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ePaperless Office Overview

The ePaperless Office was developed to increase customer relations between the Autologue system user and their customers (dealers, installers, commercial accounts) 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 Autologue'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 bar-coded 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. Optionally with an ePad signature capture device, signed laser invoices are automatically be uploaded into eOffice without having to be scanned. 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 have setup email addresses within eOffice.

Step 1 – Setting The Uservar Options

Upon subscribing to ePaperless Office, Autologue will assign you a unique store ID if you are not already using ePartConnection. This ID must be setup in the **AC_StoreId** uservar option. A new **AC_Epart_Office** uservar option must also be enabled with a value of **1** for the ePaperless Office to function. If an ePad signature capturing device is going to be used, the **AC_EPad** uservar option must be enabled with a value of **1**. We also recommend setting the **RepDaysMax** uservar option to at least **90** (90 days worth of reprintable invoices). The ePaperless Office verifies all uploaded invoices against the reprintable invoices stored on your Autologue management system.

- From the *Autologue Main Menu*, enter **13** (*System Commands*) and press **<Return>**.
- From the *System Commands Menu*, enter **9** (*Specify System Setup Options*) and press **<Return>**.
- With the cursor positioned on the **FILE** menu option, press **<Return>**.
- Using the down arrow key, position the cursor on the **EDIT** menu option and press **<Return>**.
- Using the down arrow key, position the cursor on the **AUTOLOGUE_CENTRAL** menu option and press **<Return>**.

Setting The AC_Epart_Office Uservar Option

- Using the down arrow key, position the cursor on the **AC_Epart_Office** menu option and press **<Return>**.

- Press the **<F3>** (*Activate/Edit*) key and cursor will be positioned under the *Value* heading.
- Enter **1** and press **<Return>**.
- Press the **<F10>** (*Save*) key.
- With the cursor positioned at the **Are You Sure?:** prompt, enter **Y**.

Setting The AC_StoreId Uservar Option

If you are an existing ePartConnection customer, skip down to the *Setting The RepDaysMax Uservar Option* section. Otherwise, perform the following:

- Press the **<F5>** (*Section*) key and position the cursor on the **AUTOLOGUE_CENTRAL** menu option and press **<Return>**.
- Using the down arrow key, position the cursor on the **AC_StoreId** menu option and press **<Return>**.
- Press the **<F3>** (*Activate/Edit*) key and cursor will be positioned under the *Value* heading.
- Enter the store ID number assigned from Autologue and press **<Return>**.
- Press the **<F10>** (*Save*) key.
- With the cursor positioned at the **Are You Sure?:** prompt, enter **Y**.

Setting The AC_EPad Uservar Option

If you will be using an ePad signature capturing device, perform the following:

- Press the **<F5>** (*Section*) key and position the cursor on the **AUTOLOGUE_CENTRAL** menu option and press **<Return>**.
- Using the down arrow key, position the cursor on the **AC_EPad** menu option and press **<Return>**.
- Press the **<F3>** (*Activate/Edit*) key and cursor will be positioned under the *Value* heading.
- Enter **1** and press **<Return>**.
- Press the **<F10>** (*Save*) key.
- With the cursor positioned at the **Are You Sure?:** prompt, enter **Y**.

Setting The RepDaysMax Uservar Option

- Press the **<F5>** (*Section*) key and position the cursor on the **REPRINT** menu option and press **<Return>**.
- Using the down arrow key, position the cursor on the **RepDaysMax** menu option and press **<Return>**.
- Press the **<F3>** (*Activate/Edit*) key and cursor will be positioned under the *Value* heading.

- Enter at least a value of 90 or more and press **<Return>**.
- Press the **<F10>** (*Save*) key.
- With the cursor positioned at the **Are You Sure?:** prompt, enter **Y**.
- Press the **<F11>** key three times and with the cursor positioned at the **Are You Sure?:** prompt, enter **Y**.
- Press the **<F11>** key to exit back to the *Autologue Main Menu*.

Step 2 – Setting Passwords For Customers

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

- From the *Autologue Main Menu*, enter **3** (*Customer/Vendor File*) and press **<Return>**.
- With the cursor positioned at the **ENTER NAME OR NUMBER** prompt, enter the customer number for the dealer/installer and press **<Return>**.
- With the customer's information now being displayed, press the **<F12>** key and enter a password within the *Customer Password* pop up window and press **<Return>**.

