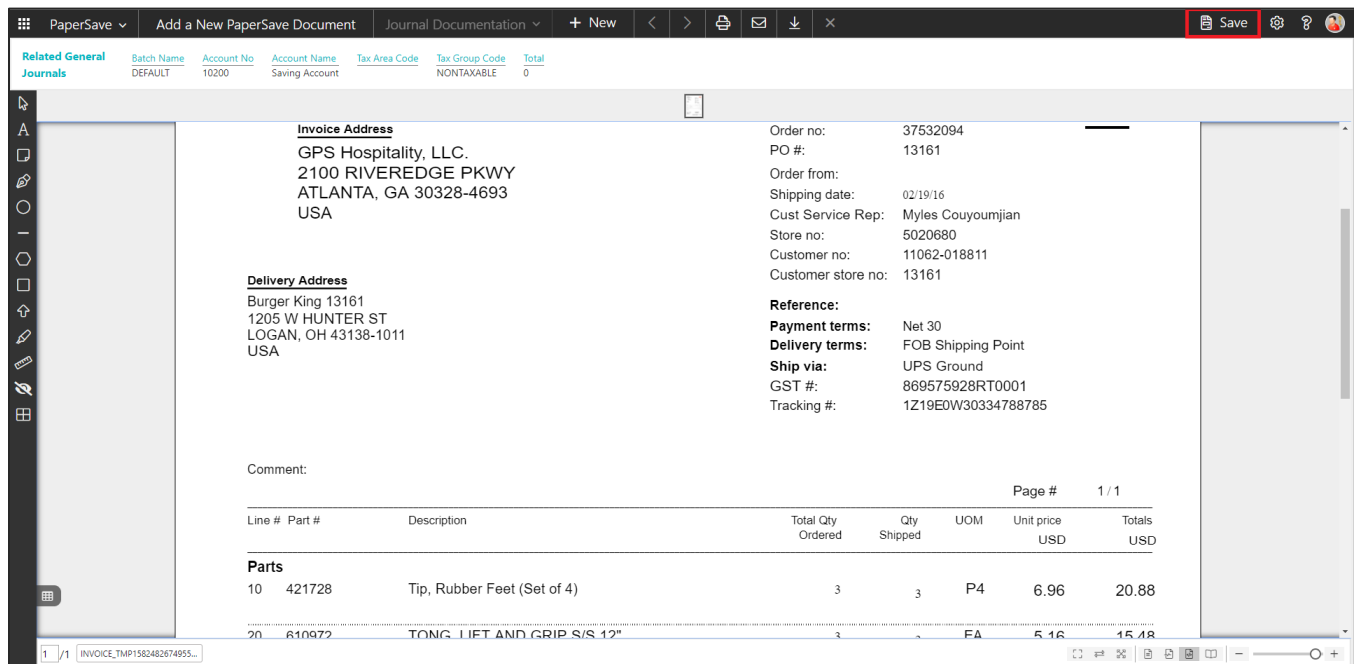
ADD DOCUMENTS FROM GENERAL JOURNAL BATCH

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.



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.



Invoice Address
GPS Hospitality, LLC.
2100 RIVEREDGE PKWY
ATLANTA, GA 30328-4693
USA

Delivery Address
Burger King 13161
1205 W HUNTER ST
LOGAN, OH 43138-1011
USA

Order no: 37532094
PO #: 13161
Order from:
Shipping date: 02/19/16
Cust Service Rep: Myles Couyoumjian
Store no: 5020680
Customer no: 11062-018811
Customer store no: 13161

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

Comment:

Line #	Part #	Description	Total Qty Ordered	Qty Shipped	UOM	Unit price USD	Totals USD
10	421728	Tip, Rubber Feet (Set of 4)	3	3	P4	6.96	20.88
20	610972	TONG. LIFT AND GRIP S/S 12"	3		FA	5.16	15.48

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

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.

