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ePaperless Office Overview

The ePaperless Office was developed to increase customer relations between the AIS 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 within the ePaperless Office.

When setup, finalized invoices are instantaneously uploaded through the internet into AIS's eOffice server. Optionally, invoices can be printed on a laser printer formatted with a bar code. A signed bar coded invoice can then be optionally 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 now 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 have setup an email address.

Step 1 – Getting Started – System Options

Upon subscribing to ePaperless Office, AIS will assign you a unique store ID. This ID must be setup in the AIS ePart/eOffice configuration screen.

Setting the Store ID and host name in AIS

- From the AIS main menu, enter **6** (supervisory)
- From the supervisory menu, enter **J** (configuration)
- From the configuration menu, enter **"zx"** and you will see the following screen:

```

** AISBOX **

Autologue-AIS Version A7.006 - MAR 16 2007 02:12P - Group A Term TERRYS

ePart, eOffice and eDelivery setup

1) ePart / eOffice
2) eDelivery

Enter Selection or F2 to Exit:
```

- From the eOffice menu, enter **1** and you will now see the following screen:

```
AUTOLOGUE CENTRAL :
STORE ID..... terry
HOSTNAME (etc/hosts)..... epartconnection.com
PORT (ALWAYS 33792)..... 33792

ePartConnection (1=Invoice, 2=Hold, 3=Check Qty)..... 2
  1 = Always to Invoice
  2 = Always to Pick Ticket (Hold)
  3 = Invoice if sufficient Qty else Hold ticket

Enable eOffice (1 = ENABLE, 2 = DISABLE)..... 1

eOffice Laser Barcode Printer Name (printOffice.bat)..... prt2

F2 TO EXIT
```

- With the cursor positioned on **STOREID**, enter the assigned **ID** and press <enter>
- With the cursor positioned at **HOSTNAME**, enter **epartconnection.com** and press <enter>
- With the cursor positioned at **PORT**, enter **33792** if not already set, and press <enter>.
- The new A7.006 software upgrade allows for ePart invoice options, if you are using ePartconnection you can choose to generate an invoice, hold ticket, or have it do either one based on quantities. Press <enter>
- With the cursor positioned at enable eOffice, enter **1** and press <enter>
- If you are printing laser invoices with barcodes, the network printer number would be entered here. This will be assigned by an AIS customer service representative. Please call 1-800-722-1113 for assistance with this option.
- Press **F2** to return to the main menu

Step 2 – Setting A Customer Password Within The AIS System

To allow your customers to view their invoices and statement information, a password must be set within each customer's record.

- From the AIS main menu, enter **3** (customer/billing)
- From the Customer menu option, enter **1** (customer input)
- Enter a customer number and press <enter> and the following screen will be displayed:

```

CUST#: 100
BILL TO: BIG BOBS                                SHIP TO:
        ADDRESS 1
        ADDRESS 2
        ADDRESS3 99999-9999
        PHONE 16261234566                        PHONE
        FAX 9.(714)5223565                      FAX @PONUMBER
PAY-TYPE      PR-SCH D2      PASSWORD PASSWORD      BALANCE      10065.51
ON-ACCOUNT    TAX-SCH 2      CONTACT CONTACT NAME      FUTURE        0.00
STATEMENT     LIST-GM      0.00      RESALE            CURRENT       397.21
SHOW-DISC Y   CORE-ID      0.00      SHIPINST SHIPPING INST      30 DAYS       2529.22
CLASS C       SALESMAN 111      SHIPCODE          60 DAYS       55.01
NO-CORE       INVPRT          MAX-YTD 7448.11          90 DAYS       161.84
TAXABLE       ASK-YMM          MAX-LYR 7388.39          120 DAYS      6922.23
PO-REQ        TENDERED        SINCE 12-27-01          CORE-BAL      1219.80
STORE         CODES          LIMIT 25000.00
LABEL         MECH-REQ        DISCOUNT#2 0.00      PAYM      100.00 12-12-06
AR-TERMS E    COREGROUP      FINANCE-RATE 1.50      PAYM      100.00 12-06-06
INV-TERMS E   DUNNING 1      DISC-10-DAYS 2.00      INV        5.33 03-14-07
NOTE1: NOTE 1 SHOWS HERE                                INV        5.33 03-07-07
NOTE2: NOTE 2 SHOWS HERE                                STATE     7448.11 12-31-06
BILLING METHOD: CASH ACCOUNT                              STATE     7285.40 11-30-06

F1=ENTER CUSTOMER#  F2=EXIT  F3=DELETE  F5=RESTORE  F6=SALES-HISTORY

