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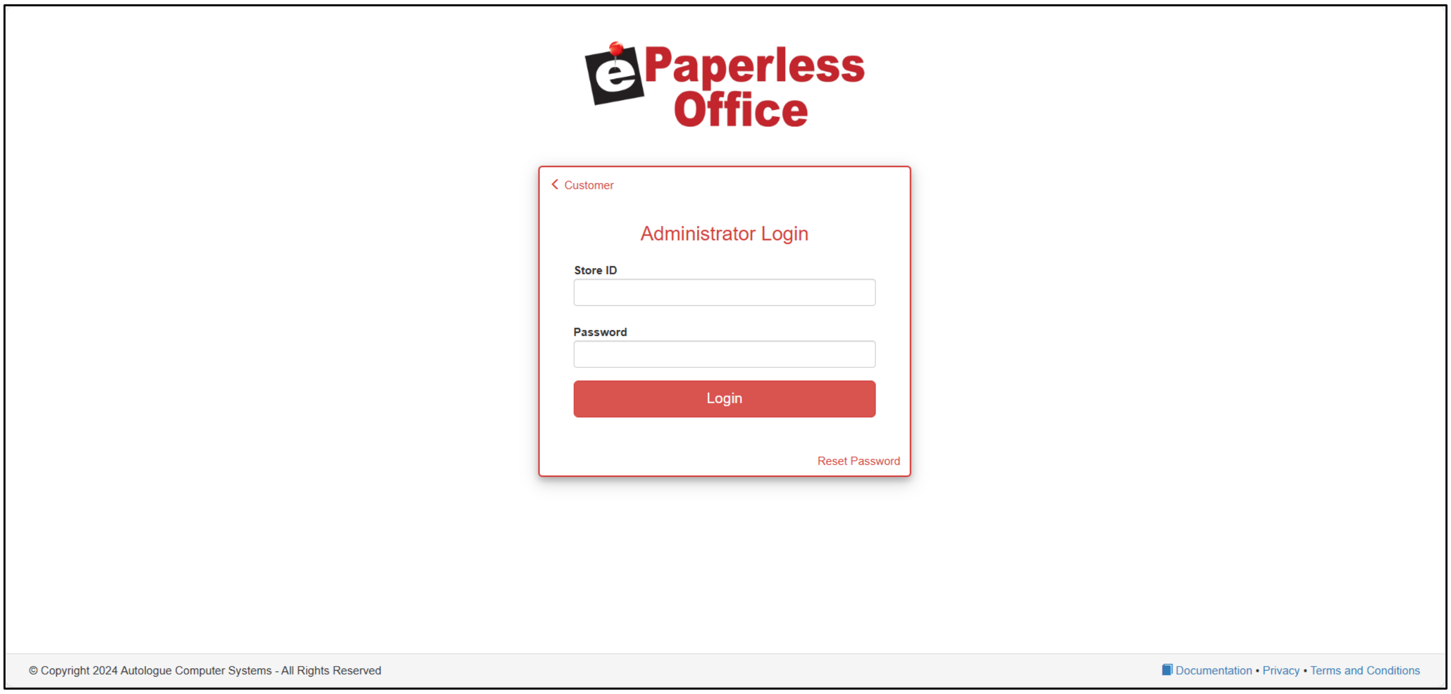
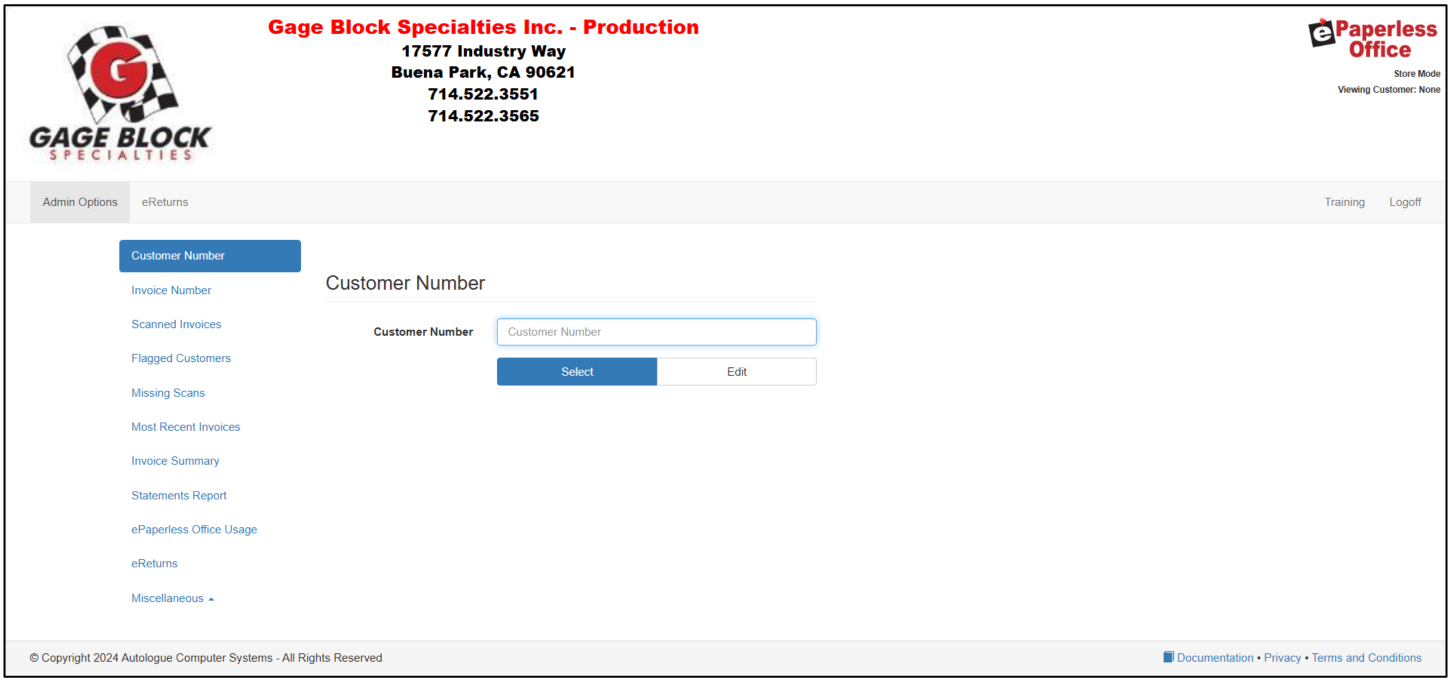
Logging Into eOffice Administration

To login into your ePaperless Office administration account and view all invoices, payments, statements and even find out one of your customers current balance, enter the following URL within your internet browser: https://eoffice.epartconnection.com/wplogin2.aspx and the following screen will be displayed:



- Enter your *Store ID* and your *Password* and then left click on the red `Login` button.

The *Admin Options* tab screen will now be displayed when you have successfully logged into your store's administration account as shown:



The *Customer Number* screen is the default screen shown when logging into your eOffice administration account.

Using the various blue menu links listed along the left-hand side of the screen, you can perform the following functions:

- Select a specific customer account to view (by customer number or name)
- View a specific invoice number
- View scanned invoices (by customer number and date range)
- Download flagged customers (by date range)
- View missing scanned invoices (by date range, options to exclude cash, credit, reconciled invoice types, show chained invoices across stores)
- View the most recent invoices received for this store (last 15)
- View an invoice summary report (by date range, with a maximum of 31 days)
- View a statements report (by date range)
- View an ePaperless Office usage report (by date range)
- Perform a variety of miscellaneous functions (setup statement message, setup statement/invoice emails, import/export customer email addresses, change customer numbers, delete all invoices/statements for a specific customer, send all your customers an email now, view datasheet email log (if applicable))

Customer Number

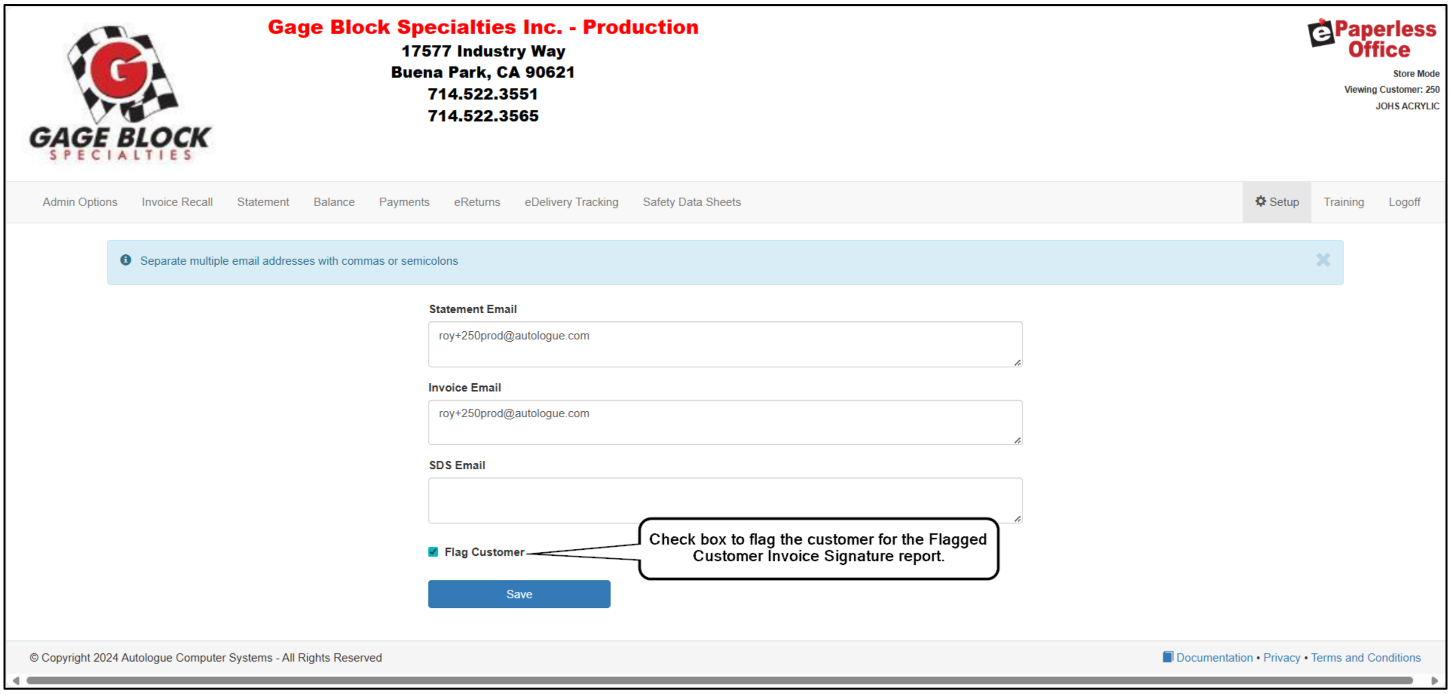
Within the *Customer Number* administration option screen, you can perform the following:

- Select a customer to view specific invoices and statements for.
- Edit a customer's email addresses (invoices/statement/SDS) and flag the customer for the flagged customer invoice signature report.

Selecting A Customer To Edit Information For

- To select a customer to edit information for, click within the *Customer Number* field and enter in their specific customer number. A drop-down selection list will be shown with matching entries. Press the `<Tab>` key and then click on the white `Edit` button.

The following screen will now be displayed for the customer account you selected as shown:



Statement Email

- Enter a customer’s statement email address within the *Statement Email* field and click on the blue `Save` button.

Invoice Email

- Enter a customer’s invoice email address within the *Invoice Email* field and click on the blue `Save` button.

SDS Email

- If SDS is enabled, enter a customer’s SDS (Safety DataSheets) invoice email address within the *SDS Email* field and click on the blue `Save` button.

☞ **<u>Note:</u> Multiple email addresses can be entered (separated with commas or semicolons) with a maximum of 150 characters.**

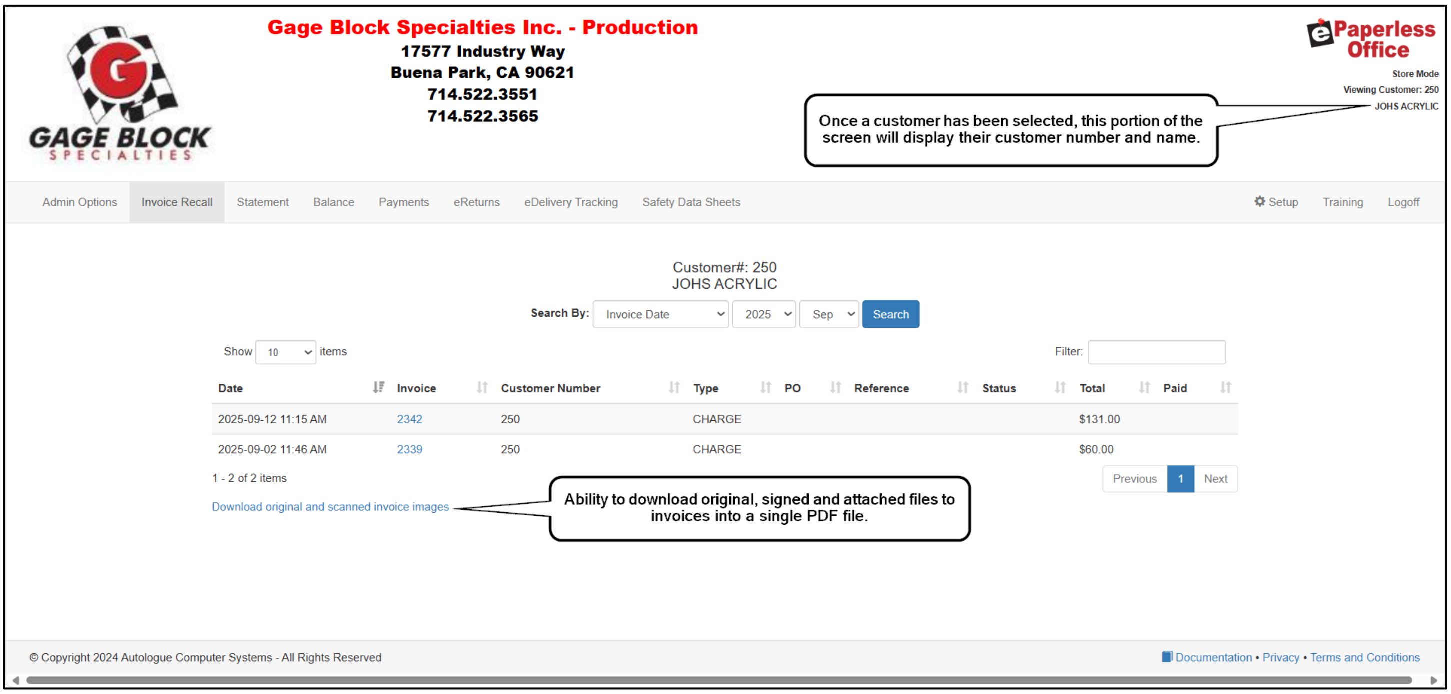
Flagging The Customer Account

- To flag the selected customer account for the *Flagged Customer Invoice Signature* report, left click on the blank *Flag Customer* check box field (which then shows as checked) and click on the blue `Save` button.

Selecting A Customer To View Information For

- To select a specific customer to view information for, simply start entering in their customer number or name within the *Customer Number* field and a drop-down selection list of customers that have a matching number or name will be listed.
- Click on the desired customer number or name.

The *Invoice Recall* tab screen will now be displayed for the selected customer account as shown:



The screen will default to showing the customers last 10 invoices in descending date order from the year and month of their last purchase.

Using the various screen tabs along the top and blue links, you can perform the following functions for the selected customer account:

• View current and past invoices	• Download original, signed, and attached invoice images (PDF format)
• View current and past statements	• View the current balance
• View current and past payments	• View eDelivery information (if the supplier has eDelivery)
• View Safety Data Sheets information (if the supplier has SDS)	• Setup the customers email addresses for receiving invoices and statements
• View online training and documentation information	

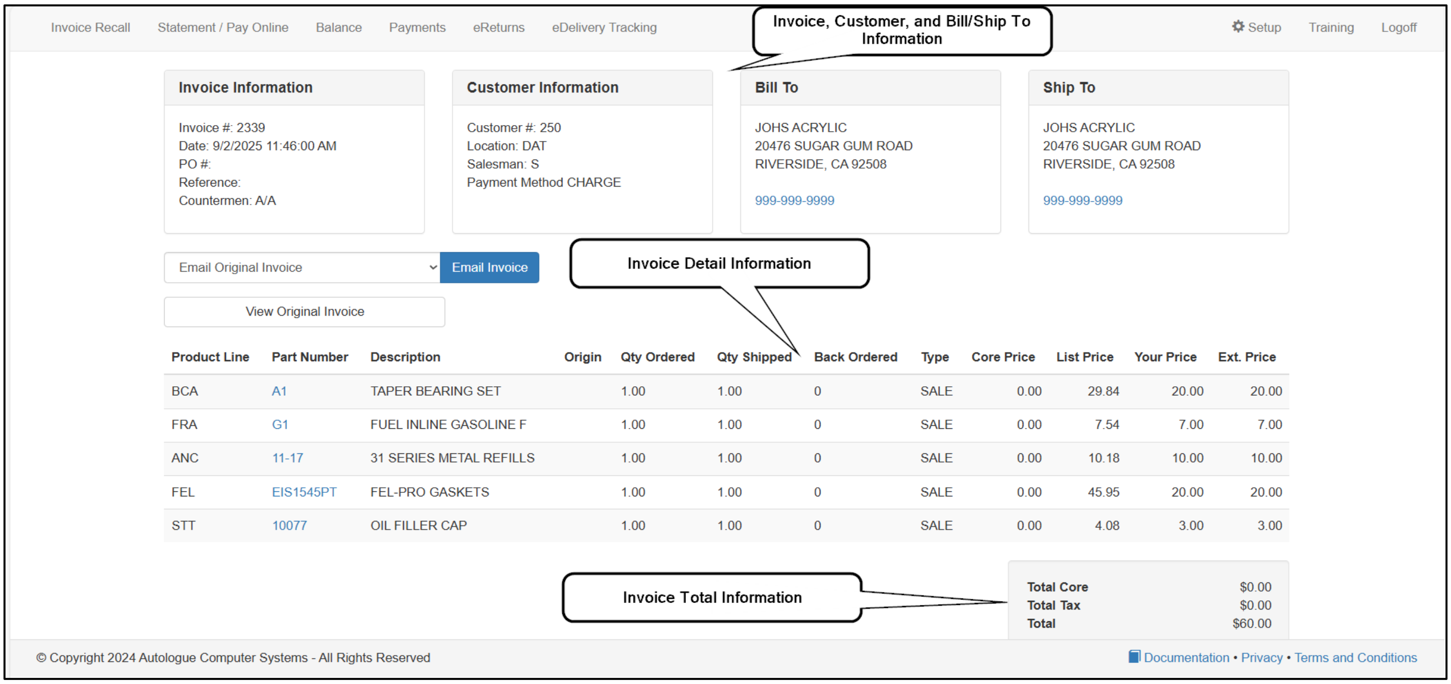
Viewing Invoices

The *Invoice Recall* tab screen is the default screen shown when selecting a customer account. The screen will default to showing the customers last 10 invoices in descending date order (newest to oldest) from the year and month of their last purchase.