CUST 428		CUSTOMER/VENDOR UPDATE	
NAME BEACH PERFORMANCE	ST CD 0	TAX% 10.123	POP% DISCNT
BILL 73-02 BEACH CHANNEL DRIVE	V/C C	SLSM BKORD Y	EXC=X %
BILL ARVERNE, N.Y. 11692	SRV CHG% 0.00	COD N 0	100.00
BILL JOE	SRV TOT 0.00	STMT Y 1	100.00
TEL 718-318-4852	DAYS 0	NET% 0.00	2 100.00
LAST PMT 0.00	CR	MIT 0	3 100.00
RECEIPTS 0.00	PO R		4 100.00
CURR BAL 0.00	MTHS	MATRIX 406	5 100.00
OPEN BAL 0.00		LIST PRICE	5 100.00
30 DAYS 0.00	60 DAYS	VENDOR	
	PRICE LEVEL BY	ENTER 0,1,2,3,4, OR 5	
0	10 20	50	60
1111111111	1111111111	1111111111	1111111111
70		110	120 130
1111111	Customer Password:	1	1111 1111111111 1111111111 1111111111
140	BEACH987		180 190 200
1111111		1111	1111111111 1111111111 1111111111
210	220 230 240	250	TXBL SALES 0.00
1111111111	1111111111	1111111111	3333333333 111110 TAX COLLTD 0.00
F1 NEW CUSTOMER	F5 SHOW PAYMENT DETAIL	TAX ID 113239270	
F2 SALES ANALYSIS	F6 ENTER P/O NUMBER	F9 SHOW OTHER PHONE	
F3 SHOW STATEMENT DETAIL	F7 EXCEPTION PRICING	F10 RECORD CHANGES	
F4 SHOW COMMON CUSTOMERS	F8 SHOW OTHER ADDRESS	F11 EXIT PROGRAM	

A new *STMT* field has also been added to the *Customer/Vendor Update* screen. When printing statements, this defines whether or not to print a paper copy of the statement for the customer. All the customer records are defaulted with a value of **Y** (yes). As your customers become more comfortable with using the internet to view their statement, you can later set this field to **N** (no).

- Press the <F10> (*Record Changes*) key to save the entered password.

Repeat this process for each of the customers you want to allow to view their invoices and statement information.

Step 3 – Uploading Old Invoices Into eOffice

You have the option to upload all your existing reprintable invoices stored on your Autologue system into the ePaperless Office database. This is accomplished by going to the *Utility Menu 7*, selecting **9. EPART CONNECTION**, then select the **SEND MISSING INVOICES & STATEMENTS TO EPART-OFFICE** menu option within the *EPART CONNECTION* menu.

Uploading Invoices Through Point Of Sale

All finalized cash/charge sale invoices generated through point of sale 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, a new point of sale version was introduced and 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) or optionally on two separate pieces of plain paper. The laser formatted invoice prints a bar code on the bottom of the last page. A signed signature can also be printed on the invoice when an ePad signature capturing device is setup on the system.

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 Inv#: 539-1 Doc#: Po #:1882	Date: 03/16/07 Time: 07:37401 Type:**CHARGE**
---	--	--	---

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		
				0.00	74.85	38.20	0.00	0.00		
Total Units				Labor	Misc	Core	List	Non-Taxable	Taxable	Total Tax

Page 1 of 1

Received by: _____

Pay This Amount
38.20



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 Inv#: 539-1 Doc#: Po #:1882	Date: 03/16/07 Time: 07:37401 Type:**CHARGE**
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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		
				0.00	74.85	38.20	0.00	0.00		
Total Units				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.

