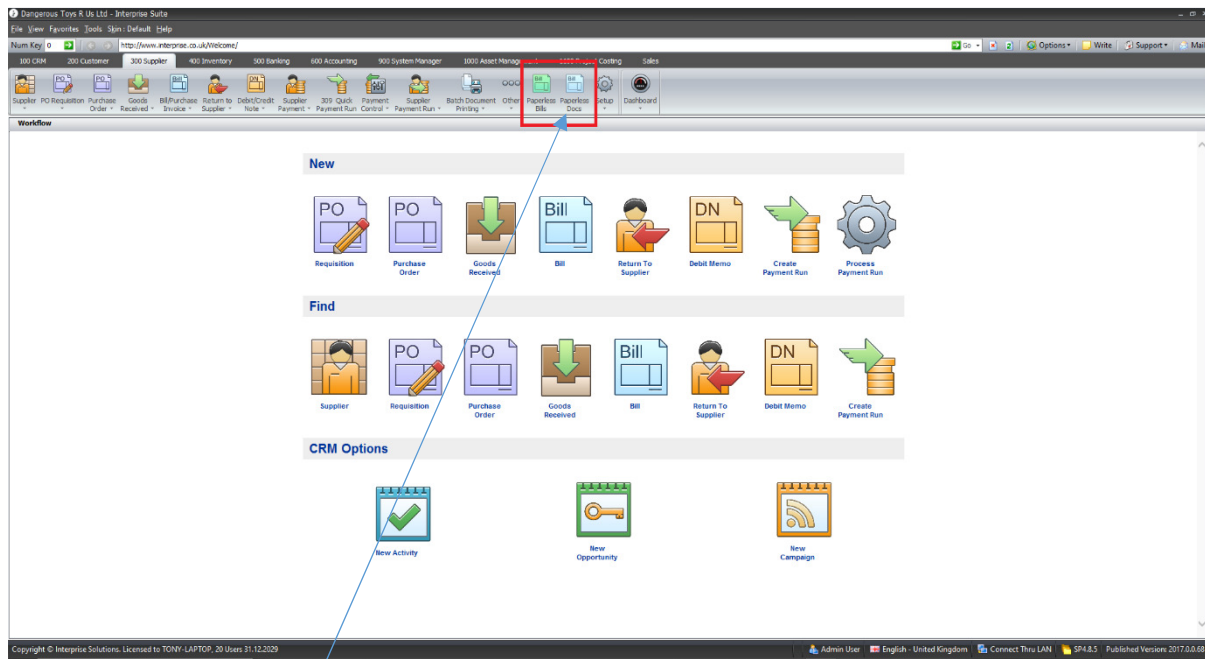


Paperless Documents



Paperless Docs would be ideal as an example to keep PODs (Proof of Delivery). If you do paper delivery notes then you could scan them in as PDFs maybe 50 at a time. Use the PDF Splitter to chop them up into single page PDFs. Use the OCR Parser to find the document code and then Attach Documents to attach them to the relevant SO or INV. This would save having to store paper copies. You would be able to access the POD at any time by looking at the invoice.

You can automatically attach documents for the following types of record:

QU	Quotes
SO	Sales Orders
INV	Invoice
RMA	Returns
CCNOTE	Credit Note
PO	Purchase Order
GRN	Good Received
BILL	Supplier Bill
ACT	Activity Case, Meeting, To Do, Call, Call Back
CUST	Customer
SUP	Supplier

You could scan documents to PDF maybe 50 at a time, maybe use the PDF Splitter feature to split them into single PDF files and then OCR Parser them in Paperless Docs.

The Paperless Docs makes it a lot easier to keep the documents and access them later on.

If the document cannot be OCR'd then you can manually pick a document type and document code from a pull down, so still attach them using this plugin.

The screenshot displays the 'Paperless Document List' application. The main window contains a table of document entries. The 'Attach Document' button in the top toolbar is highlighted with a red box. A preview window on the right shows a document page with a header and a table of data.

