

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



# Document Management System

## Training Guide

Document Management System

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## Introduction

- **How to use the Document Management System**

Document Management System

### 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 Overview

- Archive and Retrieve Reports
- Save any Preprinted Form produced by MDS
- Scan, Index and File Documents

### 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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The collage displays several business documents:

- Invoice:** Includes header information, bill-to (UNIVERSITY MEDICAL CENTER), and ship-to (UNIVERSITY MEDICAL CENTER) details.
- Picking Ticket:** Similar header and shipping information to the invoice.
- Return Authorization:** Features a return authorization number (01131431) and shipping details.
- Proforma:** Includes a proforma number (01180380) and shipping information.
- Purchase Order:** Shows a purchase order number (01129118) and shipping details.
- Statement:** Includes a table with columns for Date, Reference, Original Amount, and Payment/Credit. A scanner image is overlaid on the left side.
- Food Trading Corp. Document:** A screenshot of a document viewer showing a document with a logo and various text fields.

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.

Notes:

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**Invoice Reprint/Inquiry by Customer**

Company# 01 THE SYSTEMS HOUSE

Customer# UMC UNIVERSITY MEDICAL CENTER  
1 STATION PLAZA  
RYE NY 11099

Range of: Invoice# Release#

Starting Ending

Line	Tnx	Invoice#	Release#	Inv Date	Customer	P/O Number	Invoice Amt
1.	INV	01501741	01131780001	01/21/03	1		481.50
2.	INV	01501738	01131716001	01/13/03	1		31,297.50
3.	INV	01501737	01131591001	01/13/03	1		1,123.50
4.	INV	01501720	01131631001	01/08/03	1		214.00
5.	INV	01501711	01131608001	01/08/03	1		428.00
6.	INV	01501706	01131554001	12/31/02	PO-LARRY2		3,279.50
7.	INV	01501699	01131581001	12/30/02	1		214.00
8.	INV	01501698	01131580001	12/30/02	1		214.00
9.	INV	01501697	01131579001	12/30/02	1		21,667.50
10.	INV	01501690	01131529001	12/16/02	1		481.50

Enter line number to toggle print on/off

Enter Tnx (INV,IV,C/M,C/V) ,Invoice# or Release# to re-print: XXXXXXXXXXXX

Select Un Select Group On Group Off All on All off PRINT  
HELP END INSERT DELETE PREV PG NEXT PG INQUIRY ABORT

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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MDS Form Archive Viewer

#	Form Desc	Origin Method	Destination	Date	Printed By	Time
1.	INV.01501737	REPRINT			johnsenr	
		PRINT		01/30/03		04:43:10
2.						
3.						
4.						
5.						
6.						
7.						
8.						

Enter Line# to View, DELETE to Delete or END :

Display HELP    Fax END    EMail INSERT    LDELETE    PREV PG    NEXT PG    INQUIRY    ABORT

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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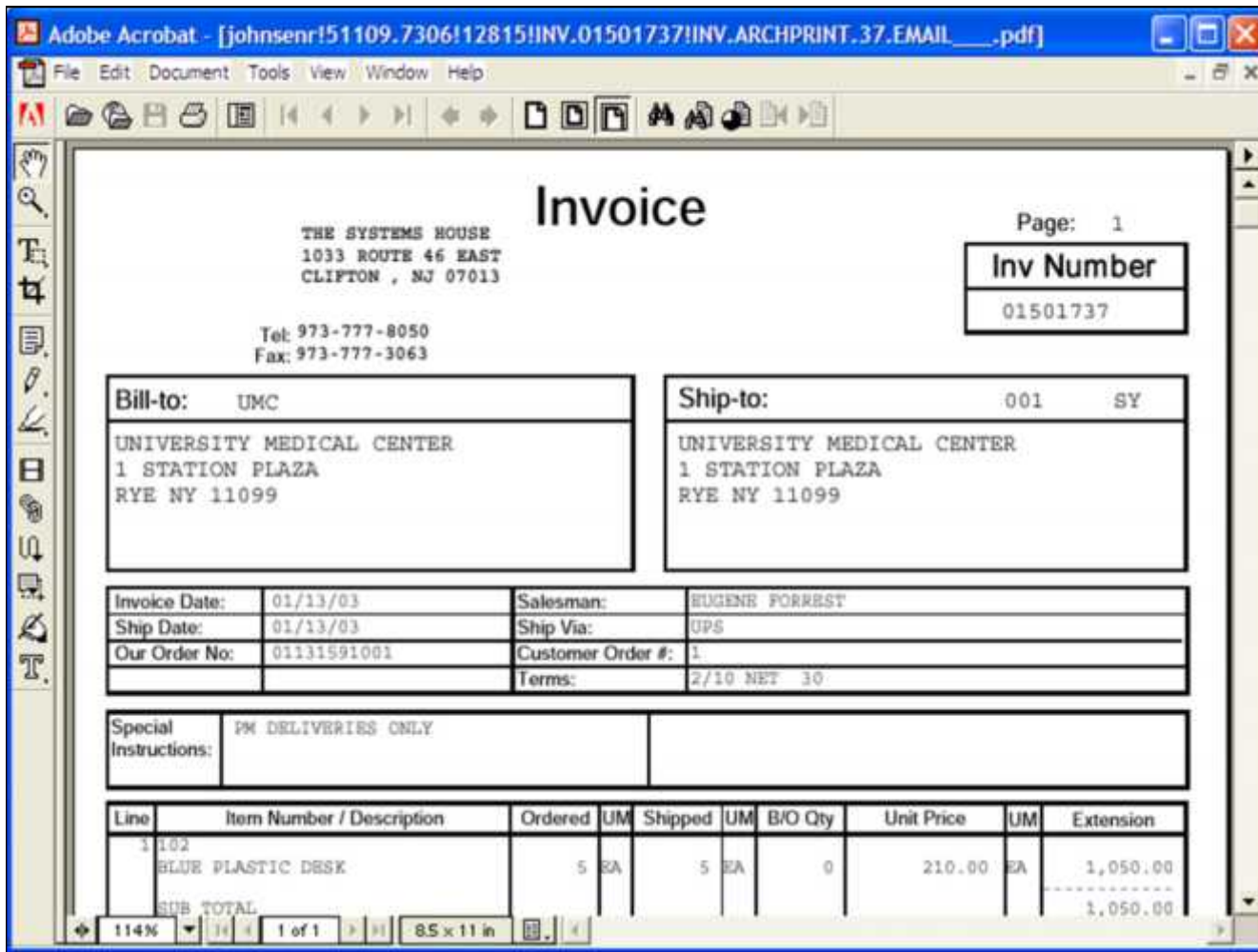


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Document Management System  
Viewing Document

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

Notes:

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# Faxing a Document

FAX Information Entry

1.FAX Phone Number: 973-777-1483

2.Coversheet (Y/N): Y

	COVERSHEET	INFORMATION
3.Company Name:	THE SYSTEMS HOUSE	
4.Sender Name :	JOHN SMITH	
5.Sender Phone:	201-777-8050	
6.Sender Fax :	973-777-3063	
7.Subject :	INV.01501737	
8.Message :		
9.Deliver to :	CUSTOMER SERVICE	
10.To Company :		

Enter Line# to change or 0 to send FAX: XXXXXX

Document Management System

Notes:

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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.