Viewing The Invoice Information

- To display the specific invoice information (part numbers, descriptions, quantities, etc.,) and other information for a specific invoice listed on the screen, left click on the blue invoice number link.

The screen will now display the invoice data information for the specific invoice number as shown:



The top portion of the screen will display header sections for the Invoice, Customer, Bill/Ship To information.

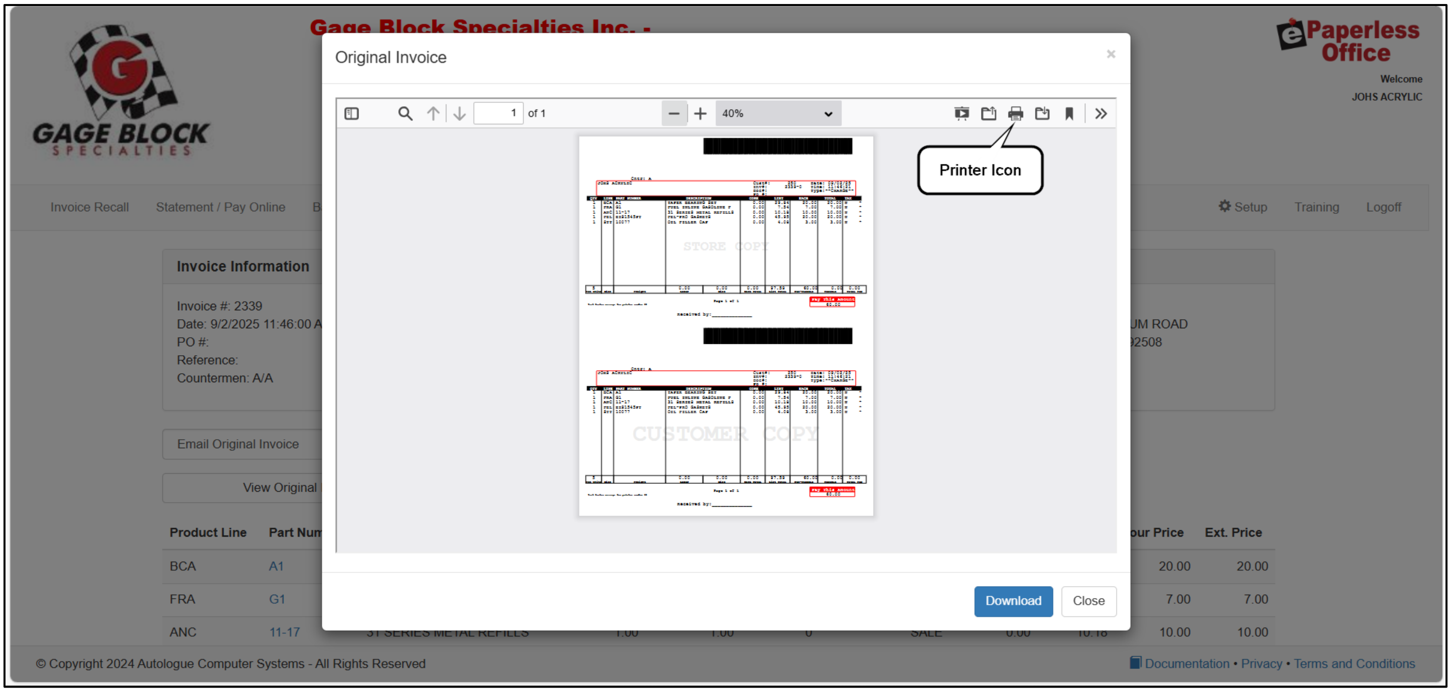
Email Invoice

- To email the current invoice being viewed, simply click on the blue `Email Invoice` button.

The drop-down selection list field displayed to the left of the blue *Email Invoice* button allows you to select from the various available invoice types (*Text Only*, *Original*, *Scanned, Delivery Signature*) when emailing.

Viewing The Original Invoice Image

If the original invoice was printed on a laser printer in a PDF format, a *View Original Invoice* button will be displayed. Clicking on this button will pop up a window displaying the original PDF formatted invoice image as shown:



You have the option to download and save the file as a PDF formatted file by clicking on the blue `Download` button. The filename would be the invoice number with a .pdf filename extension (i.e. *891.pdf*).

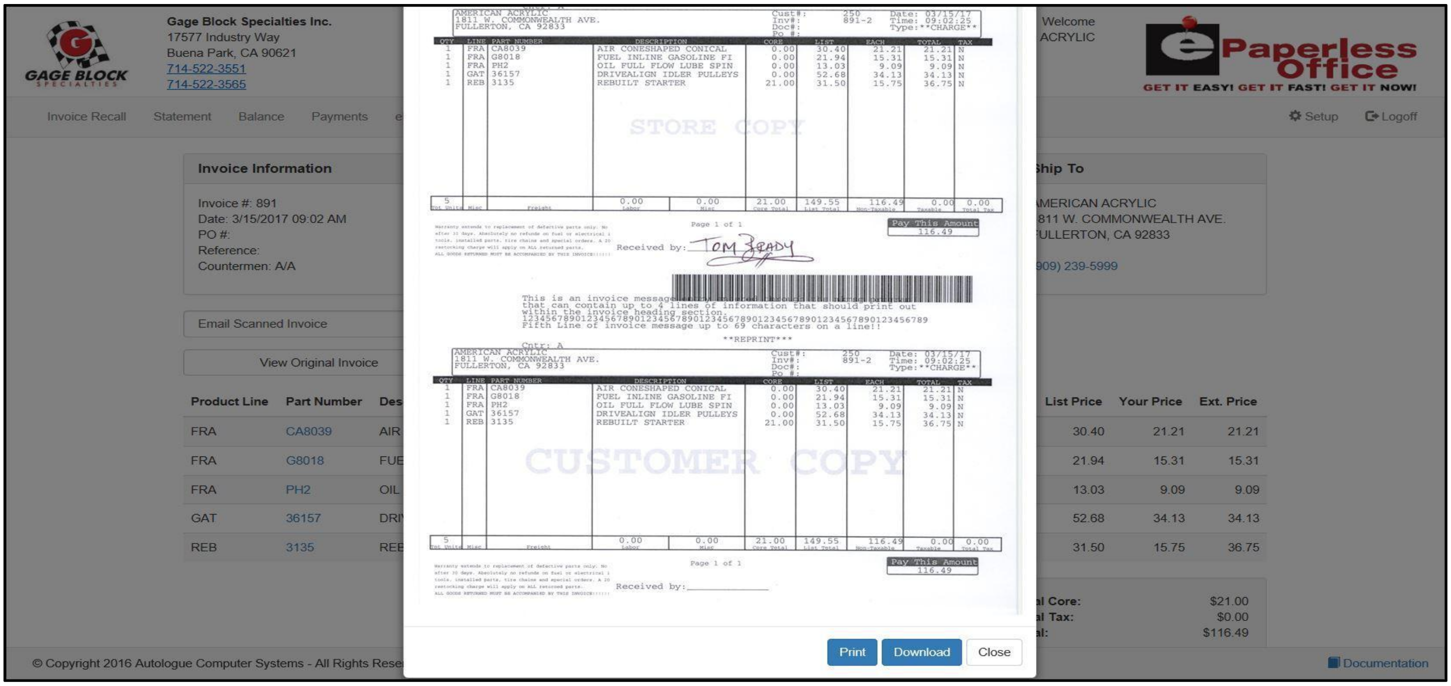
You have the option to print a copy of the file being displayed by clicking on the printer (🖶) icon button that is displayed on the top right bar of the pop-up window.

- Click on the `Close` button to return to the invoice data information screen.

Viewing The Scanned Invoice Image

If the original invoice was printed on a laser printer and a signature was written on it and scanned/uploaded using the *Invoice Uploader* program, a `View Scanned Invoice` button will be displayed.

Clicking on this button will pop up a window displaying the scanned invoice image as shown:



You have the option to download and save the file as a .jpg or .tif formatted file by clicking on the blue `Download` button. The filename would be the invoice number with a .jpg or .tif filename extension (i.e. *891.jpg*).

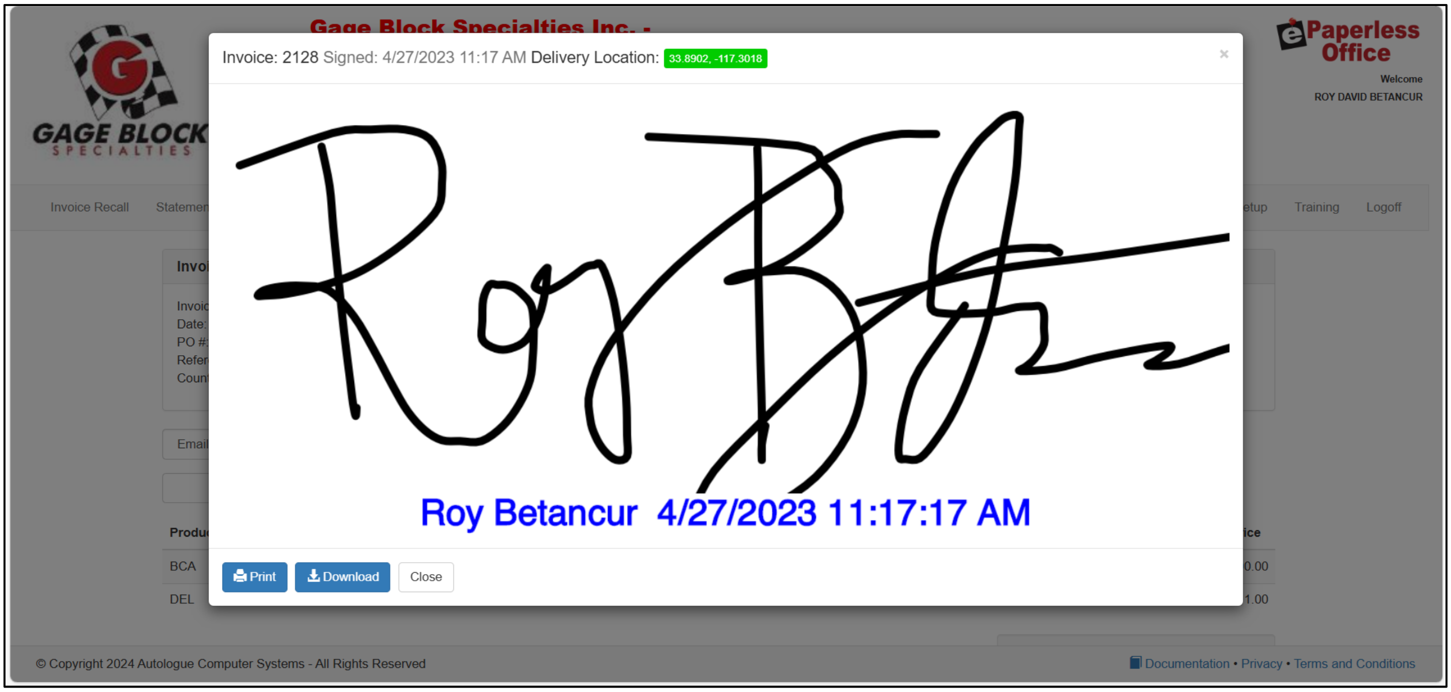
You have the option to print a copy of the file being displayed by clicking on the blue `Print` button that is displayed on the bottom of the pop-up window.

- Click on the `Close` button to return to the invoice data information screen.

Viewing The Signature Image

If the original invoice was signed for by the customer on a mobile device using the *eDelivery* mobile application, a `View eDelivery Signature` button will be displayed.

Clicking on this button will display an *eDelivery Signature* screen as shown:

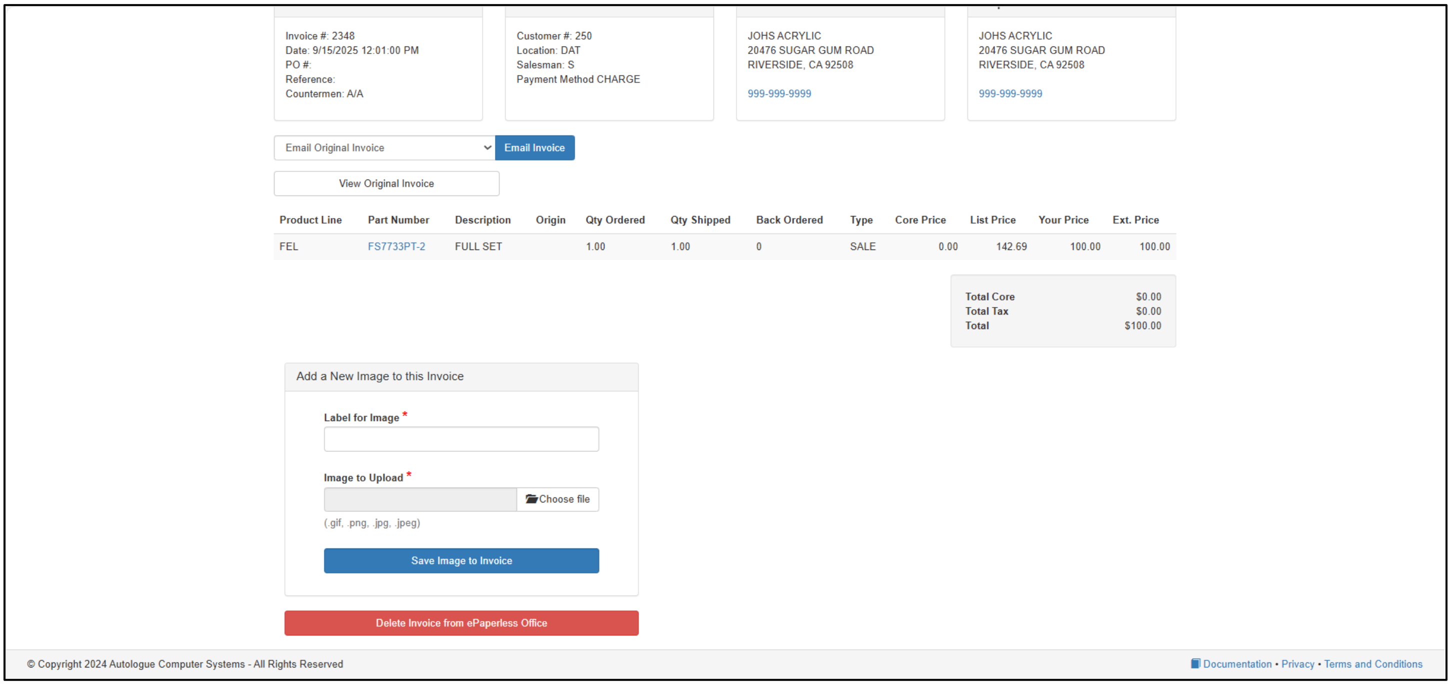


You have the option to download and save the file as a .png formatted file by clicking on the blue `Download` button. The filename would be the invoice number with a .png filename extension (i.e. *891.png*).

You have the option to print a copy of the file being displayed by clicking on the blue `Print` button that is displayed below the signature pop-up window.

- Click on the `Close` button to return to the invoice data information screen.

Add A New Image To The Invoice



- You can attach a specific label/image (.gif, .png, .jpg, .jpeg - pictures) and to the invoice being viewed by left clicking within the *Label for Image* field and entering a label name for the image that is being attached.
- Left click on the `Choose File` button and select the specific image file (.gif, .png, .jpg, .jpeg) to be attached and click on the `Open` button. The filename will now be displayed within the *Image for Upload* field.
- Left click on the blue `Save Image to Invoice` button.

Deleting An Invoice From eOffice

- You can delete the invoice being viewed by clicking on the red `Delete Invoice from ePaperless Office` button.
- The *Delete Invoice!* pop-up screen will display a *Are you sure you want to **Delete** this invoice?* prompt. Click on the red `Yes` button.

Showing Invoice Items And Paging

If there are more than 10 invoices purchased within the year and month being displayed, the bottom right of the screen will display page number links (*2, 3, 4, Next*) to allow you to click on to see the next 10 invoices or to jump to a specific page of invoices.

To show 10, 25, 50 or all invoices for year and month currently being displayed, click within the *Show N items* drop down field and click on the desired menu selection (*10, 25, 50, All*) and the screen will redraw with the selected number of invoice items to display.

Filter

You can enter a value within the *Filter:* field and the screen will then match the entered value to any invoice that contains this information within any of the columns listed. The screen will redraw and display only the matching invoice items.

Invoice Column Information Displayed

The screen will display the following columns of information for each of the invoices listed:

• Invoice Date	• Invoice Number
• Invoice Origin (with multiple locations)	• Invoice Type
• PO Number	• Reference Number
• Status	• Invoice Total
• Paid Status	

Column Sorting

The invoice recall screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Search By

The *Search By* field displayed within the upper middle portion of the screen allows you to search by the following drop-down field options:

• Invoice Date	• Invoice Number
• Part Number	• Reference Number
• PO Number	• Manufacturer Code
• Description	• Selling Price

Search By Invoice Date

- To display invoice information for a specific year and month, left click within the *Search By:* drop down field list and left click on the *Invoice Date* menu selection.
- Left click within the year drop down field list and left click on the desired year.
- Left click within the month drop down field list and left click on the desired month.

The screen will now display the invoice information (newest to oldest) for the selected year and month.

Search By Invoice Number

- To display invoice information for a specific invoice number, left click within the *Search By:* drop down field list and left click on the *Invoice Number* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific invoice number to search by and then left click on the blue `Search` button to the right of the entry field.

If the invoice number was found, the screen will now display the matching invoices information (newest to oldest).

Search By Part Number

- To display invoice information for a specific part number, left click within the *Search By:* drop down field list and left click on the *Part Number* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific part number (without mfr code) to search by and then left click on the blue `Search` button to the right of the entry field.

The screen will now display a listing of all matching invoices (newest to oldest) that contain the entered part number.

Search By Reference Number

- To display invoices that contain a specific reference number, left click within the *Search By:* drop down field list and left click on the *Reference Number* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific reference number to search by and then left click on the blue `Search` button to the right of the entry field.

The screen will now display a listing of all matching invoices (newest to oldest) that contain the entered reference number.

Search By PO Number

- To display invoices that contain a specific PO number, left click within the *Search By:* drop down field list and left click on the *PO Number* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific PO number to search by and then left click on the blue `Search` button to the right of the entry field.

The screen will now display a listing of all matching invoices (newest to oldest) that contain the entered PO number.

Search By Manufacturer Code

- To display invoice information for a manufacturer code, left click within the *Search By:* drop down field list and left click on the *Manufacturer Code* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific manufacturer code to search by and then left click on the blue `Search` button to the right of the entry field.

The screen will now display a listing of all matching invoices (newest to oldest) that contain part numbers with the entered manufacturer code.

Search By Description

- To display invoice information for parts numbers with a specific description, left click within the *Search By:* drop down field list and left click on the *Description* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific description to search by and then left click on the blue `Search` button to the right of the entry field.

The screen will now display a listing of all matching invoices (newest to oldest) that contain part numbers with the entered description.

