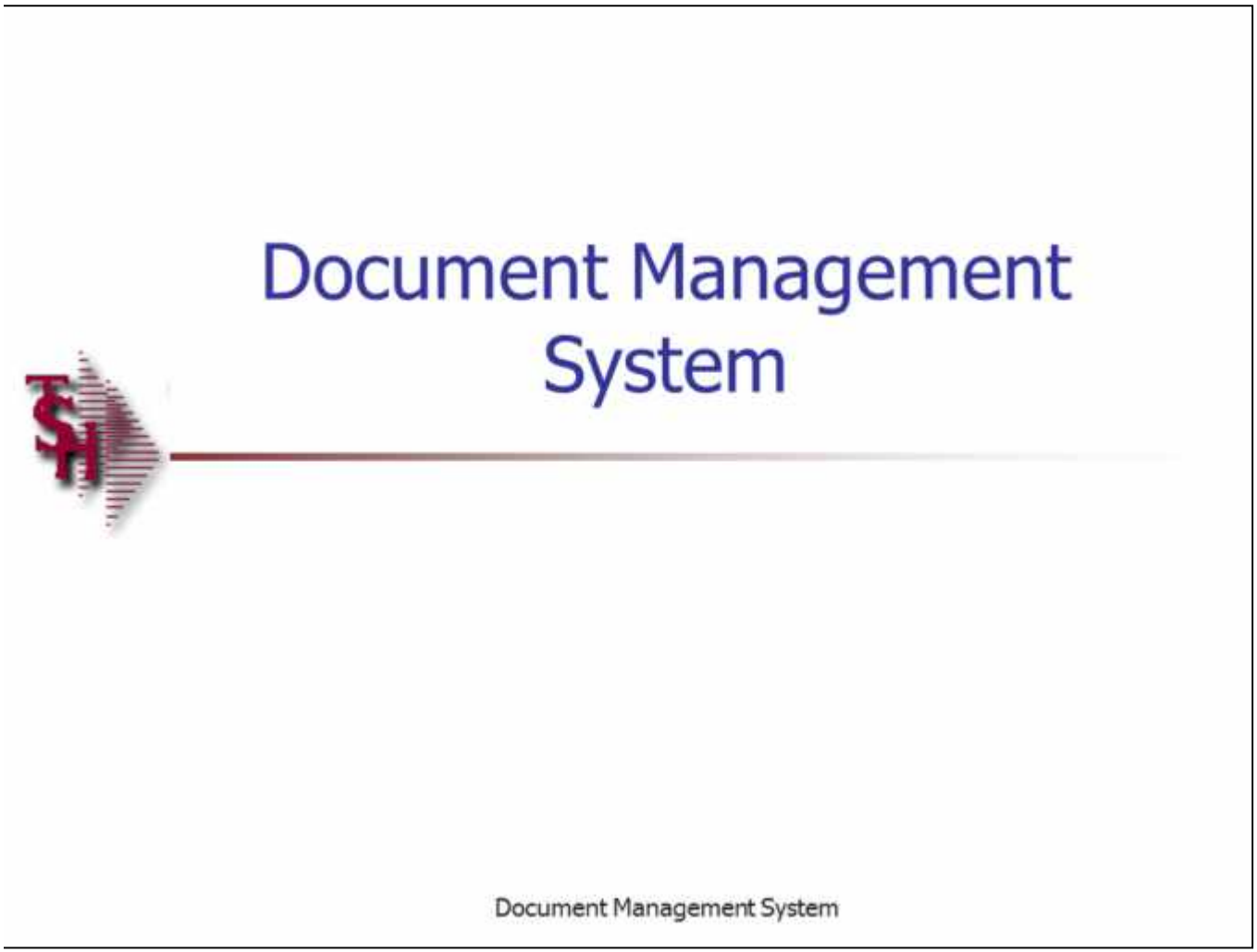

Customer Reporting System Training Guide

The following training guide is a guide for the Document Management System.

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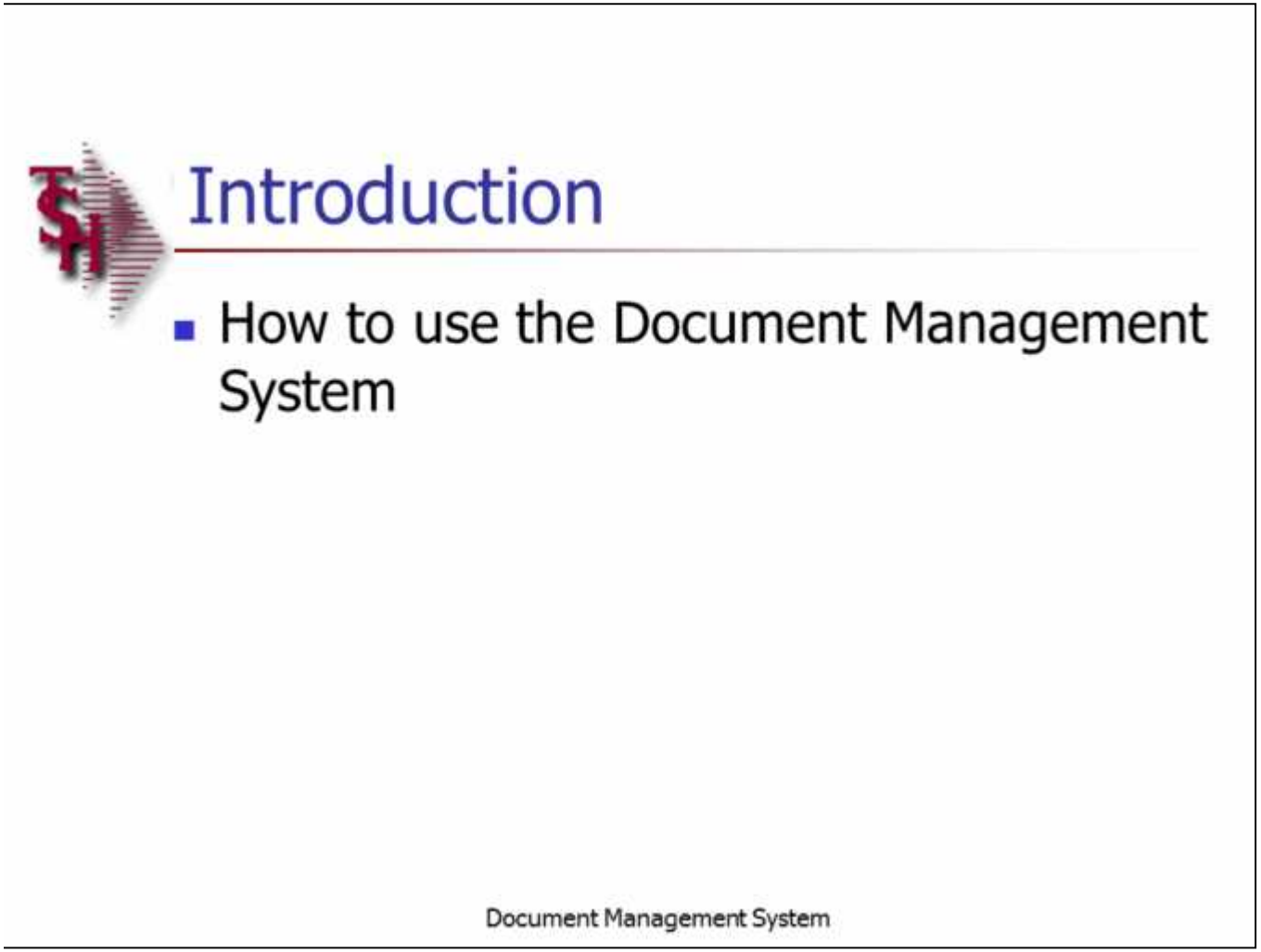

Introduction

The Document Management System will allow a MDS operator to scan, load, and view, on their pc, various MDS documents and images.

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Document Management System (DMS) The Paperless Office System

Now you can throw out your file cabinets and eliminate the voluminous amount of paperwork that a distributor deals with each day: proof of delivery, packing slips, customer invoices, vendor invoices, computer generated reports, notes, memos and more. And save hours or days of staff time by eliminating filing and retrieval of documents.

DMS empowers businesses to:

•Archive and retrieve reports captured from your back office software (fully integrated with Master Distribution System).

•Save any preprinted form produced by MDS, i.e., invoices, checks, statements, etc.

•Scan, index and file documents such as proof of delivery, vendor invoices, customer checks, etc.

•Retrieve documents easily and quickly, even while on the telephone with a customer.

The strength of DMS is in the retrieval of the data. With a traditional filing system, when a customer questions an invoice, a staff person in the accounting department must go to a file cabinet and find a proof of delivery, the invoice and packing slip. Those documents must then be scanned and faxed to the customer. That process can often take a day or more, since staff are busy with other duties.

With DMS, the customer service rep, who is on the phone with the customer, retrieves these documents from the paperless office system, presses a button, and the documents are automatically faxed or e-mailed as an attachment to the customer.

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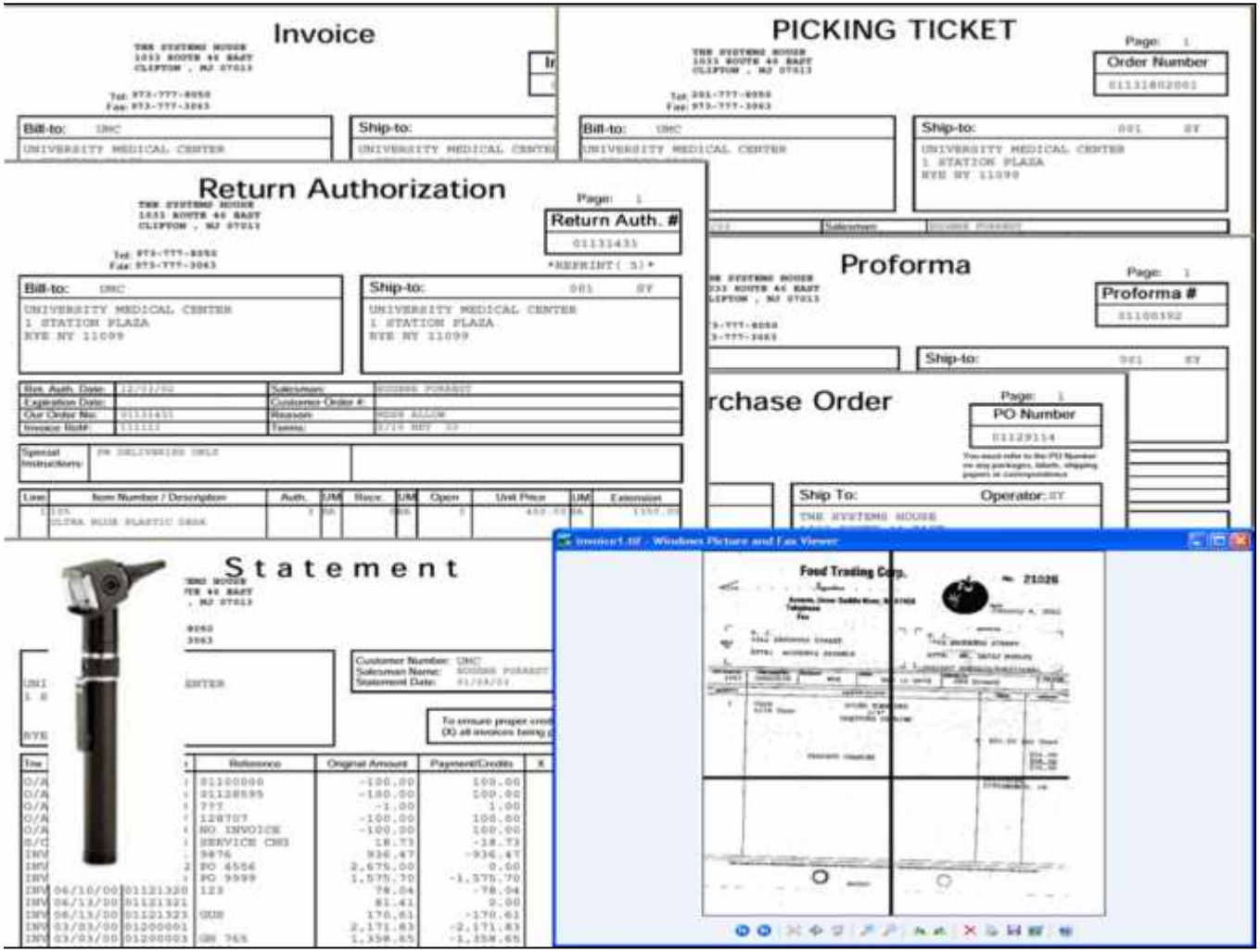

Document Management System

Types of Documents

Currently, MDS allows users to view the following laser forms:

Accounts Payable Check's

Invoice's

Order's

Pro Forma's

Purchase Order's

Return Authorization's

Accounts Receivable Statement's

Return To Vendor Invoice's

Images and documents scanned and/or loaded into MDS are also viewable.