PaperSave

Document

Journal Documentation

Search within document list

Related General Journals

Batch Name

Account No

Account Name

Tax Area Code

Tax Group Code

Total

DEFAULT

10200

Saving Account

NONTAXABLE

0

+ 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 09:41:44 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:

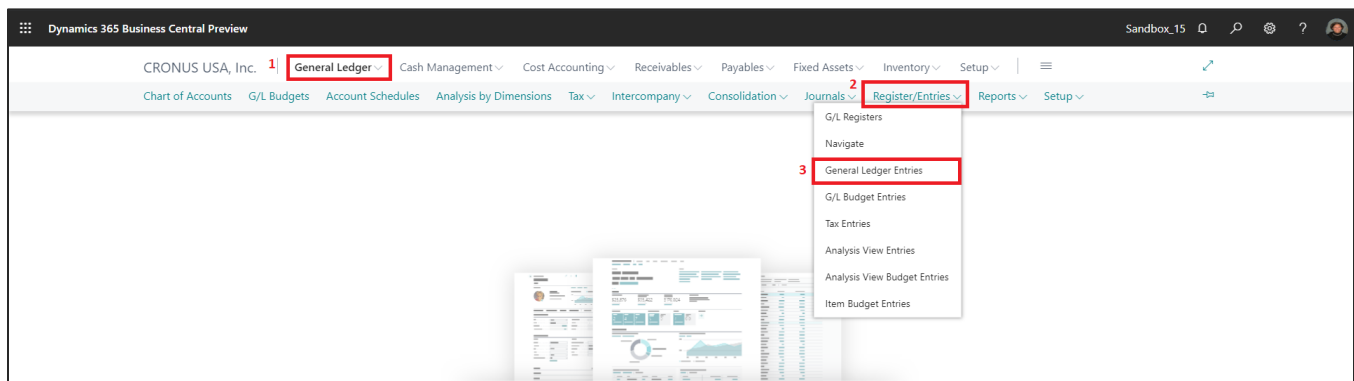
1. On the Process tab of General journals batch, click on “**Show Interrelated Documents**”.
2. This will open PaperSave cloud login prompt (on the first login). **Enter** login credentials.
3. On login success, it will **show** the available Interrelated documents to the record.

PaperSave		Documents that are interrelated to this root General Journals		Search within document list			
Root General Journals		Batch Name	Account No	Account Name	Tax Area Code	Tax Group Code	Total
		DEFAULT	10200	Saving Account		NONTAXABLE	0
		REFRESH FILTER SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL					
<input type="checkbox"/>		Created	Created By				
<input type="checkbox"/>		13-09-2019 09:38:11 AM	Vivek Soni				
<input type="checkbox"/>		13-09-2019 09:41:44 AM	Vivek Soni				
<input type="checkbox"/>		13-09-2019 09:44:34 AM	Vivek Soni				
<input type="checkbox"/>		13-09-2019 09:44:34 AM	Vivek Soni				
<input type="checkbox"/>		13-09-2019 09:44:35 AM	Vivek Soni				
<input type="checkbox"/>		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:

Dynamics 365 Business Central

7190 COST OF RETAIL SOLD | WORK DATE: 5/1/2019

General Ledger Entries | Search | Edit List | Process | Entry | Page | Actions | Navigate | Fewer options

Posting Date ↓	Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gen. Pos.
→ 4/1/2019	:	103403	7190	Direct Cost 30000 on 04/01/19		
4/1/2019		103403	7190	Direct Cost 30000 on 04/01/19		
3/31/2019		103402	7190	Direct Cost 50000 on 03/31/19		
3/31/2019		103402	7190	Direct Cost 50000 on 03/31/19		
3/27/2019		103401	7190	Direct Cost 30000 on 03/27/19		
3/27/2019		103401	7190	Direct Cost 30000 on 03/27/19		
3/27/2019		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		

Incoming Document Files

Name Type

(There is nothing to show in this view)