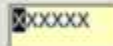


# E-mailing Document

## Email Information Entry

<b>1.Email Address</b> :	<input type="text" value="johnd@abc.com"/>
<b>2.Sender Address</b> :	<input type="text"/>
<b>3.Subject</b> :	<input type="text" value="INV.01501737"/>
<b>4.Message</b> :	<input type="text" value="INV.01501737"/>
	<input type="text" value="THE SYSTEMS HOUSE"/>
	<input type="text" value="1033 ROUTE 46 EAST"/>

Enter Line# to change or END to send EMAIL:



Document Management System

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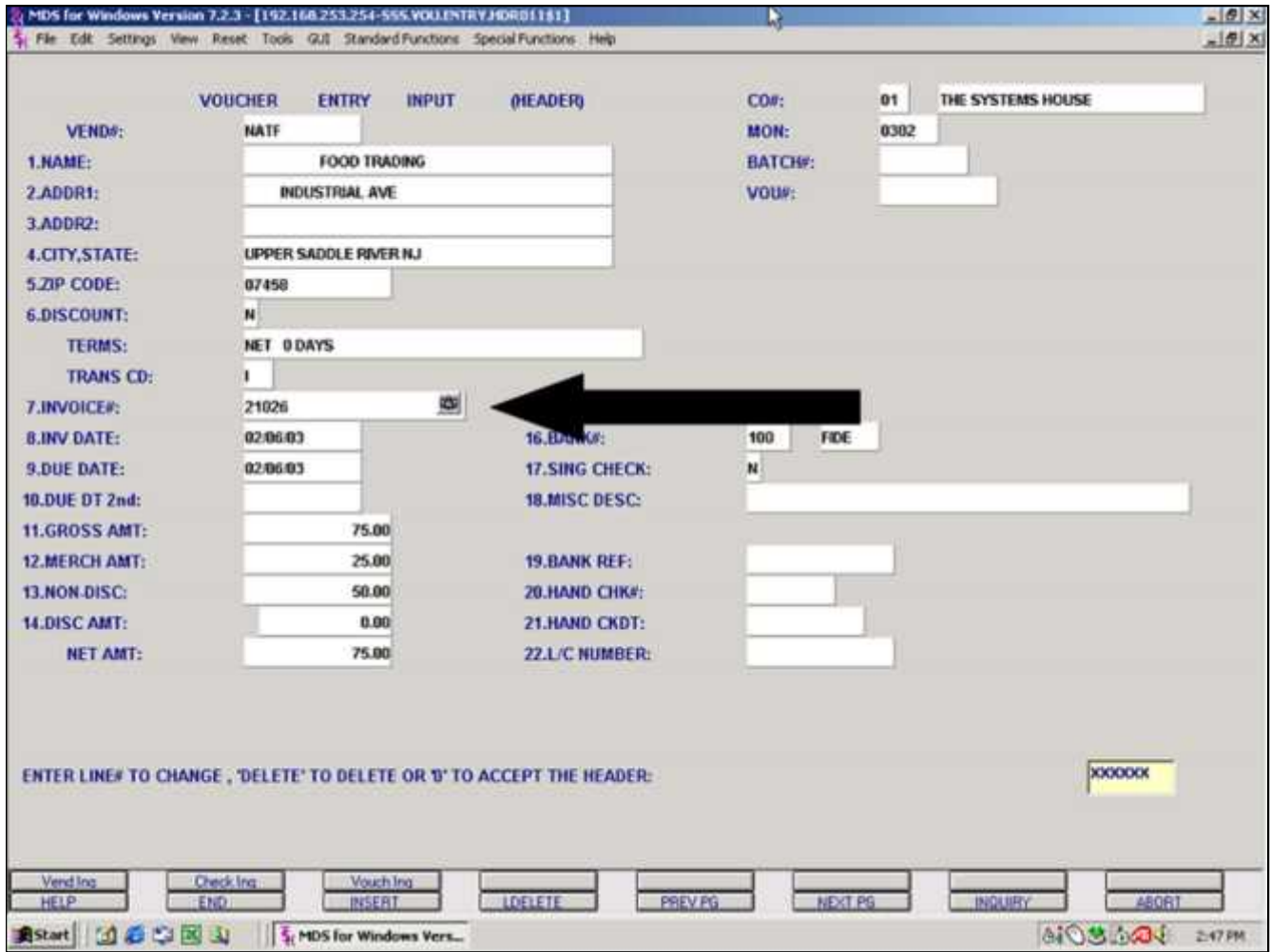
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Document Management System  
 Scanning Document  
 Start by clicking on the CAMERA icon.

Notes:

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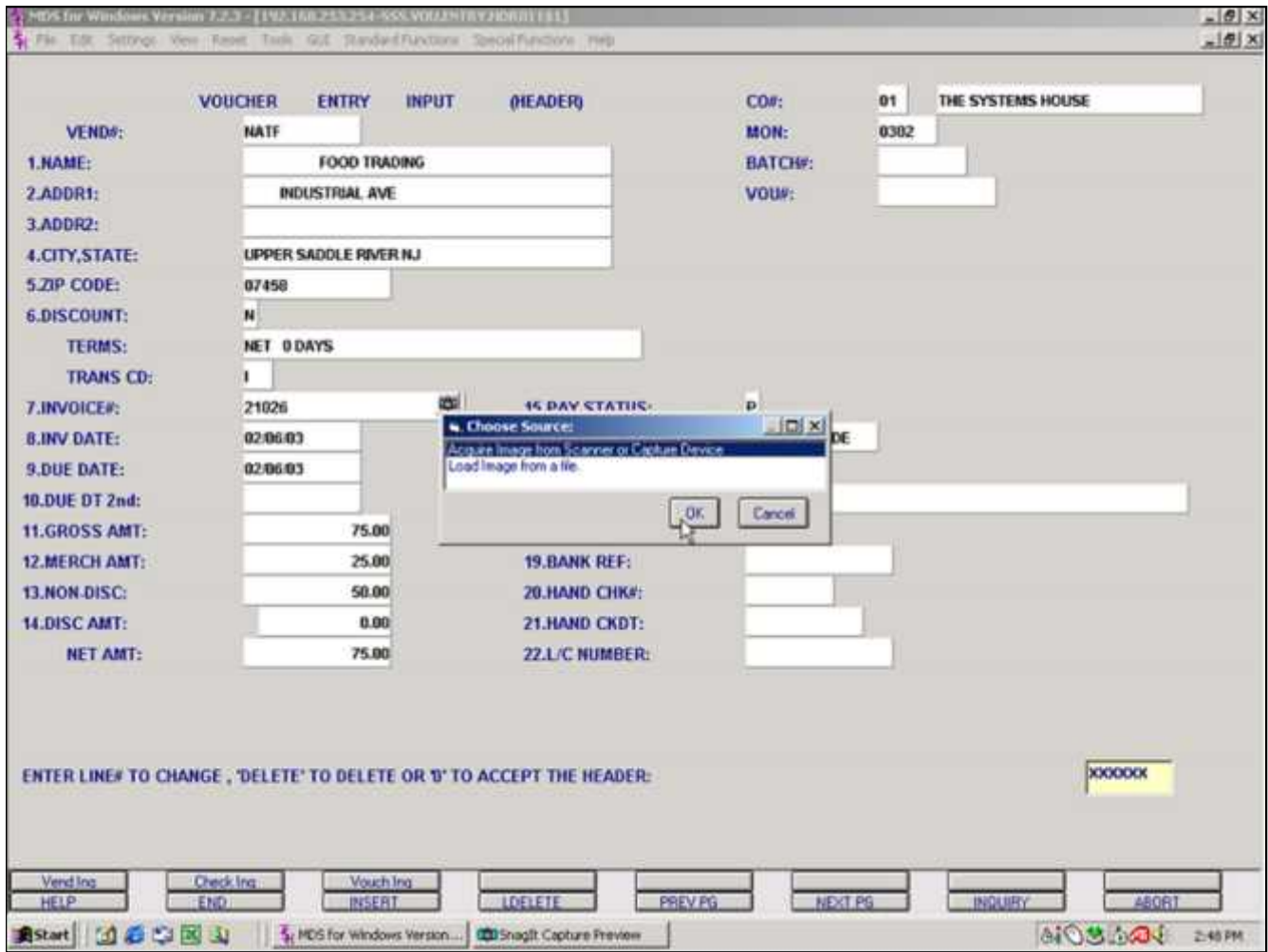
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Document Management System