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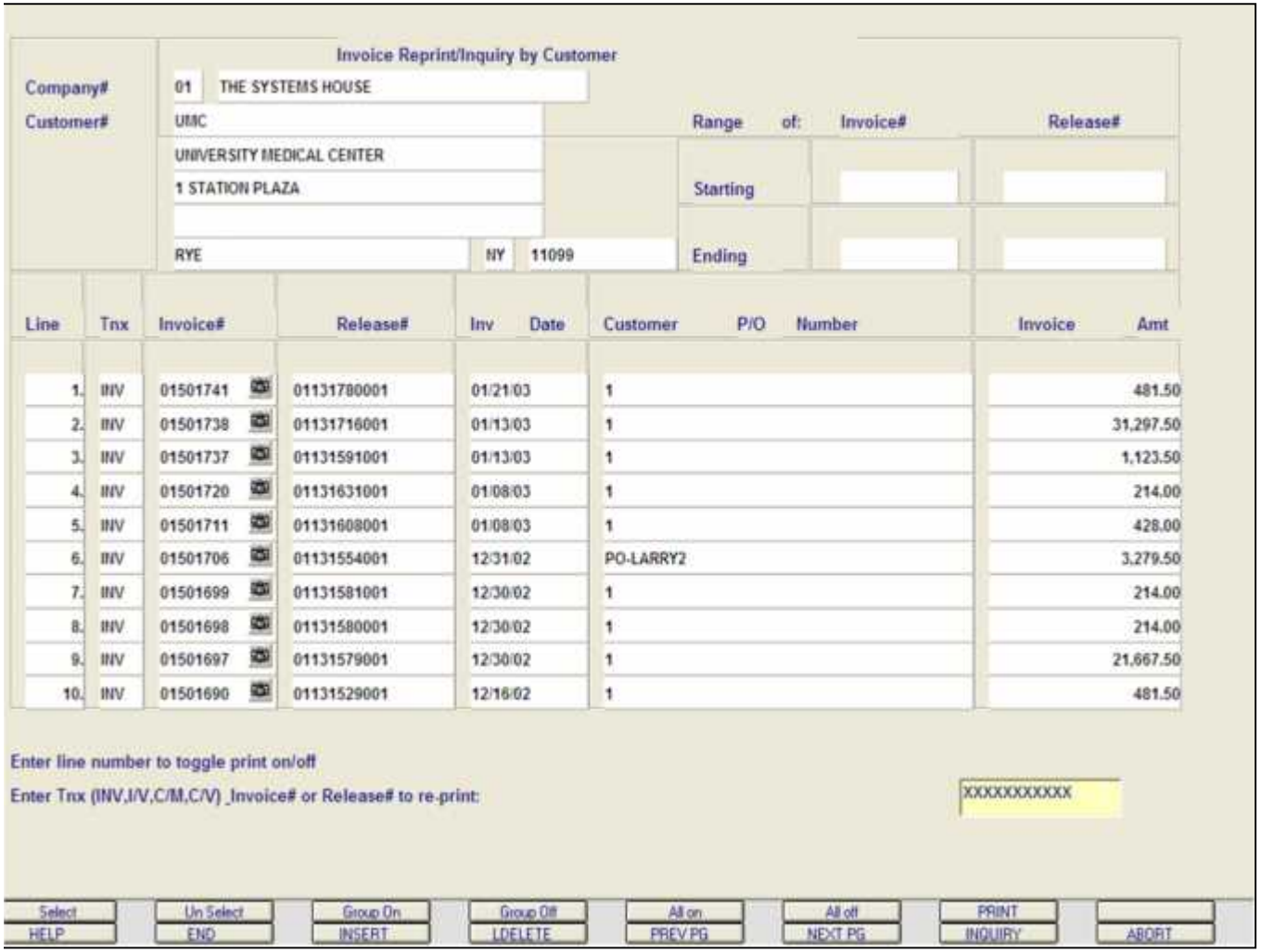

Document Management System

Viewing Document

From any Reprint/Inquiry right click on the document that you wish to view. All documents must first be printed before the operator is able to continue. If not, the system will respond with an error message:

"No image on file".

Notes:

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Document Management System

Viewing Document

MDS Form Archive Viewer

Once the operator right clicks on the document (and it has already been reprinted), they will be brought to the MDS Form Archive Viewer.

The MDS Form Archive Viewer will display all reprints, faxes, and emails of the selected document.

Each line will display the form description, origin method, date, time, and the user who reprinted the document.

Notes:

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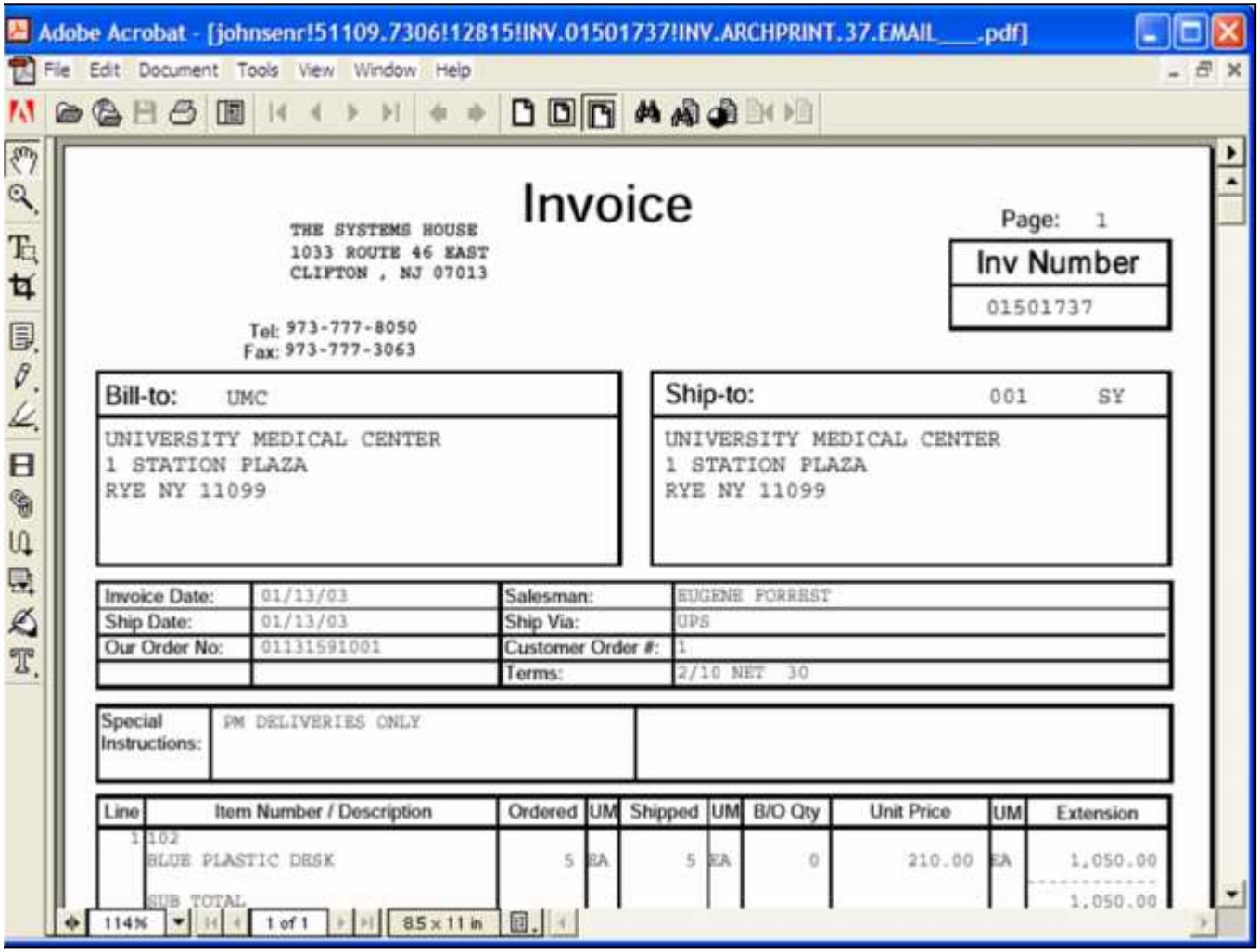

Document Management System

Viewing Document

Display

To view the document in Adobe Acrobat Reader, click on the 'DISPLAY' icon or hit the Shift+<F1> function key.

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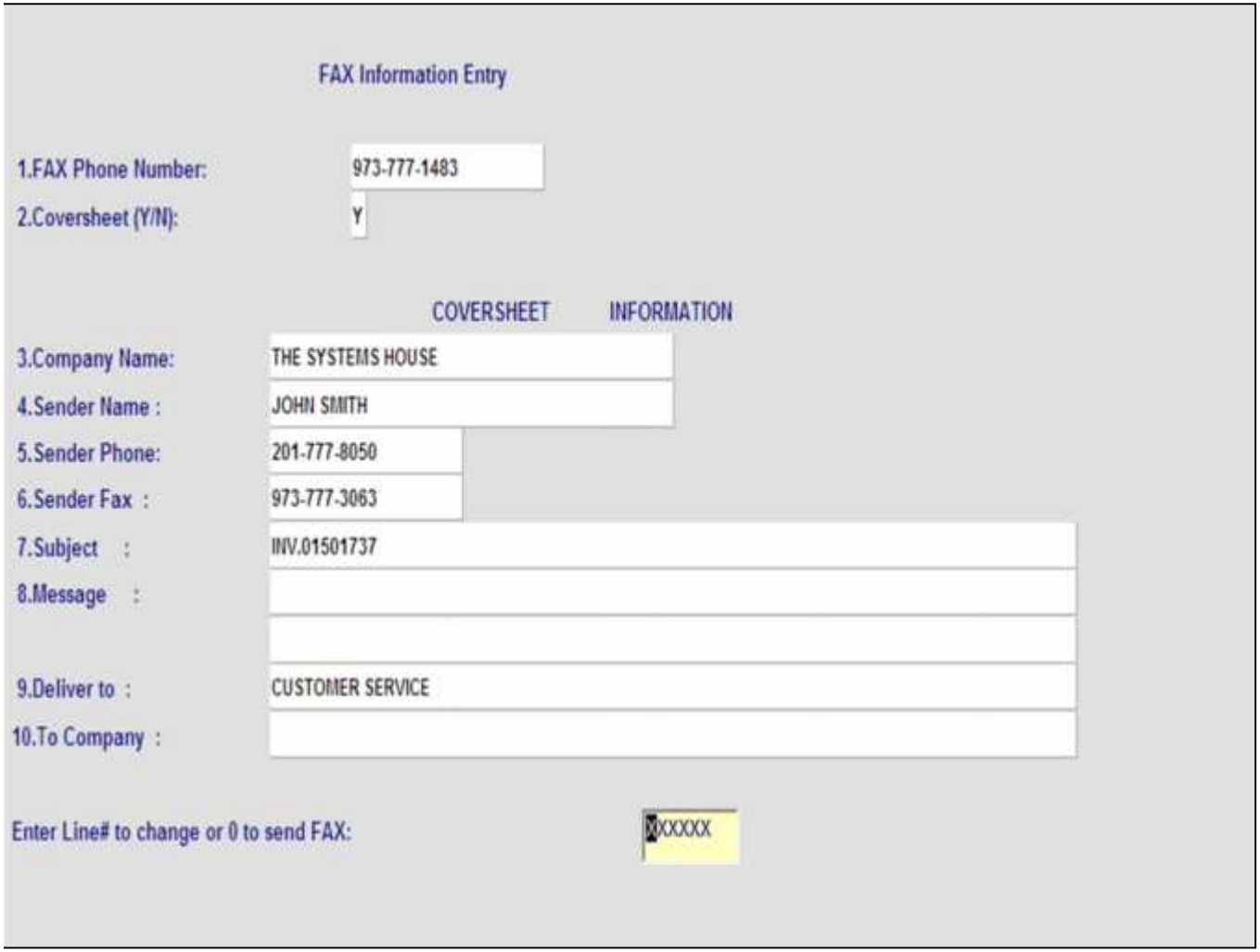

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Document Management System

Viewing Document

Fax

To fax the document, click on the 'FAX' icon or hit the Shift+<F2> function key.