Search By Selling Price

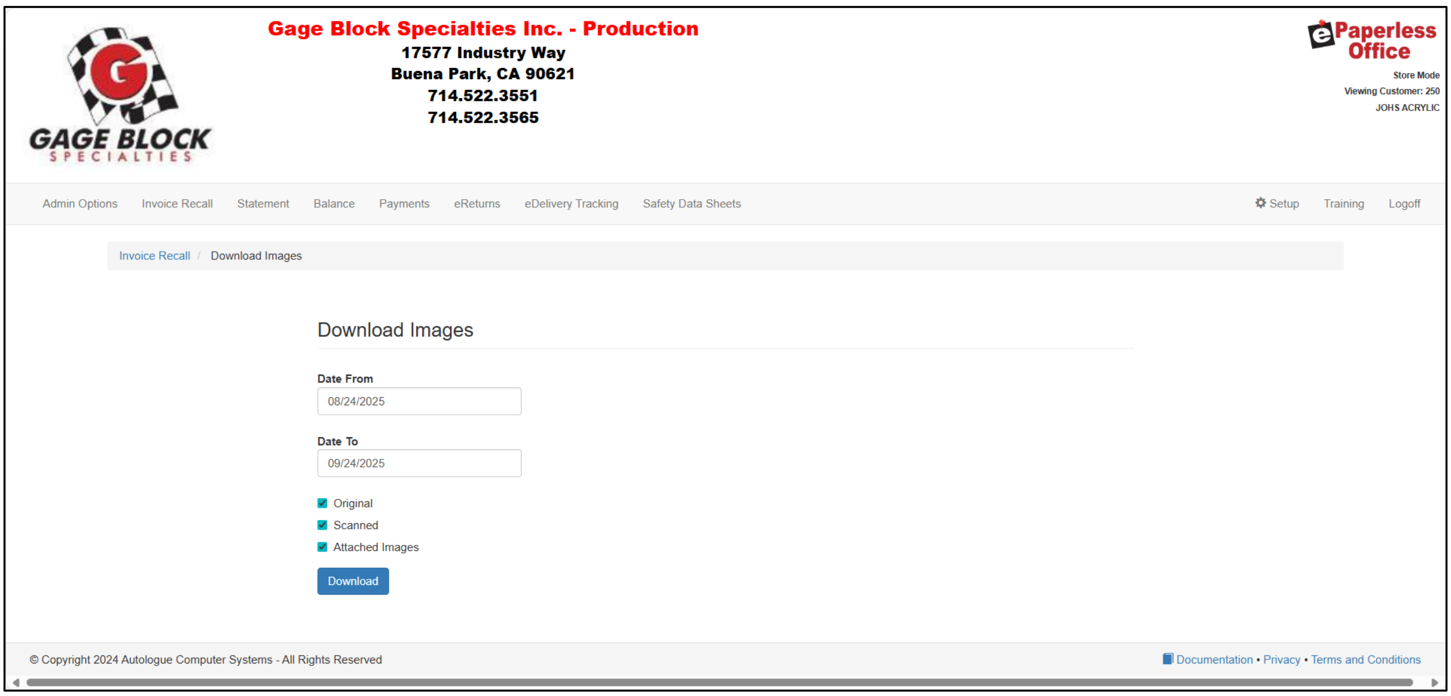
- To display invoice information for parts numbers with a specific selling price, left click within the *Search By:* drop down field list and left click on the *Selling Price* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific selling price to search by and then left click on the blue `Search` button to the right of the entry field.

The screen will now display a listing of all matching invoices (newest to oldest) that contain part numbers with the entered selling price.

Download Original And Signed Invoice Images

- You can download original (PDF), signed (scanned) and/or attached images (pictures) for a date range of invoices by left clicking on the *Download original and signed invoice images* blue link that is shown below the listing of invoice items of the *Invoice Recall* screen.

The *Download images* screen will now be displayed as shown:

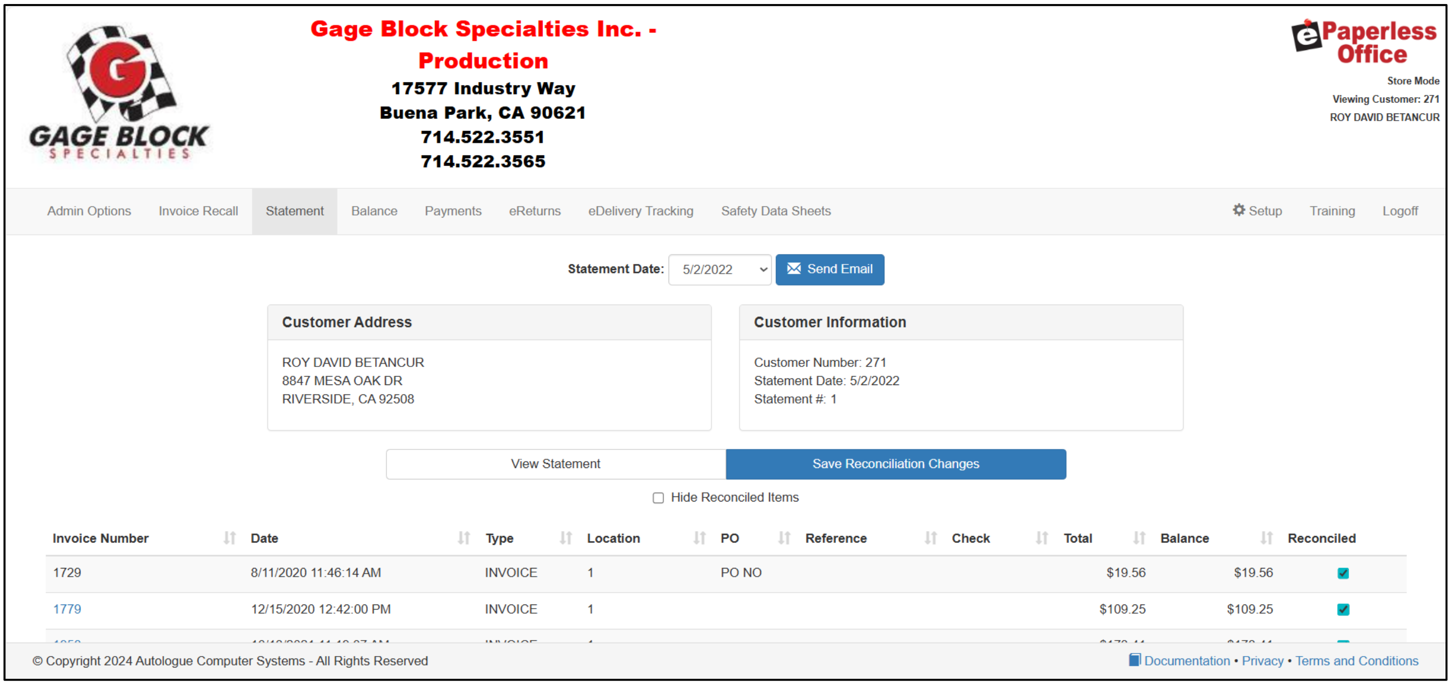


- Click within the *Date From* and *Date To* range fields to change the selected date ranges of the invoices.
- By default, all the specific types of invoices (*Original*, *Signed*, *Attached Images*) will be check marked. Check or uncheck the specific types and then click on the blue `Download` button to create a consolidated *Invoices.pdf* formatted file that you can now save.

View Statements

- To view past statements for the customer selected, click on the *Statement* tab at the top of the screen.

The screen will default to showing the customers last statement as shown:



The top portion of the screen will display the header sections of information for the *Customer Address* and *Customer Information*.

Selecting A Statement By Date

- To display a specific statement for a specific date, left click within the *Statement Date:* drop down field selection list and left click on any of the available statement dates listed.

The screen will now display the statement information for the selected date.

Statement Column Information Displayed

The screen will display the following columns of information for each of the invoices listed on the statement being viewed:

• Invoice Number	• (Invoice) Date
• (Invoice) Type	• Location
• PO (Number)	• Reference (Number)
• Check (Number)	• (Invoice) Total
• Balance	• Reconciled

The bottom right-hand portion of the screen will display the statement totals information.

Column Sorting

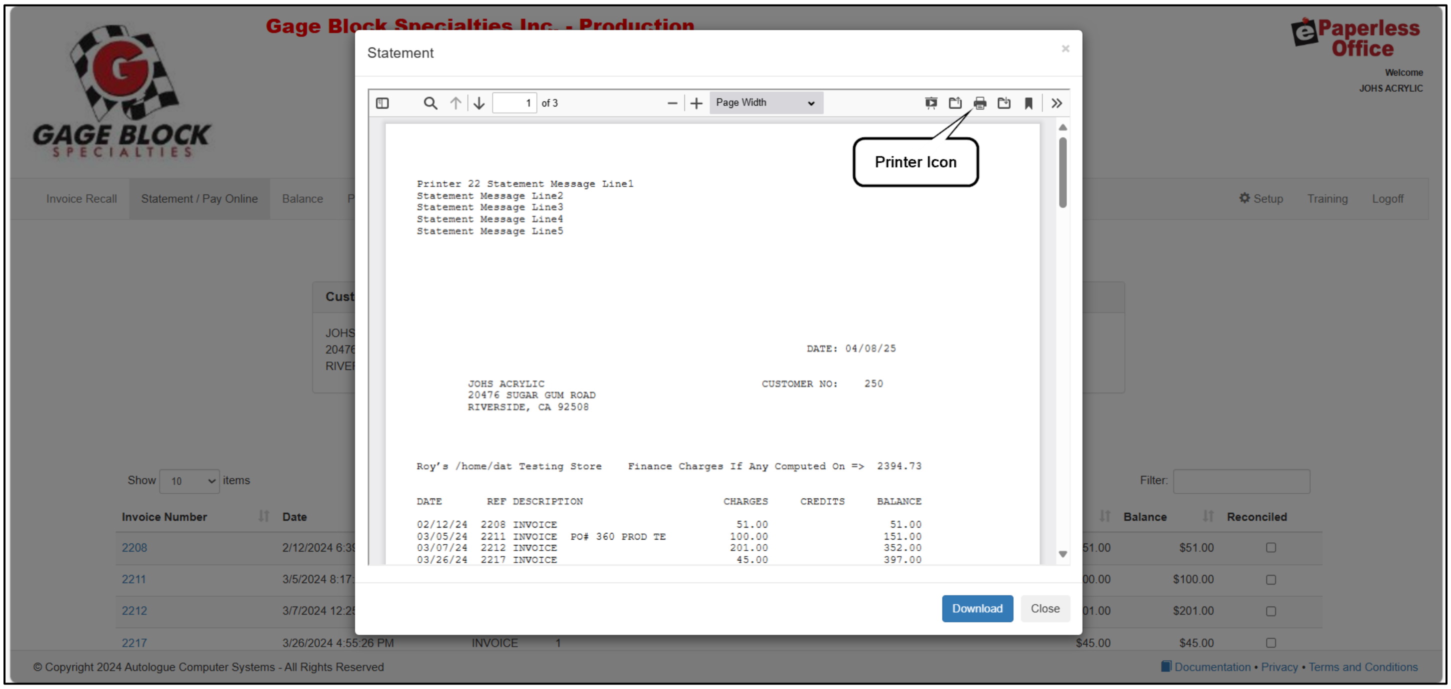
The statement screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Send Email

- To email the current statement being viewed, simply click on the blue ✉ `Send Email` button that is displayed to the right of the *Statement Date:* drop down field.

View Statement Button

If the original statement was printed on a laser printer in a PDF format, a *View Statement* button will be displayed. Clicking on this button will pop up a window displaying the original PDF formatted statement image as shown:



You have the option to download and save the file as a PDF formatted file by clicking on the blue `Download` button. The filename would be the date of the statement with a .pdf filename extension (i.e. *3_17_2017.pdf*).

You have the option to print a copy of the file being displayed by clicking on the printer (🖨) icon button that is displayed on the top right bar of the pop-up window.

- Click on the `Close` button to return to the statement data information screen.

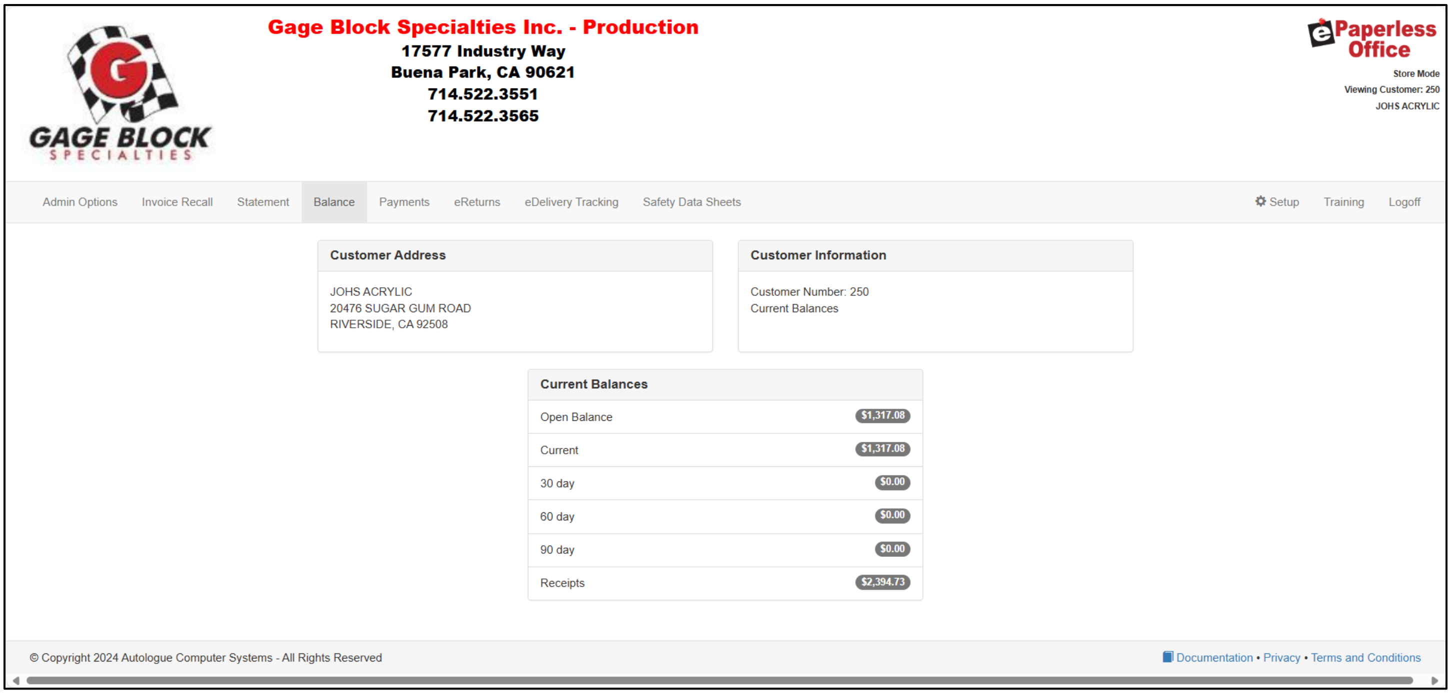
Save Reconciliation Changes

- You have the option to mark specific invoices as being reconciled by clicking on and check marking their respective *Reconciled* check box field and then clicking on the blue `Save Reconciliation Changes` button that is displayed below the *Customer Information* heading section of the statement. Optionally, you can have the screen redrawn and hide the invoices that have been marked and saved by clicking on the *Hide Reconciled Items* check box.

Viewing A Customer's Balance

- To view the current balance for the selected customer, click on the *Balance* tab at the top of the screen.

The screen will show a breakdown of their current balances as shown:

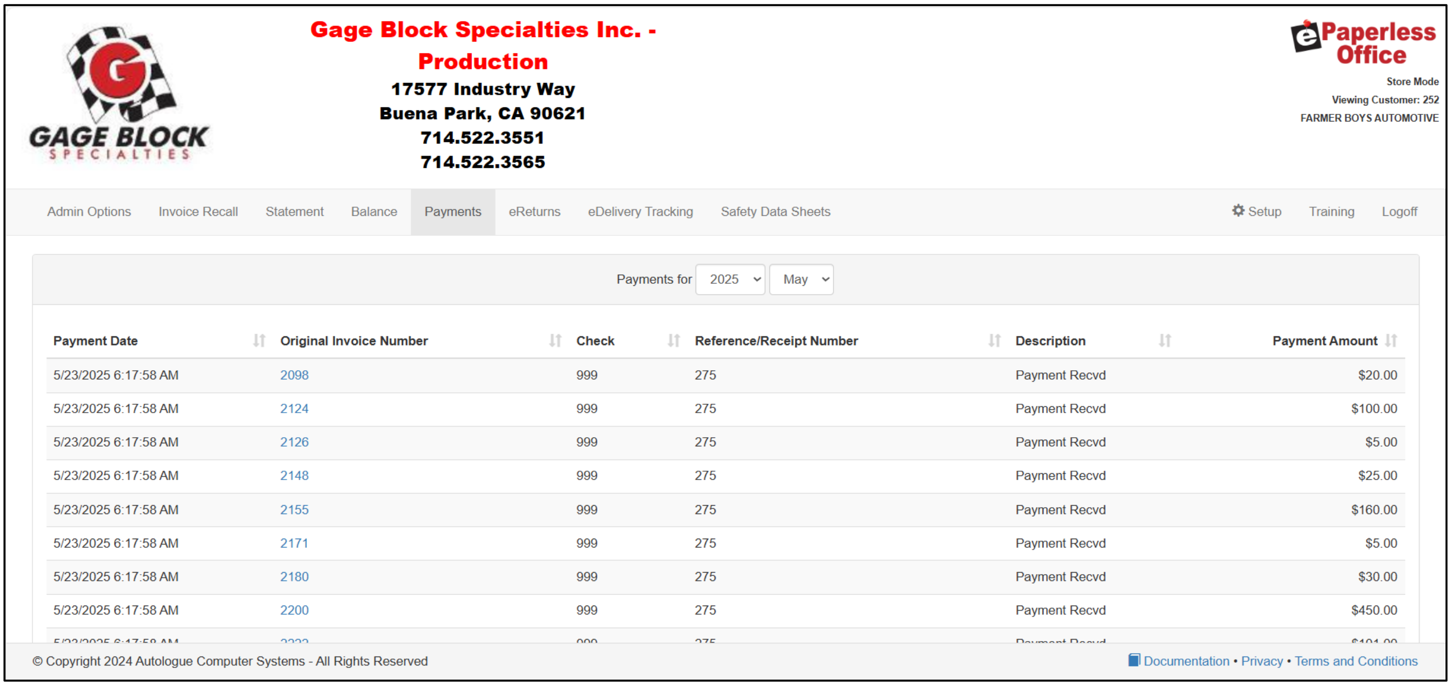


Most management systems will usually show open balance, current, 30 day, 60 day, 90 day, receipts and last payment date and amount. The top portion of the screen will display the header sections of information for the *Customer Address* and *Customer Information*.

☞ **Note: Some management systems may not have the ability to send real time Balance information. When this occurs, a red bar will display above the *Customer Address* and *Customer Information* headings that contains a *Can't get open balance* message.**

Viewing Payments

- To view payments for the selected customer, click on the *Payments* tab at the top of the screen and the following screen will be displayed:



The screen will default to showing their last 10 paid invoices in descending date order from the year and month of their last payment.