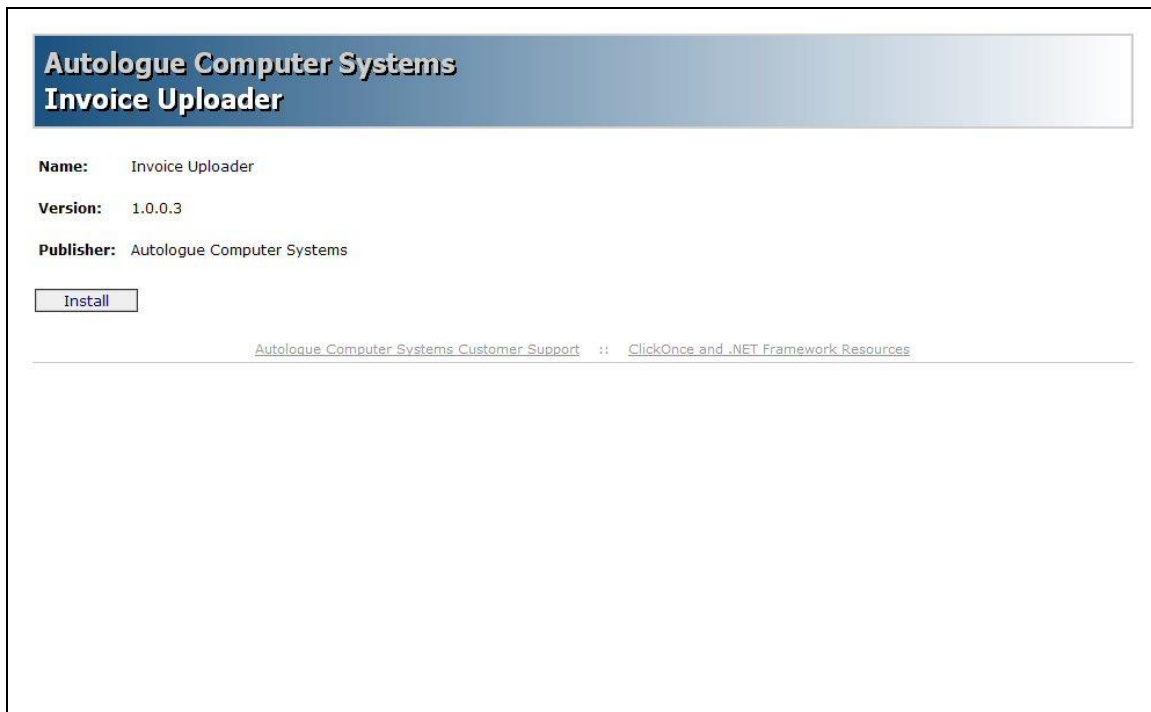
- ☞ **Note:** The scanning must be setup using any model scanner on a Windows PC loaded with Windows 2000, XP or Vista. Your scanning program must be setup to save images as JPEG (.jpg) files, and scanned at a maximum of 300 DPI (dots per inch) using the color (photo) mode.

You will need to install Autologue's *Invoice Uploader* windows executable program. This can be downloaded and installed by 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.

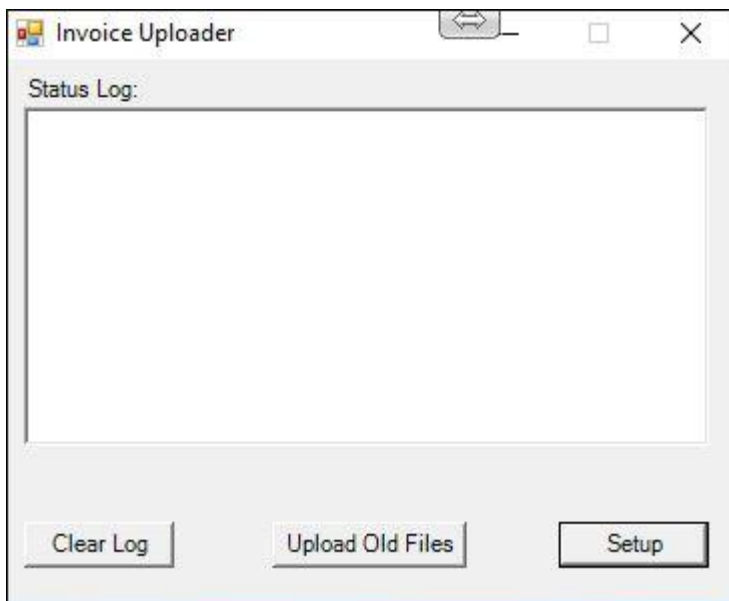
The screen will display a window that will perform a system requirement verification of the PC.

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:



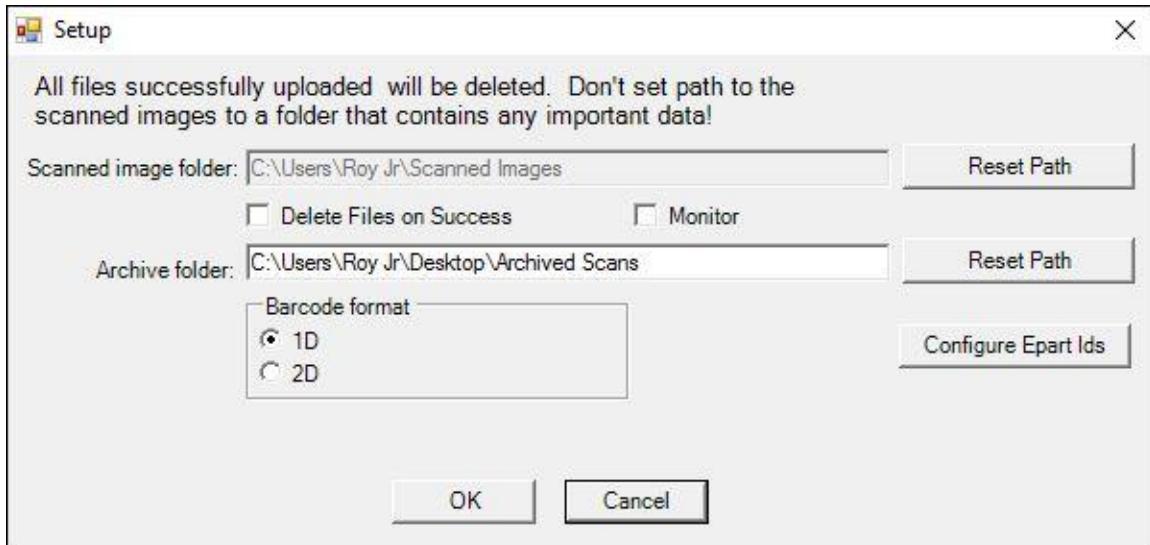
Invoice Uploader Program Window

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.

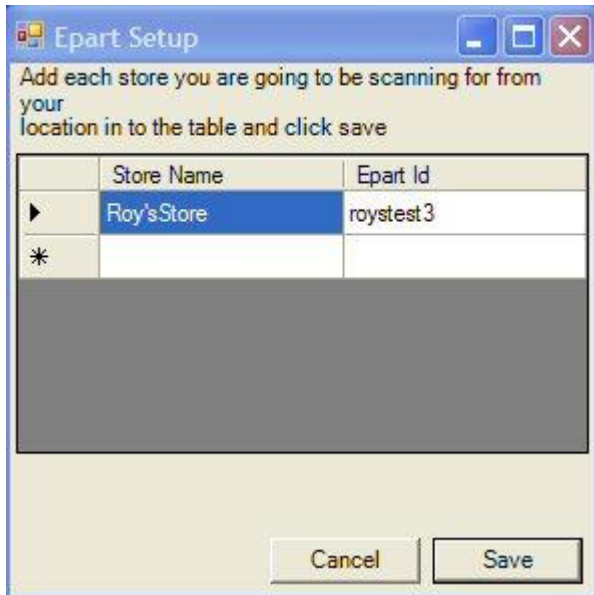
Barcode Format

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

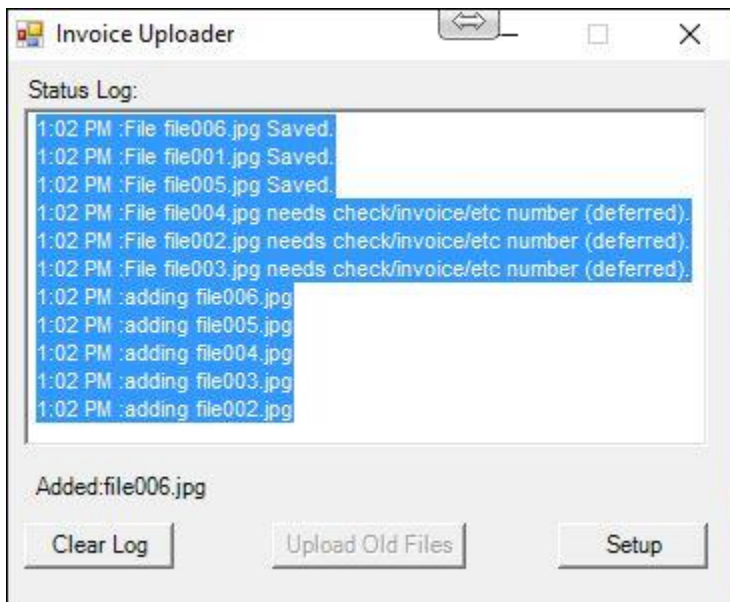
- Left click within the blank space column under the *Store Name* heading and enter your store name. Then left click within the blank space column under the *Epart Id* heading, enter your epart ID that was assigned for the entered store name and then left click on the *Save* button when finished.

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.