```

- In the center column there is a **PASSWORD** field, this is where you would enter a password so your customers can access their invoices and statements on-line. If they are an existing ePartconnection customer this password will already be set.

A new STATEMENT NOPRT field has also been added to the *CustomerFlags* screen(**option 3 and 3 again**) This tells the statement program whether or not to print a paper copy of the statement for the customer. All the customer records are defaulted with a value of N (blank). As your customers become more comfortable with using the internet to view their statement, you can later set this field to **Y** (yes) no statement print.

CUSTOMER FILE MAINTENANCE		PAY-TYPE		NO-CORE		TENDERED		OPEN ITEM
		ON-ACNT		PO-REQ		ASK-YMM		
		STATEMENT		INVPR		CLASS		
CUST#	NAME		NOPRT		LABEL			
0		Y	M	<input checked="" type="checkbox"/>			C	
00001	MINE	Y	M				C	0
0001	ME	Y	M				C	0
001		Y	W				C	0
025	TEST CASE	C	Y	W			C	0
0999		C	Y	M			C	0
10	ME AGAIN		Y	M			C	0
100	BIG BOBS						C	0
1000	WALK IN		Y	M			C	0
1002	TESTER		Y	W			C	0
1003	TEST ME		Y	W			C	0
101	BIG BOBS		Y	M			M	0
1010	PROMISED LAND						C	
1012	RESERVE AUTO		Y	M			C	0
102	YFTGJETG.KFGEKHV		Y	M			C	0
1099	TEST GUY		Y	M			C	0

F1=FindF2=ExitF3=DeleteF5=Repeat

Step 3 – Uploading Old Invoices Into eOffice

You have the option to upload 90 days of invoices stored on your AIS system into the ePaperless Office database. From the main menu enter option 3(customer/billing), enter option 6 (customer reports), enter option 6 (recaps), enter option 9(export menu), enter option 6(check upload to eOffice) and press <enter> when complete.

Uploading Invoices Through Point Of Sale

All finalized cash/charge sale invoices generated through invoicing will now be automatically uploaded through the internet into the ePaperless Office database. This process is transparent to the point of sale user.

Laser Printed Invoices

Optionally, the latest AIS software upgrade, A7.006, can be setup to print laser invoices on plain perforated paper. Two copies of the invoice print on a single sheet of paper (top/bottom). The laser formatted invoice prints a bar code on the bottom of the last page.

Roy's Auto Parts
1234 Any Street
Riverside, CA 92501
(909) 781-4412
Hours 7AM - 6PM Mon-Fri, 8AM - 5PM Sat

BENS AUTO REPAIR INC.
10-74 BEACH 22 STREET
FAR ROCKAWAY N.Y. 11691
B6997 337-6997 BERNN

Cust#: 433 Date: 03/16/07
Inv#: 539-1 Time: 07:37:01
Doc#: Type:**CHARGE**
Po #:1882

Qty	Line	Part Number	Description	Core	List	Cost	Extension	Tax
1	TTI	SS200T	SOLENOID	0.00	54.07	19.66	19.66	N
1	FRA	PH30	FULLFLOW LUBE SPINON	0.00	12.53	6.64	6.64	N
6	GTx	30	MOTOR OIL	0.00	2.25	1.65	9.90	N
CUSTOMER NEEDS DELIVERY BY 2PM!!								
1	DEL	1	DELIVERY CHARGE	0.00	6.00	2.00	2.00	N
9				0.00	2.00	0.00	74.85	38.20
Total Units				Misc	Freight	Labor	Misc	Core
							List	Non-Taxable
							Taxable	Total Tax