Showing Paid Invoice Items And Paging

If there are more than 10 paid invoices within the year and month being displayed, the bottom right of the screen will display page number links (*2, 3, 4, Next*) to allow you to click on to see the next 10 paid invoices or to jump to a specific page of paid invoices.

To show 10, 25 or all paid invoices for year and month currently being displayed, click within the *Show N items* drop down field and click on the desired menu selection (*10, 25, All*) and the screen will redraw with the selected number of paid invoice items to display.

Filter

You can enter a value within the *Filter:* field and the screen will then match the entered value to any paid invoice that contains this information within any of the columns listed. The screen will redraw and display only the matching invoice items.

Payment Column Information Displayed

The screen will display the following columns of information for each of the paid invoices listed:

• Payment Date	• Original Invoice Number
• Check (Number)	• Reference/Receipt Number
• Description (Payment Received/Partial Paid)	• Payment Amount

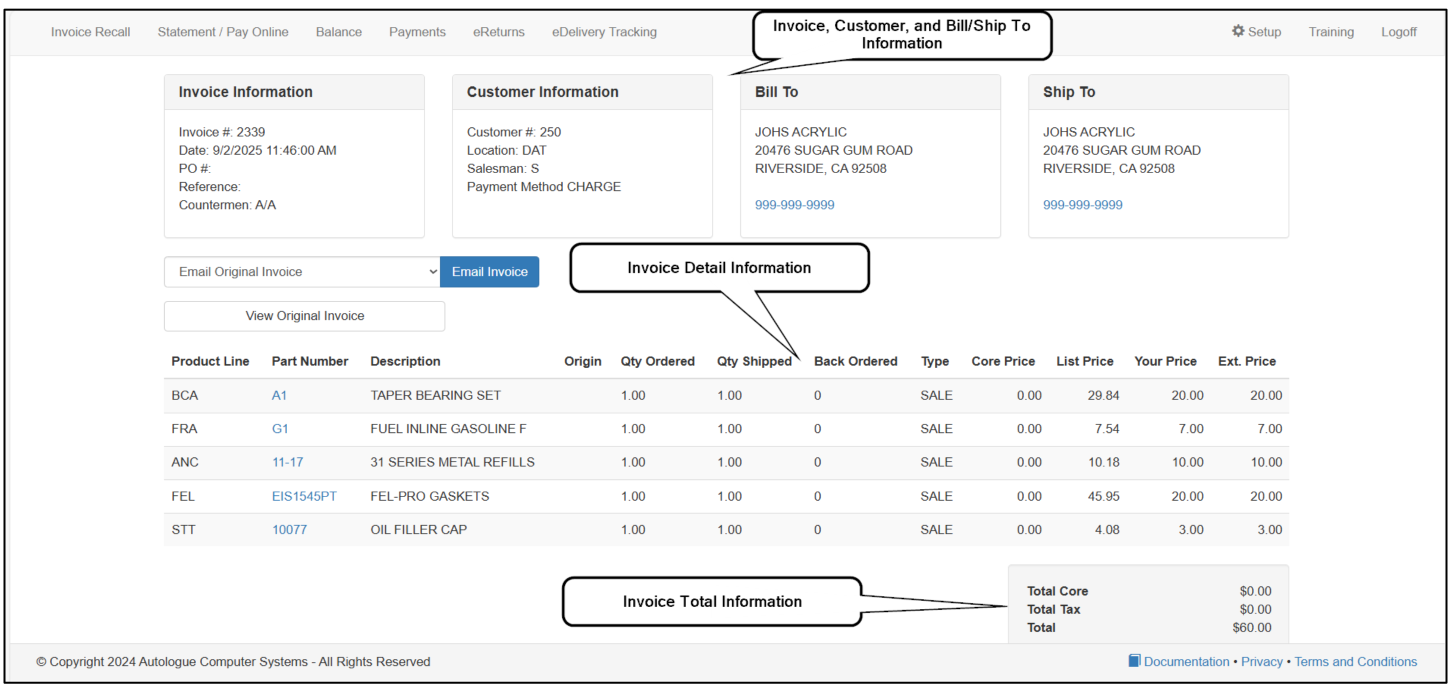
Column Sorting

The payment screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Viewing The Paid Invoice Information

- To display the specific invoice information (part numbers, descriptions, quantities, etc.,) and other information for a specific paid invoice listed on the screen, left click on the blue invoice number link.

The screen will now display the invoice data information for the specific invoice number as shown:



The top portion of the screen will display header sections for the Invoice, Customer, Bill/Ship To information.

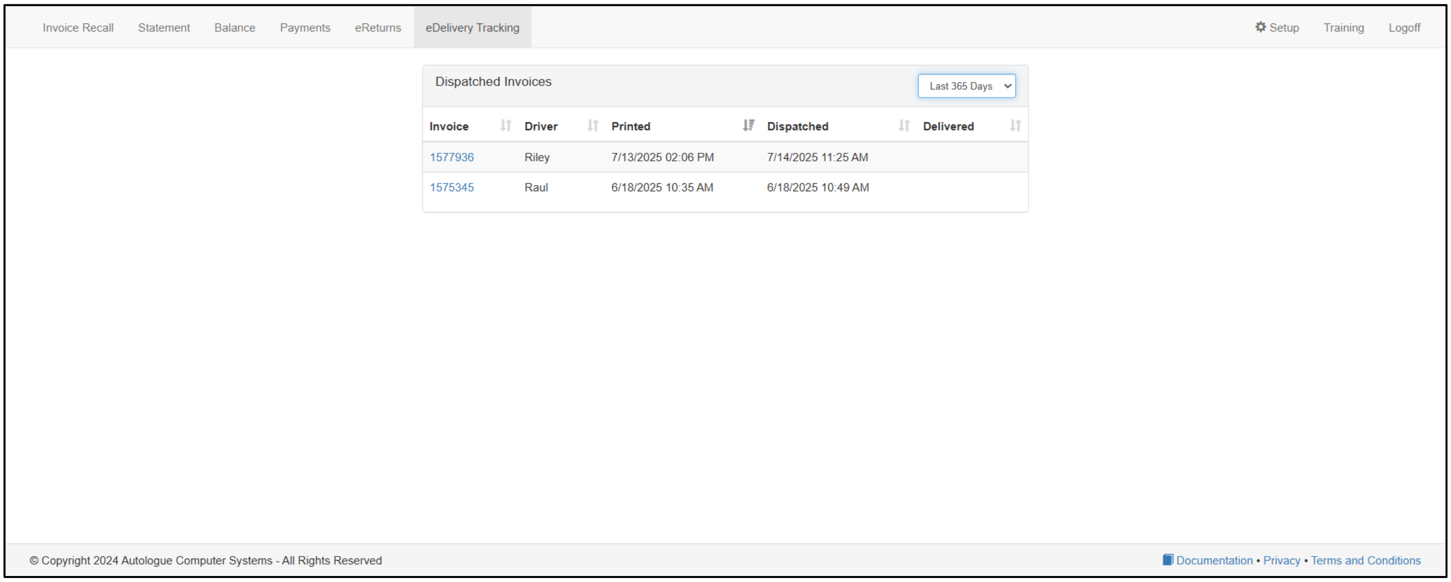
eReturns

The *eReturns Home* screen is where you can create and submit return requests for specific parts. There is separate *eReturn User Guide* document that explains all the functionality within the eReturns application.

Tracking Deliveries

- If you are using *eDelivery* and you want to track the selected customers' invoices and see whether they have been printed, assigned to an eDelivery dispatch and/or delivered, click on the *eDelivery Tracking* tab at the top of the screen.

The screen will now display any invoices sent up to *eDelivery* within the last 7, 30 or 365 days as shown:



eDelivery Tracking Column Information Displayed

The screen will display the following columns of information for each of the invoices listed:

• Invoice (Number)	• Driver (Name)
• Printed (Invoice Date/Time)	• Dispatched (Invoice Date/Time)
• Delivered (Invoice Date/Time)	

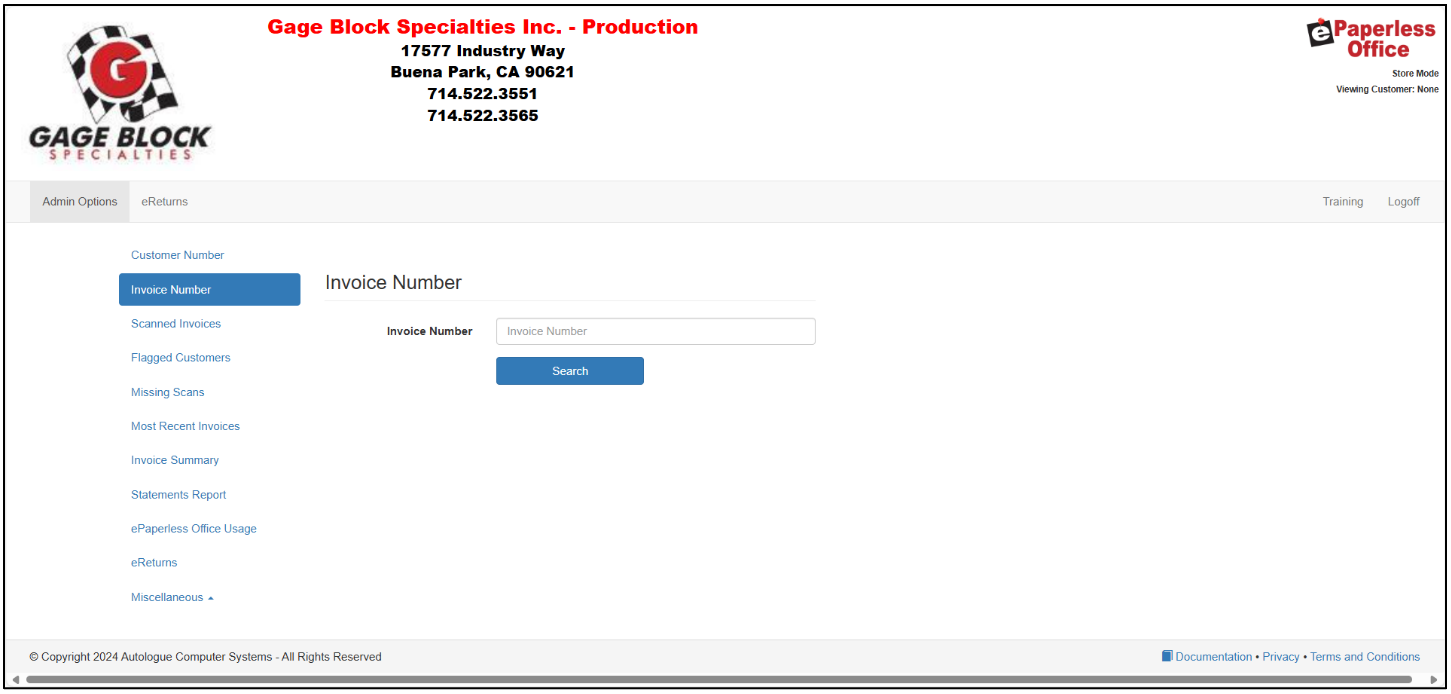
Column Sorting

The *eDelivery Tracking* screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Searching For A Specific Invoice Number

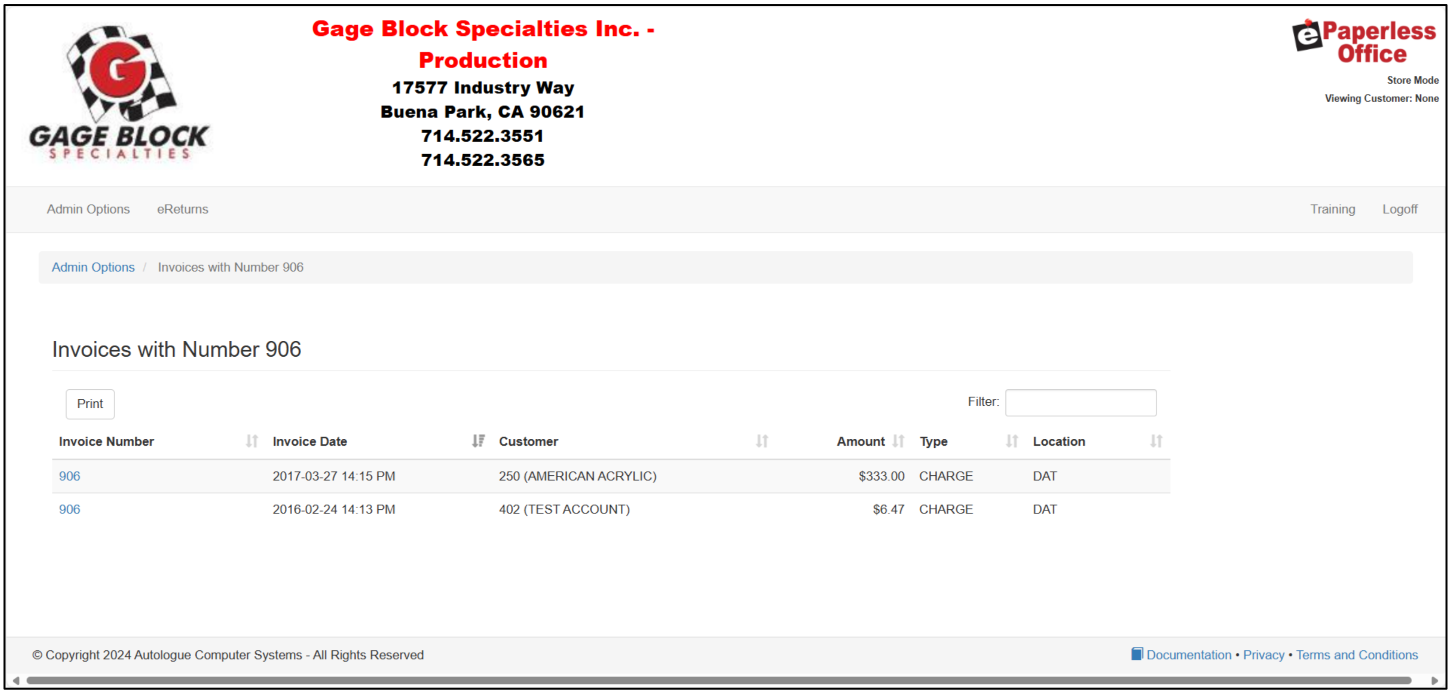
- To view a specific invoice for any of your customers, click on the *Invoice Number* menu link on the left side of the screen.

The *Invoice Number* screen will now be displayed as shown:



- With the cursor positioned within the *Invoice Number* field, enter in the specific invoice number to search for and then click on the blue `Search` button.

The screen will now display the invoice number search results as shown:



Invoice Column Information Displayed

The screen will display the following columns of information for each of the invoices listed:

• Invoice Number	• Invoice Date
• Customer (Number & Name)	• Amount (Invoice Total)
• Invoice Type	• Location

Column Sorting

The invoice recall screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Filter

You can enter a value within the *Filter:* field and the screen will then match the entered value to any of the invoices that contains this information within any of the columns listed. The screen will redraw and display only the matching invoice items.

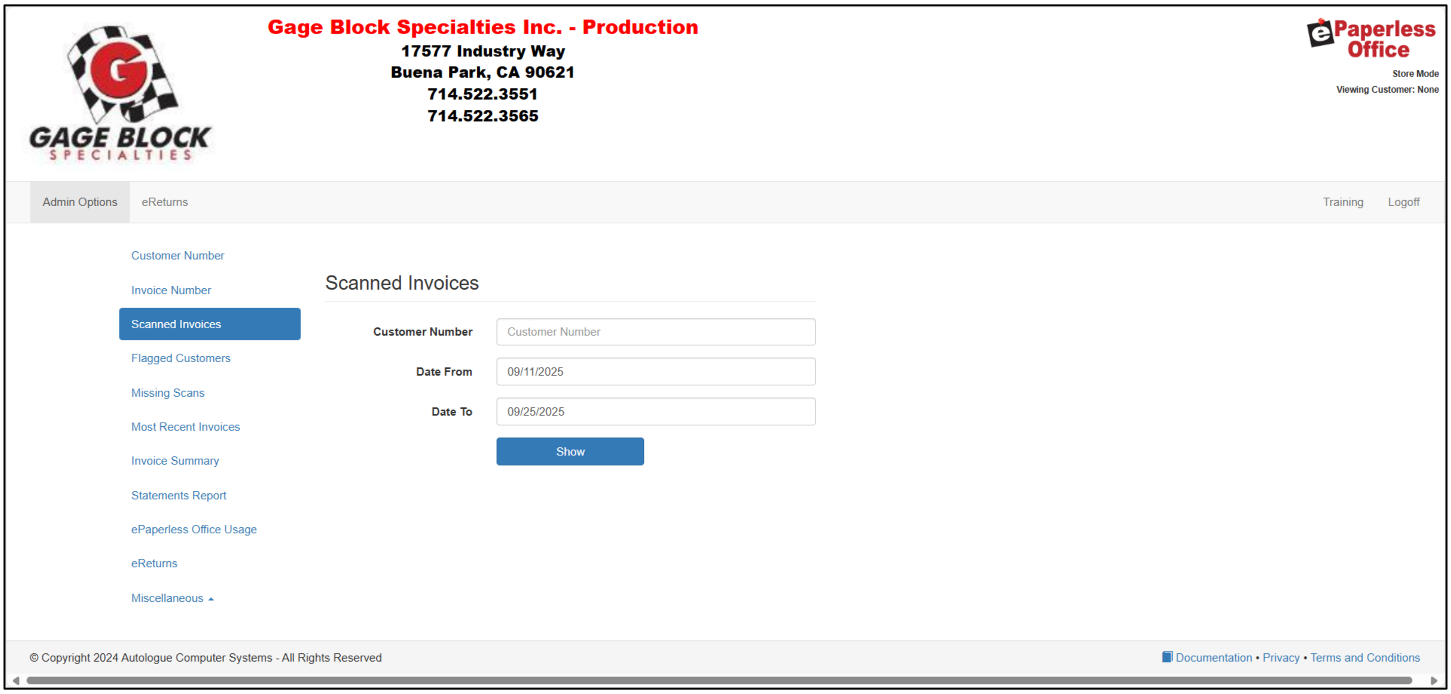
Printing

You can print the invoice information listed on the screen by clicking on the `Print` button listed above the *Invoice Number* column heading.

Show Scanned Invoices For A Customer

- To view scanned invoices for a specific customer, click on the *Scanned Invoices* menu link on the left side of the screen.

The *Scanned Invoices* screen will now be displayed as shown:



The screen will default the from/to dates to be from the past two weeks.

- With the cursor positioned within the *Customer Number* field, enter in the specific customer number to search for scanned invoices for.
- Click within the *Date From* field and click on the beginning date to search from.