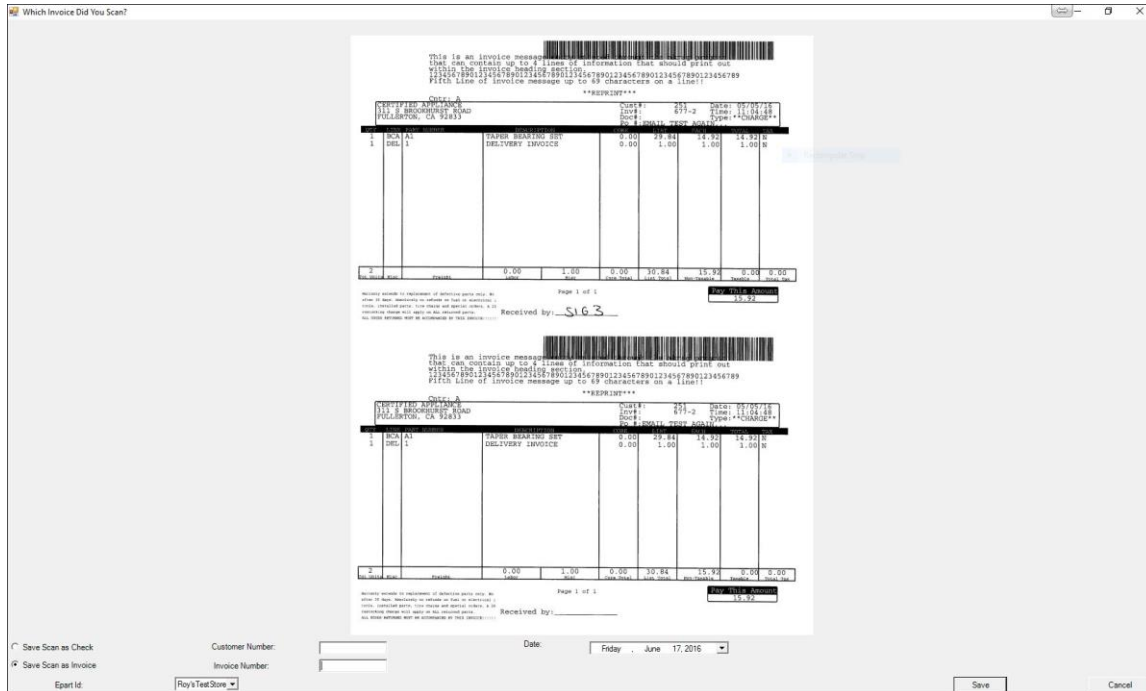
The *Status Log* window area of the screen will reflect whether the uploading of the scanned image files was successfully uploaded or not:



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:



- 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.