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

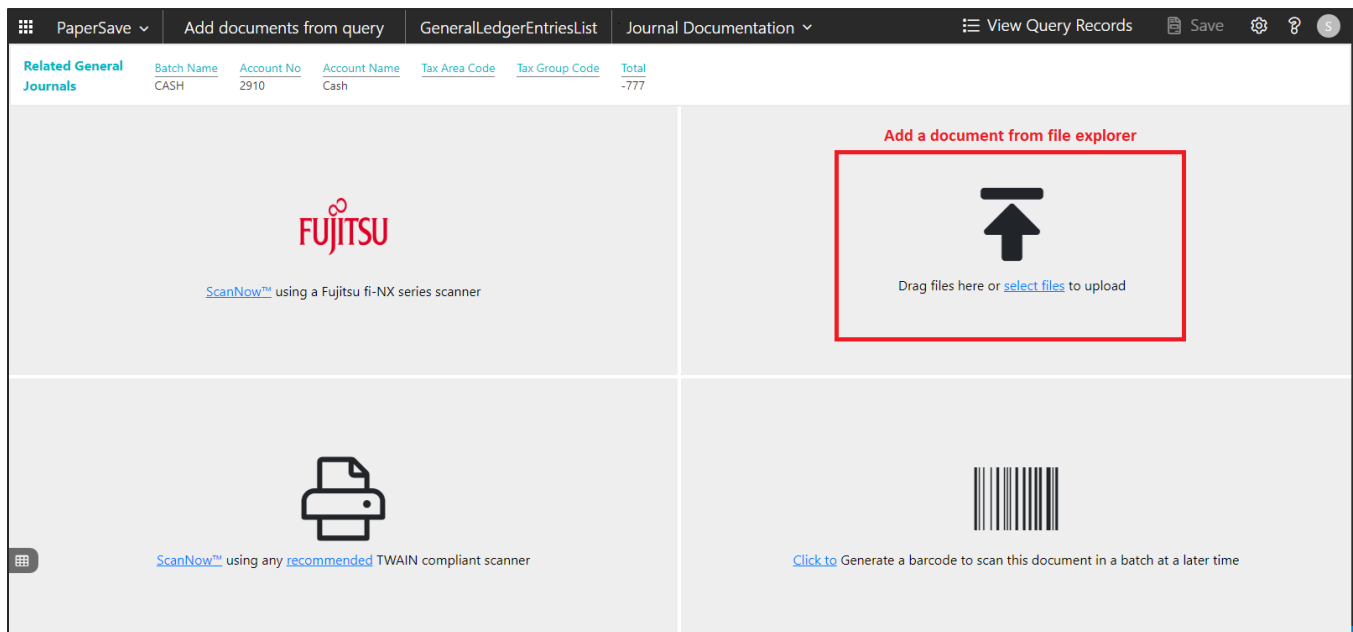
The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes the 'Process' tab, which is highlighted. Below the navigation bar, the 'General Ledger Entries' list is displayed. The list has columns for Date, Type, Document No., No., Description, Type, and Pos. The first row is highlighted in blue. To the right of the list, the 'Incoming Document Files' section is visible, showing a table with columns for Name and Type. The table is currently empty, with the message '(There is nothing to show in this view)'.

Date	Type	Document No.	No.	Description	Type	Pos
4/1/2019		103403	7190	Direct Cost 30000 on 04/01/19		
4/1/2019		103403	7190	Direct Cost 30000 on 04/01/19		
3/31/2019		103402	7190	Direct Cost 50000 on 03/31/19		
3/31/2019		103402	7190	Direct Cost 50000 on 03/31/19		
3/27/2019		103401	7190	Direct Cost 30000 on 03/27/19		
3/27/2019		103401	7190	Direct Cost 30000 on 03/27/19		
3/27/2019		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		