Counter	File Name	Size (KB)	File Type	Date Created	User Created	Type	Document/Entry Code	Customer/Supplier Name
55	QU Converted to SO 72	103 KB	pdf	08/03/2022	admin	Quote	QU-000072	A Toy Customer UK Ltd
56	QU Pro Converted to SO 72	103 KB	pdf	08/03/2022	admin	Quote	QU-000072	A Toy Customer UK Ltd
57	ACT 282 outstanding	88 KB	pdf	08/03/2022	admin	Activity	ACT-000282	ABC Toy Company Ltd
58	ACT 284 completed	88 KB	pdf	08/03/2022	admin	Activity	ACT-000284	A Toy Customer UK Ltd
59	BILL 112	103 KB	pdf	08/03/2022	admin	Invoice	INV-000156	Tony Test
60	CRMA 11 Outstanding	87 KB	pdf	08/03/2022	admin	RMA	CRMA-000011	DIG Toys Ltd
61	CRMA 12 converted	87 KB	pdf	08/03/2022	admin	RMA	CRMA-000012	Henry Mcall toys Ltd.
63	INV 156 Delivery Note rout posted	86 KB	pdf	08/03/2022	admin	Invoice	INV-000156	Tony Test
63	INV 156 not posted	104 KB	pdf	08/03/2022	admin	Invoice	INV-000156	Tony Test
64	INV 157 Delivery Note Posted Inv	86 KB	pdf	08/03/2022	admin	Invoice	INV-000157	Bike Brothers
65	INV 157 Posted	104 KB	pdf	08/03/2022	admin	Invoice	INV-000157	Bike Brothers
66	SO 322 Order Acknowledgement	103 KB	pdf	08/03/2022	admin	Sales Order	SO-000322	Arden Cycles
67	SO 322 Order Packing Note	86 KB	pdf	08/03/2022	admin	Sales Order	SO-000322	Arden Cycles
68	SO 322 Order Picking Ticket	87 KB	pdf	08/03/2022	admin	Sales Order	SO-000322	Arden Cycles
69	SO 322 Pick note by Route Order	87 KB	pdf	08/03/2022	admin	Sales Order	SO-000322	Arden Cycles
70	SO 322 Sales Order	87 KB	pdf	08/03/2022	admin	Sales Order	SO-000322	Arden Cycles
71	SO 322 SO Delivery Note	88 KB	pdf	08/03/2022	admin	Sales Order	SO-000322	Arden Cycles
72	SO 323 Order Ack Converted	103 KB	pdf	08/03/2022	admin	Sales Order	SO-000323	Bike Brothers
73	SO 323 Pick Note BY router Order Converted to Inv	87 KB	pdf	08/03/2022	admin	Sales Order	SO-000323	Bike Brothers
74	SO 323 SO Delivery Note Converted to Inv	87 KB	pdf	08/03/2022	admin	Sales Order	SO-000323	Bike Brothers
75	CONOTE 12	103 KB	pdf	08/03/2022	admin	Credit Memo	CCMOTC-000012	Henry Mcall toys Ltd.
76	GRN 107 Anasling Bill	103 KB	pdf	08/03/2022	admin	Purchase Order	PO-000218	Dangerous Toys R Us Ltd
77	GRN 109 Bill Received	103 KB	pdf	08/03/2022	admin	Purchase Order	PO-000218	Dangerous Toys R Us Ltd
78	PO 217 outstanding	103 KB	pdf	08/03/2022	admin	Purchase Order	PO-000217	Baba Caba
79	PO 218 Converted to GRN	103 KB	pdf	08/03/2022	admin	Purchase Order	PO-000218	Bits And Bobs

The above have been OCR'd. All you need to do now is click the Attach document button.

In Setup we have 1 template that we apply to all files. We specify a Text Search using the document Prefix like INV- or SO-. It comes with these already configured so should work out the box.