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Received by: _____

Pay This Amount
38.20

Roy's Auto Parts
1234 Any Street
Riverside, CA 92501
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Hours 7AM - 6PM Mon-Fri, 8AM - 5PM Sat

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6	GTx	30	MOTOR OIL	0.00	2.25	1.65	9.90	N
CUSTOMER NEEDS DELIVERY BY 2PM!!								
1	DEL	1	DELIVERY CHARGE	0.00	6.00	2.00	2.00	N
9				0.00	2.00	0.00	74.85	38.20
Total Units				Misc	Freight	Labor	Misc	Core
							List	Non-Taxable
							Taxable	Total Tax

Page 1 of 1

Received by: _____

Pay This Amount
38.20

Sample Laser Invoice

Scanning Signed Invoices Setup

Optionally, the signed laser formatted bar code invoice can be scanned on a Windows PC and the ePaperless Office will automatically match it to the original by reading its bar code. Additionally, non-bar-coded 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.

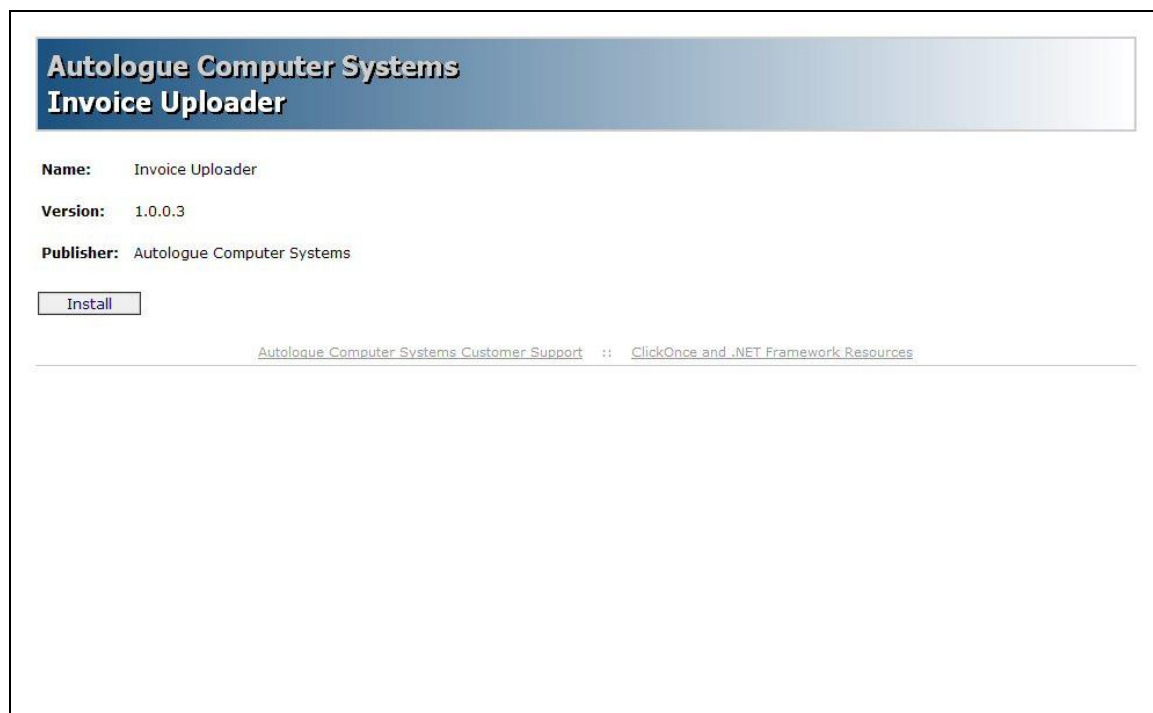
- ☞ **Note:** The scanning must be setup using any model scanner on a Windows PC loaded with Windows 2000, XP or Vista. Your scanning program must be setup to save images as JPEG (.jpg) files, and scanned at a maximum of 300 DPI (dots per inch) using the color (photo) mode.