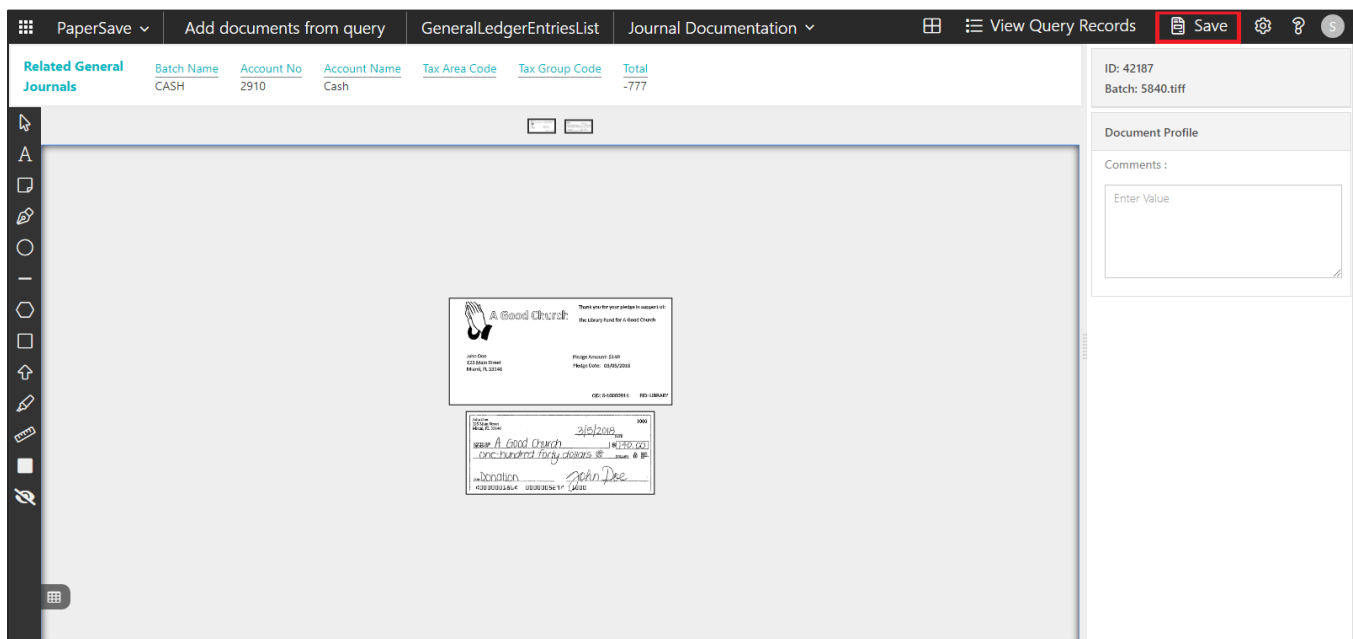
ADD DOCUMENTS FROM GENERAL LEDGER ENTRIES LIST

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.



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.



7. 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.

PaperSave ▾ Documents related to query GeneralLedgerEntriesList View Query Records ⚙️ ?									
FILTER REFRESH SHOW GROUPING CHOOSE FIELDS EXPORT TO EXCEL									
<input type="checkbox"/>	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Comments	
<input type="checkbox"/>	42183	5840.tiff	09/19/2019 08:07:09 AM	spanchal@whiteowlsolutions.com	(0804E7DC-D5DA-E911-9678-00155D295C02)	General Journals	Journal Documentation		
<input type="checkbox"/>	42187	5840.tiff	09/20/2019 03:52:02 AM	spanchal@whiteowlsolutions.com	(0804E7DC-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.

PaperSave ▾

Documents that are interrelated to this root General Journals

Search within document list

PS

Root General Journals

Batch Name

Total

2,240

Refresh

REFRESH

FILTER

SHOW GROUPING

CHOOSE FIELDS

EXPORT TO EXCEL

<input type="checkbox"/>	ID	File Name	Created	Created By	Parent Id	Record Type	Document Type	Comments
<input type="checkbox"/>	<div><div></div><div>42183</div></div>	5840.tiff	09/19/2019 08:07:09 AM	spanchal@whiteowlsolutions.com	(0804E7DC-D5DA-E911-9678-00155D295C02)	General Journals	Journal Documentation	
<input type="checkbox"/>	<div><div></div><div>42187</div></div>	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.

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'CRONUS AU' and various functional area dropdowns: Finance, Cash Management, Sales, Purchasing (selected), Setup & Extensions, and Intelligent Cloud Insights. Below the navigation bar, the 'Vendors' section is active, showing a list of vendors. The list has columns for 'No.', 'Name', 'Location Code', 'Phone No.', and 'Contact'. The first vendor, '10000 Fabrikam, Inc.', is selected, and its details are shown on the right. The details view includes 'Vendor Statistics' with various financial metrics.