1. FAX Phone Number - Enter the phone number the fax software should dial to send this fax.

2. Coversheet (Y/N) - Do you want to attach a coversheet to this FAX? Enter 'Y' to attach a coversheet., 'N' to send the report only.

3. Company Name - Enter the Company name that will be receiving this fax. This information is populated from the Company file.

4. Sender Name - Enter the name of the person or department sending this FAX. This information is populated from the Operator file.

5. Sender Phone - Enter the phone number of the person or department sending this FAX. This information is populated from the Company file.

6. Sender Fax - Enter the fax number of the person or department sending this FAX. This information is populated from the Company file.

7. Subject - The document type and number is referenced in this field. The operator may change if needed.

8. Message - Enter a message which will appear on the coversheet. If this field is left blank. The message will read: "See Attached Report Page(s)".

9. Deliver to - Enter the name of the person or department that should receive this FAX.

10. To Company - Enter the name of the company that should receive this FAX.

ENTER LINE# TO CHANGE OR 0 TO SEND FAX

Enter '0' and <RETURN> to send the FAX.

Document Management System

Viewing Document

Email

To Email the document, click on the 'EMAIL' icon or hit the Shift+<F3> function key.

1. Email Address - Enter the email address of the person or department that should receive the email.

2. Sender Address - The email address of the person or department sending the email is referenced.

3. Subject - The document type and number is referenced in this field. The operator may change if needed.

4. Message - The document type and number is referenced in this field.

ENTER LINE# TO CHANGE OR 0 TO SEND EMAIL

Enter '0' and <RETURN> to send the EMAIL.

Notes:

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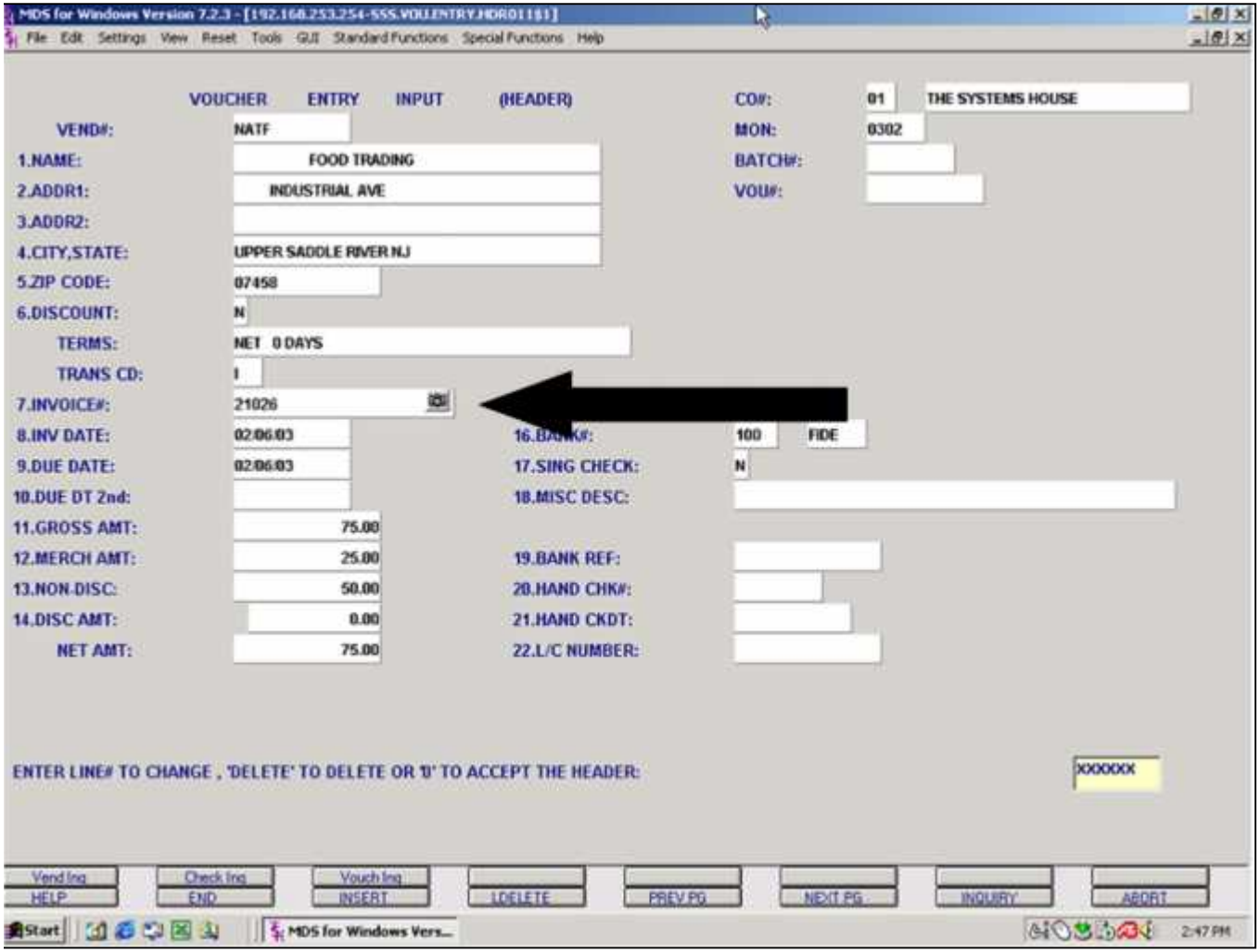

Document Management System
Scanning Document
Start by clicking on the CAMERA icon.

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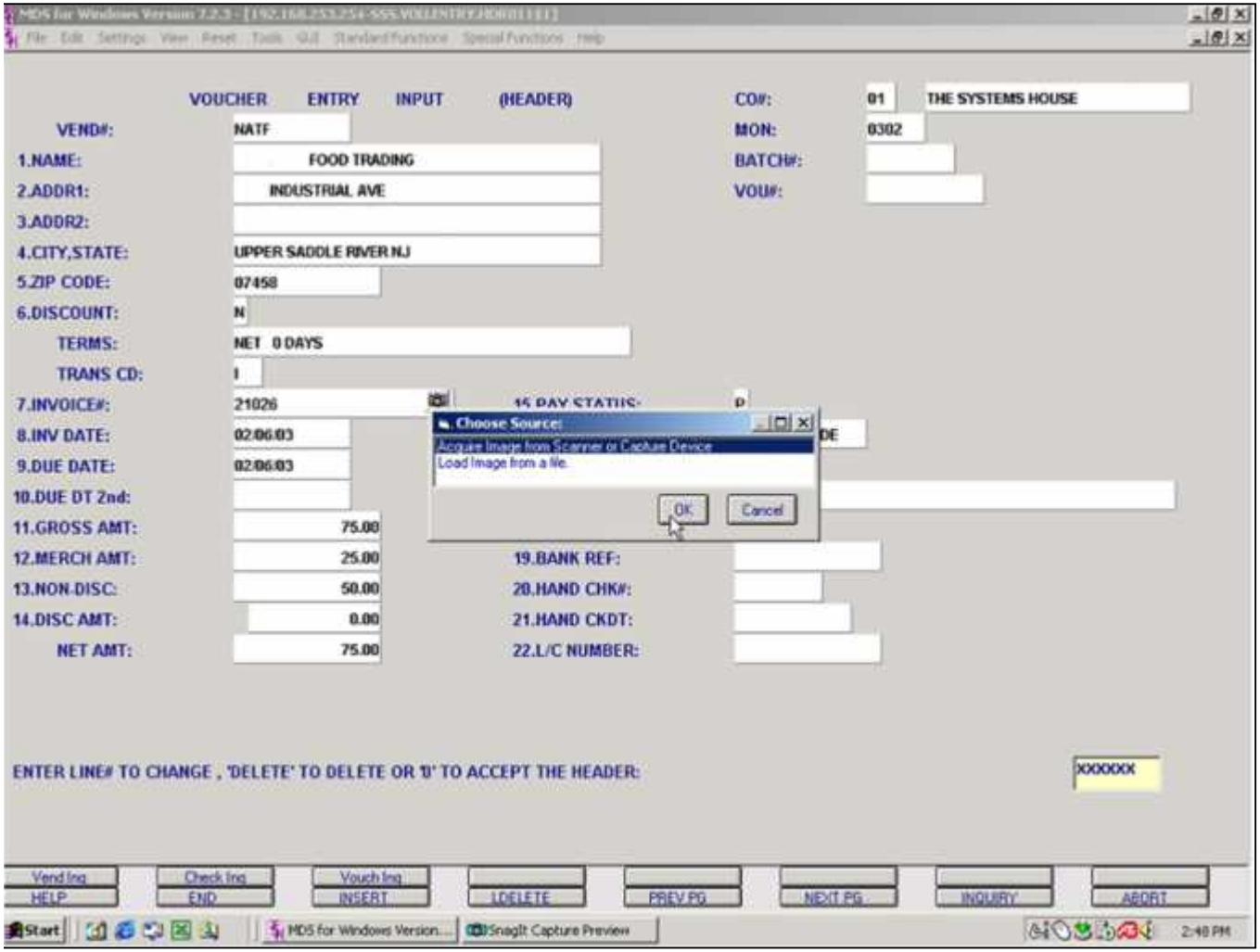

Document Management System

Scanning Document

Next, select “Acquire Image from Scanner of Capture Device” from the “Choose Source” display box.

