Table Of Contents

ePaperless Office Overview

The ePaperless Office was developed to increase customer relations between the Datatron system user and their customer using internet technology to decrease operating expenses with document imaging. Their customers will have the ability to access any invoice (with signature capture) and print, email or fax via internet anytime, 24 hours a day, 7 days a week! They can see instantly online what part numbers were purchased and how many times they were ordered. They will also be notified automatically via email when their monthly statement is ready to be viewed in the ePaperless Office.

When set up, finalized invoices are instantly uploaded via the internet to Autologue's eOffice server. Optionally, invoices can be printed on a laser printer formatted with a bar code. A signed, barcoded invoice can then be scanned and stored and eOffice will automatically match it to the original by reading its bar code. Non-barcoded invoices can also be scanned and stored with the only difference being in that the user would have to manually enter in the invoice number to assign the scanned invoice. Statement information is automatically uploaded when printed statements are generated. An email notification explaining that their statement is ready to be viewed will be sent to all customers that input an email address into eOffice.

Getting Started

Upon subscribing to ePaperless Office, Autologue will assign you a unique Store ID if you are not already using ePartConnection. If using ePart, a location's ePart Store ID will be used for eOffice.

Because newly-updated programs must be placed on your system and choices must be made regarding how to properly set up eOffice (based on the design of your business), someone from Datatron will assist you in setting up eOffice so everything properly.

If any questions or concerns (especially those relating to your Datatron system), please contact the Datatron main office at 800-747-9611.

Customer File – Password Setup

In order for a customer to be able to access eOffice, they must use a password. Passwords are maintained on the Datatron system using Customer Extra Record #10: Dealer Terminal Password. What you enter here is what eOffice will use as a password for the customer. Dealer Terminal Password is set on the 2nd screen of Customer Master File Maintenance (AR-1-1-2 or OE-15-1-2).

Uploading Invoices Through Point Of Sale

Once everything has been set up, all finalized cash/charge sale invoices generated through point of sale and/or through the Background Processor (in Warehouse logs) will now be automatically uploaded to ePaperless Office via the internet. This process is transparent to the point of sale user.

Scanning Signed Invoices Setup

Optionally, the signed laser formatted bar code invoice can be scanned on a windows PC and ePaperless Office will automatically match it to the original by reading its bar code. Additionally, non-barcoded invoices can also be scanned and stored with the only difference being in that the user would manually enter in an invoice number to assign the scanned invoice. The scanning must be setup on a windows PC and have Autologue's "Invoice Uploader" windows executable program setup and running.

Displayed below is the Invoice Uploader program window that must be running on a PC connected to the internet:
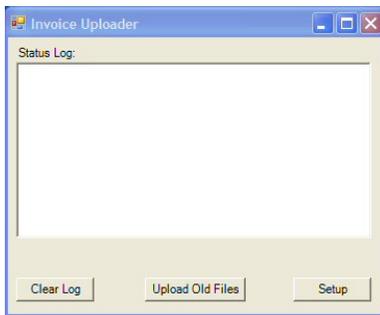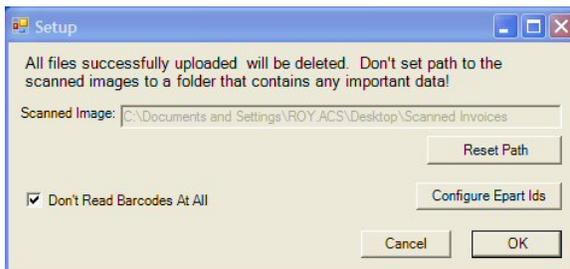

Invoice Uploader Program Window

As invoices are scanned and uploaded into the ePaperless Office database, the *Status Log* section of the screen will display a log of each file as its being uploaded. To clear the status log, left click on the *Clear Log* button.

Invoice Uploader Setup
To setup where the scanned images are to uploaded from, left click on the *Setup* button found on the bottom of the Invoice Uploader program window. The following window will be displayed:

Invoice Uploader Setup Window

Ignoring Bar Codes
If you will be scanning regular invoices that are printed witout bar codes, left click on the *Don't Read Barcodes At All* check box.

Scanned Images Path
Left click on the *Reset Path* button, select the folder where your scanned images are being saved to and then left click on the *OK* button when finished.