No. ↑	Name	Location Code	Phone No.	Contact
10000	Fabrikam, Inc.			Krystal York
20000	First Up Consultants			Aaron Loton
30000	Graphic Design Institute			Bryce Jasso
40000	Wide World Importers			Blake Springthorpe
50000	Nod Publishers			Patrick Cochran
V00010				
V00070	Citrix			
V00080	Citrix & Company			
V00090				
V00100	mbaf			
V00110	Fujitsu & Company			
V00120	Abisoft			

Vendor Statistics	
Vendor No.	10000
Balance (LCY)	42,739.00
Outstanding Orders (LCY)	0.00
Amt. Rcd. Not Invd. (LCY)	10,439.00
Outstanding Invoices (LCY)	128,898.37
Total (LCY)	182,076.37
Overdue Amounts (LCY) as of...	40,876.00
Invoiced Prepayment Amoun...	0.00
Payments (LCY)	0.00
Refunds (LCY)	0.00
Last Payment Date	-

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

Dynamics 365 Business Central

VENDOR CARD | WORK DATE: 5/1/2019

10000 · Fabrikam, Inc.

Process Request Approval New Document Navigate Vendor More options

General Show more


No.	10000	...	Post Dated Checks ...	0.00
Name	Fabrikam, Inc.		Provisional Balance...	42,739.00
Blocked			Balance Due (LCY) ...	40,876.00
Balance (LCY)	42,739.00			

Address & Contact Show more

ADDRESS		CONTACT	
Address	10 McArthur Avenue	Primary Contact C...	...
Address 2		Contact	Krystal York
Country/Region Co...	US	Phone No.	

Details Attachments (0)

Vendor Picture



Vendor Statistics

Vendor No. 10000

- 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**".

EDIT - ASSOCIATION DIALOG

Do you want to associate the document in the side by side viewer?

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
→ Vendor Document Number:	:

Associate future documents automatically without prompt...
☐

OK
Cancel

- 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

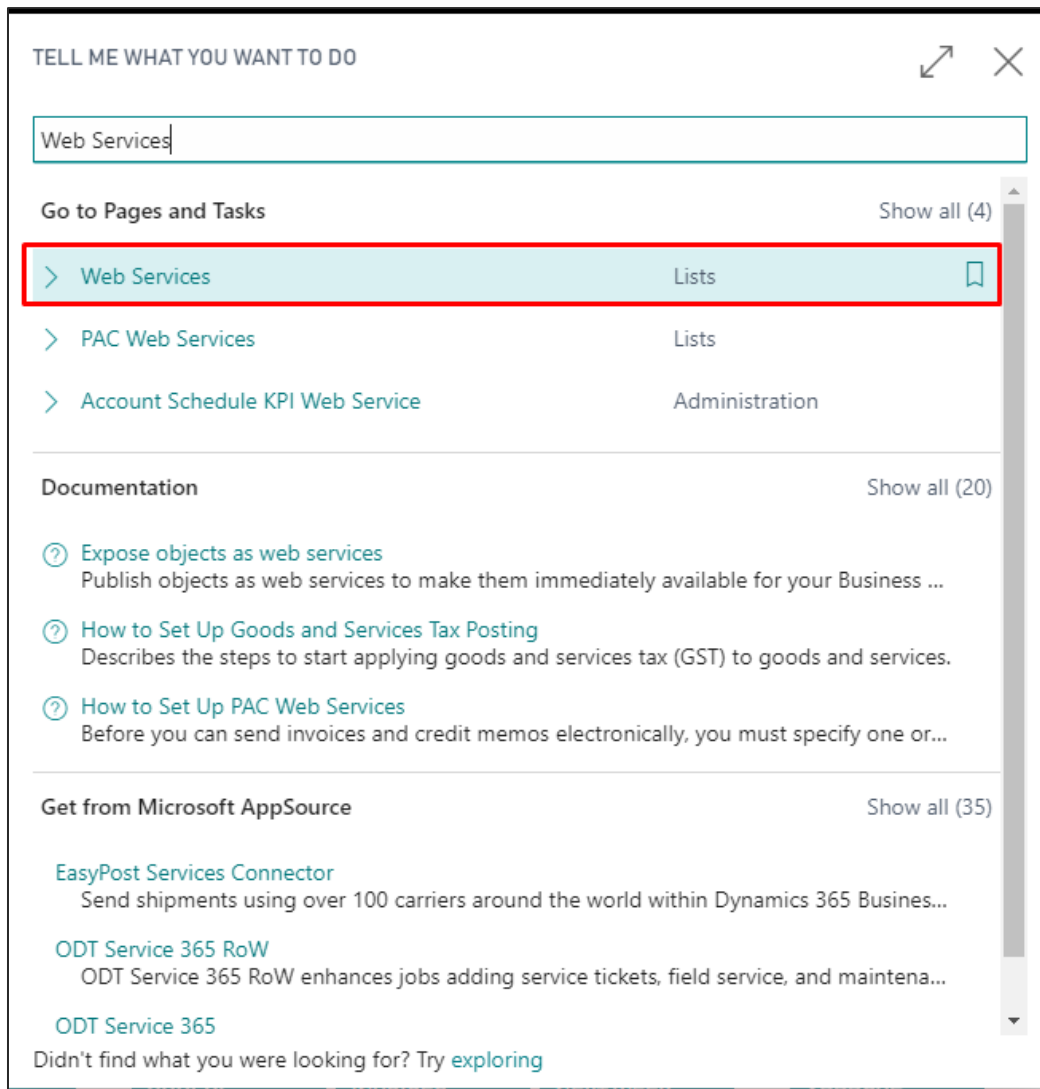
Follow the below steps to access Dynamics 365 Business Central Web Services for PaperSave:

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

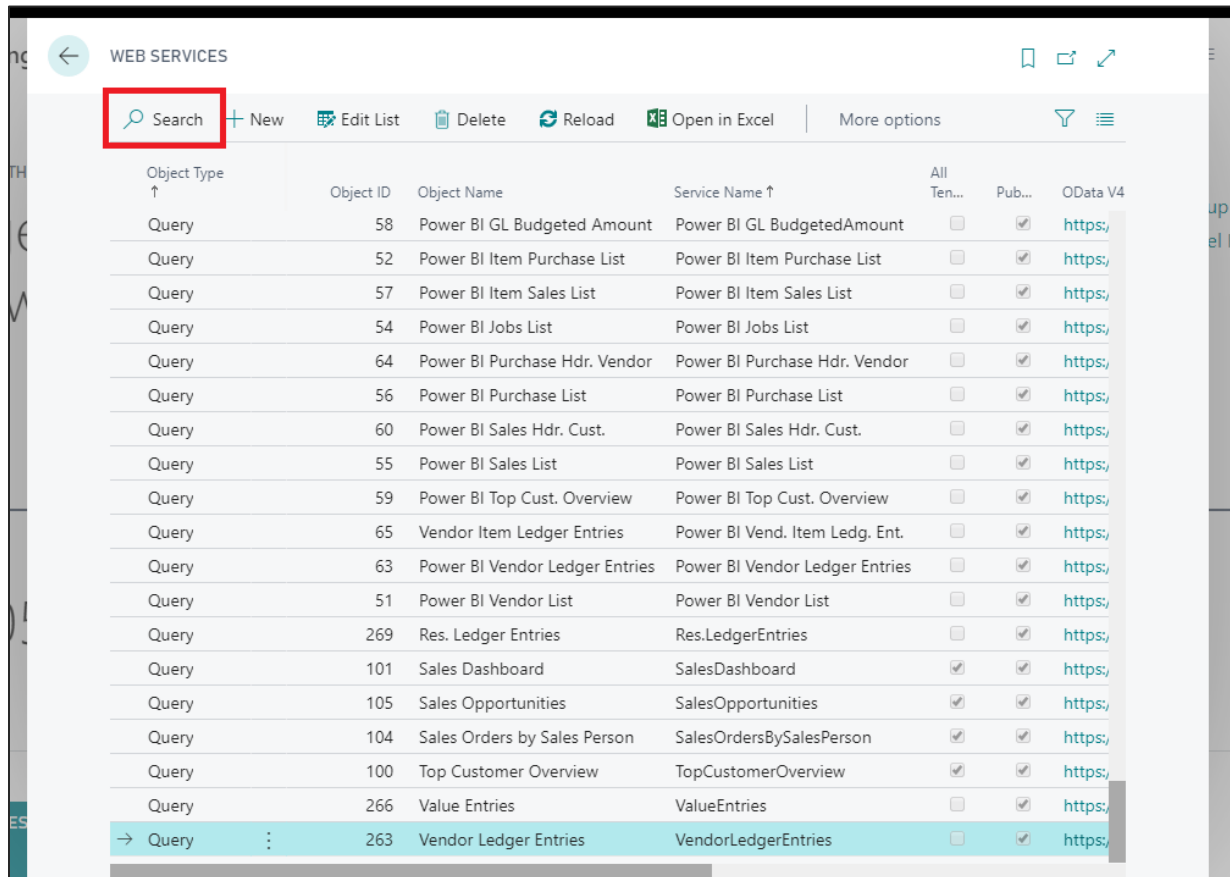


The screenshot shows the Dynamics 365 Business Central interface for 'Barcharts Publishing'. The top navigation bar includes links for Finance, Cash Management, Sales, Purchasing, Setup & Extensions, and Intelligent Cloud Insights. The main content area displays a 'Your top customer was Selangorian Ltd., bought for 1,250 USD' insight. Below this, there are four summary cards: 'SALES THIS MONTH' (USD21,059), 'OVERDUE SALES INVOICE AMOUNT' (USD0), 'OVERDUE PURCH. INVOICE AMOUNT' (USD4,120), and 'SALES INVOICES PREDICT... OVERDUE' (0). At the bottom, there are three sections: 'ONGOING SALES' (Sales Quotes: 2, Sales Orders: 2, Sales Invoices: 6), 'ONGOING PURCHASES' (Purchase Orders: 22, Ongoing Pur. Invoices: 29, Purch. Invoices Next Week: 10), and 'APPROVALS' (Requests to Approve: 0).

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".



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



Object Type ↑	Object ID	Object Name	Service Name ↑	All Ten...	Pub...	OData V4
Query	58	Power BI GL Budgeted Amount	Power BI GL BudgetedAmount	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	52	Power BI Item Purchase List	Power BI Item Purchase List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	57	Power BI Item Sales List	Power BI Item Sales List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	54	Power BI Jobs List	Power BI Jobs List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	64	Power BI Purchase Hdr. Vendor	Power BI Purchase Hdr. Vendor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	56	Power BI Purchase List	Power BI Purchase List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	60	Power BI Sales Hdr. Cust.	Power BI Sales Hdr. Cust.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	55	Power BI Sales List	Power BI Sales List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	59	Power BI Top Cust. Overview	Power BI Top Cust. Overview	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	65	Vendor Item Ledger Entries	Power BI Vend. Item Ledg. Ent.