Click “OK”

Notes:

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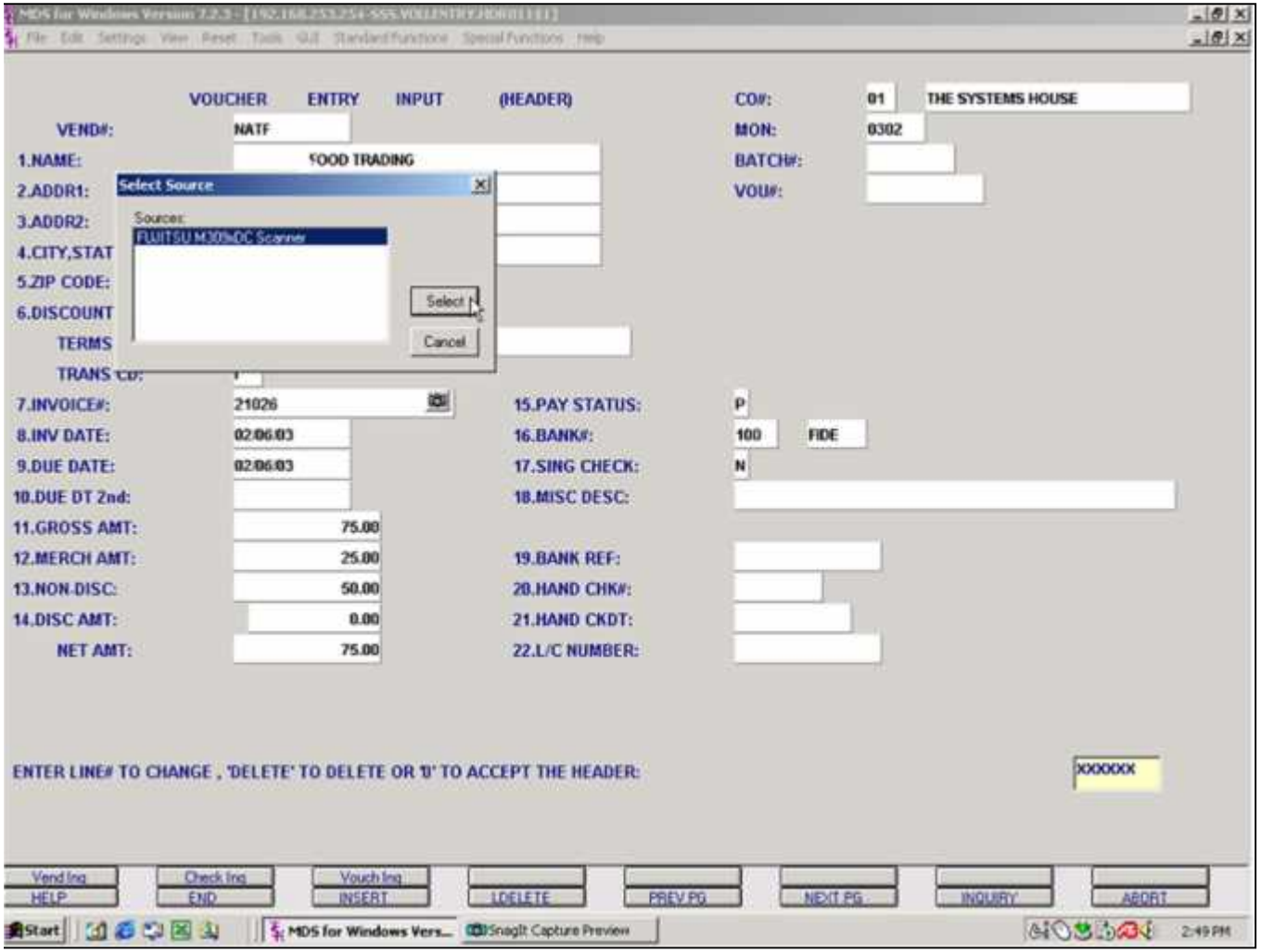

Document Management System

Scanning Document

The “Select Source” pop-up box will display. Choose the appropriate device and click “Select”.

You will now be prompted to scan your document.

Notes:

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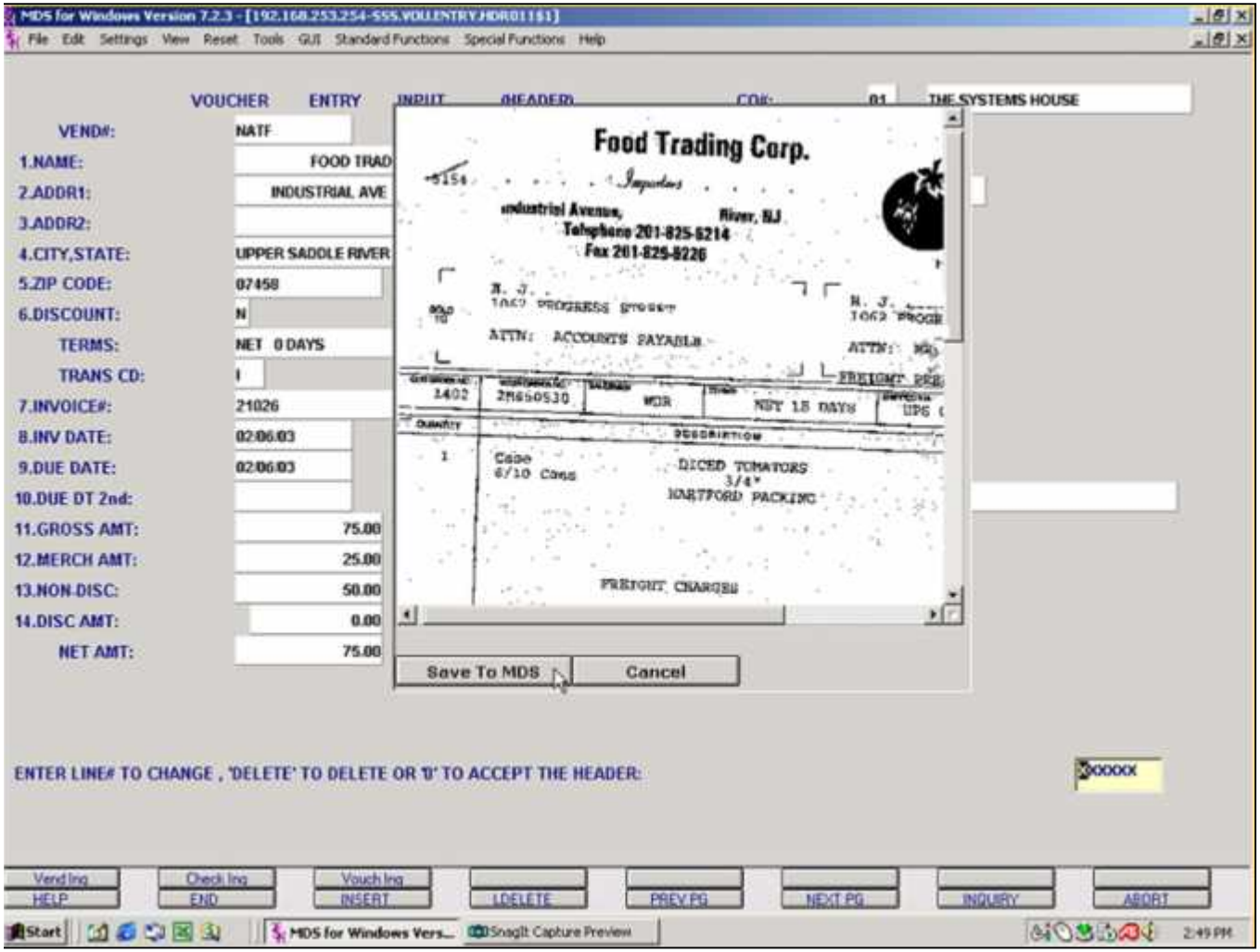

Document Management System

Scanning Document

Once scanned, a portion of the image will be display on the screen. You may use the scroll buttons to view the entire document.

If the document is correct, click on the button “Save to MDS”. Otherwise, click on the “Cancel” button and you may rescan the image.

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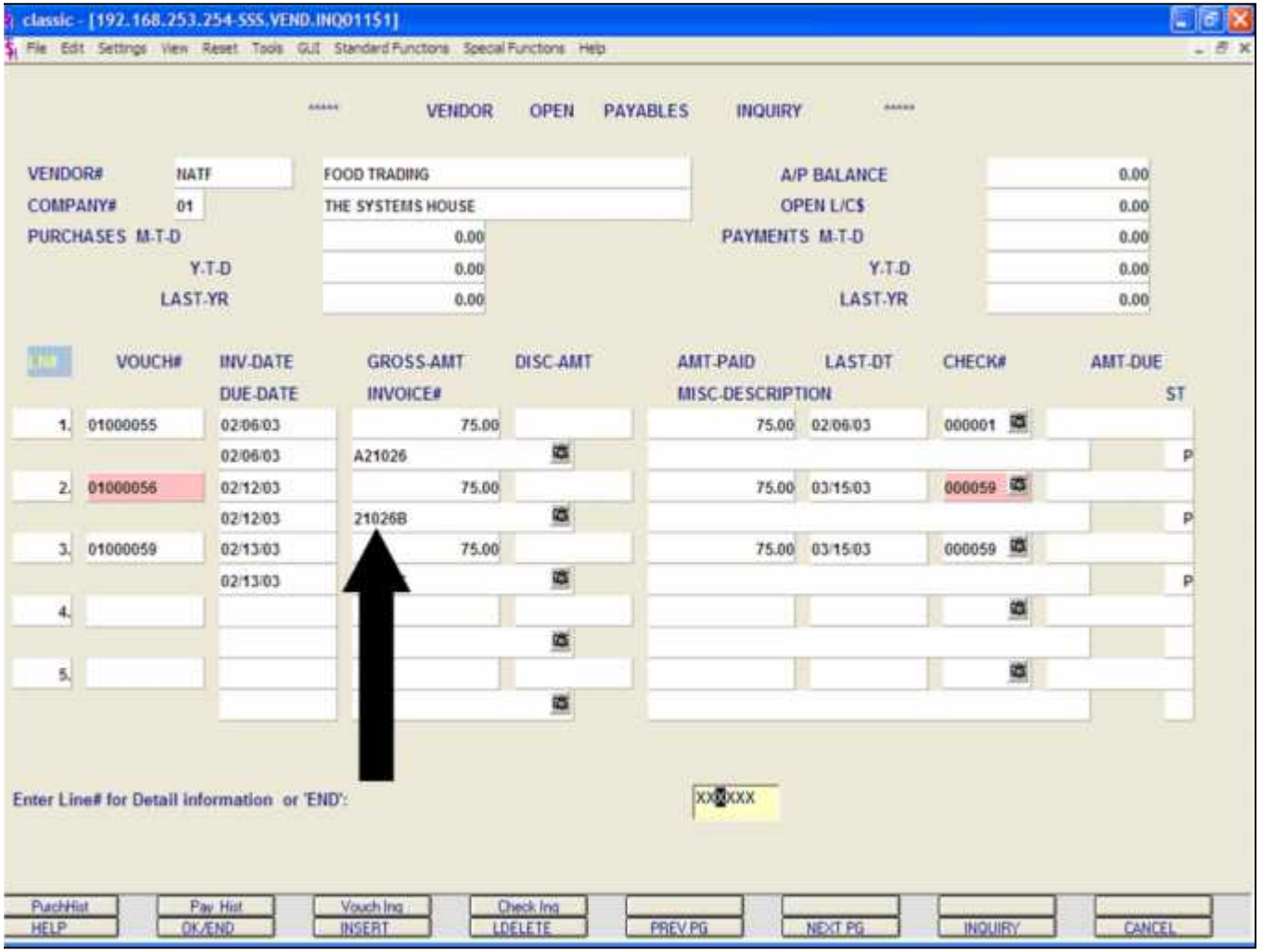

Document Management System

Viewing the Scanned Document

A previously scanned document can be viewed in many different places through MDS. Listed is one example.

In Accounts Payable voucher entry, if an Invoice was scanned into the system, we are able to view the document in the Vendor Open Payables Inquiry.

Right click on the Invoice#. The MDS Form Archive Viewer will be displayed.