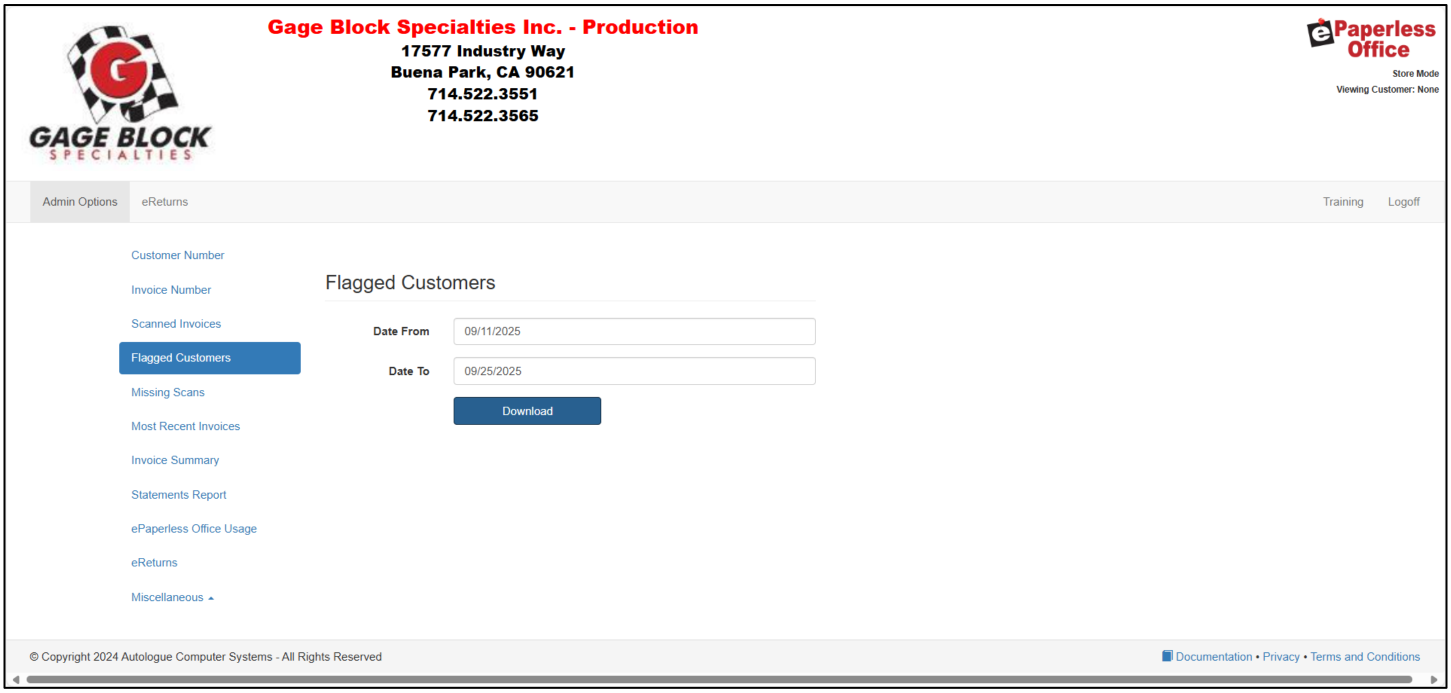
- Click within the *Date To* field and click on the ending date to search to and then click on the blue Show button and the screen will now display the matching scanned invoices search results as shown:

- Click on the blue *Admin Options* link to return to the *Scanned Invoices* screen.

Flagged Customers Invoice Download

- To create a PDF download file of original invoices for all flagged customers, click on the *Flagged Customers* menu link on the left side of the screen.

The *Flagged Customers* screen will now be displayed as shown:

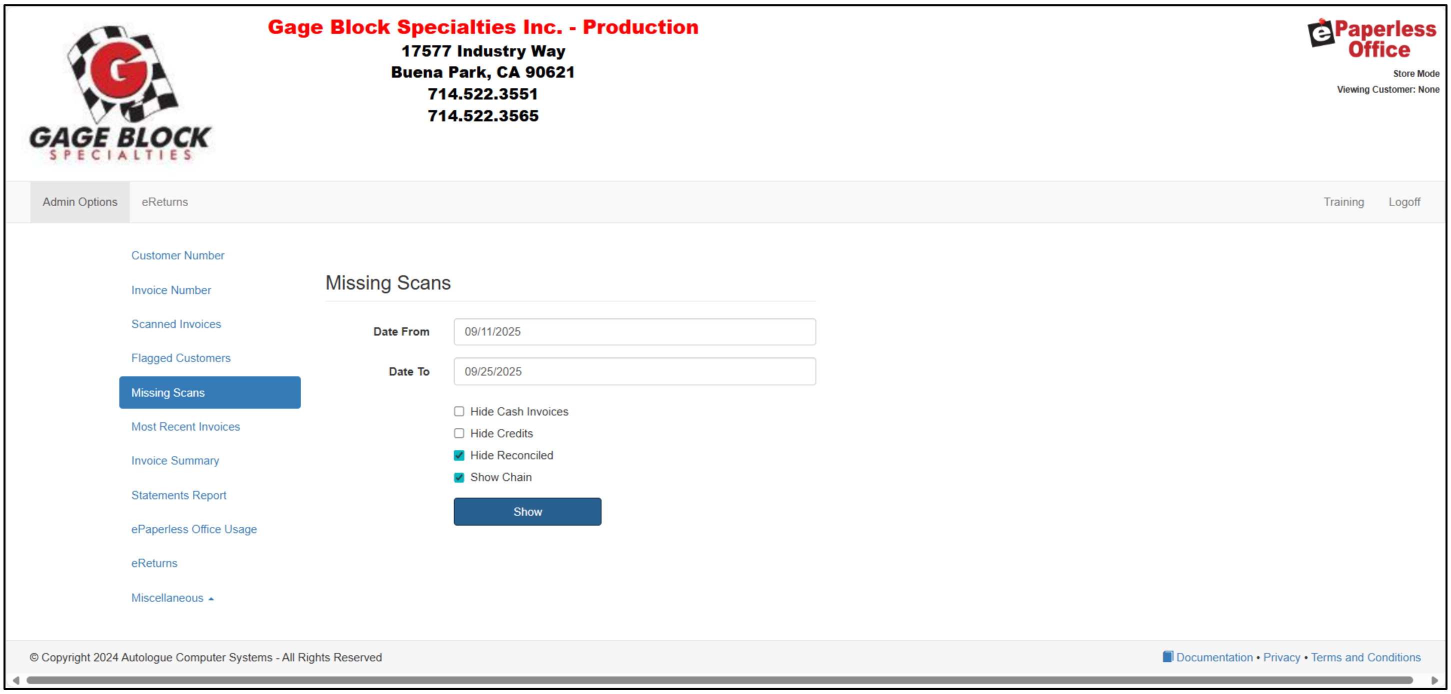


The screen will default the from/to dates to be from the past two weeks.

- Click within the *Date From* and *Date To* range fields to change the selected date ranges of the invoices to download.
- Click on the blue *Download* button to create a consolidated *FlaggedCustomers.pdf* formatted file that you can now save. The file will contain the original PDF invoices for all flagged customers within the date range selected.

Show Invoices Missing Scans

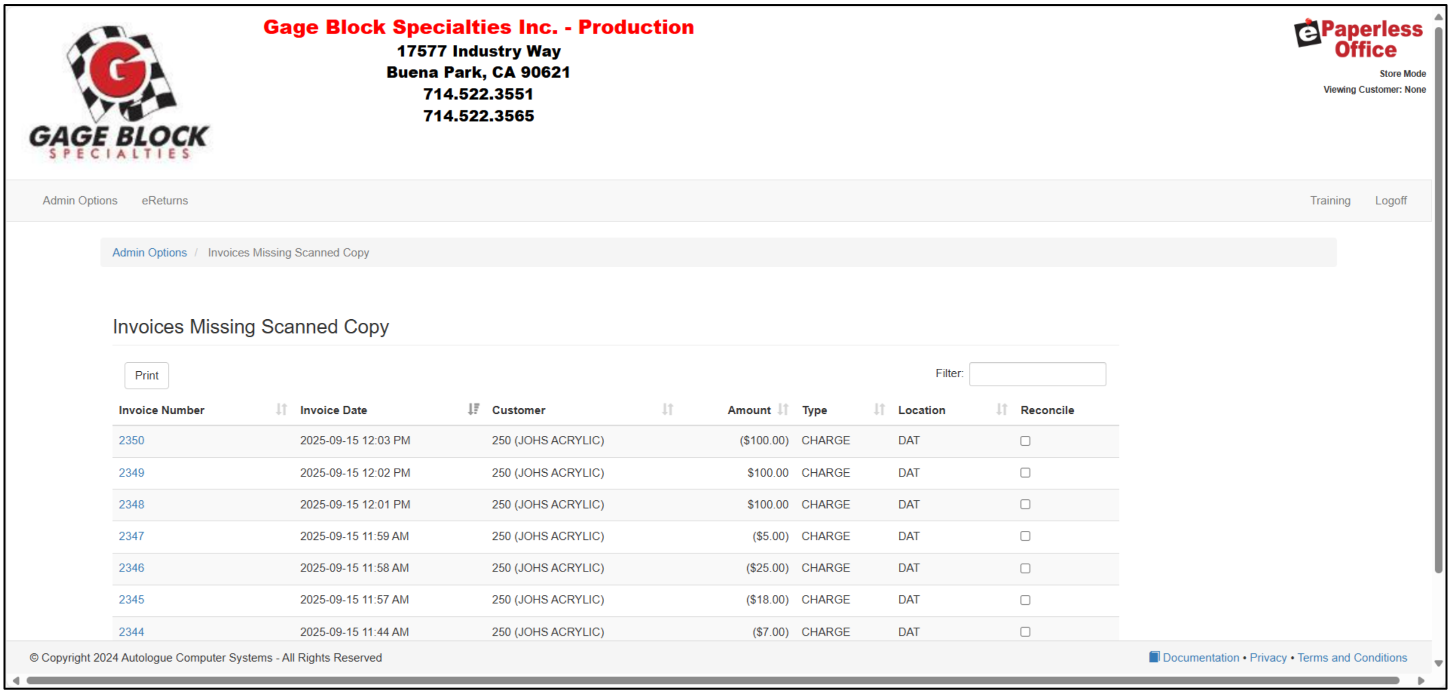
- To show invoices that are missing scanned copies of invoices, click on the *Missing Scans* menu link on the left side of the screen and the *Missing Scans* screen will now be displayed as shown:



The screen will default the from/to dates to be from the past two weeks.

- Click within the *Date From* and *Date To* range fields to change the selected date ranges of the invoices to download.
- There are check box options to hide cash invoices, credits, and reconciled invoices, as well as show chained store invoices. Click on the respective check boxes to exclude specific invoice types and then click on the blue `Show` button.

The screen will now display the invoices that are missing a scanned copy results as shown:



Viewing The Invoice Information

- To display the specific invoice information (part numbers, descriptions, quantities, etc.,) and other information for a specific invoice listed on the screen, left click on the blue invoice number link.

Invoice Column Information Displayed

The screen will display the following columns of information for each of the invoices listed:

• Invoice Number	• Invoice Date
• Customer (Number & Name)	• Amount (Invoice Total)
• Invoice Type	• Location
• Reconcile (Check box)	

Column Sorting

The missing scans screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Filter

You can enter a value within the *Filter:* field and the screen will then match the entered value to any of the invoices that contains this information within any of the columns listed. The screen will redraw and display only the matching invoice items.

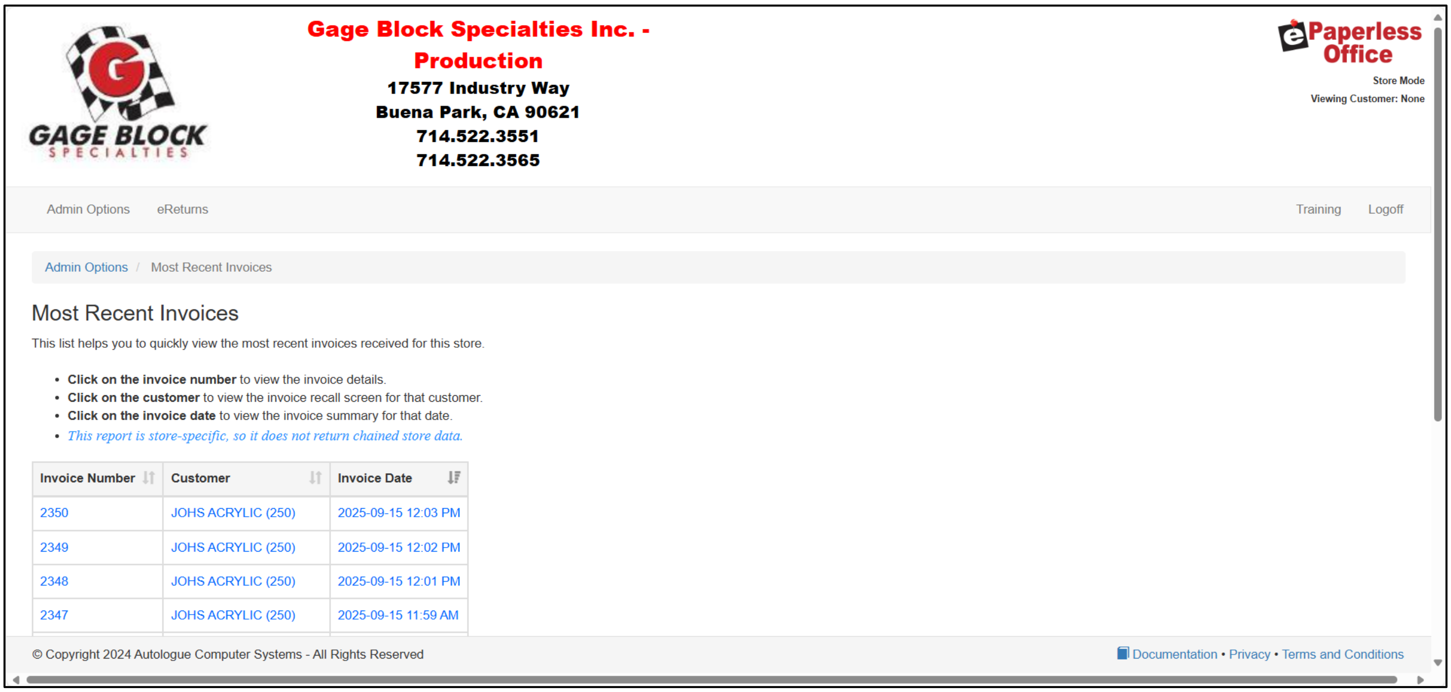
Printing

You can print the missing scans invoice information listed on the screen by clicking on the `Print` button listed above the *Invoice Number* column heading.

Most Recent Invoices

- To display a listing of the most recent invoices received for this store, click on the *Most Recent Invoices* menu link on the left side of the screen.

The *Most Recent Invoices* screen will now be displayed as shown:



The screen will display a listing of the most recent (last 15) invoices received only for this store. It does not return chained store data.

- Clicking on the blue invoice number link will display the invoice details.
- Clicking on the blue customer name/number link will display the invoice recall screen for that customer.
- Clicking on the blue invoice date link will display the invoice summary for that date.

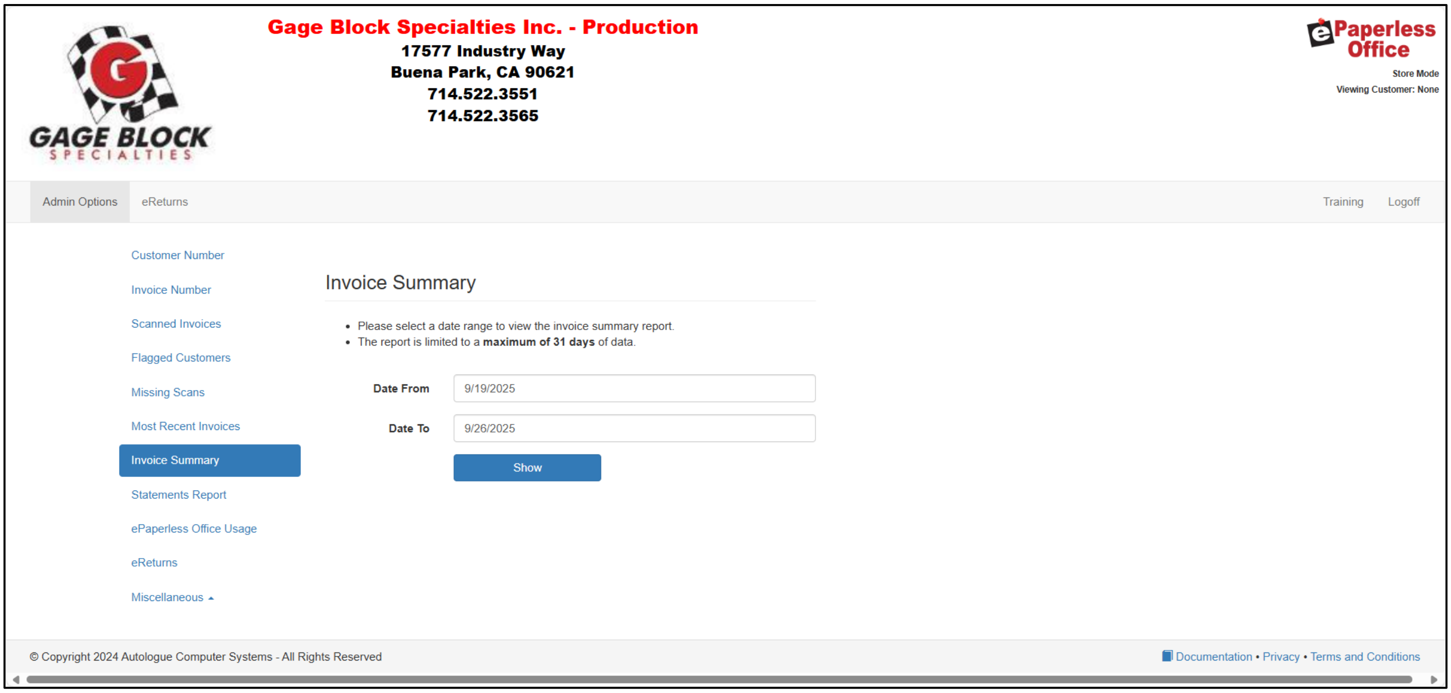
Column Sorting

The most recent invoices screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Invoice Summary

- To display an invoice summary for a date range, click on the *Invoice Summary* menu link on the left side of the screen.