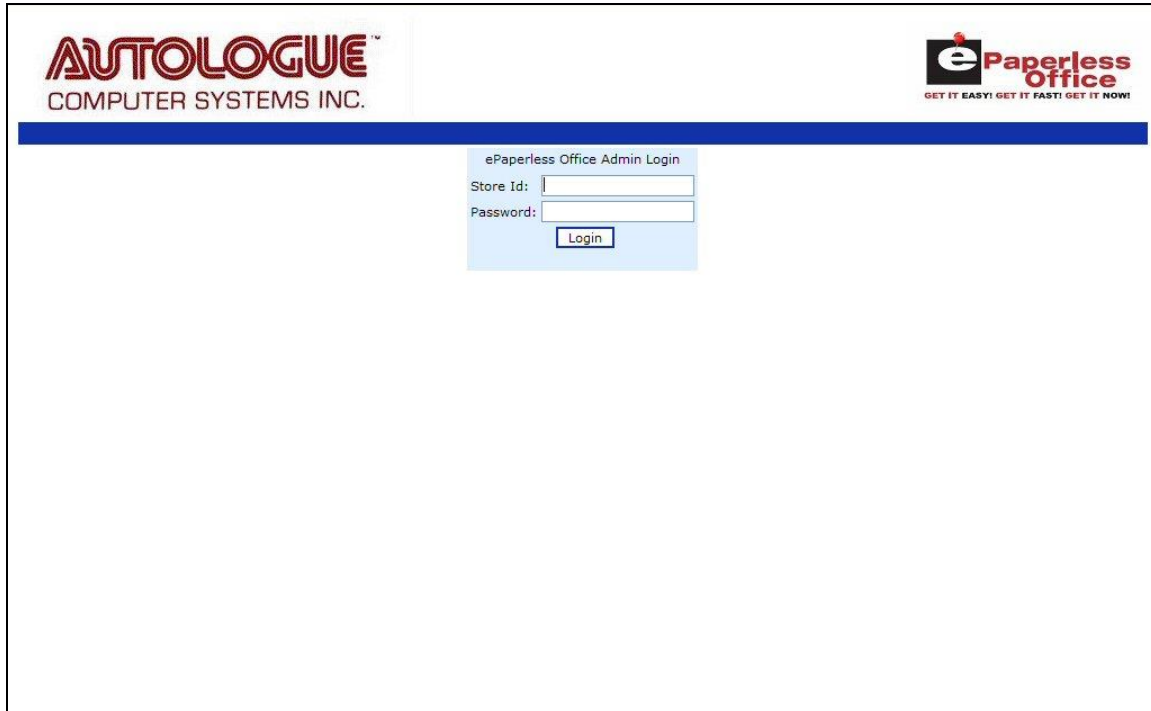
Uploading Statements

When statements are generated, any customer within the printed range that has an open balance or 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:



The screenshot shows a web page with a blue header bar. On the left, the logo for AUTOLOGUE COMPUTER SYSTEMS INC. is displayed. On the right, the ePaperless Office logo is shown. In the center, there is a light blue login box titled "ePaperless Office Admin Login". This box contains two text input fields: "Store Id:" and "Password:". Below these fields is a button labeled "Login".

- 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	Logoff
Select Customer Number: <input type="text"/>				Select Cust					
				Edit Cust					
Search For Invoice Number: <input type="text"/>				Search					
Show Scanned Invoice for Customer:		Customer Number: <input type="text"/>	Date From: <input type="text"/>	Date To: <input type="text"/>	Show				
Show Scanned Invoices for Flagged Customers:		Date From: <input type="text"/>	Date To: <input type="text"/>	Show					
Show Invoices Missing Scanned Copies:		Date From: <input type="text"/>	Date To: <input type="text"/>	<input type="checkbox"/> Hide Cash Invoices		Show			
				<input type="checkbox"/> Hide Credits					
Invoice Summary Report:		Date From: <input type="text"/>	Date To: <input type="text"/>	Show					
Delete all Invoices & Statements for Customer #:		<input type="text"/>		Delete					
Change Customer Number:		Old Number: <input type="text"/>	New Number: <input type="text"/>	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 Number

View Information For A Selected Customer Number

To view specific information within the *Invoice Recall*, *Statement*, *Current Balance* or *Payment* tabs, you must first select a customer account as described:

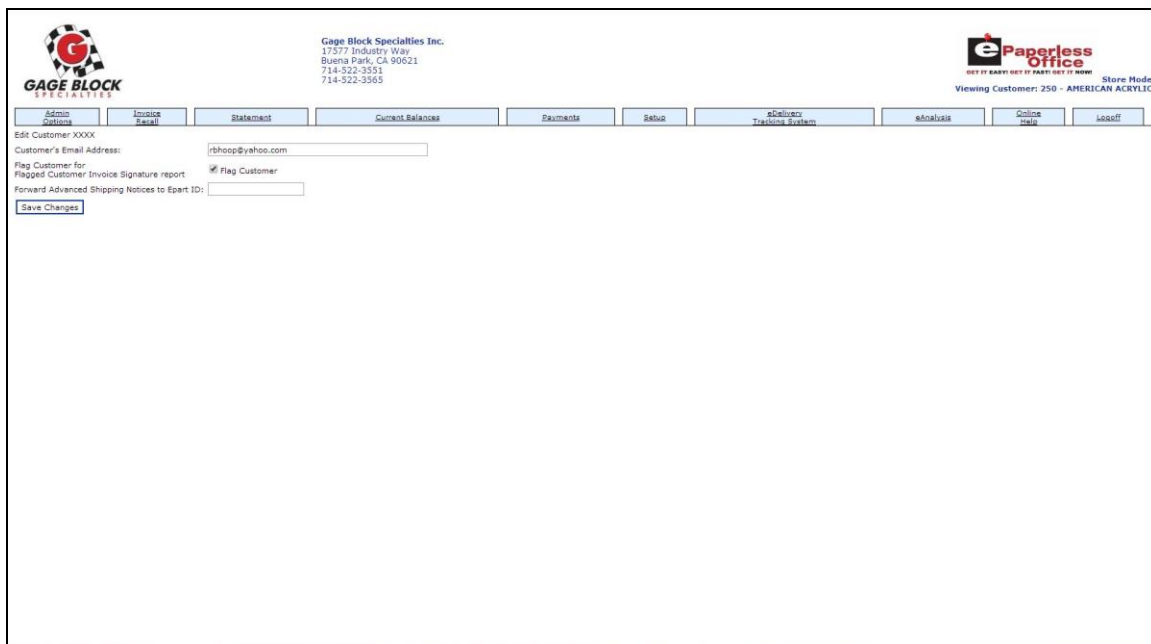
- To select a specific customer to view information for, left click within the *Select Customer:* field, enter in the customer number and then left click on the *Select* button.