You will need to install Autologue's *Invoice Uploader* windows executable program. This can be downloaded and installed entering in the following URL within the Internet Explorer browser:

<http://www.autologue.com/InvoiceUploader/publish.htm>

- ☞ **Note:** To install Autologue's *Invoice Uploader* windows executable program, you must use the Internet Explorer browser!

The screen will display the following:



- Left click on the *Install* button.

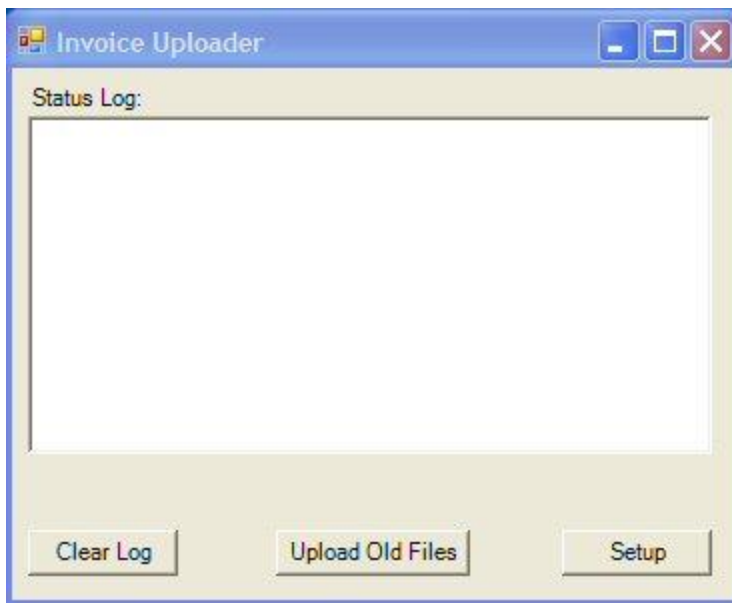
The screen will display a window that will perform system requirement verification of the PC.

An *Application Install – Security Warning* window will pop up and display the following:



- To install the application, left click on the *Install* button.

The *Invoice Uploader* program will now be installed and will be opened as shown:



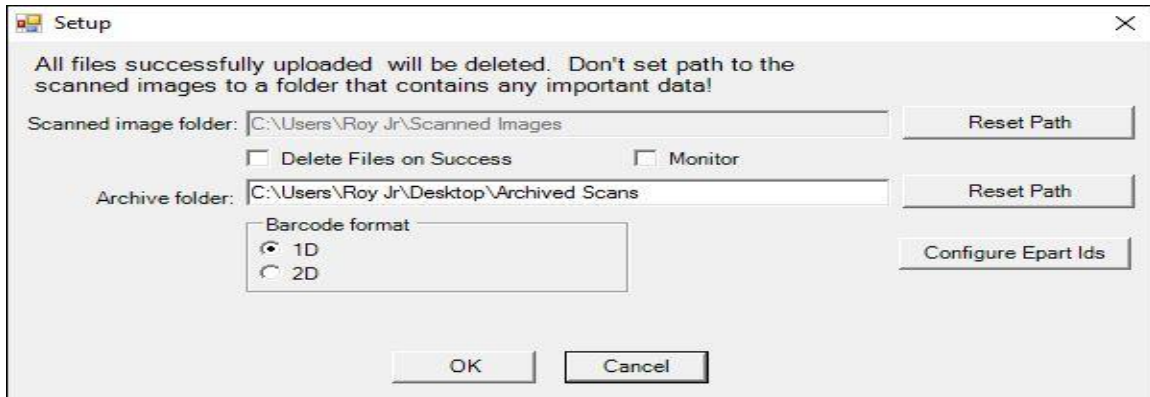
Invoice Uploader Program Window

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

Scanned Images Folder

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

Delete Files On Success

If you want to delete the scanned images after the scanned image has been uploaded, left click on the *Delete Files on Success* check box. Otherwise the scanned images will remain within the scanned images folder after being uploaded.