The *Invoice Summary* screen will now be displayed as shown:

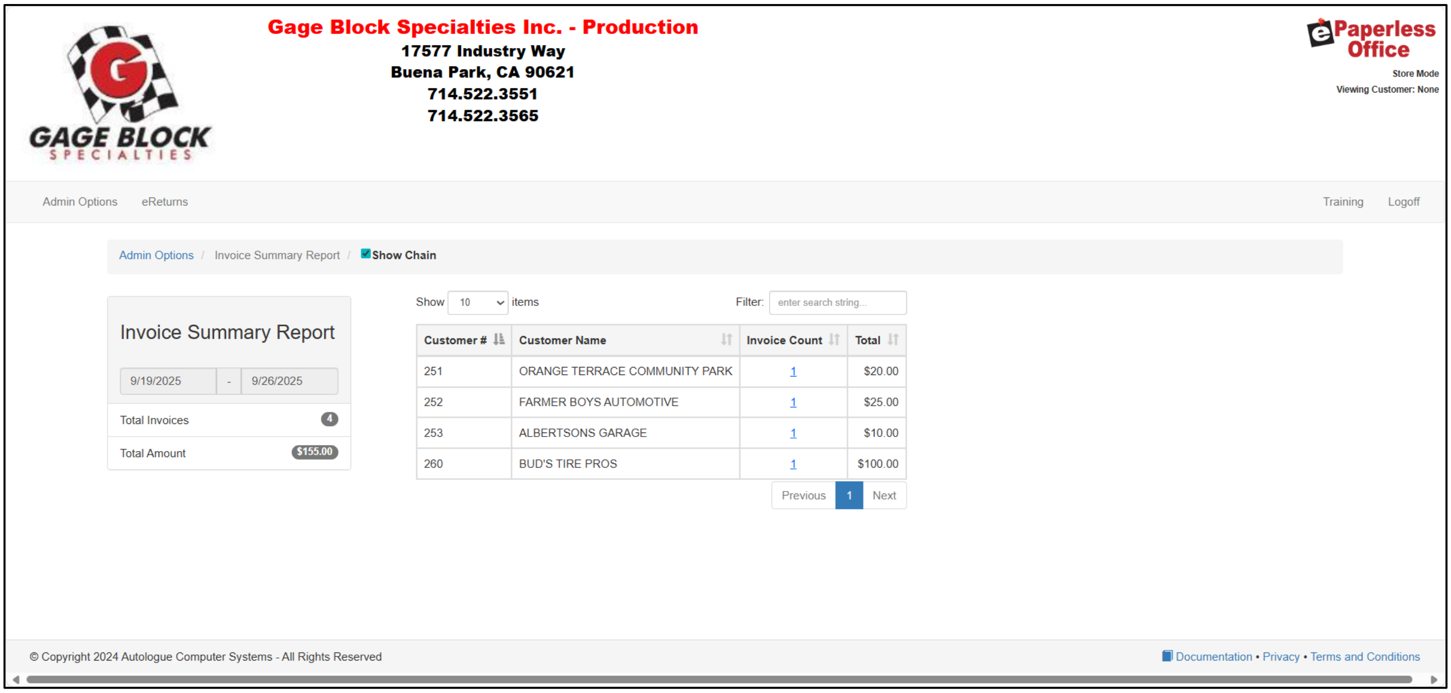


The screen will default the Date From/To fields from the past week to the current date.

- Click within the *Date From* and *Date To* range fields to change the selected date ranges of the invoices to display the *Invoice Summary Report* for and then click on the blue `Show` button.

☞ **<u>Note:</u> The report is limited to a maximum of 31 days of data.**

The screen will now display the *Invoice Summary Report* information results as shown:



The screen will display a summary total box in the upper left column that contains the totals for the number of invoices, and the dollar amount of all the invoices within the selected date range. The screen also lists out the customer number, customer name, invoice count, and the total amount of their invoices.

Column Sorting

The screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

Filter

You can enter a value within the *Filter:* field and the screen will then match the entered value to any of the invoices that contains this information within any of the columns listed. The screen will redraw and display only the matching invoice items.

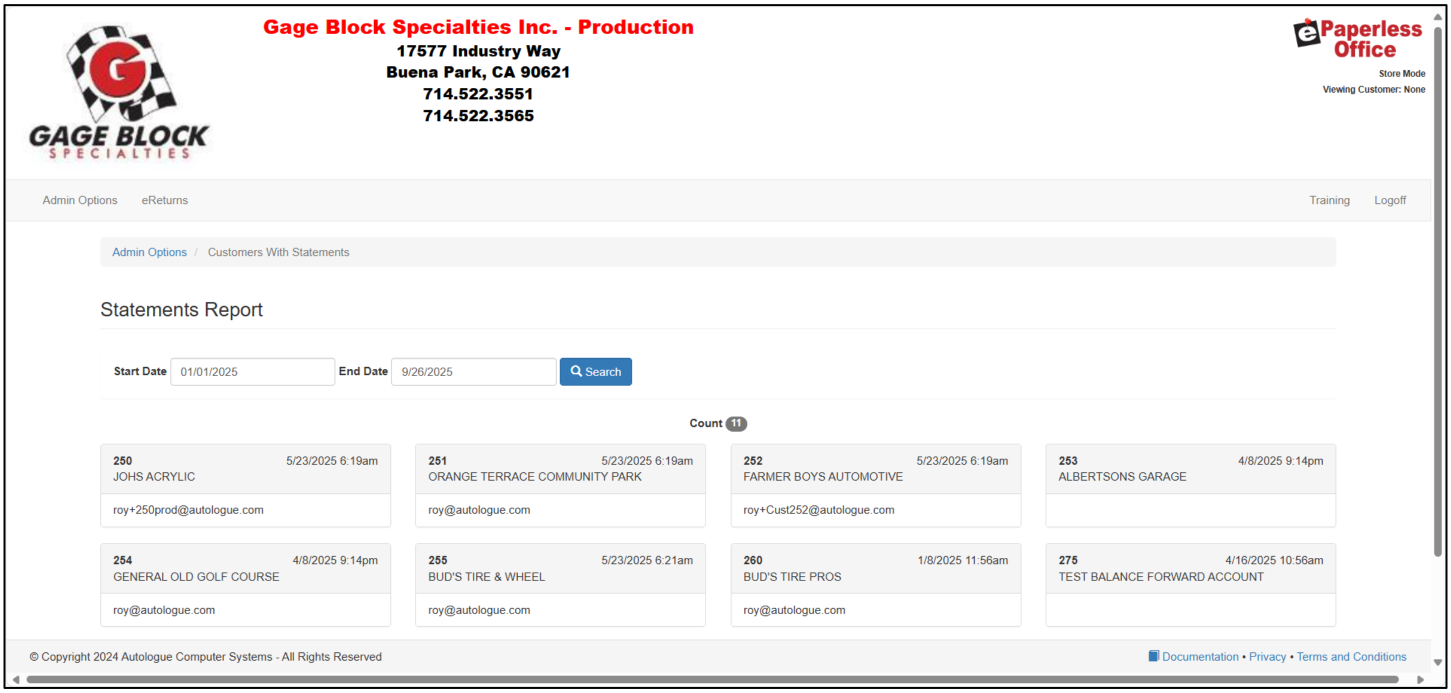
Statements Report

- To display a statements report for a date range, click on the *Statements Report* menu link on the left side of the screen and the following screen will be displayed:

The screen will default the Date From/To fields from the past two months to the current date.

- Click within the *Date From* and *Date To* range fields to change the selected date ranges of the statements to display and then click on the blue Search button.

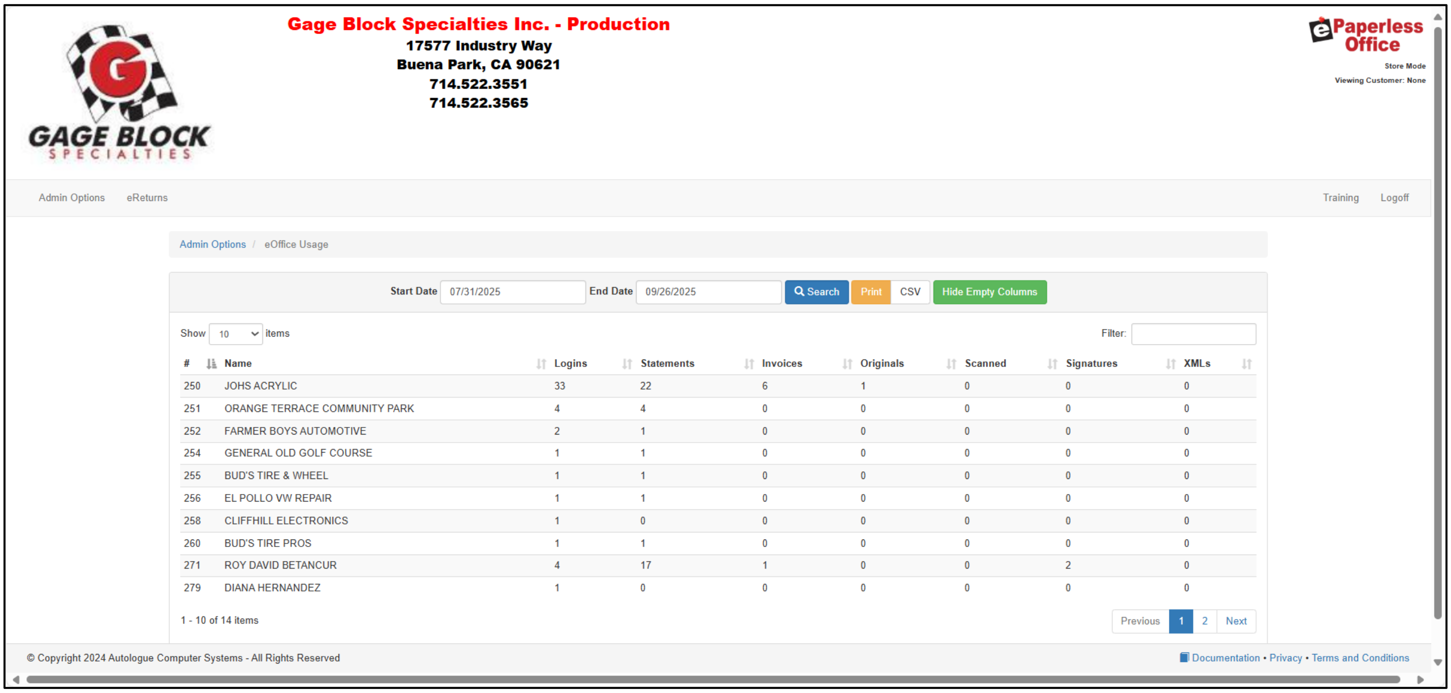
- The screen will now display the *Customers With Statements* results as shown:



The screen will display the following information for the customers that have a statement within the date range, count (displays the total number of customers that have statements), customer number and name, statement date, and any email addresses setup.

ePaperless Office Usage

- To display an eOffice Usage report for a date range, click on the *ePaperless Office Usage* menu link on the left side of the screen and the screen will now display the results as shown:



The displayed results are based upon the default the start/end dates to be from the end of the previous month to the present day. Each customer, that had eOffice usage activity, will have a row that will report the following count information within the date range:

- <u>Logins:</u> number of times logged into eOffice.
- <u>Statements:</u> number of times they viewed an actual statement.
- <u>Invoices:</u> number of times they viewed an actual invoice.
- <u>Originals:</u> number of times they clicked on the `View Original Invoice` button for an invoice.
- <u>Scanned:</u> number of times they clicked on the `View Scanned Invoice` button for an invoice.
- <u>Signatures:</u> number of times they clicked on the `View Signature` button for an invoice.
- <u>XML's:</u> number of times they clicked on the `Download XML` button for an invoice.

- To change the selected date range, click within the *Start Date* and *End Date* range fields and select date range to display information for and then click on the blue `Search` button. The screen will redraw and display the new results.
- To print the screens search results, click on the gold `Print` button.
- To export the search results into a comma delimited value (CSV) file, click on the white `CSV` button. The fields of information are dependent upon what was being viewed on the screen.

- To hide or show columns of information that has values of 0, click on the green `Show/Hide Empty Columns` button. The screen will redraw with the columns hidden or showing.
- To show more than 10 customers on the screen, click on the *Show N items* drop down selection field. Select *10*, *25*, *50* or *100* items to view and the screen will redraw with the number of customers now showing.

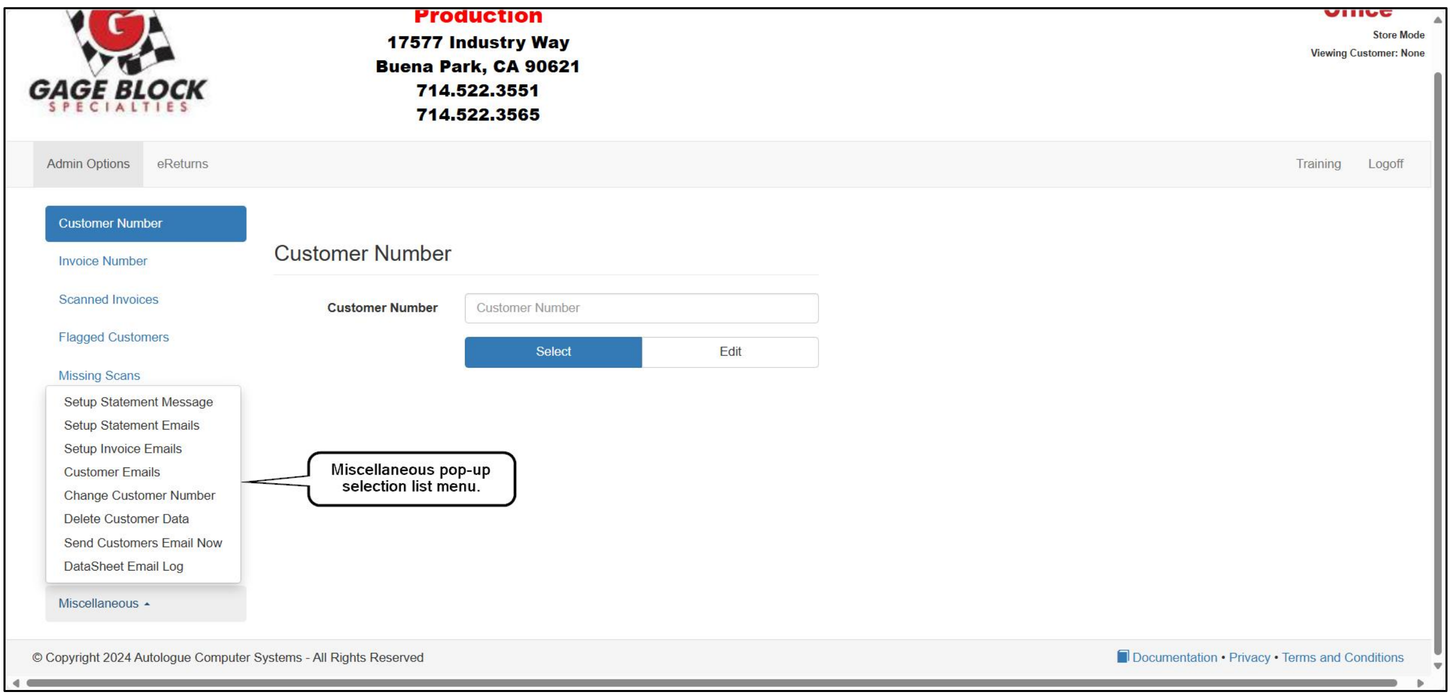
eReturns

The *eReturns Home* screen is where you can create and submit return requests for specific parts. There is separate *eReturn User Guide* document that explains all the functionality within the eReturns application.

Miscellaneous Functions

- There are a variety of miscellaneous administration functions that can be performed by clicking on the *Miscellaneous* menu link on the left side of the screen.

A miscellaneous pop-up selection list menu will now be displayed as shown:

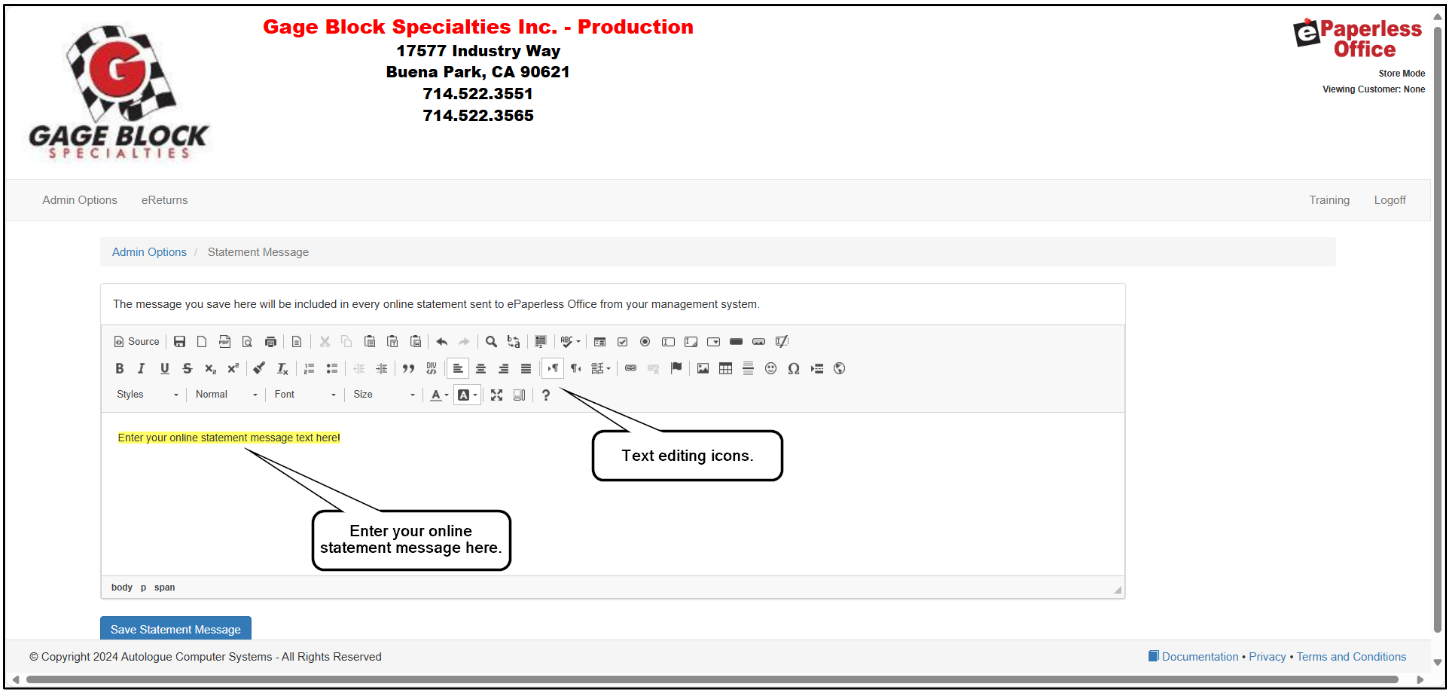


From this menu, you have option to perform the following miscellaneous functions:

- Setup Statement Message
- Setup Statement Emails
- Setup Invoice Emails
- Customer Emails
- Change Customer Number
- Delete Customer Data
- Send Customers Email Now
- Datasheet Email Log

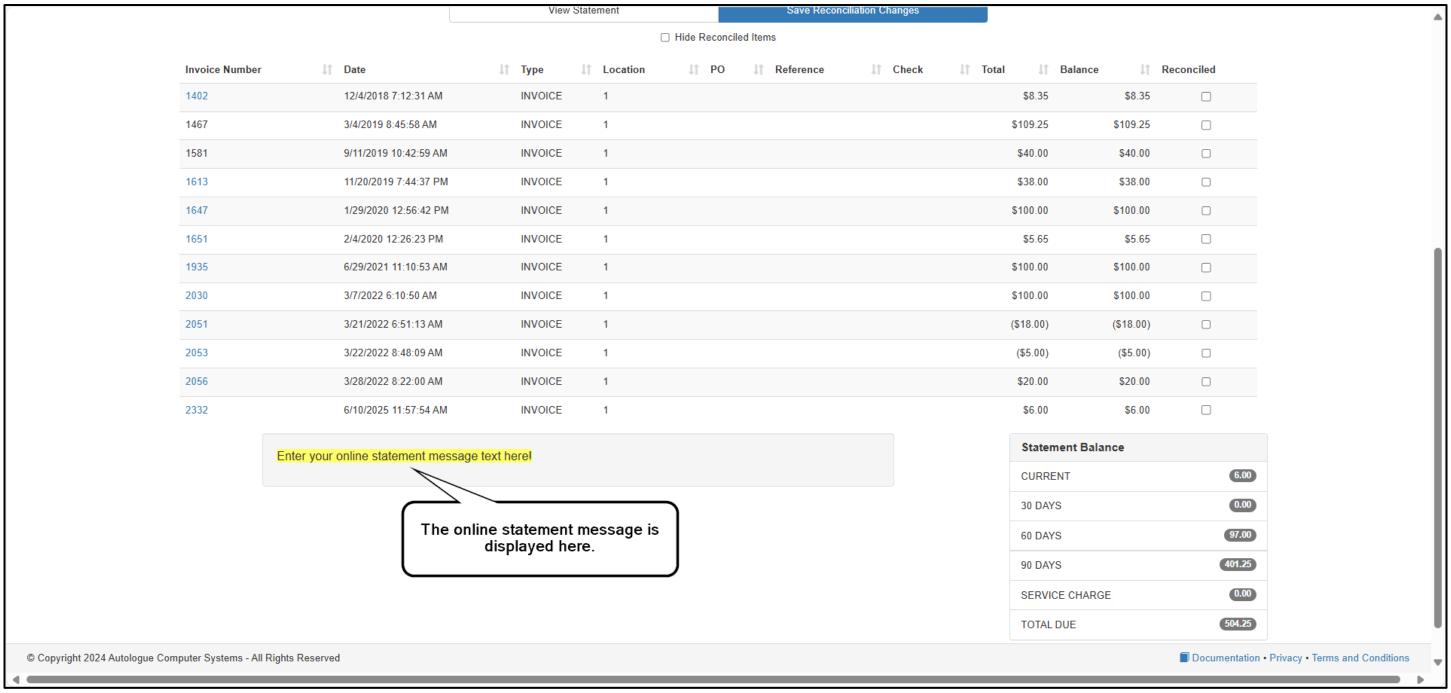
Setup Statement Message

- To setup an online statement message that will be displayed when customers view their statements via the *Statement* tab screen, click on the *Setup Statement Message* menu selection and the following screen will be displayed:



- With the cursor positioned within the body of the screen, enter the desired online statement message that will be displayed in every statement sent to the customer from the management system. There is functionality to bold, underline, and italicize specific text as well as many other functions using the text editing icons within the editing screen.
- When you are satisfied with the statement message, click on the blue `Save Statement Message` button to save the message.