Setting Up Your Epart Ids

To setup your ePart ID's assigned to your single or multiple stores, left click on the *Configure Epart Ids* button. The *Epart Setup* window will be displayed:
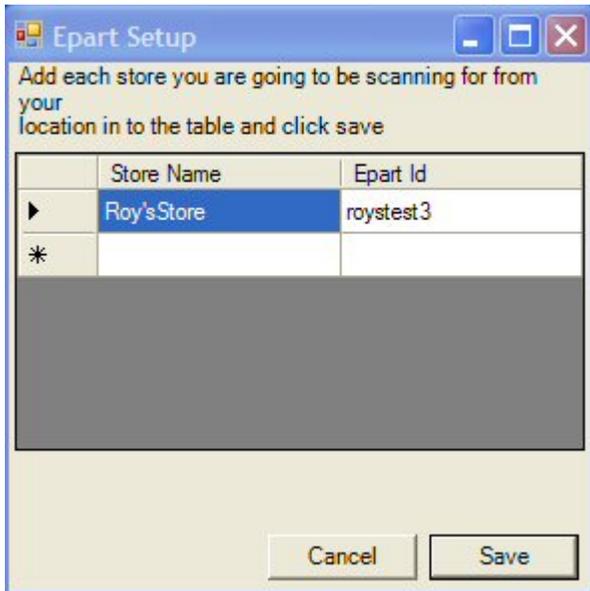
Configure Epart Ids Setup Window

Left click within the blank space column under the *Store Name* heading and enter your store name. Then left click within the blank space column under the *Epart Id* heading, enter your epart ID that was assigned for the entered store name and then left click on the *Save* button when finished. If you have multiple stores, multiple entries will need to be added.

Uploading Statements

When statements are generated, any customer within the printed range that has an open balance or that had activity during the current month will have their statement data automatically uploaded through the internet into the ePaperless Office database. This process is transparent to the user. Optionally, if the customer has an email address setup, an email notification will be sent to alert the customer that a statement is ready to be viewed.

Store Mode Login

You have the ability to login to your ePaperless Office account and view any of the information uploaded from all of your customer accounts. This is called the store mode login. To login with this mode, enter the following URL within your internet browser: http://eoffice.epartconnection.com/wplogin2.aspx and the following screen will be displayed:

Enter your store's ID, password and then left click on the *Login* button. The user will now be logged into the store mode admin options screen as shown:

Within this screen, management has the ability to perform the following functions:

- Select a specific customer number to view information for
- Find/View a specific invoice
- Show invoices that are missing scanned copies
- Delete all invoice for customer

Select Customer
To select a specific customer to view information for, left click within the *Select Customer:* field, enter in the customer number and then left click on the *Select* button. The screen will now display invoice recall screen for the entered customer number.

Find Invoice
To select a specific invoice to view information for, left click within the *Find Invoice:* field, enter in the invoice number and then left click on the *Find* button. The screen will now display the invoice information.

Show Invoices That Are Missing Scanned Copies
To display a list of invoice numbers that are missing scanned copies, left click within the *From:* field, enter in a different starting date or leave the default date. Left click within the *To:* field, enter in a different ending date or leave the default date and then left click on the *Show* button. If there were invoices found within the date range that were missing scanned copies, the screen will display a listing of the invoices.

Deleting All Invoices For A Customer
To select a specific customer to delete all invoices for, left click within the *Delete all Invoices for Customer #:* field, enter in the customer number and then left click on the *Delete* button. The screen will now display the following:
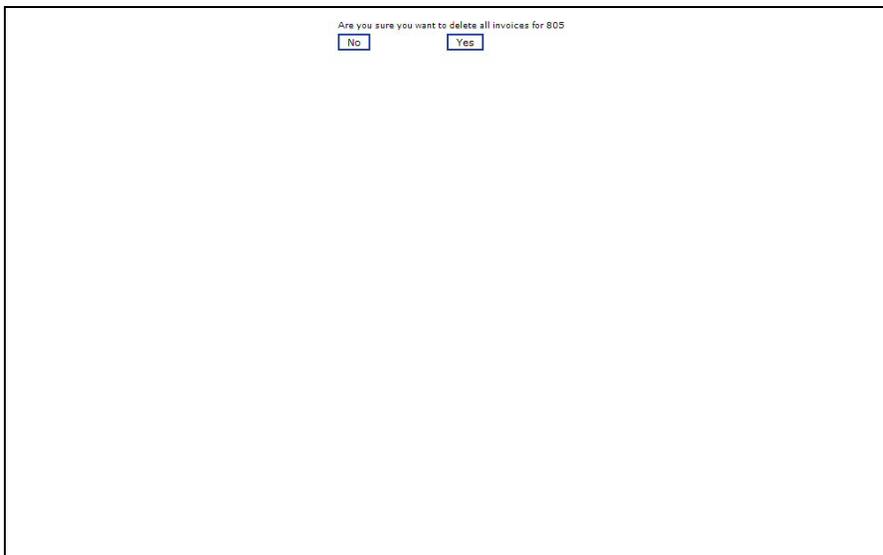
Left click on the *Yes* button and all the invoices for the entered customer number will be deleted.