Monitor

To have the program automatically monitor and upload any scanned file that is new to the scanned image folder, left click on the *Monitor* check box. If unchecked, the user has to manually upload the scanned images by clicking on the *Upload Old Files* button within the *Invoice Uploader* program.

Archive Folder

Left click on the *Reset Path* button to the right of the *Archive folder* field, select the folder where your scanned images are to be archived to and then left click on the *OK* button when finished.

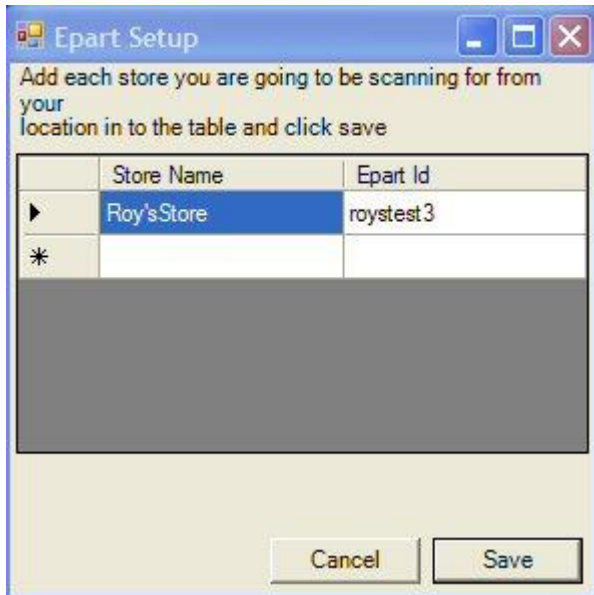
Barcode Format

By default the barcode format is set to 1D (one dimensional). If the scanned image file contains a two dimensional barcode, click on the 2D field.

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

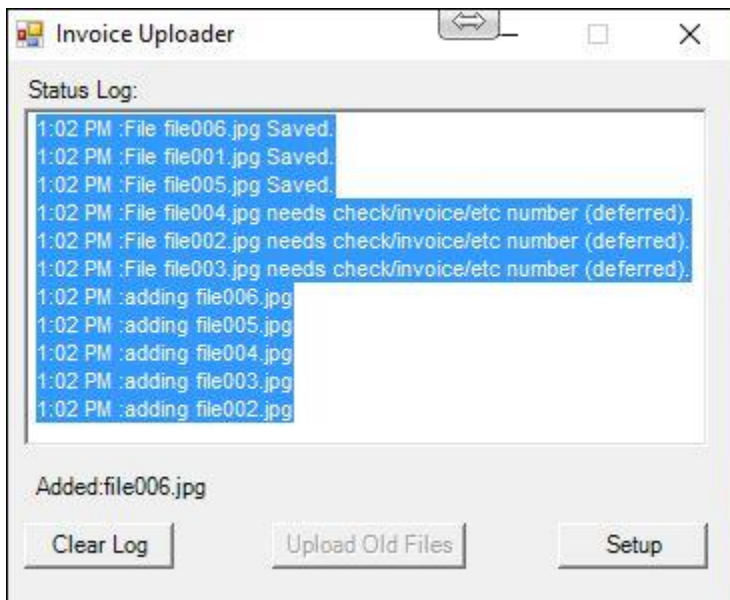
- Left click within the blank space column under the *Store Name* heading and enter your store name. Then left click within the blank space column under the *Epart Id* heading, enter your epart ID that was assigned for the entered store name and then left click on the *Save* button when finished.