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.

Flagging & Setting An Email Address For A Selected Customer Number

To flag a customer or setup an email address for a specific customer number, 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 *Edit Cust* button.



The screenshot shows the 'Edit Customer' form for Gage Block Specialties Inc. The form includes a navigation bar with tabs for Admin, Invoice, Statement, Current Balance, Payments, Setup, and others. The main form area contains the following fields and options:

- Customer's Email Address:** A text input field containing 'rbhoop@yahoo.com'.
- Flag Customer for Flagged Customer Invoice Signature report:** A checked checkbox labeled 'Flag Customer'.
- Forward Advanced Shipping Notices to Epart ID:** An empty text input field.
- Save Changes:** A button at the bottom left of the form.

- To set an email address for the selected customer, left click within the *Customer's Email Address:* field and enter in the email address.
- To set the selected customer up as a "Flagged Customer" for the Flagged Customer Invoice Signature Report, left click on the *Flag Customer* check box and make sure it's checked.
- Once the email and/or flagged customer fields have been setup, left click on the *Save Changes* button.

Search For Invoice Number

- To select a specific invoice to view information for, left click within the *Search For Invoice Number:* field, enter in the invoice number and then left click on the *Search* 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 Scanned Invoices For Flagged Customers

- To display a list of scanned invoices by date range for all flagged customers, left click within the *Date From:* field, enter in a different starting date or leave the default date.

☞ **Note:** Customer's are flagged using the *Edit Cust* button.

- 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 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.

Invoices Summary Report

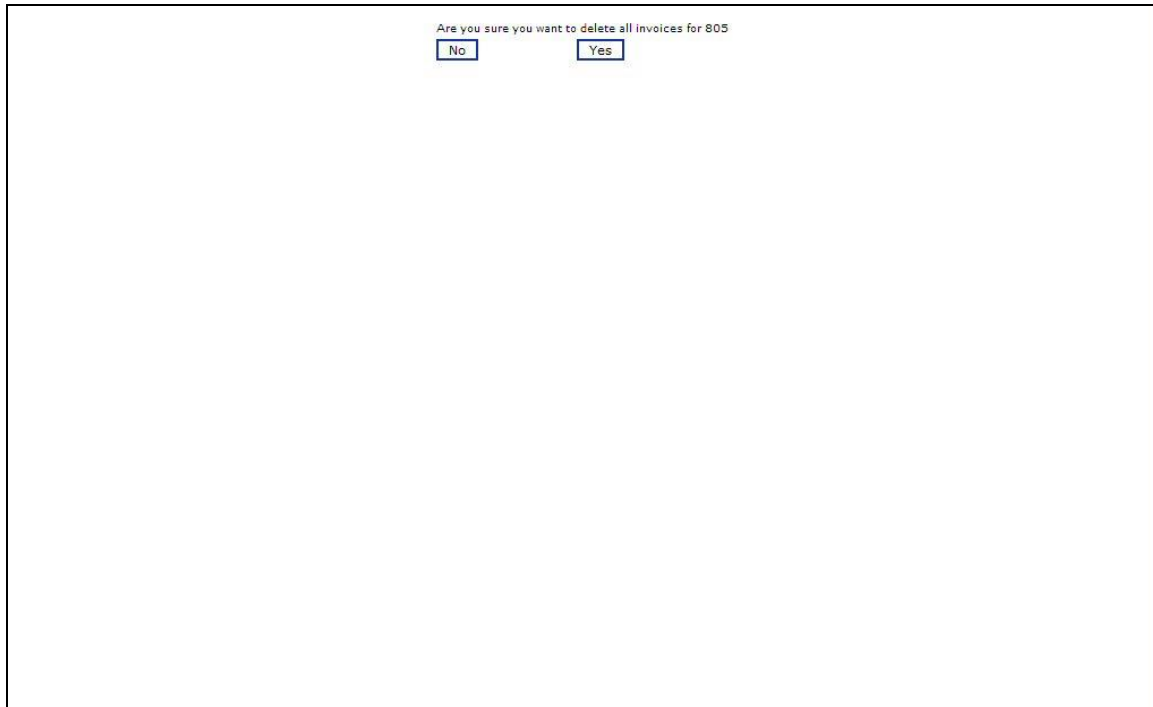
- To display an invoice summary report, left click within the *Date From:* field next to the *Invoice Summary Report:* field, enter in a different starting date or leave the default date.
- Left click within the *Date To:* field, enter in a different ending date or leave the default date and then left click on the *Show* button.