Scanning Document p2

Next, select "Acquire Image from Scanner or Capture Device" from the "Choose Source" display box.

Click "OK"

Notes:

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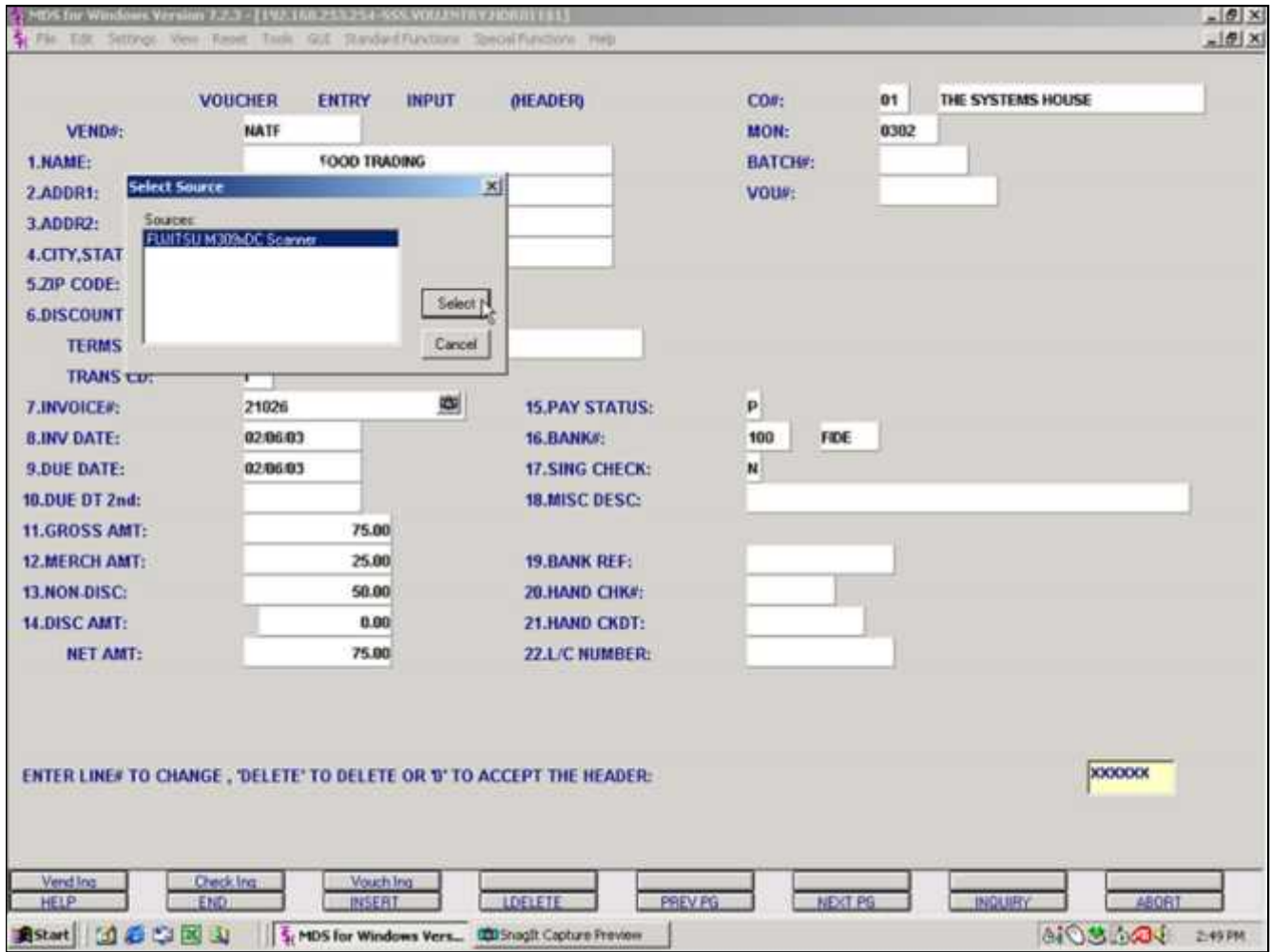
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Document Management System

