Paperless Office

Click on Paperless Office -> Setup -> Paperless Office Options. Enable items that you would like to save to Paperless.

Click on Journal and Register Maintenance.

Choose Company code from the lookup list or ALL companies.

Company List

Company Code	Name
<all>	<all companies>
ABC	ABC Distribution and Service Corp.
ABX	American Business Expressions
DMO	Demo Company
EEC	Edwardson Electric Company
MFG	MFG Computer Systems, Inc
P13	ABC Disb - 2013 Payroll
TST	test
XYZ	XYZ Manufacturing Company
Y13	ABC - 2013
Z13	ABC Distribution - 2013
ZZZ	ZZZ Test Company

Search: Company Code | Begins with | Find
Filters...

Custom... | Select | Cancel

Found 12 records
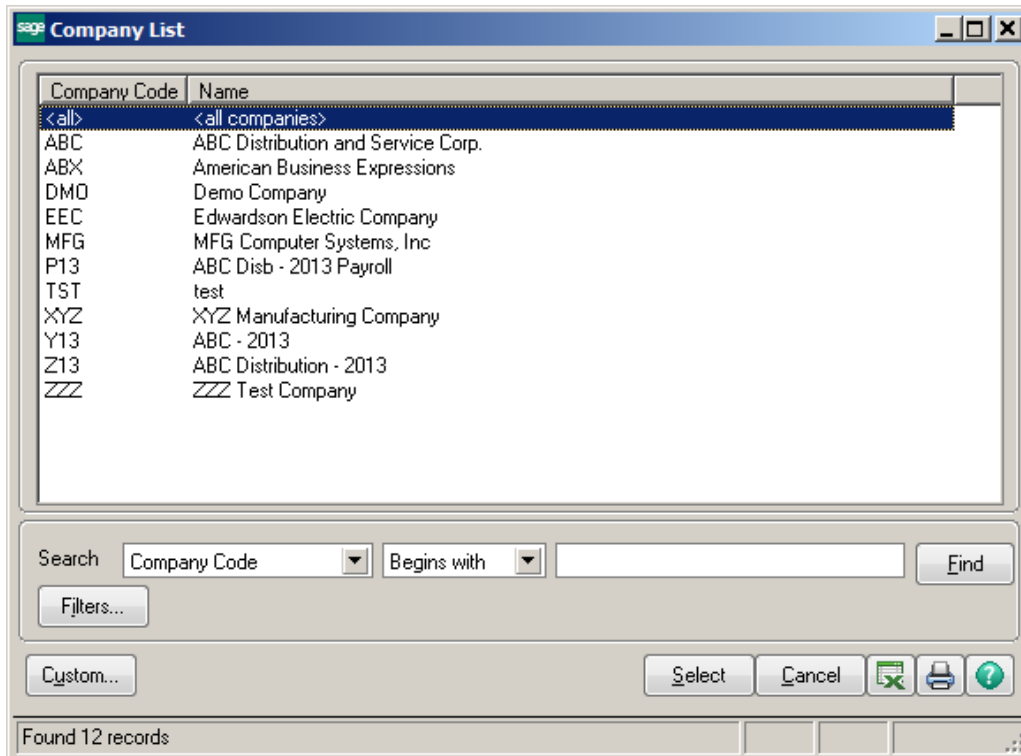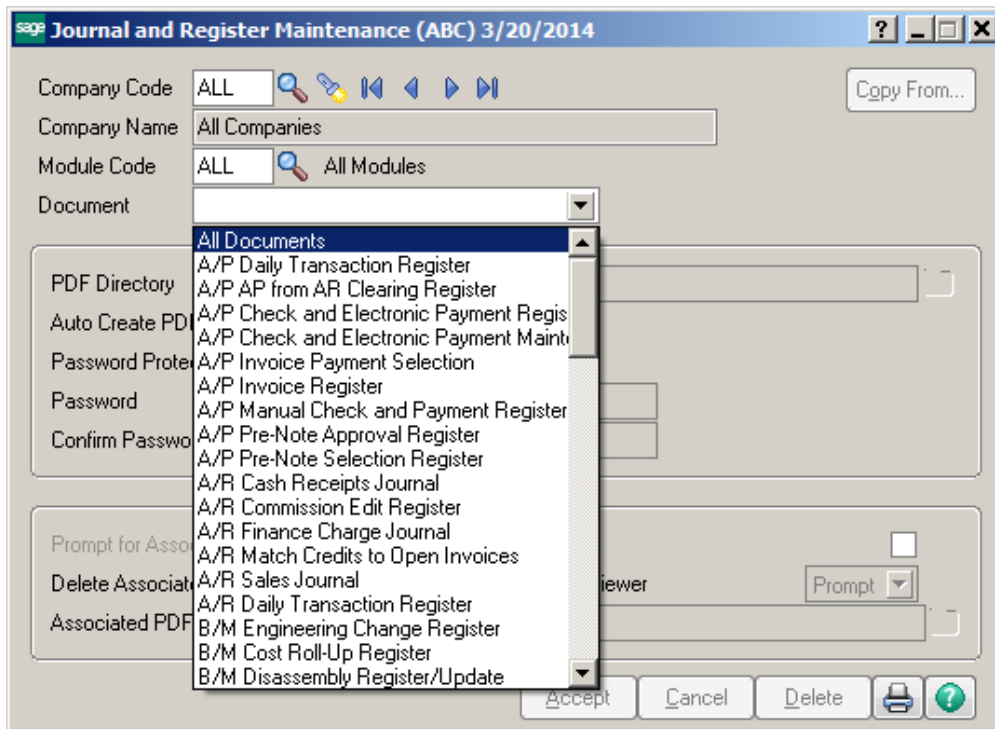
Choose module code or ALL modules from lookup list.