If you have multiple stores, multiple entries will need to be added.

Uploading Scanned Invoices

- To upload scanned invoices that are residing within the scanned images folder, left click on the *Upload Old Files* button found on the bottom of the Invoice Uploader program window.

The *Status Log* window area of the screen will reflect whether the uploading of the scanned image files was successfully uploaded or not:



Files that have *Saved* displayed besides them indicate they were successfully uploaded into eOffice. Files that have *needs check/invoice/etc number (deferred)* displayed besides them indicate they were not successfully uploaded into eOffice.

Deferred Files

When the *Invoice Uploader* program is unable to process the bar code of a scanned file, the file will be deferred. A *Which Invoice Did You Scan?* pop up window will be displayed for each deferred scanned invoice file:

The screenshot shows a window titled "Which Invoice Did You Scan?". It contains two identical scanned invoice documents. Each invoice has a barcode at the top and a table of items below. The table has columns for Item, Description, Quantity, Unit, Price, and Total. The first invoice is for "DELIVERY INVOICE" and the second is for "DELIVERY INVOICE". The window also includes fields for Customer Number, Invoice Number, and Date, and buttons for Save, Cancel, and Save Scan as Check.

- You would then have to enter in the invoice number, customer number, select the invoice date and then click on the *Save* button to have the deferred invoice uploaded into eOffice.

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:

Store's Counter Login

Store Id:

Password:

- Enter your store's ID and password and then left click on the *Login* button.

The user will now be logged into the store mode admin options screen as shown:

Admin Options	Invoice Recall	Statement	Current Balances	Payments	Setup	eDelivery Tracking System	Safety DataSheets	Online Help	Logout
Select Customer Number: <input type="text"/>					<input type="button" value="Select Cust"/> <input type="button" value="Edit Cust"/> <input type="button" value="Search"/>				
Search For Invoice Number: <input type="text"/>									
Show Scanned Invoice for Customer: <input type="text"/>					<input type="button" value="Show"/>				
Show Scanned Invoices for Flagged Customers: <input type="text"/>					<input type="button" value="Show"/>				
Show Invoices Missing Scanned Copies: <input type="text"/>					<input type="button" value="Show"/>				
Invoice Summary Report: <input type="text"/>					<input type="button" value="Show"/>				
Delete all Invoices & Statements for Customer #: <input type="text"/>					<input type="button" value="Delete"/>				
Change Customer Number: <input type="text"/>					<input type="button" value="Change"/>				
<input type="button" value="Display Customers with Statements"/> <input type="button" value="Display Your Customer's Epaperless Office Usage"/> <input type="button" value="Set an Online Statement Message"/> <input type="button" value="Setup your Statement Emails"/> <input type="button" value="Setup your Invoice Emails"/> <input type="button" value="Send an Email to your Customers Now"/> <input type="button" value="Export Customer Emails"/>									

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

- Select a specific customer number to view information for, flag and set and email address for
- Find/View a specific invoice
- Show scanned invoices for a specific customer by date range
- Show invoices that are missing scanned copies by date range

- Generate an invoice summary report by date range
- Delete all invoices & statements for a specific customer number
- Displays customers with statements
- Display your customer's ePaperless office usage
- Set an online statement message
- Setup your statement emails
- Setup your invoice emails
- Send an email to your customers
- Export your customers email addresses

Select Customer

- To view specific information within the *Invoice Recall*, *Statement*, *Current Balance* or *Payment* tabs, you must first select a customer account as described:
- 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 the *Invoice Recall* screen for the current customer being viewed and the customer account number will be displayed next to the *Viewing Customer:* field that is displayed in the upper right hand portion of the screen.

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 Scanned Invoices For A Customer

- To display a list of scanned invoices by date range for a specific customer, left click within the *Customer Number:* field and enter in the customer number.
- Left click within the *Date From:* field, enter in a different starting date or leave the default date.
- Left click within the *Date To:* field, enter in a different ending date or leave the default date and then left click on the *Show* button.