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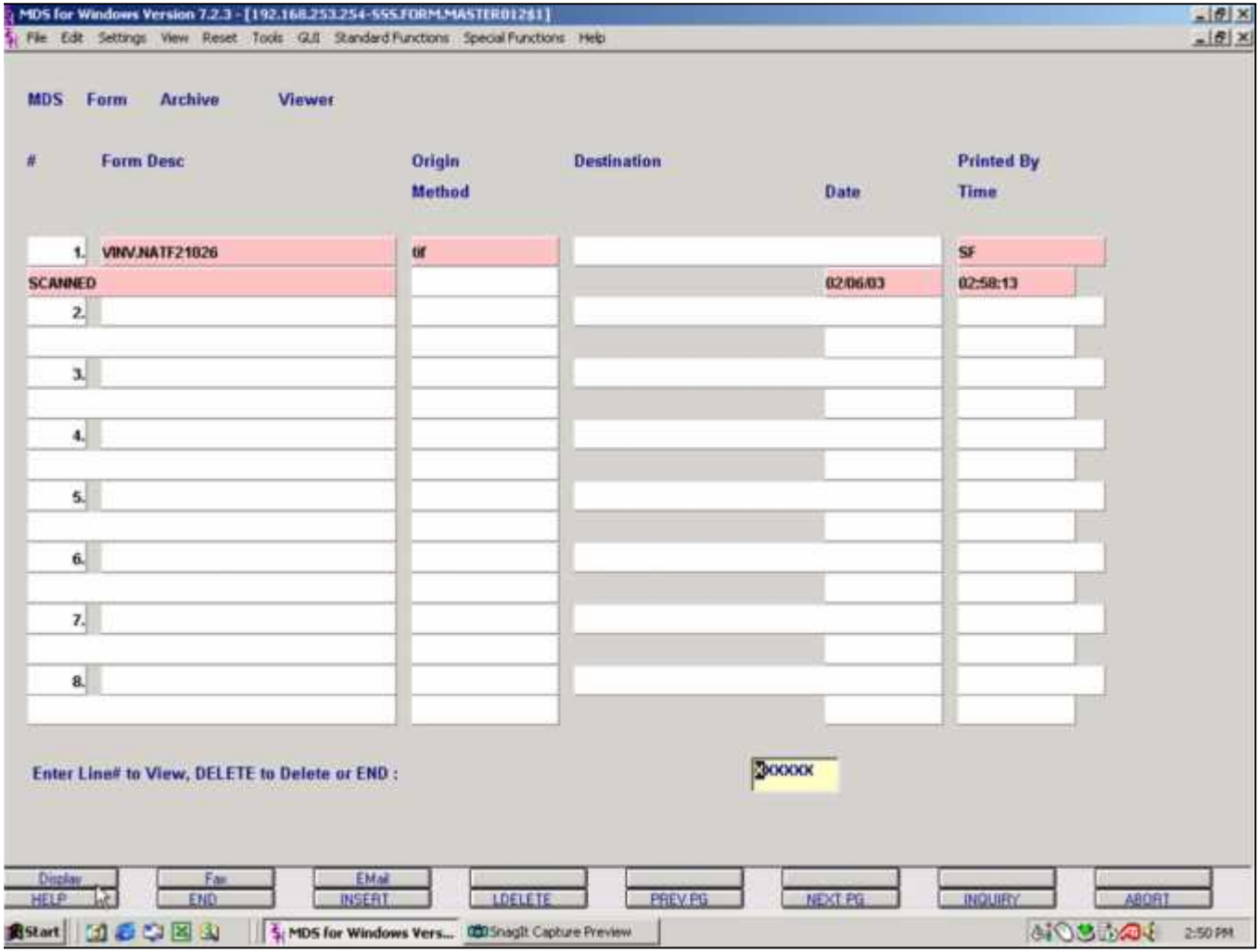

Document Management System

Viewing the Scanned Document

From the MDS Form Archive Viewer, click on the 'Display' icon or press Shift+<F1> function keys.

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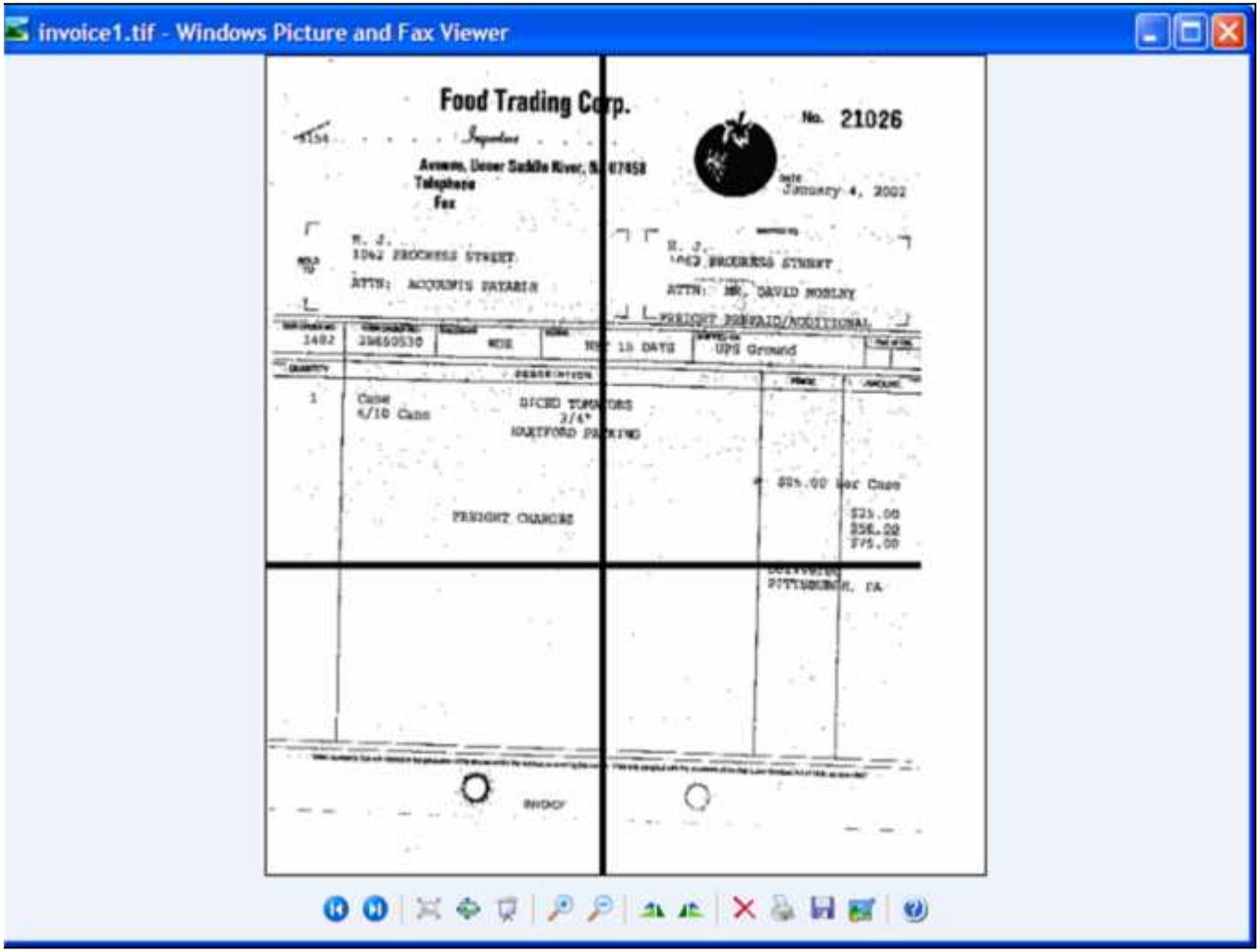

Document Management System

Viewing the Scanned Document

The document image will be displayed on your screen.

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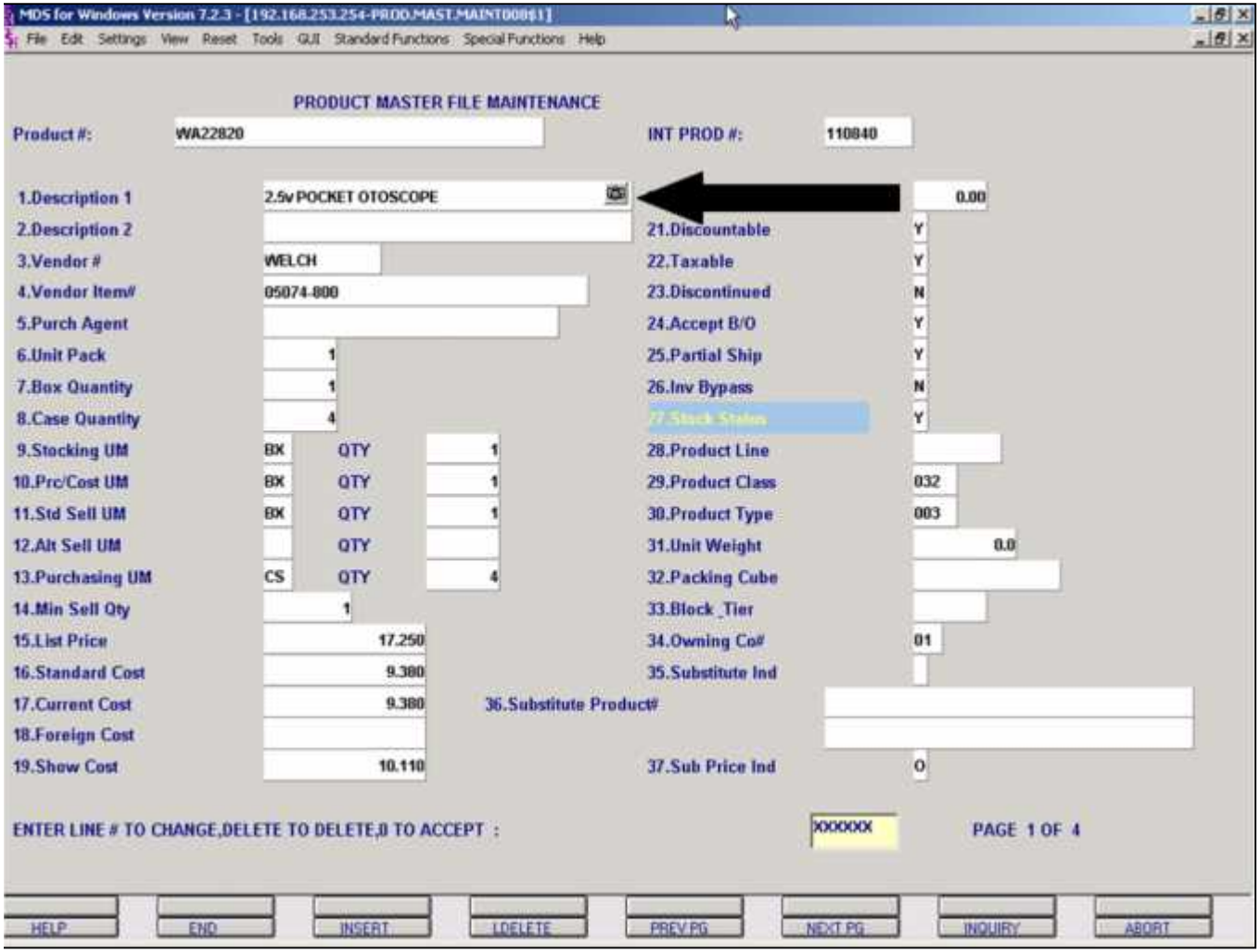

Document Management System

Associating a picture

The user is able to associate a picture from a scanner or capture device, or the user can load an image from a file.

Start by clicking on the “camera” icon.