Note: Paperless documents for each module can be stored in different locations.

Module List

Module Code	Name
<all>	<all modules>
A/P	Accounts Payable
A/R	Accounts Receivable
B/M	Bill of Materials
B/R	Bank Reconciliation
F/L	Fixed Assets
G/L	General Ledger
I/M	Inventory Management
I/T	eBusiness Manager
J/C	Job Cost
M/P	Material Requirements Planning
P/O	Purchase Order
P/R	Payroll
S/O	Sales Order
T/C	TimeCard
W/O	Work Order

Search: Module Code | Begins with | Find
Filters...

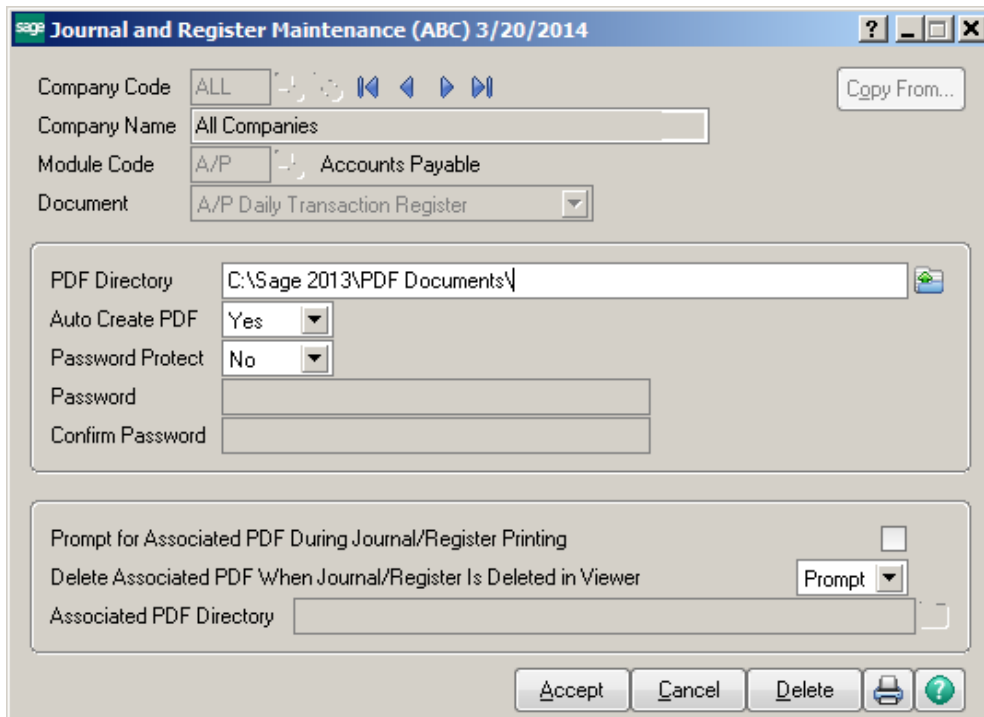Custom... | Select | Cancel

Found 16 records

Choose specific document or ALL Documents from the lookup list.

Enter the Path location for the Paperless Documents in the PDF Directory field.

Note: This can be a different location for each module and/or company.

Auto Create PDF options:

- Yes – automatically creates the PDF when the Print button is selected
- Prompt – this option will prompt the user to
- No – the system will not create a PDF document

Password Protect:

- Yes – Applies the password that is keyed into the field below to the document
- Prompt – prompts the user to enter a password when printing the document
- No – does not apply a password to the document

Period End Reports

Report Maintenance

Form Maintenance

Choose Company code from the lookup list or ALL companies.