Scanning Document p3

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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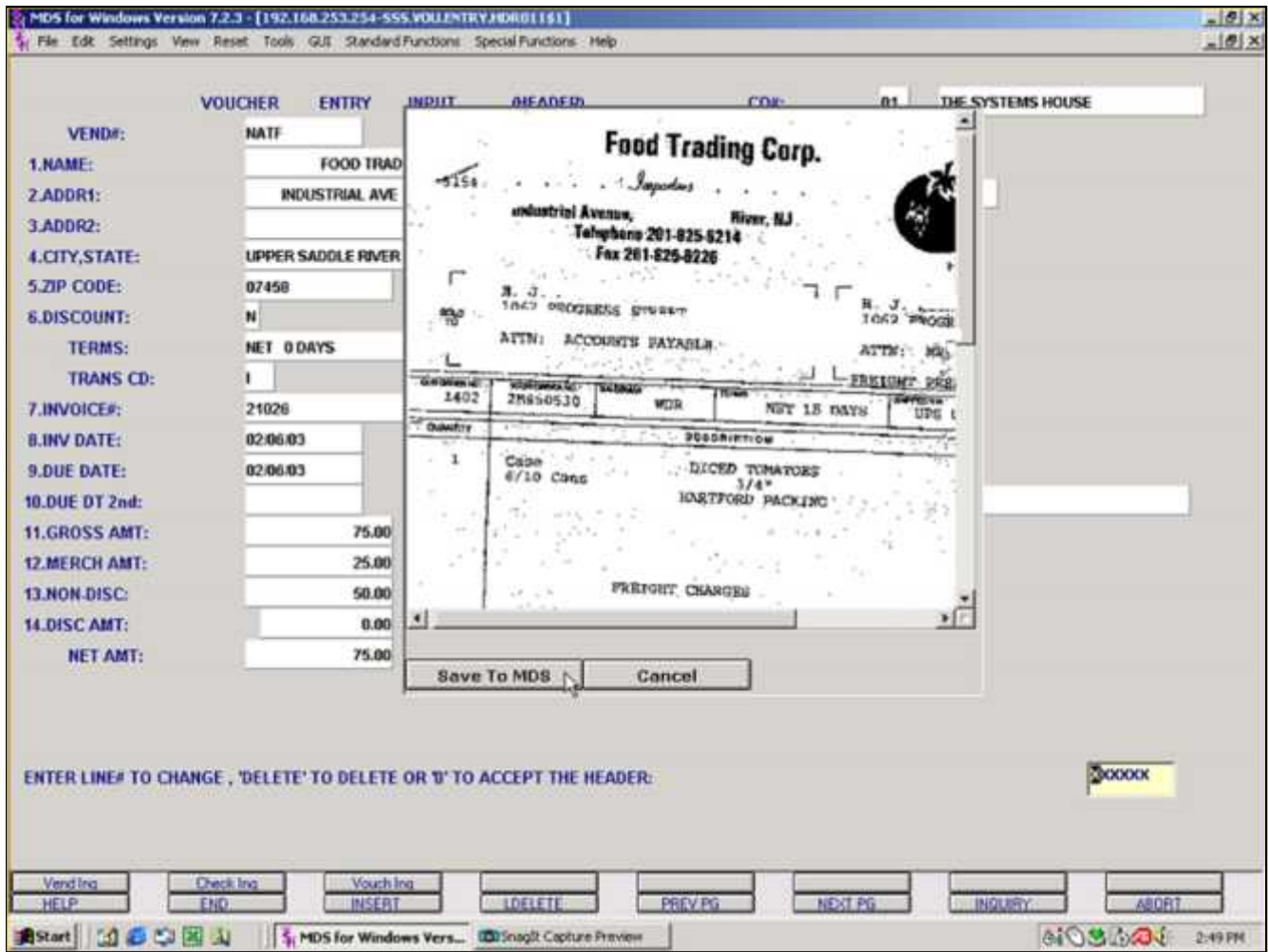
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Document Management System

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.

Notes:

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classic - [192.168.253.254-SSS.VEND.INQ01151]

File Edit Settings View Reset Tools GUI Standard Functions Special Functions Help

\*\*\*\*\* VENDOR OPEN PAYABLES INQUIRY \*\*\*\*\*

VENDOR# NATF FOOD TRADING A/P BALANCE 0.00  
 COMPANY# 01 THE SYSTEMS HOUSE OPEN L/C\$ 0.00  
 PURCHASES M-T-D 0.00 PAYMENTS M-T-D 0.00  
 Y.T-D 0.00 Y.T-D 0.00  
 LAST-YR 0.00 LAST-YR 0.00

VOUCH#	INV-DATE	GROSS-AMT	DISC-AMT	AMT-PAID	LAST-DT	CHECK#	AMT-DUE	ST
	DUE-DATE	INVOICE#		MISC-DESCRIPTION				
1.	01000055	02/06/03	75.00		75.00	02/06/03	000001	
		02/06/03						P
2.	01000056	02/12/03	75.00		75.00	03/15/03	000059	
		02/12/03						P
3.	01000059	02/13/03	75.00		75.00	03/15/03	000059	
		02/13/03						P
4.								
5.								

Enter Line# for Detail Information or 'END':

XXXXXXXX

Purch Hist Pay Hist Vouch Inq Check Inq  
 HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL

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.

Notes:

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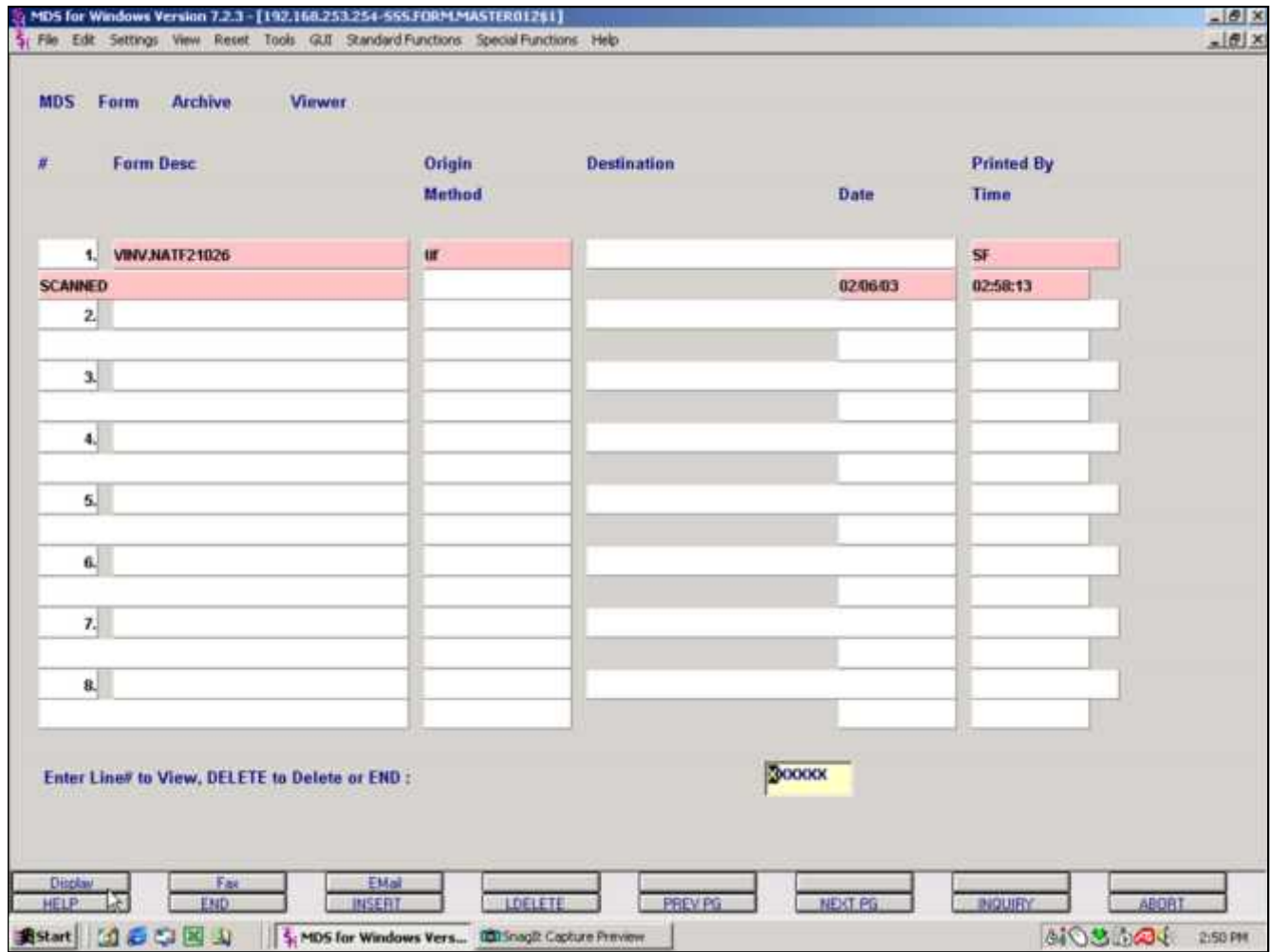