Shown below is an example of where the statement message is displayed when a customer views their statement:



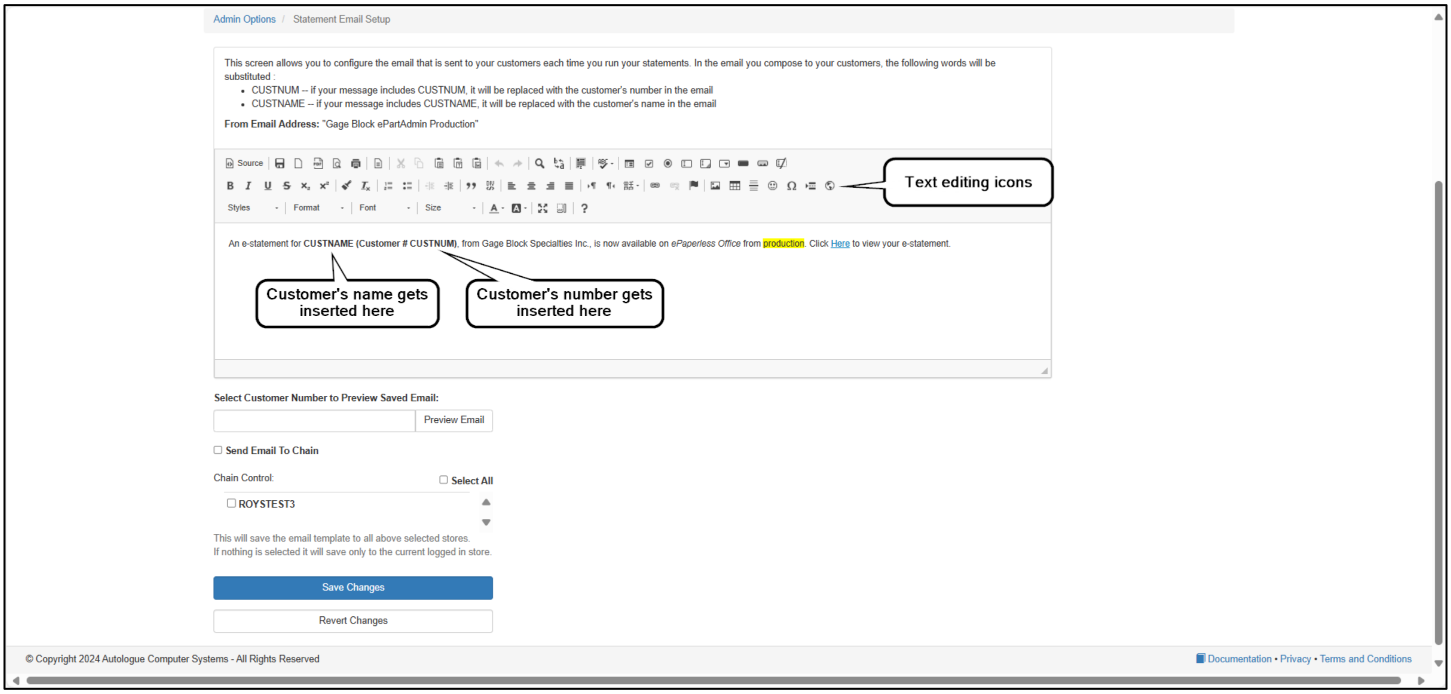
Invoice Number	Date	Type	Location	PO	Reference	Check	Total	Balance	Reconciled
1402	12/4/2018 7:12:31 AM	INVOICE	1				$8.35	$8.35	
1467	3/4/2019 8:45:58 AM	INVOICE	1				$109.25	$109.25	
1581	9/11/2019 10:42:59 AM	INVOICE	1				$40.00	$40.00	
1613	11/20/2019 7:44:37 PM	INVOICE	1				$38.00	$38.00	
1647	1/29/2020 12:56:42 PM	INVOICE	1				$100.00	$100.00	
1651	2/4/2020 12:26:23 PM	INVOICE	1				$5.65	$5.65	
1935	6/29/2021 11:10:53 AM	INVOICE	1				$100.00	$100.00	
2030	3/7/2022 6:10:50 AM	INVOICE	1				$100.00	$100.00	
2051	3/21/2022 6:51:13 AM	INVOICE	1				($18.00)	($18.00)	
2053	3/22/2022 8:48:09 AM	INVOICE	1				($5.00)	($5.00)	
2056	3/28/2022 8:22:00 AM	INVOICE	1				$20.00	$20.00	
2332	6/10/2025 11:57:54 AM	INVOICE	1				$6.00	$6.00	

Statement Balance	
CURRENT	6.00
30 DAYS	0.00
60 DAYS	97.00
90 DAYS	401.25
SERVICE CHARGE	0.00
TOTAL DUE	504.25

- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Setup Statement Emails

- To setup your statement email message that will be sent to customers, click on the *Setup Statement Emails* menu selection and the following screen will be displayed:

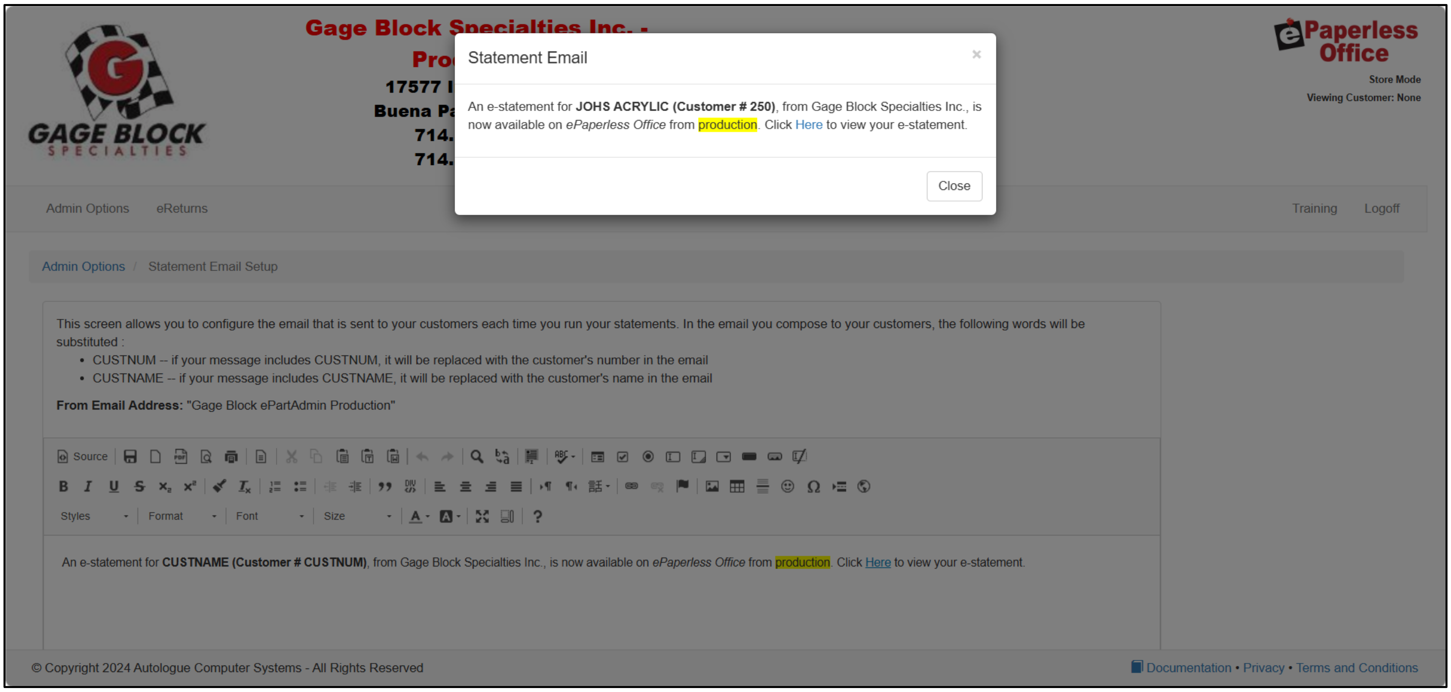


- With the cursor positioned within the body of the screen, enter the desired email statement message that will go out to all customers. The message can include **`CUSTNUM`** and **`CUSTNAME`** keywords that will be substituted with the customer's number and name within the email. There is functionality to bold, underline, and italicize specific text as well as many other functions using the icons within the email editor screen.

Previewing The Statement Email

- To preview the statement email, enter in a specific customer number under the *Select Customer Number to Preview Saved Email* heading field and then click on the `Preview Email` button.

A *Statement Email* preview pop-up window will be displayed as shown:

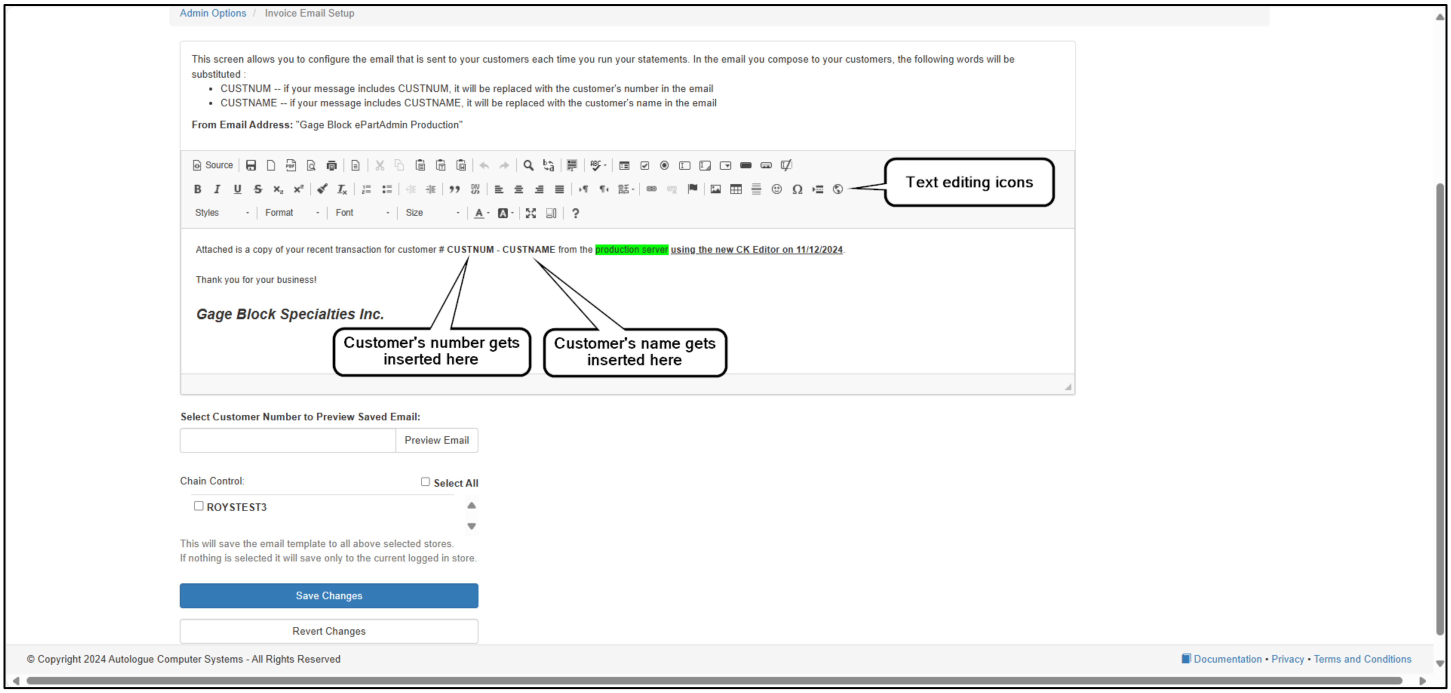


- To close the preview window and return to the email screen, click on the `Close` button.
- When you are satisfied with the email statement message, click on the blue `Save Changes` button to save the message.
- To revert the screen back to its original message, click on the `Revert Changes` button.
- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Setup Invoice Emails

- To setup your invoice email message that will be sent to customers, click on the *Setup Invoice Emails* menu selection.

The screen will now display the following as shown:

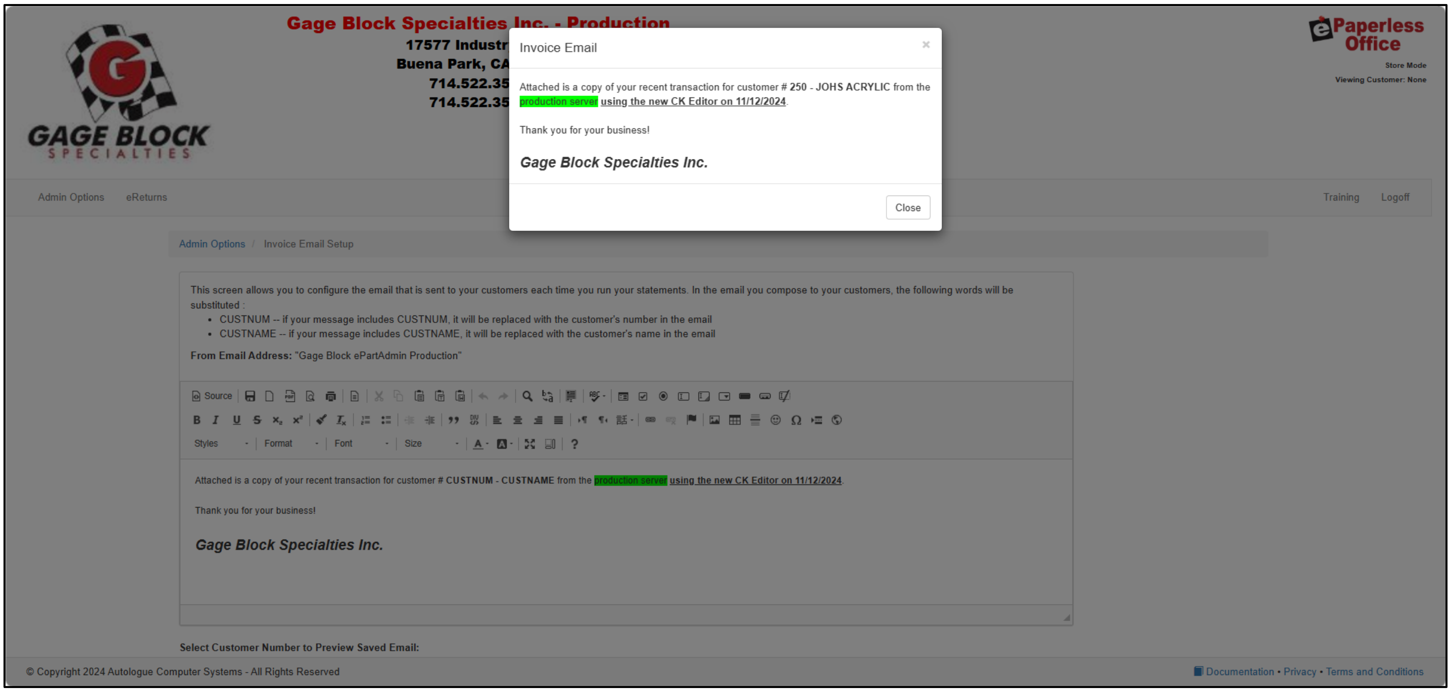


- With the cursor positioned within the body of the screen, enter the desired email invoice message that will go out to all customers. The message can include **`CUSTNUM`** and **`CUSTNAME`** keywords that will be substituted with the customer's number and name within the email. There is functionality to bold, underline, and italicize specific text as well as many other functions using the icons within the email editor screen.

Previewing The Invoice Email

- To preview the invoice email, enter in a specific customer number under the *Select Customer Number to Preview Saved Email* heading field and then click on the `Preview Email` button.