Choose module code or ALL modules from lookup list.

Choose the Document type or ALL Documents.

Check the box to Enable Electronic Delivery. Type the e-mail address to use as the "from" e-mail address when e-mailing the form. If a company is selected in the Company Code field, this field displays the e-mail address entered in Company Maintenance. You can change this e-mail address when e-mailing the form from the printing task

PDF Directory - Enter the full path of the folder to use for storing the form in PDF format, or click the Browse Directory button to browse to the folder.

Override Password - Type the override password for viewing the PDF documents created for this form. You can type up to 32 characters. If a PDF password is entered for the customer, vendor, or employee in Paperless Office Delivery Options, this field provides a second password to open PDF documents.

How It Works

Journals and Registers

Enter your data into the Data Entry screen, example: Accounts Payable Invoice Data Entry. Click on the Accounts Payable Invoice Register. **Click Print.** **DO NOT CLICK PREVIEW!!** The PDF will open on your screen. Review the document for accuracy, check totals, debits equal credits, etc.

If you wish to print the document, click the printer button.

Otherwise, exit out and update the register. The document will be saved to the directory you indicated in setup and can be viewed using the Paperless Office Viewer.

Emailing Forms

Library Master:

Click on Library Master\Main\Company Maintenance. Select your company and choose the Email tab.
Enter the address for your SMTP server. (You may need assistance from your IT Company for this piece.)

Accounts Receivable:

Click on Accounts Receivable\Main\Customer Maintenance. Click on the Paperless button.

Choose the document type that you would want to email.

Select your delivery options.

Select who you are going to deliver it to.   Note: You can have multiple email addresses to deliver to.

Sales Order – Invoice

Enter invoices for customers. Click on Invoice Printing icon/menu. Select method for printing/electronic delivery. Based on your selection the system will print the invoices it needs to print and electronically deliver the invoices that are set up.

Select...	...to perform the following when these check boxes are selected in Paperless Office Delivery Options for the customer, vendor, or employee		
	E-mail and/or Fax check box	Print check box	None
Print All	Hard copies of all selected forms are printed.	Hard copies of all selected forms are printed.	Hard copies of all selected forms are printed.
Electronically Deliver Only	The selected forms are saved as PDF and sent by e-mail and/or fax.	Nothing	Nothing
Print/PDF for Print Delivery Option	Nothing	The selected forms are saved as PDF and printed as hard copies.	The selected forms are saved as PDF and printed as hard copies.
Print/PDF All and Electronically Deliver	The selected forms are saved as PDF, printed as hard copies, and sent by e-mail and/or fax.	The selected forms are saved as PDF and printed as hard copies.	The selected forms are saved as PDF and printed as hard copies.
Print/PDF or Electronically Deliver	The selected forms are saved as PDF and sent by e-mail and/or fax.	The selected forms are saved as PDF and printed as hard copies.	The selected forms are saved as PDF and printed as hard copies.
Print/PDF All	The selected forms are saved as PDF and printed as hard copies.	The selected forms are saved as PDF and printed as hard copies.	The selected forms are saved as PDF and printed as hard copies.
PDF All	The selected forms are saved as PDF.	The selected forms are saved as PDF.	The selected forms are saved as PDF.

The following screen will appear after the invoices have been electronically delivered confirming Successful attempts.
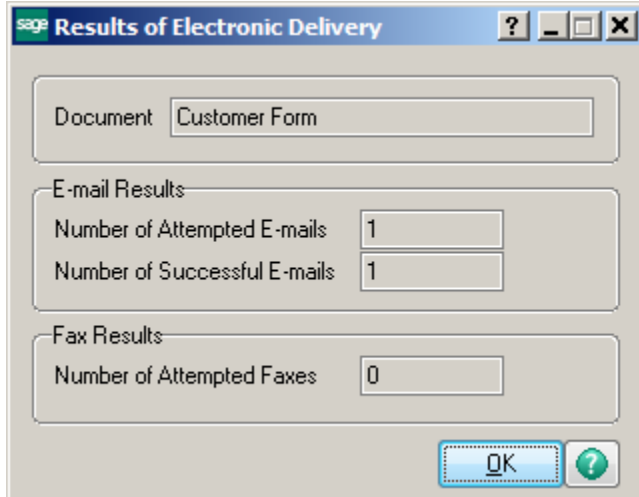
Print your Sales Journal and update as normal.

The invoice can be viewed from the Paperless Office Customer Viewer or within the Customer on the Invoices tab.