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Document Management System  
 Viewing the Scanned Document  
 From the MDS Form Archive Viewer, click on the 'Display' icon or press Shift+ <F1> function keys.

Notes:

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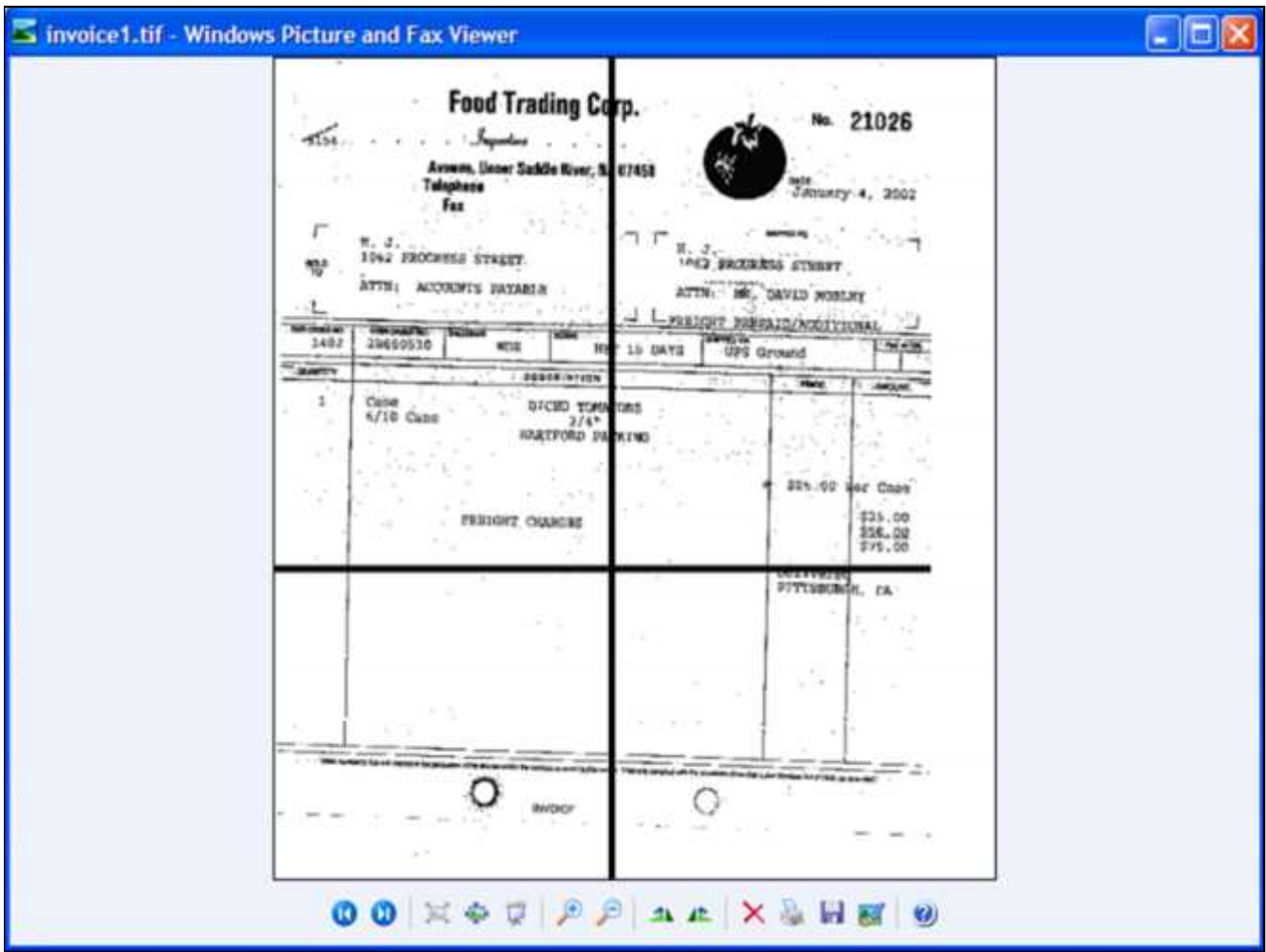
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Document Management System  
 Viewing the Scanned Document-  
 Document Sample  
 The document image will be displayed on your  
 screen.

Notes:

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MDS for Windows Version 7.2.3 - [192.168.253.254-PRDO.MAST.MAINT00861]

File Edit Settings View Reset Tools GUI Standard Functions Special Functions Help

### PRODUCT MASTER FILE MAINTENANCE

Product #:  INT PROD #:

1. Description 1	<input type="text" value="2.5v POCKET OTOSCOPE"/>			<input type="text" value="0.00"/>
2. Description 2	<input type="text"/>		21. Discountable	<input type="text" value="Y"/>
3. Vendor #	<input type="text" value="WELCH"/>		22. Taxable	<input type="text" value="Y"/>
4. Vendor Item#	<input type="text" value="05074-800"/>		23. Discontinued	<input type="text" value="N"/>
5. Purch Agent	<input type="text"/>		24. Accept B/O	<input type="text" value="Y"/>
6. Unit Pack	<input type="text" value="1"/>		25. Partial Ship	<input type="text" value="Y"/>
7. Box Quantity	<input type="text" value="1"/>		26. Inv Bypass	<input type="text" value="N"/>
8. Case Quantity	<input type="text" value="4"/>		27. Stock Status	<input type="text" value="Y"/>
9. Stocking UM	<input type="text" value="BX"/>	<input type="text" value="QTY"/>	<input type="text" value="1"/>	
10. Proc/Cost UM	<input type="text" value="BX"/>	<input type="text" value="QTY"/>	<input type="text" value="1"/>	
11. Std Sell UM	<input type="text" value="BX"/>	<input type="text" value="QTY"/>	<input type="text" value="1"/>	
12. Alt Sell UM	<input type="text"/>	<input type="text" value="QTY"/>		
13. Purchasing UM	<input type="text" value="CS"/>	<input type="text" value="QTY"/>	<input type="text" value="4"/>	
14. Min Sell Qty	<input type="text" value="1"/>			
15. List Price		<input type="text" value="17.250"/>		
16. Standard Cost		<input type="text" value="9.380"/>		
17. Current Cost		<input type="text" value="9.380"/>		
18. Foreign Cost				
19. Show Cost		<input type="text" value="10.110"/>		
			28. Product Line	<input type="text"/>
			29. Product Class	<input type="text" value="032"/>
			30. Product Type	<input type="text" value="003"/>
			31. Unit Weight	<input type="text" value="0.0"/>
			32. Packing Cube	<input type="text"/>
			33. Block_Tier	<input type="text"/>
			34. Owning Co#	<input type="text" value="01"/>
			35. Substitute Ind	<input type="text"/>
			36. Substitute Product#	<input type="text"/>
			37. Sub Price Ind	<input type="text" value="0"/>

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :  PAGE 1 OF 4

HELP END INSERT LDELETE PREV PG NEXT PG INQUIRY ABORT

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.