If there were scanned invoices found within the date range, the screen will display their scanned invoice images.

Show Invoices That Are Missing Scanned Copies

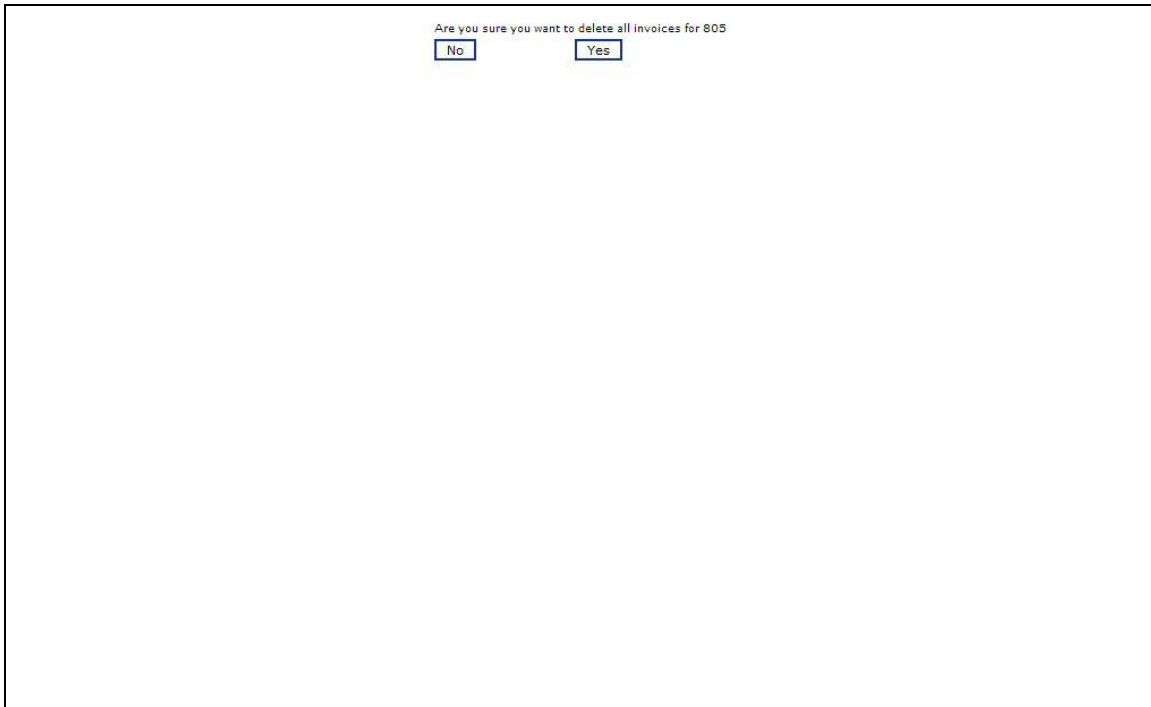
- To display a list of invoice numbers that are missing scanned copies, left click within the *Date From:* field next to the *Show Invoices Missing Scanned Copies* field, enter in a different starting date or leave the default date.
- Left click within the *Date To:* field, enter in a different ending 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:

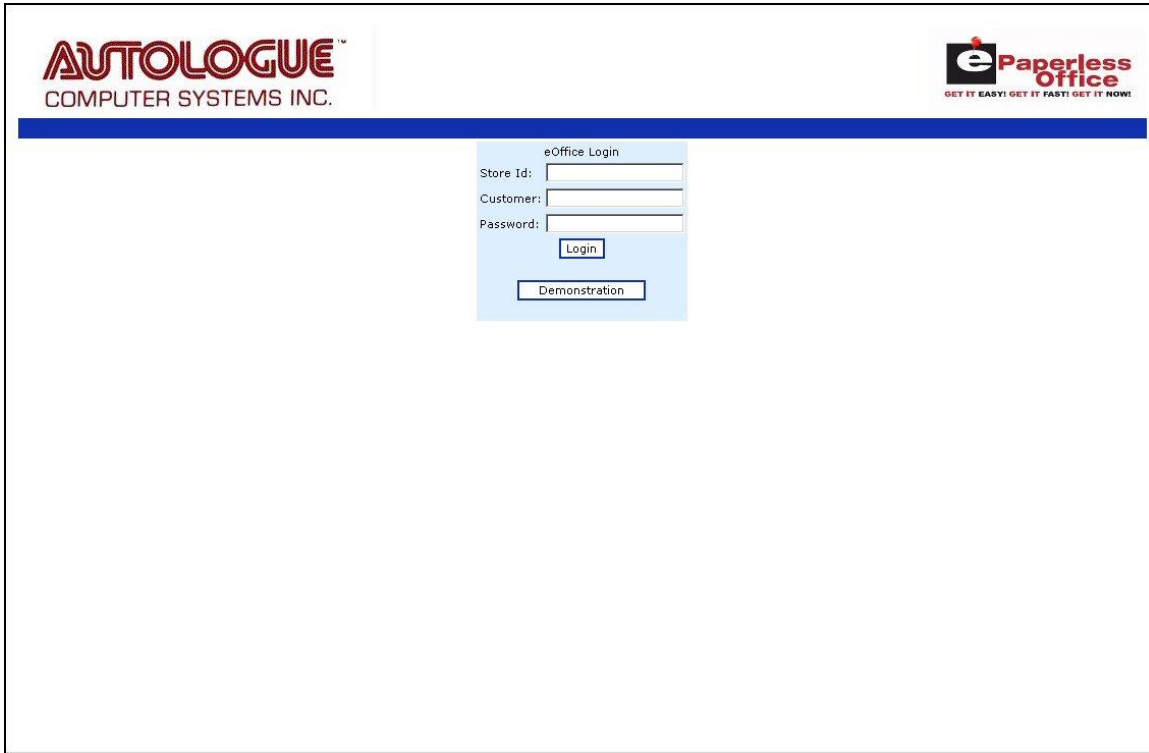
A screenshot of a web application's confirmation dialog box. The dialog box is a rectangular window with a thin black border. At the top center, it contains the text "Are you sure you want to delete all invoices for 805". Below this text, there are two small, rectangular buttons. The button on the left is labeled "No" and the button on the right is labeled "Yes". Both buttons have a light blue background and a thin black border.

- Left click on the *Yes* button and all the invoices for the entered customer number will be deleted.

Your Customers Login

Your customers have the ability to login into their ePaperless Office account and view all of their invoices, payments, statements and can even find out their current balance.

- The customer will need to enter the following URL within their internet browser:
<http://eoffice.epartconnection.com> and the following screen will be displayed:



- They would enter your store's ID, their customer number and password and then left click on the *Login* button.

The customer will now be logged into their account as shown:

GAGE BLOCK SPECIALTIES

Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714-522-3551
714-522-3565

ePaperless Office
GET IT EASY! GET IT FAST! GET IT NOW!

Welcome!
AMERICAN ACRYLIC

Invoice Recall | Statement | Current Balances | Payments | Setup | eDelivery Tracking System | Online Help | Logout

Search by Invoice Number: Search Search by Reference Number: Search
 Search by Part Number: Search Search by PO Number: Search
 Search by Manufacture Code: Search Search by Description (& ACIS PO#): Search
 Search by Selling Price: Search Show Signed Invoices for Month/Year: Search

2014 2013 2012 2011 2010 2009 2008 2007
 Jan Feb Mar Apr May Jun Aug
 No invoices for Sep of 2014
 Previous Next

When the customer is logged in, this portion of the screen will display their customer name.

Within this screen, your customer has the ability to perform the following functions through the various screen tabs:

- View past invoices
- View past statements
- View their current balance
- View past payments
- Setup their email address for receiving statements
- View their eDelivery's
- View online help information