The screen will now display the summary totals information for the entered date range.

Deleting All Invoices & Statements For A Customer

- To select a specific customer to delete all invoices and statements for, left click within the *Delete all Invoices & Statements 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.

Display Customers With Statements

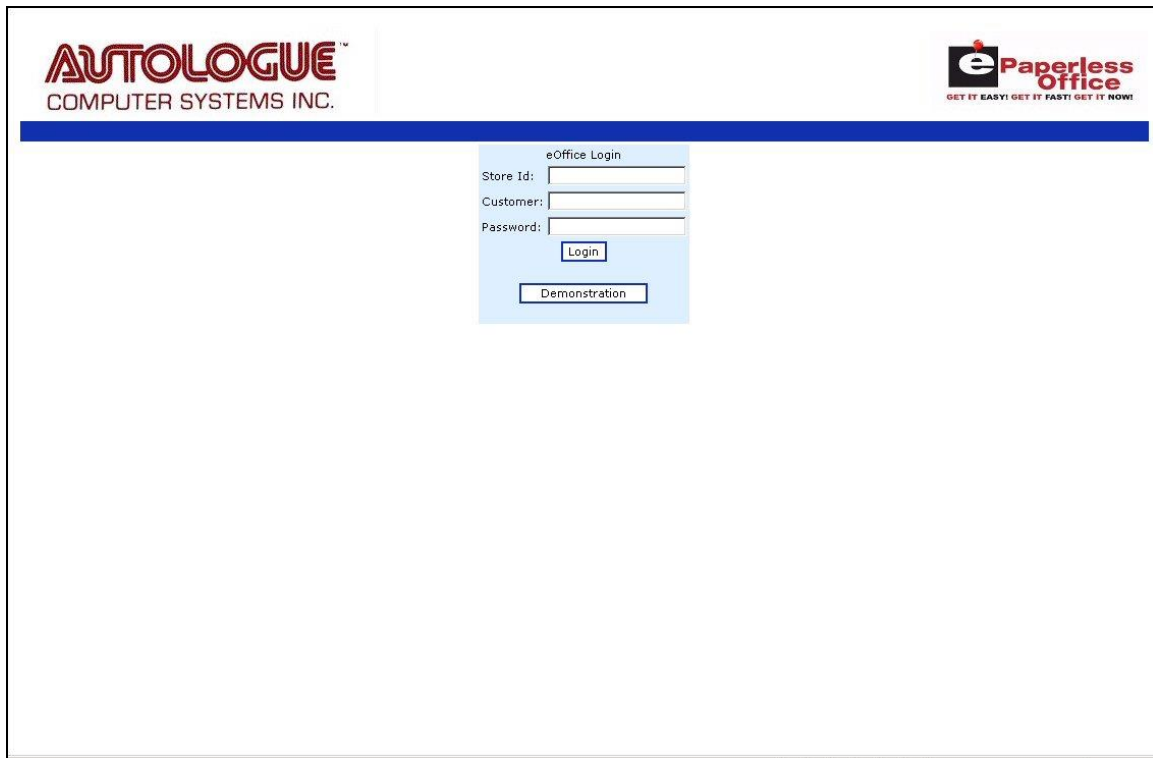
- To display a report of all customers with statements, left click within the *Display Customers with Statements* button.

The screen will now display a listing of customers that have statements.

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:



The screenshot shows a web browser window displaying the eOffice Login page. The page has a blue header bar. On the left side of the header, the logo for AUTOLOGUE COMPUTER SYSTEMS INC. is displayed. On the right side, the ePaperless Office logo is shown. The main content area is white and contains a light blue login form. The form is titled "eOffice Login" and includes three input fields: "Store Id:", "Customer:", and "Password:". Below the "Password:" field are two buttons: "Login" and "Demonstration".

- 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.
17377 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: TrackOne 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 (& ADIS 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