Notes:

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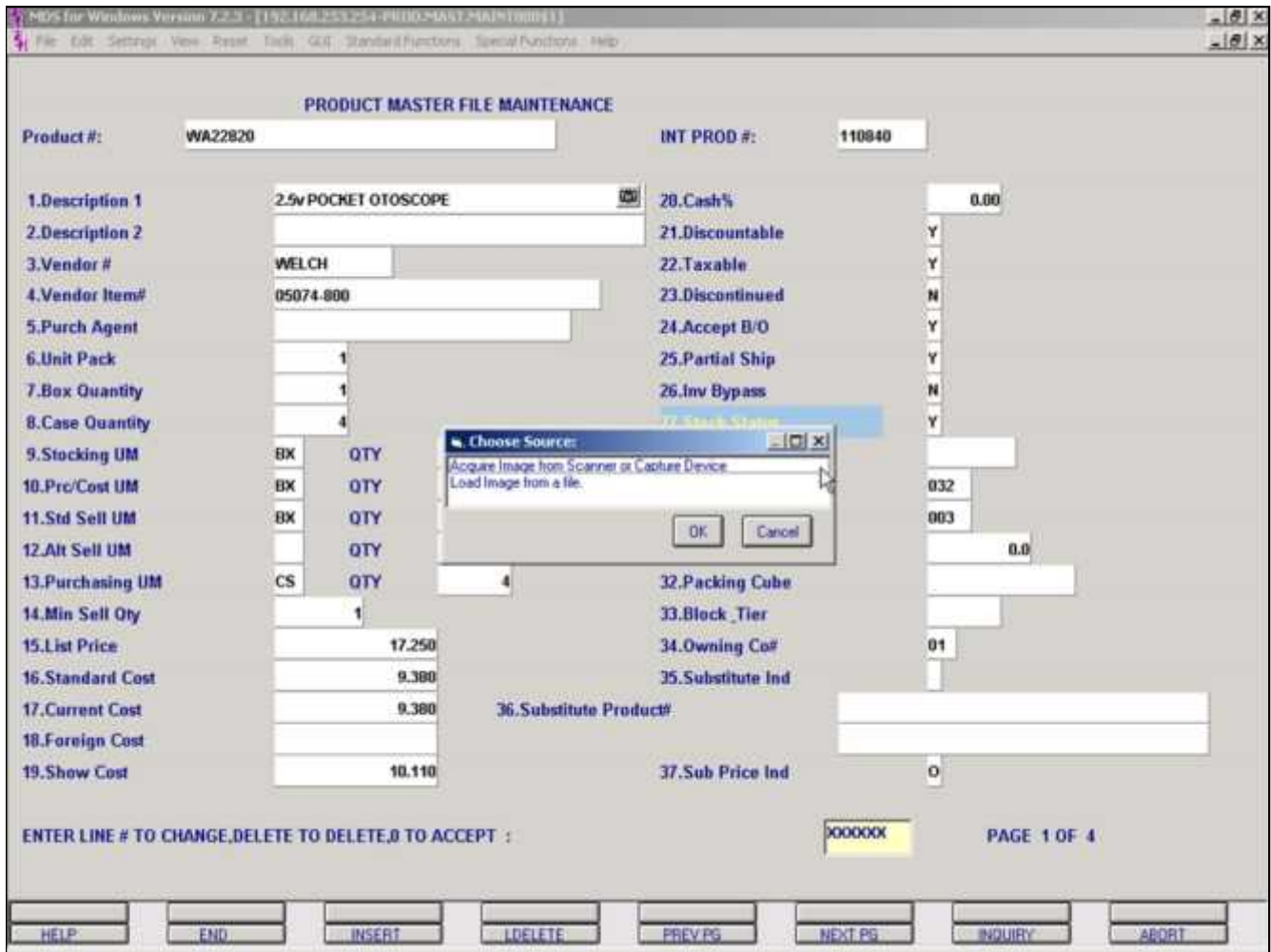
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Document Management System

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.

Notes:

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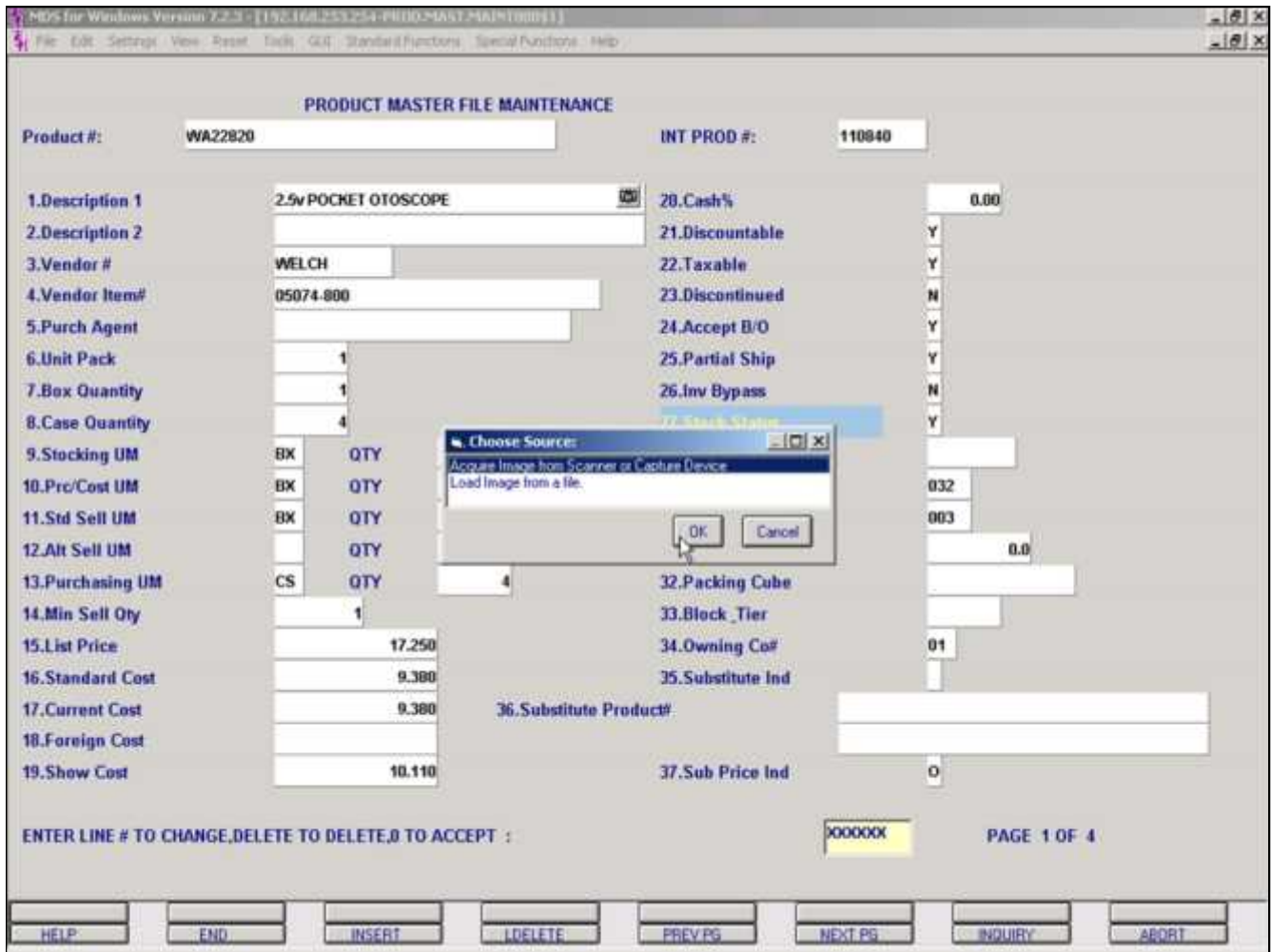
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Document Management System  
 Associating a Picture  
 Acquire Image from Scanner or Capture Device  
 Highlight "Acquire Image from Scanner or Device" and click on the "OK" button.