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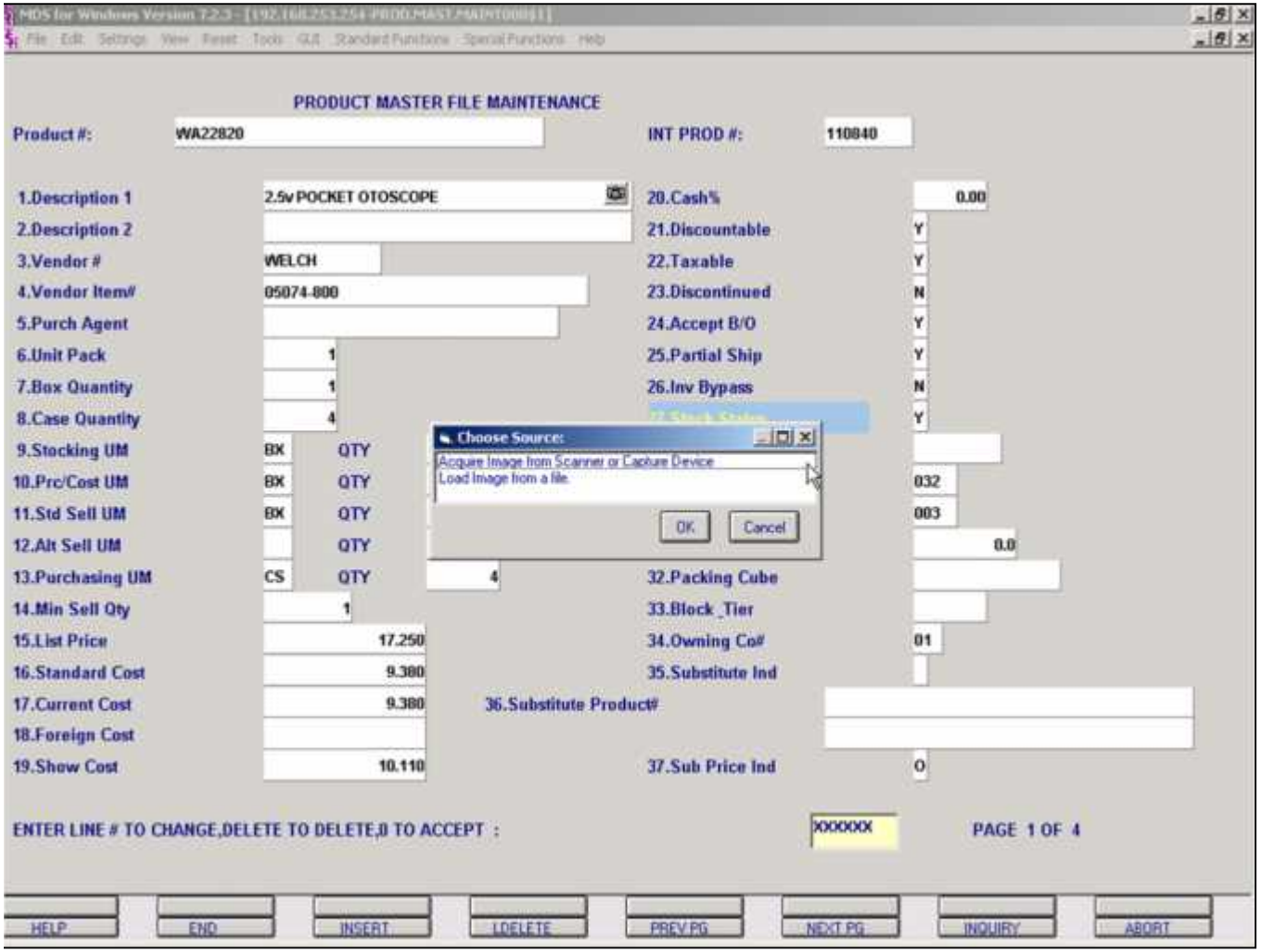

Document Management System

Associating a picture

Choose “Acquire Image from Scanner or Capture Device” or “Load Image from a file” depending on how you would like to bring the image into MDS.

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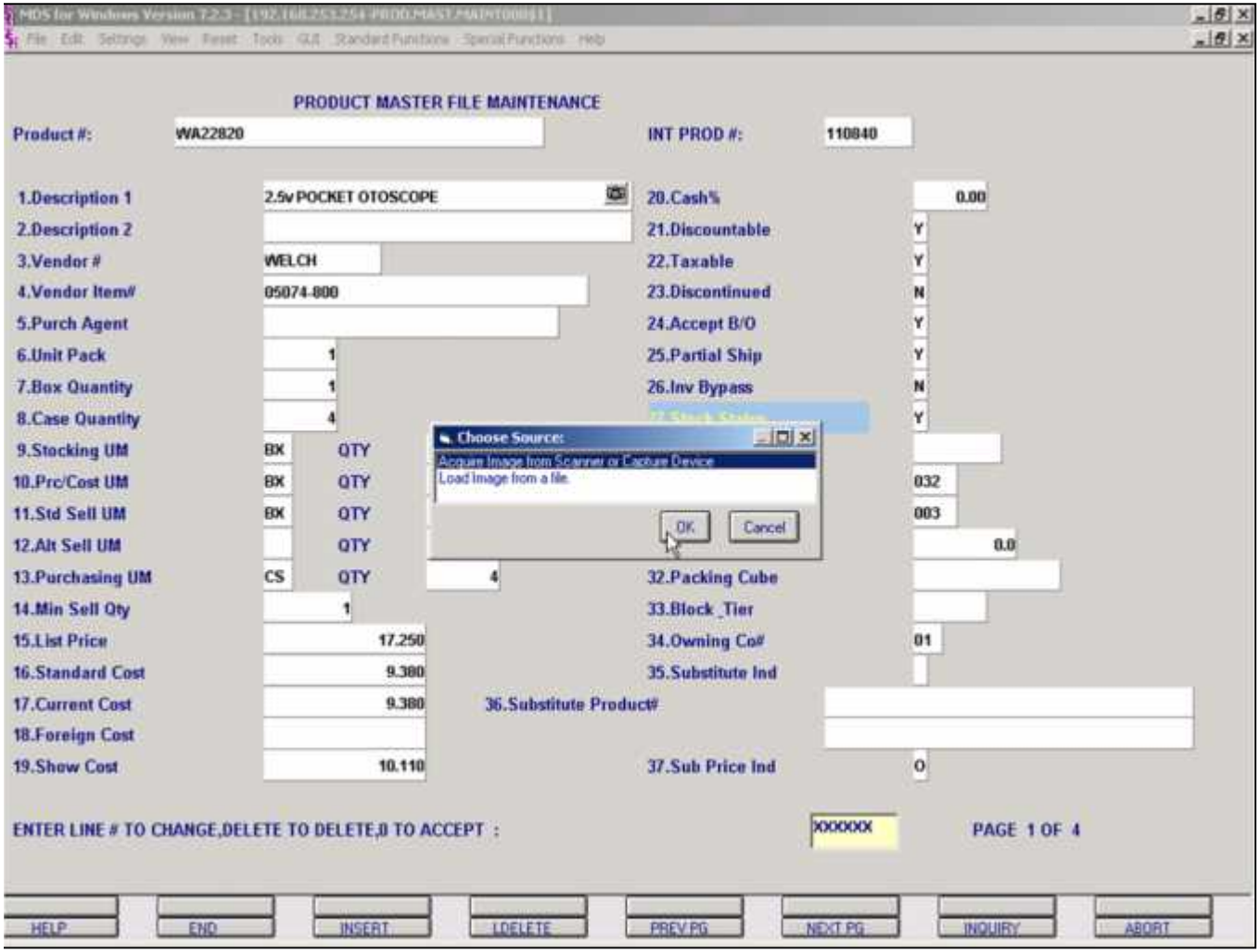

Document Management System

Associating a Picture

Acquire Image from Scanner or Capture Device

Highlight “Acquire Image from Scanner or Device” and click on the “OK” button.

Notes:

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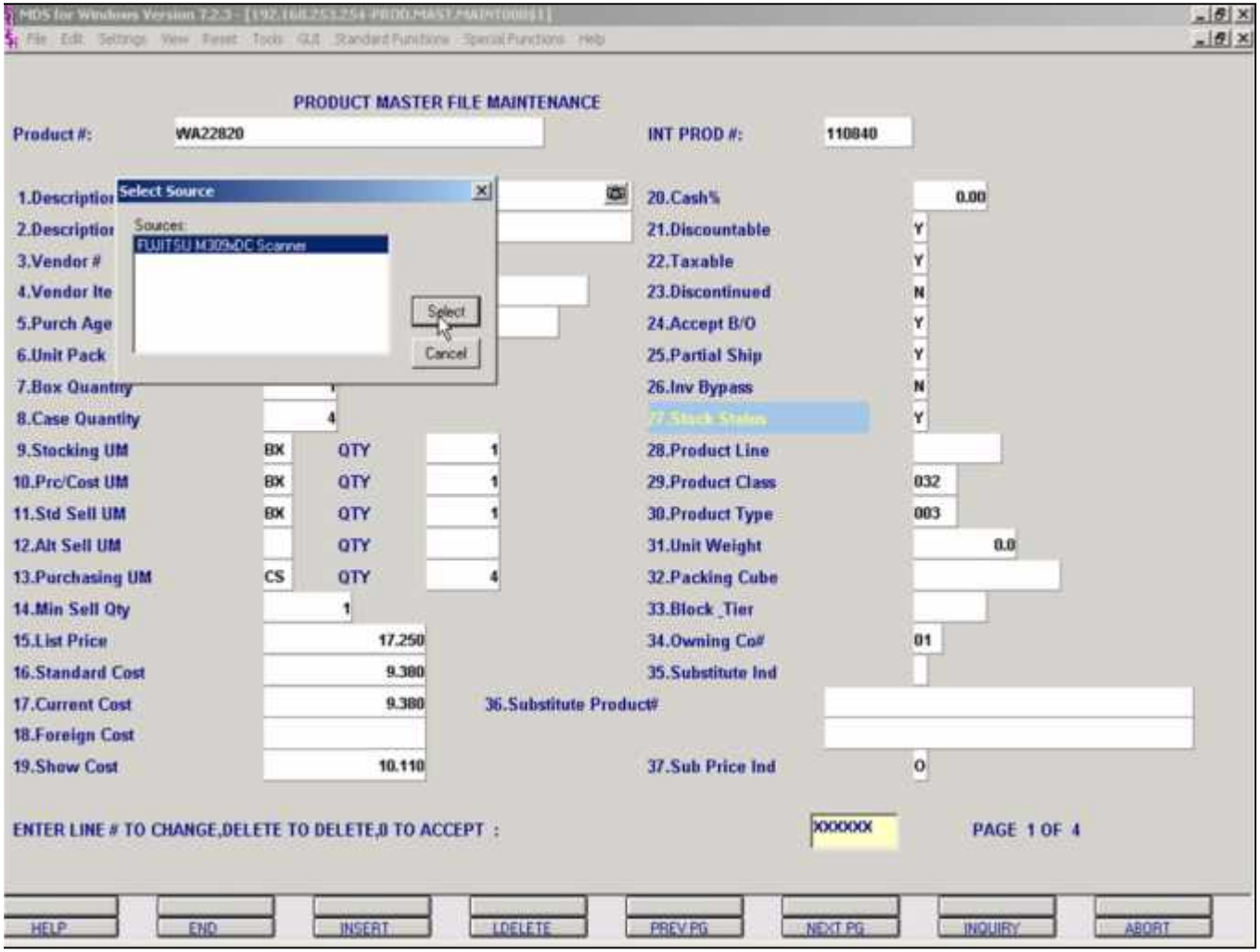

Document Management System

Associating a Picture

Acquire Image from Scanner or Capture Device

Highlight the source to bring in the image and click on the “Select” button.

Next, the system will scan the image.