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	63	Power BI Vendor Ledger Entries	Power BI Vendor Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	51	Power BI Vendor List	Power BI Vendor List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	269	Res. Ledger Entries	Res.LedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	101	Sales Dashboard	SalesDashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	105	Sales Opportunities	SalesOpportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	104	Sales Orders by Sales Person	SalesOrdersBySalesPerson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	100	Top Customer Overview	TopCustomerOverview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	266	Value Entries	ValueEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
→ Query	263	Vendor Ledger Entries	VendorLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://

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

← WEB SERVICES

papersave X + New Edit List Delete Reload Open in Excel ...

Object Type ↑	Object ID	Object Name	Service Name ↑	All Ten...	Pub...	OData V4
→ Page	70166897	PaperSave General ledger Entry	PaperSave GLEntry	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Page	70166895	PaperSave GLSetup	PaperSave GLSetup	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Page	70166898	PaperSave Purchase Invoice	PaperSave Purchase Invoices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Page	70166896	PaperSave Return Journals	PaperSave Return Journals	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166826	PaperSave Cash Rec. Journal	PaperSave Cash Receipt Journal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166831	PaperSave Customers	PaperSave Customer Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166828	PaperSave IC G/L Account	PaperSave IC GLAccount	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166827	PaperSave IC Partners	PaperSave IC Partners	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166832	PaperSave Items	PaperSave Item Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166829	PaperSave Job Details	PaperSave Job Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166825	PaperSave Payment Journal	PaperSave Payment Journal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://
Query	70166830	PaperSave Vendors	PaperSave Vendor Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	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 Journal	It returns the details for cash receipt journal and includes the 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

	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 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).