A preview email window will be displayed as shown:

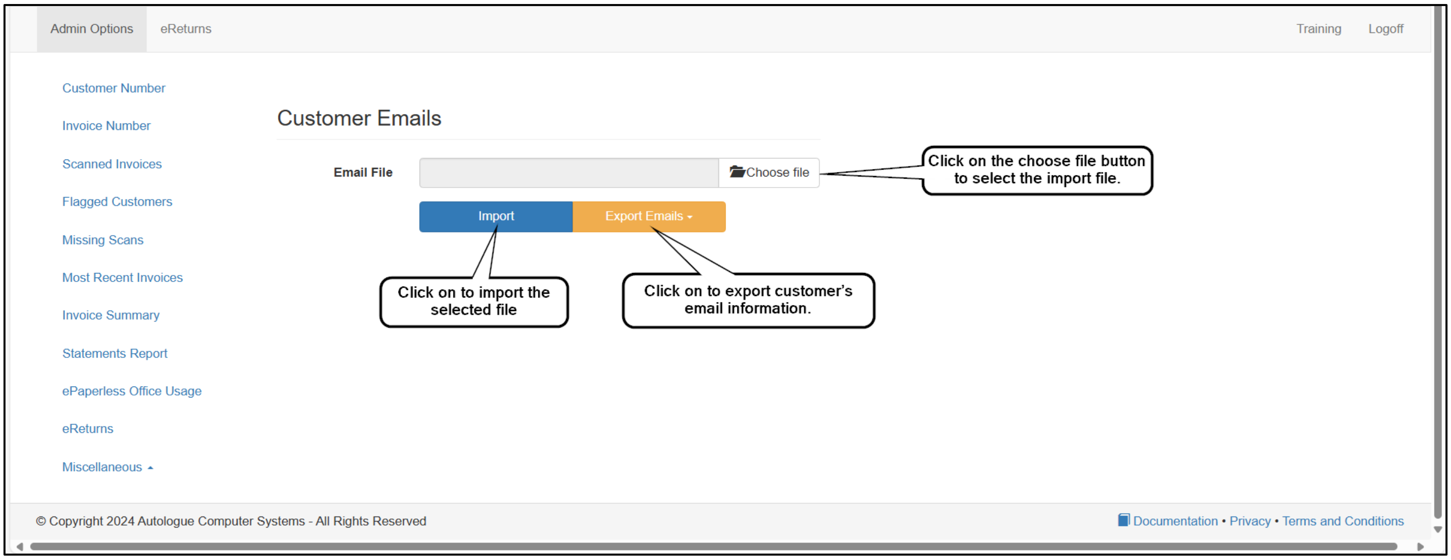


- To close the preview window and return to the email screen, click on the `Close` button.
- When you are satisfied with the email invoice message, click on the blue `Save Changes` button to save the message.
- To revert the screen back to its original message, click on the `Revert Changes` button.
- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Customer Emails

- To import/export email addresses for your customers, click on the *Customer Emails* menu selection.

The *Customer Emails* screen will now display the following as shown:



Export Customer Emails

- You can download a CSV (comma separated value) formatted file (*custEmails.csv*) by left clicking on the `Export Emails` button.

The file will contain headings and data for customer number, statement email, and invoice email for all your customers. If there are multiple email addresses for either invoices or statements, they will be quote delimited.

Import Customer Emails

- To import customer emails, left click on the `Choose file` button. Select the CSV (comma separated value) formatted file and then left click on the blue `Import` button.

The emails information will be loaded into each customer accordingly.

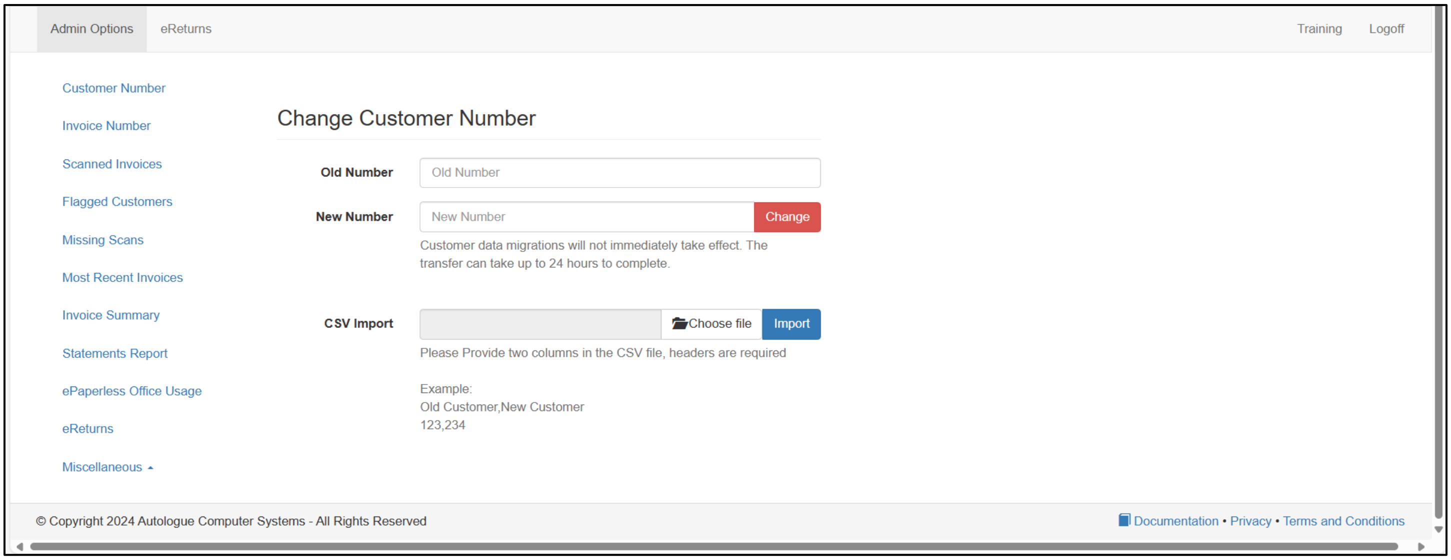
- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Change Customer Data

When you change a customer number within your management system, the customer number will also need to be changed within eOffice.

- To change a customer number within eOffice, click on the *Change Customer Data* menu selection.

The *Change Customer Number* screen will now be displayed as shown:



- With the cursor positioned within the *Old Number* field, enter the customer's old number, then press the <Tab> key.
- With the cursor positioned within the *New Number* field, enter the customer's new number, then click on the red `Change` button.
- A small *Change Customer Number! – Are you sure you want to change Customer Number?* pop up window will now be displayed. Click on either the red `Yes` button to make the change or the blue `No` button.

Importing Customer Number Changes

An example for the CSV file format is shown below the *CSV Import* field.

- To import customer number changes, left click on the `Choose file` button. Select the CSV (comma separated value) formatted file and then left click on the blue `Import` button.

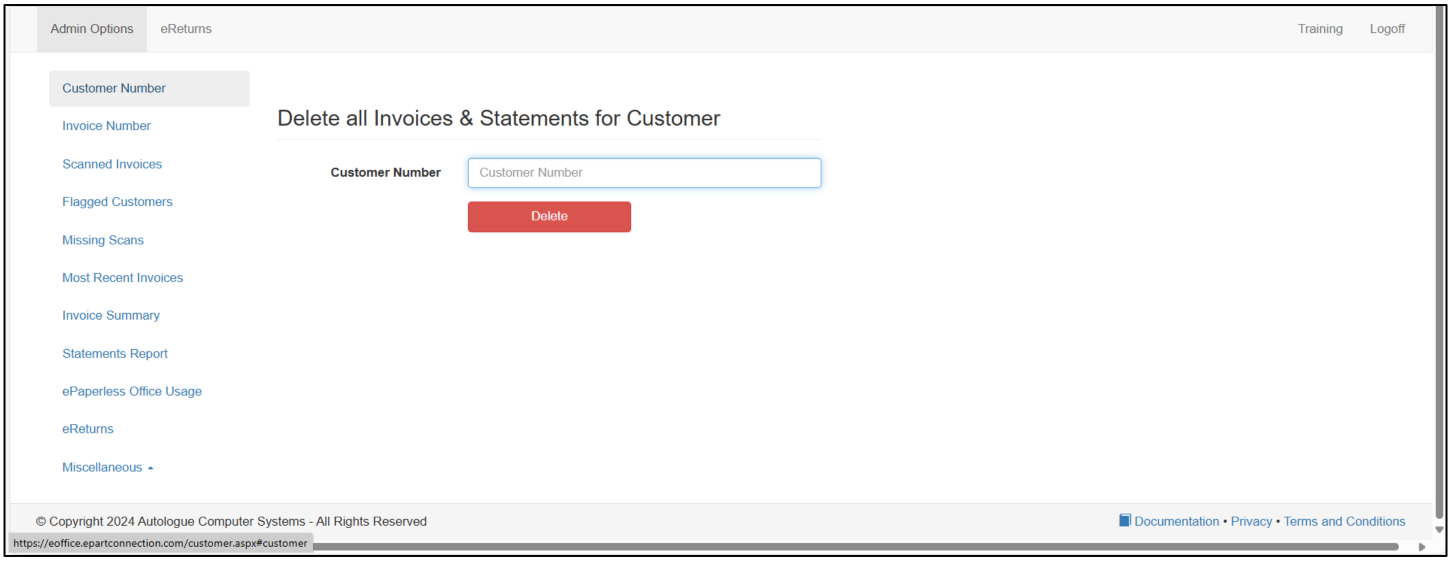
The customer number changes will be applied accordingly.

- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Delete Customer Data

- To delete all invoice and statement data for a customer number within eOffice, click on the *Delete Customer Data* menu selection.

The *Delete all Invoices & Statements for Customer* screen will now be displayed as shown:



- With the cursor positioned within the *Customer Number* field, enter the customer number and then click on the red `Delete` button.
- A small *Delete Customer Data! – Are you sure you want to Delete the Customer Data?* pop up window will now be displayed. Click on either the red `Yes` button to make the change or the blue `No` button.

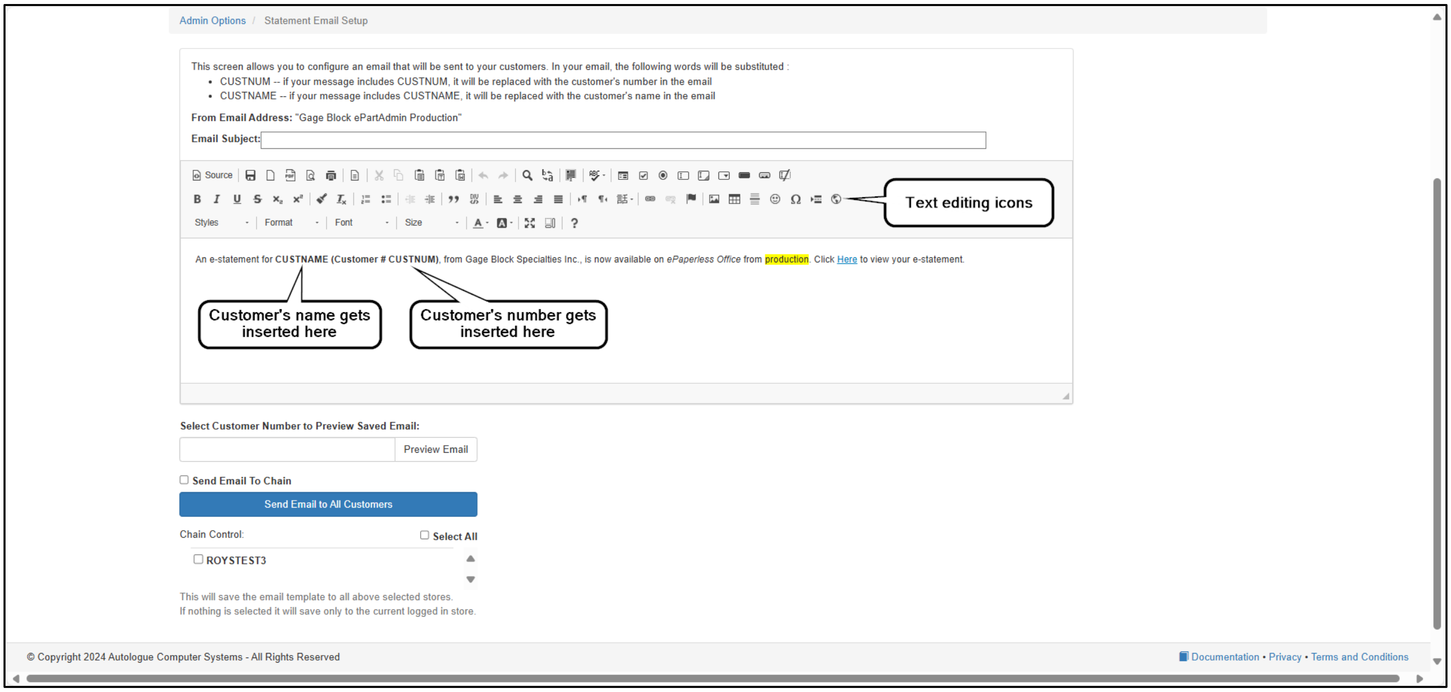
When the red `Yes` button is clicked, the screen will display a green bar at the top of the screen with the following message ✓*Customer NNN flagged for deletion. Please allow 24-48 hours for data to be cleared.*

- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Send Customers Email Now

- To create an email and have it sent to all your customers, click on the *Send Customers Email Now* menu option.

The screen will now display the following as shown:



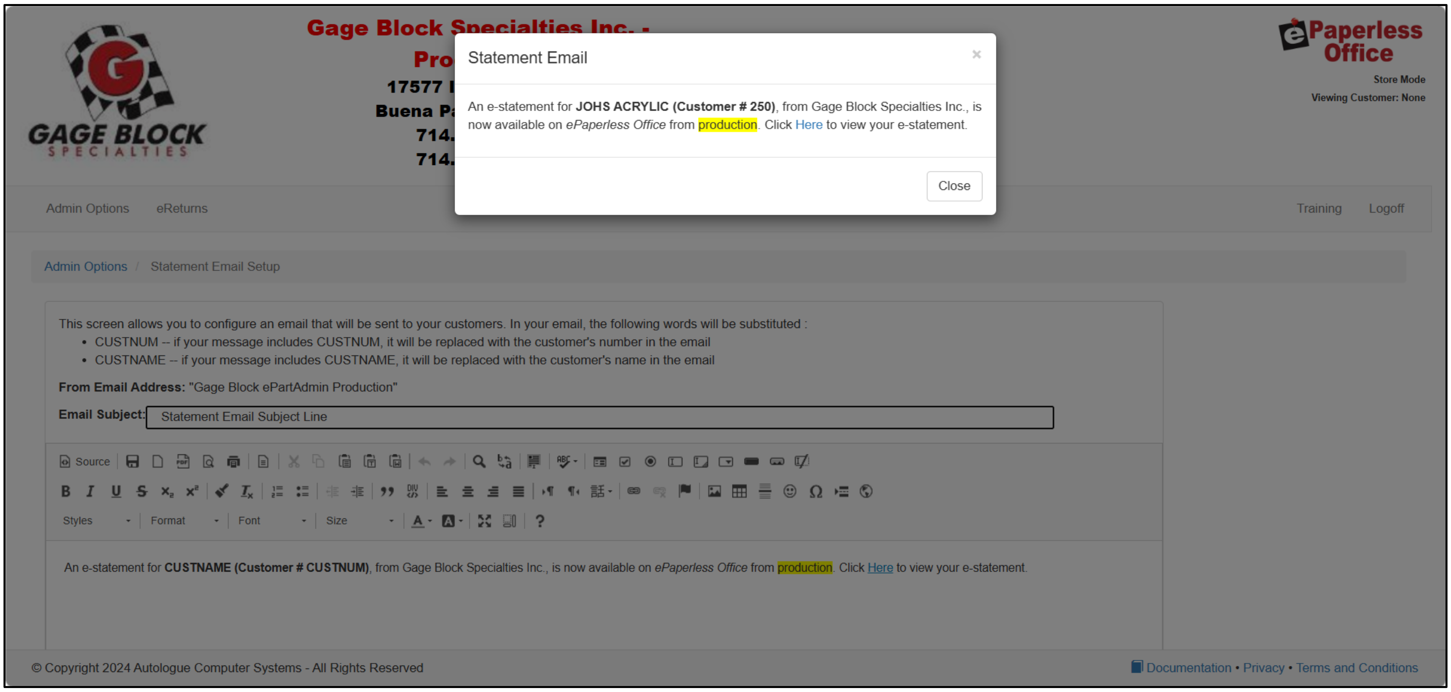
- With the cursor positioned within the *Email Subject:* field, enter the subject information and then click within the body of the screen.

Within the body of the screen, you can create a specific email message that will go out to all customers. The message can include **`CUSTNUM`** and **`CUSTNAME`** keywords that will be substituted with the customer's number and name within the email. There is functionality to bold, underline, and italicize specific text as well as many other functions using the icons within the email editor screen.

Previewing The Email

- To preview the email, enter in a specific customer number under the *Select Customer Number to Preview Saved Email* heading field and then click on the `Preview Email` button.

A preview email window will be displayed as shown:

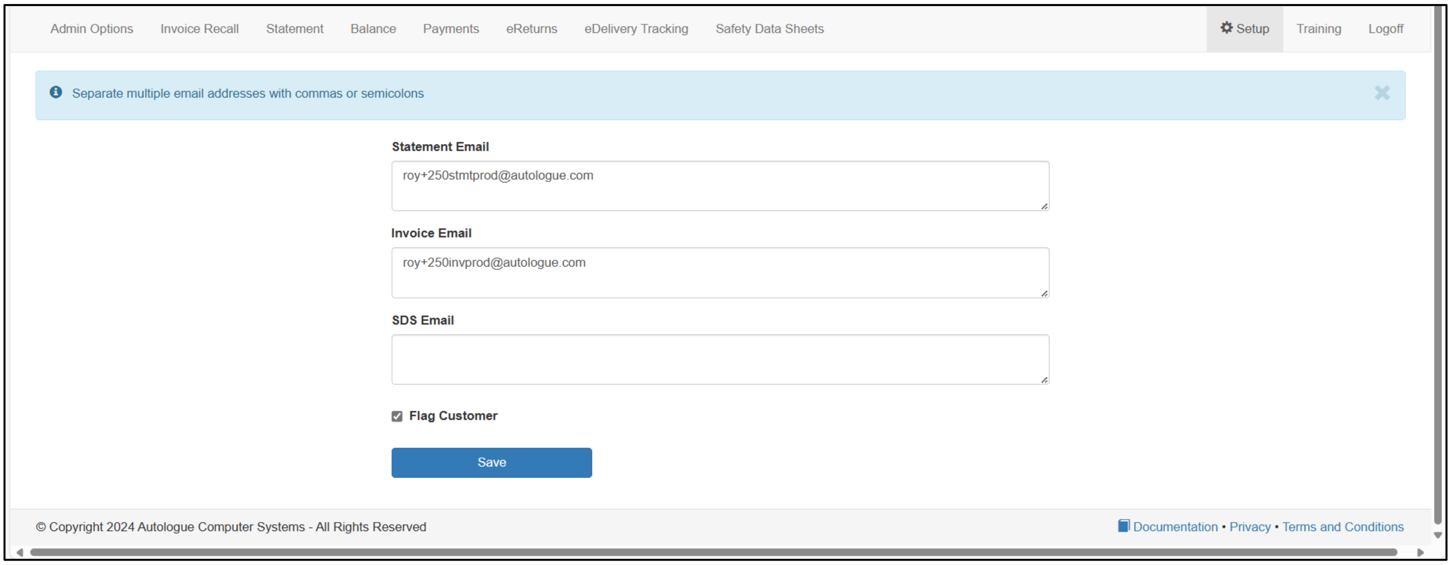


- To close the preview window and return to the email screen, click on the `Close` button.
- When you are satisfied with the email, click on the blue `Send Email to All Customers` button have this email message sent out to all customers that have invoice email addresses setup.
- Click on the blue *Admin Options* menu link to return to the *Admin Options* screen.

Setup

- Once a customer has been selected, to setup specific email addresses for a customer to receive invoices and/or statement notifications, click on the ☼ *Setup* tab at the top right hand side of the screen.

The following screen will now be displayed as shown:



Refer to the *Selecting A Customer To Edit Information* section previously described for complete details of this screen.

Logging Off Of ePaperless Office

- To log out of the ePaperless Office administration account website, click on the *Logoff* tab at the top right-hand side of the screen.