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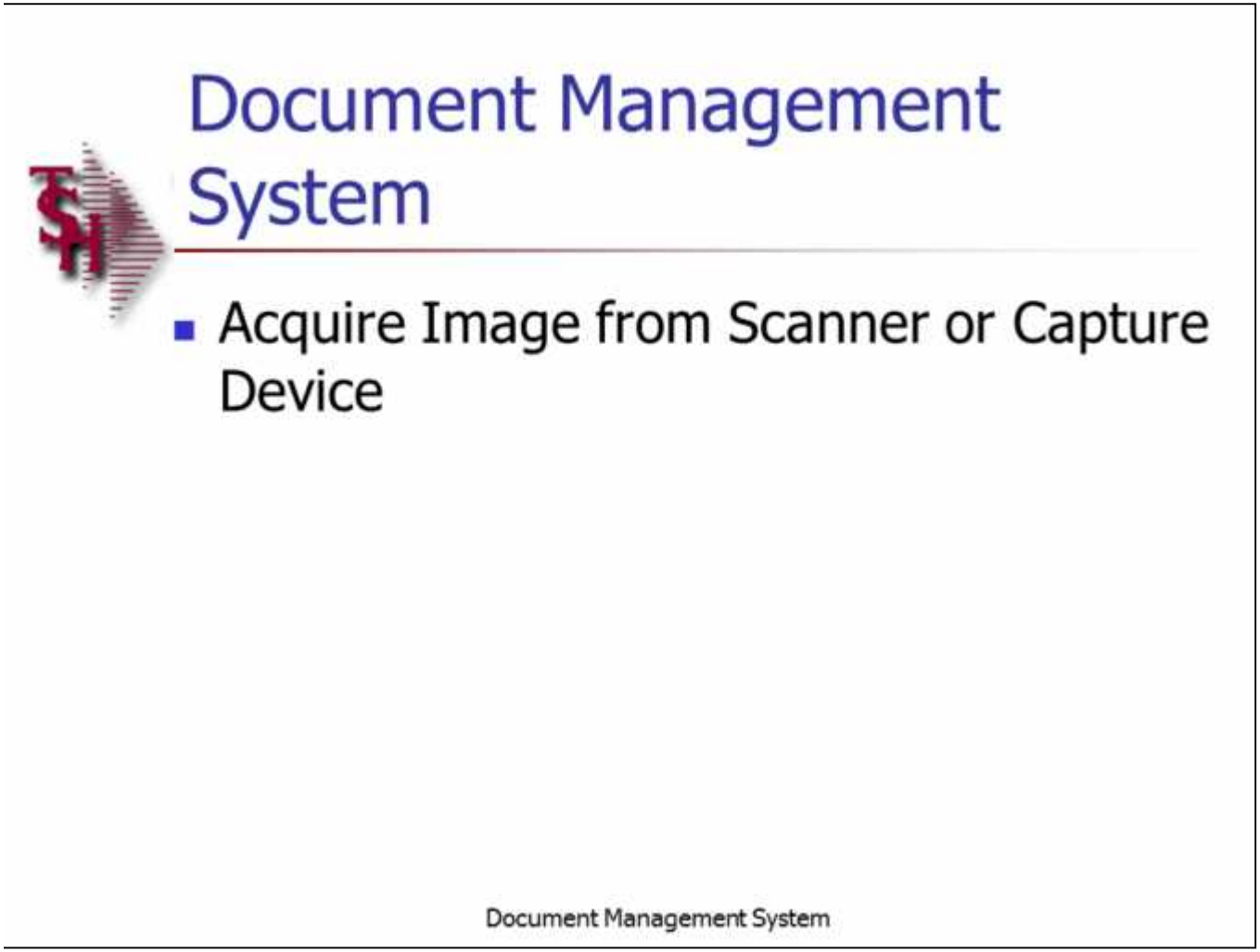

Document Management System

Associating a Picture

Acquire Image from Scanner or Capture Device

At the bottom of your screen, the system will display: “Enter Image Description” followed by a text entry box. The image description is called “SCANNEDIMAGE” by default. You may change the description.

Do not use any spaces.

Hit <ENTER> when finished.

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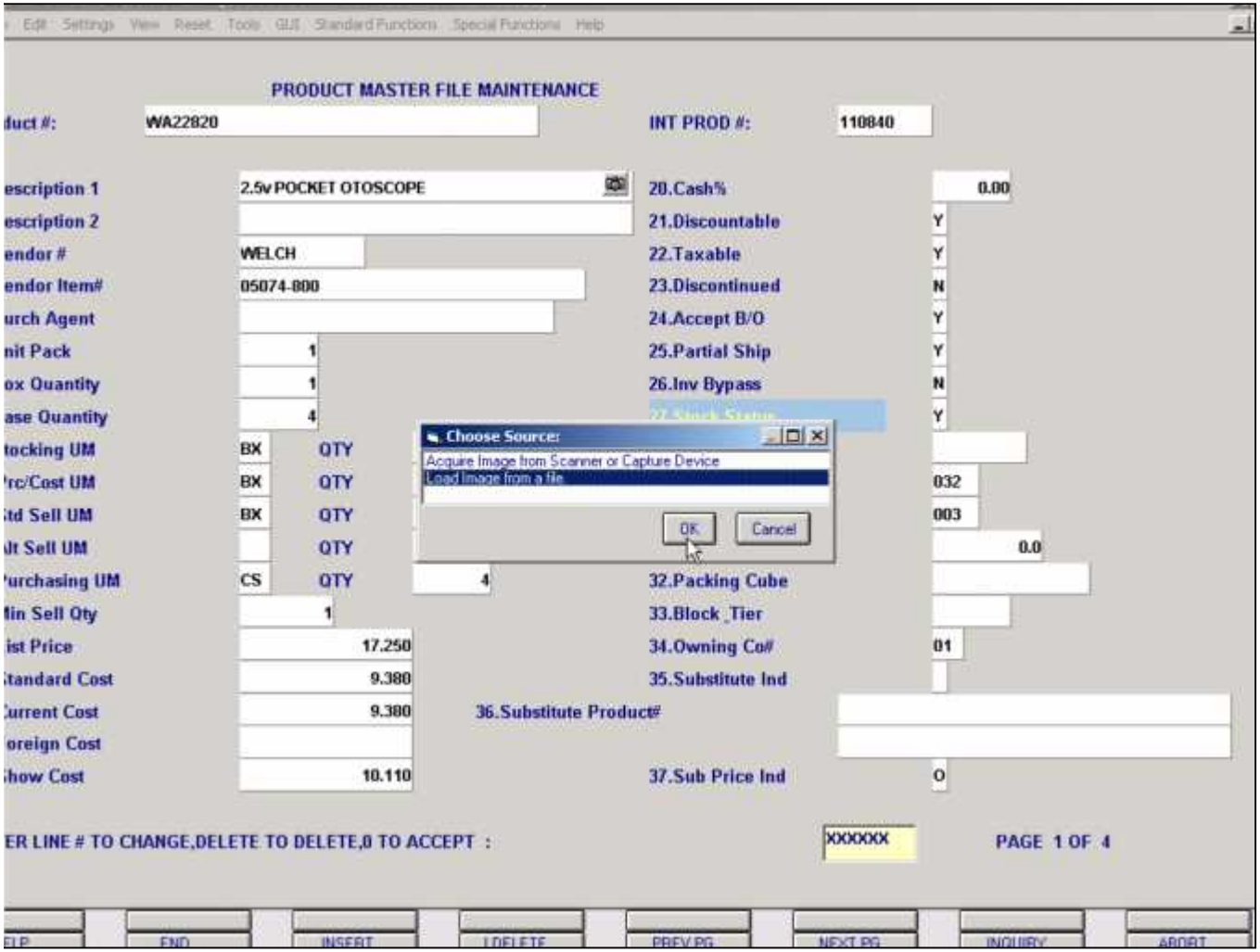

Document Management System

Associating a Picture

Load Image from a file

Highlight “Load Image from a file” and click on the “OK” button.

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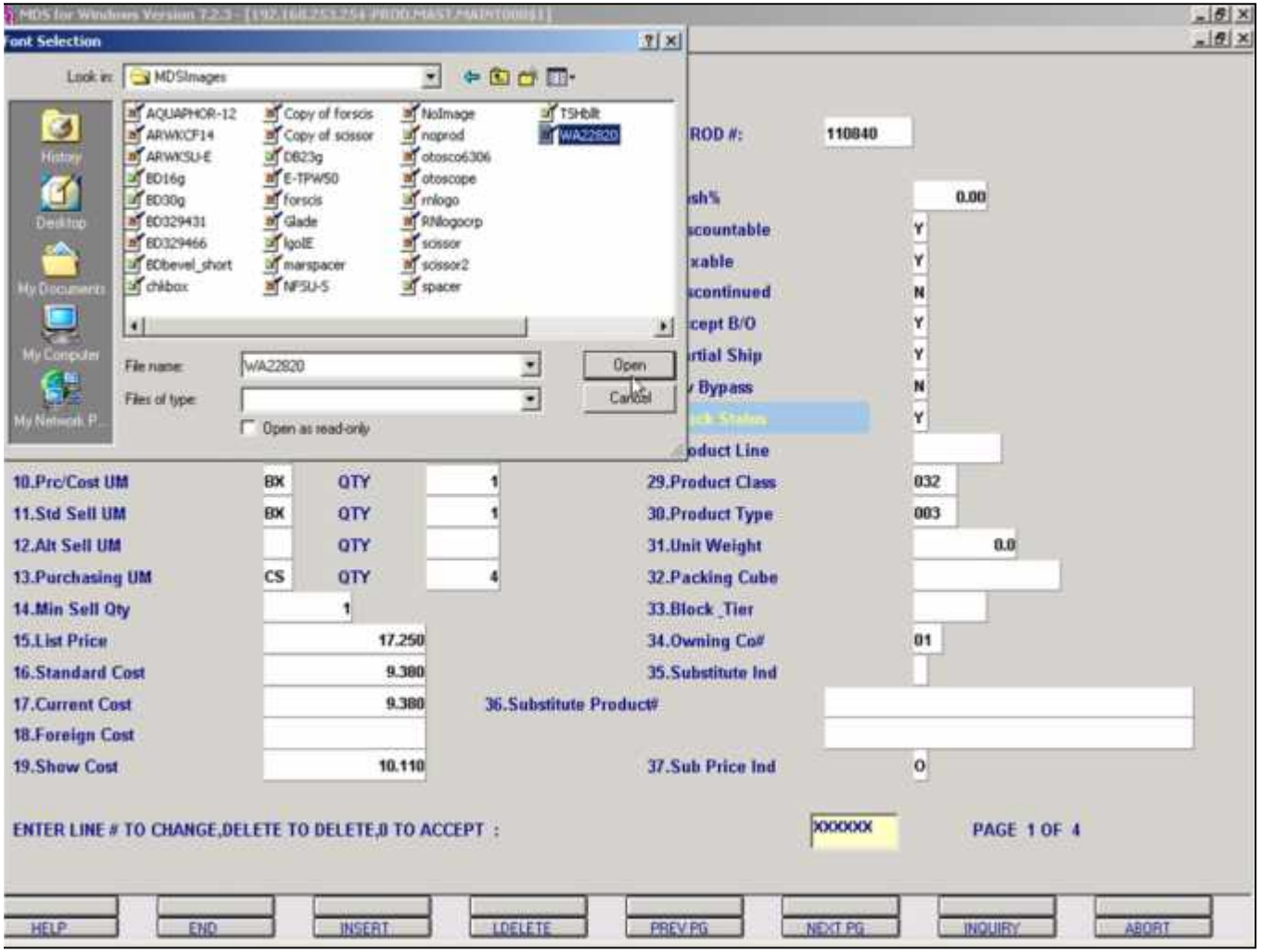

Document Management System

Associating a Picture

Load Image from a file

A selection box will display. From here navigate to the folder where the image is stored. Highlight the image name and click the “Open” button.