Notes:

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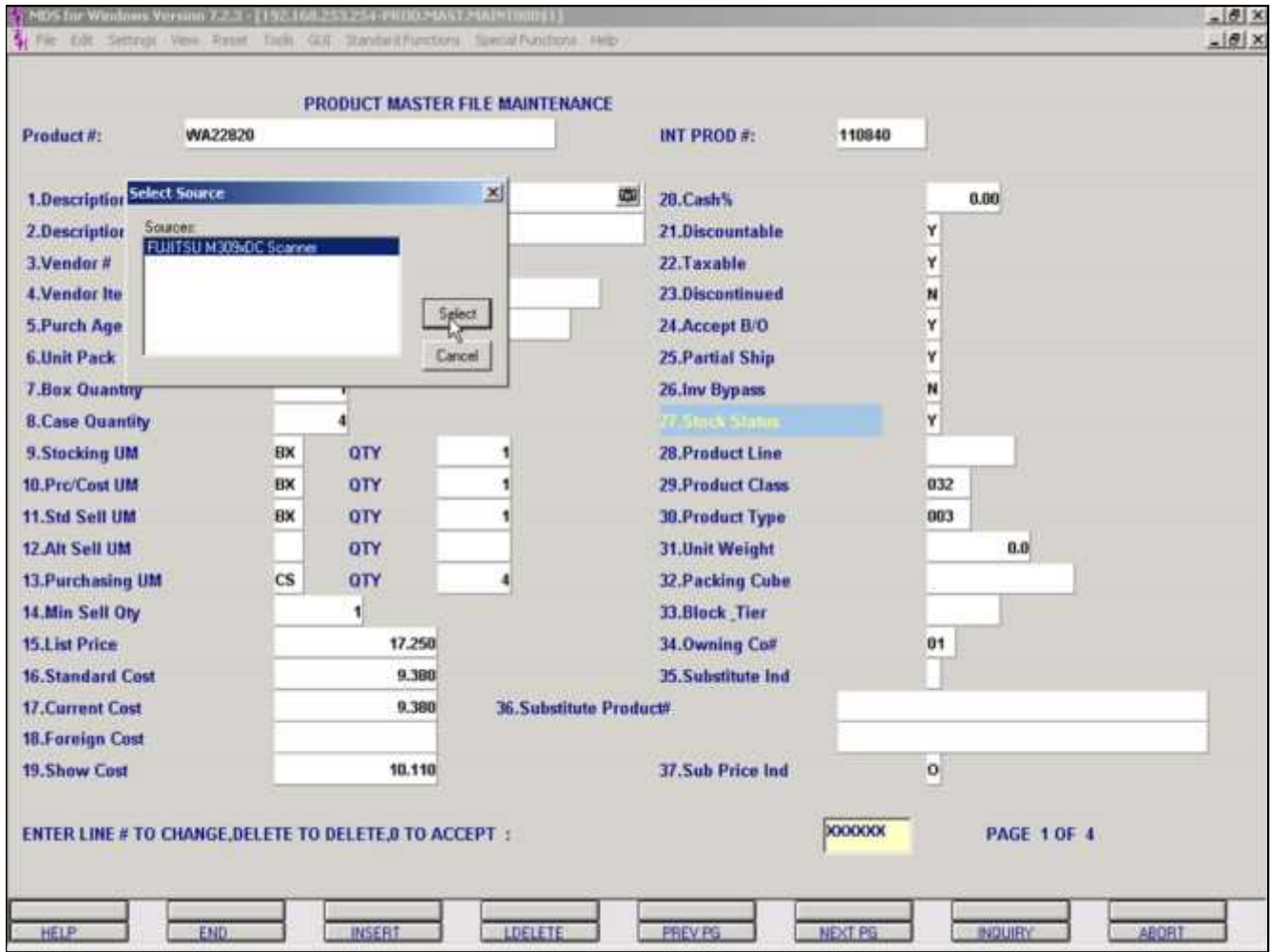
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Document Management System

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.

Notes:

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## Associating an Image p5

- **Acquire Image from Scanner or Capture Device**

Document Management System

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.