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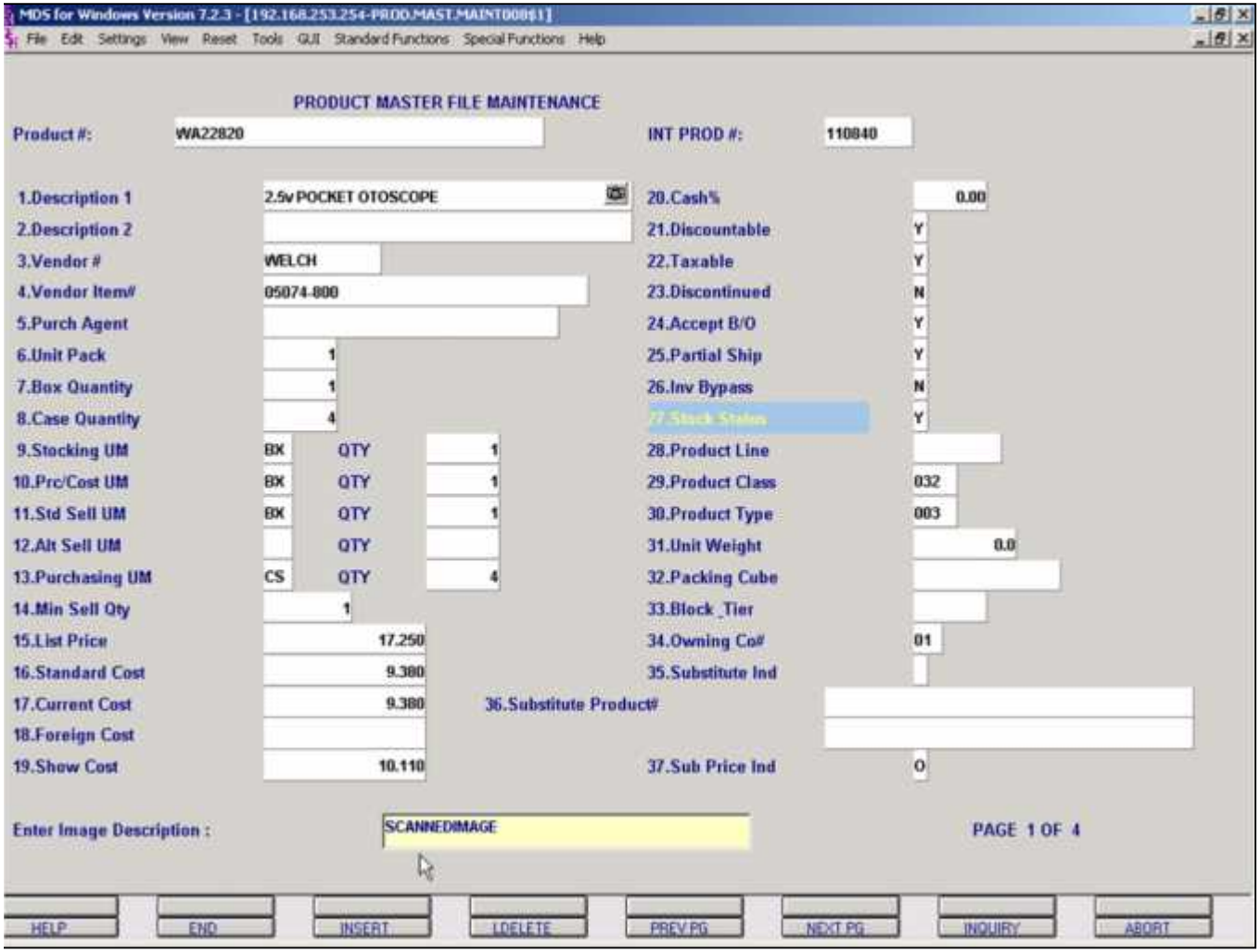

Document Management System

Associating a Picture

Load Image from a file

At the bottom of your screen, the system will display: “Enter Image Description” followed by a text entry box. The image description is called “SCANNEDIMAGE” by default. You may change the description.

Do not use any spaces.

Hit <ENTER> when finished.

Notes:

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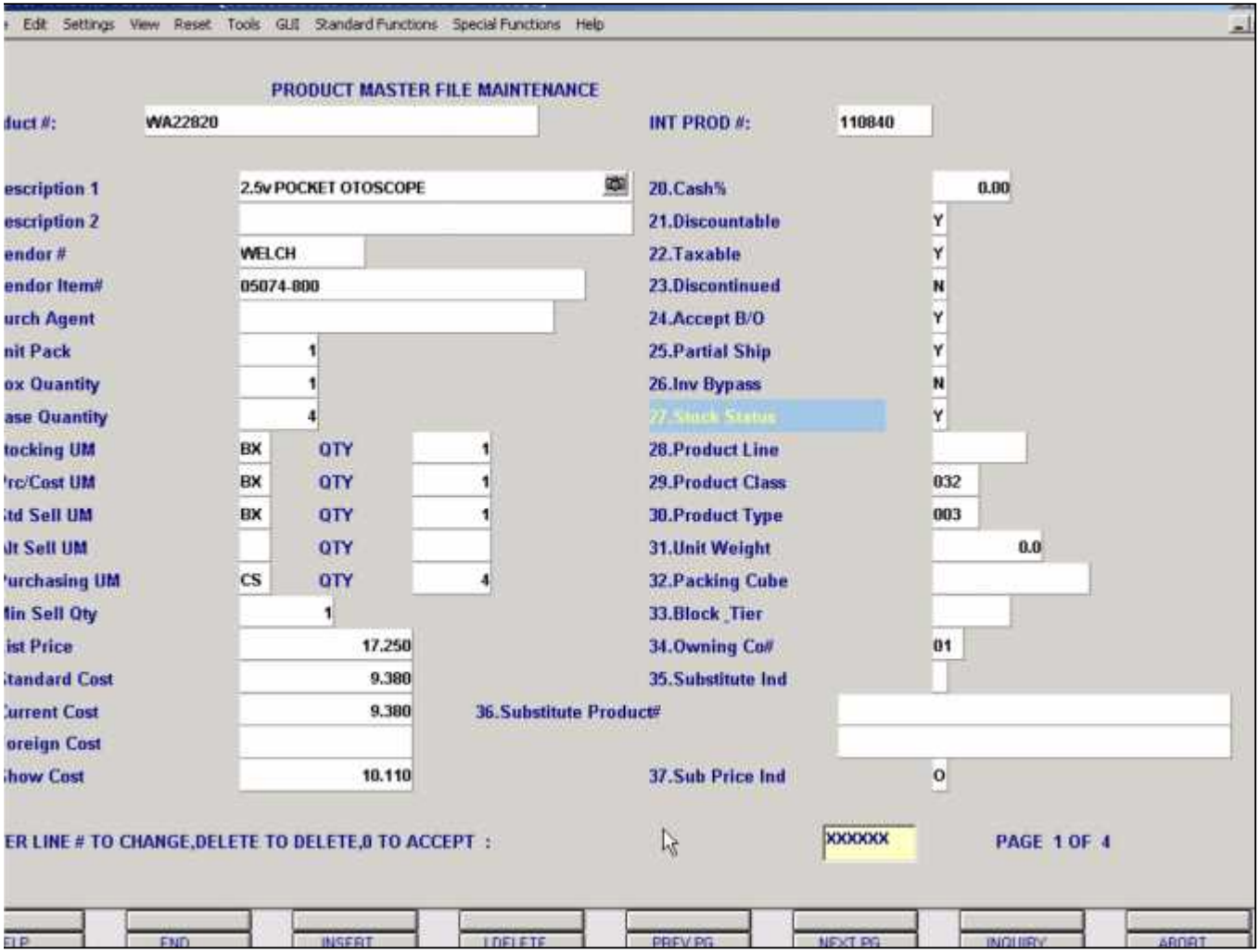

Document Management System
Associating a Picture
Load Image from a file
When complete, enter '0' to accept changes.

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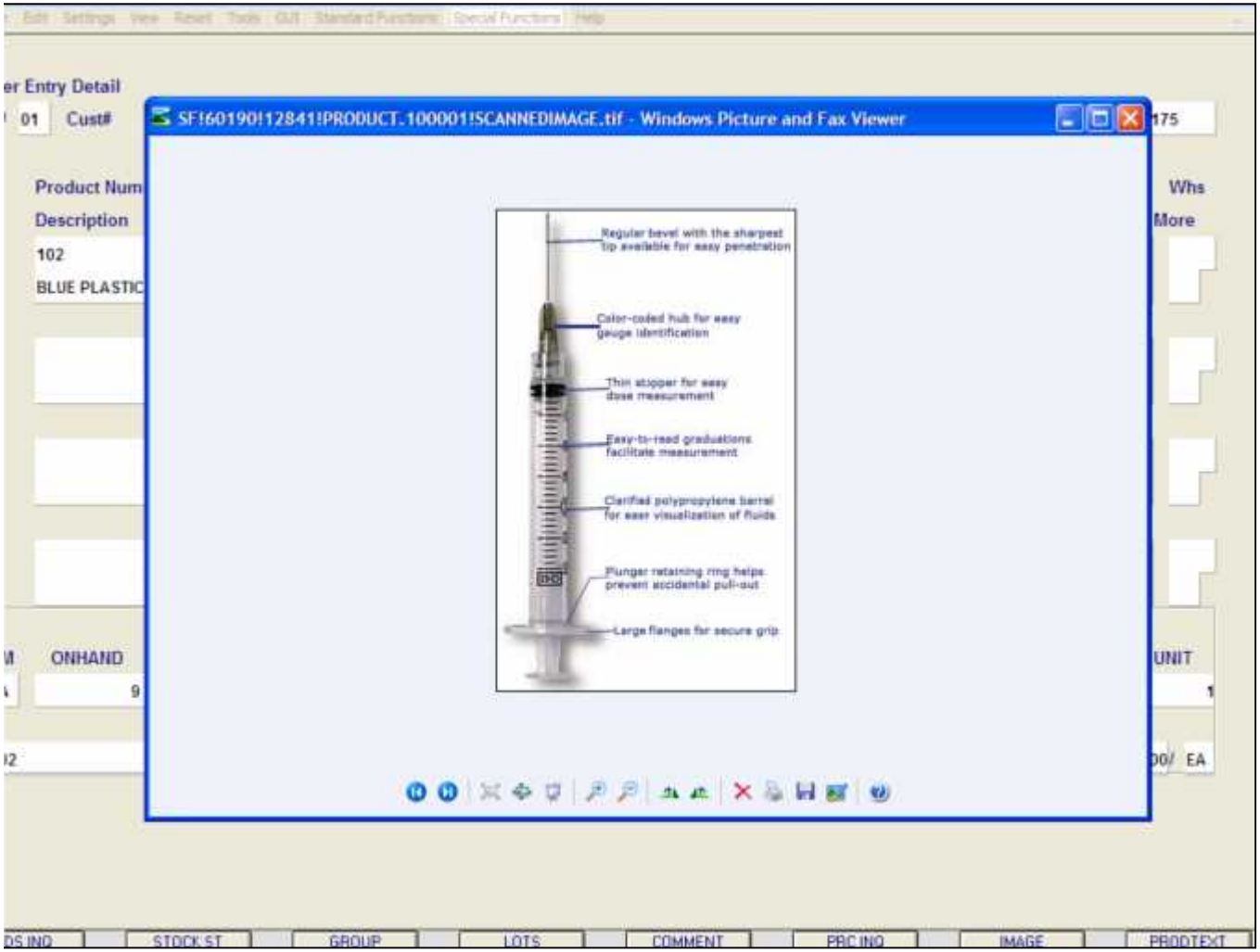

Document Management System

Viewing Image

The image that was brought into MDS, from scanner, capture device, or specific file, can be viewed in many places. One example to view a product image is in the Order Entry module.

In the Order Entry Detail screen, once the product is entered, the user can click on the "IMAGE" icon and the image will be displayed.

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Comments:

Notes:

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