Notes:

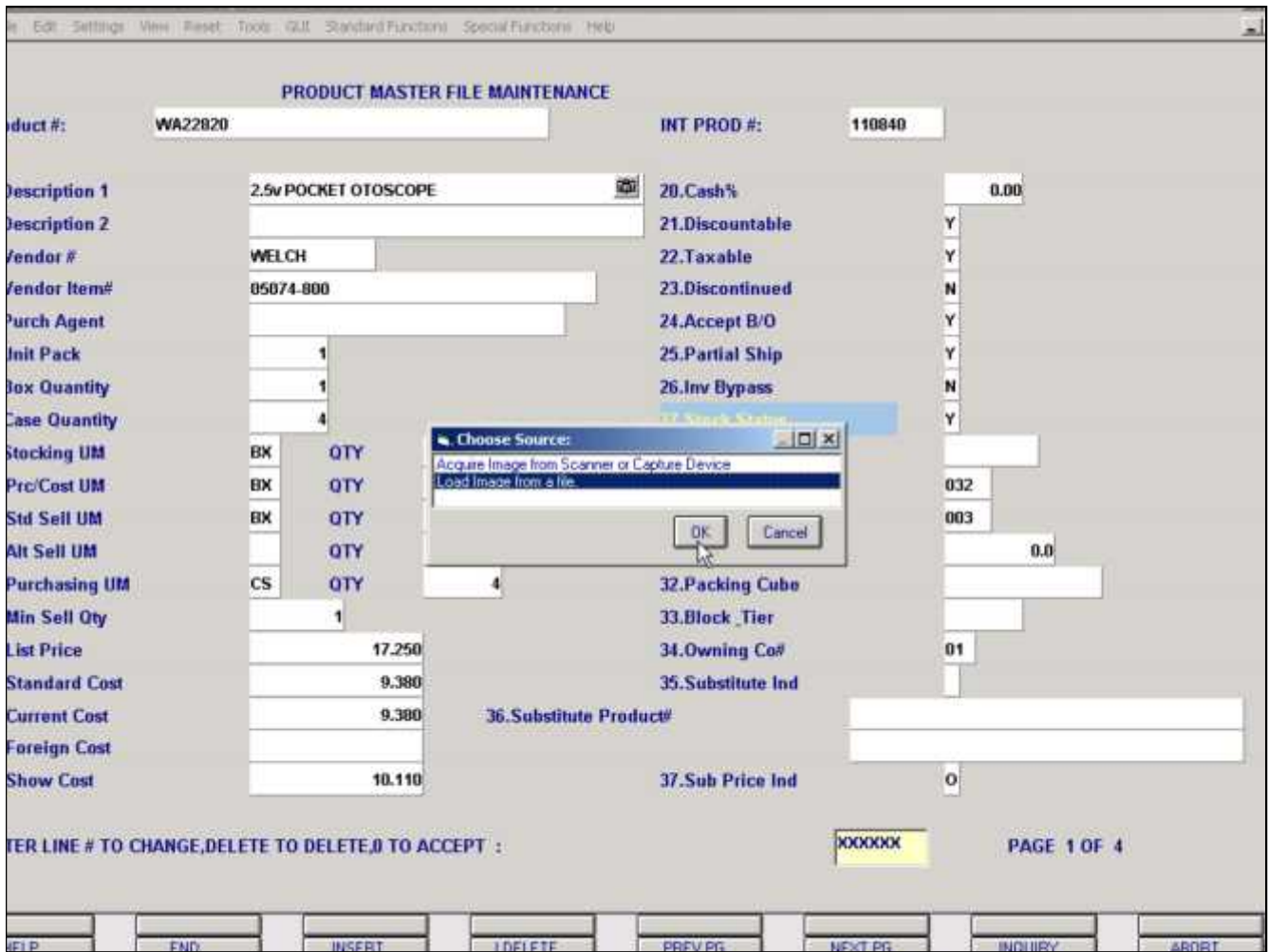
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Document Management System

Associating a Picture

Load Image from a file

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

Notes:

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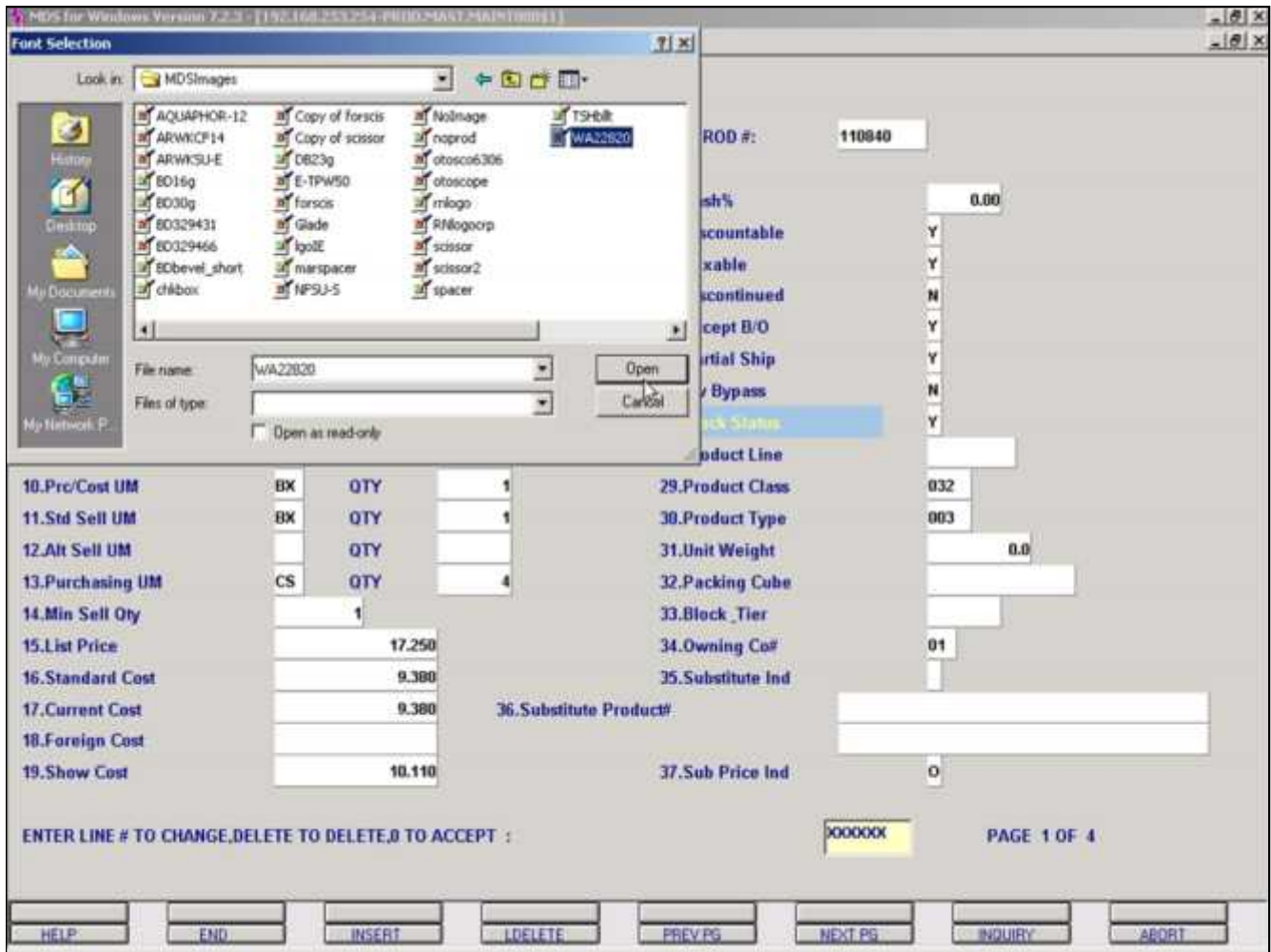
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Document Management System

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.

Notes:

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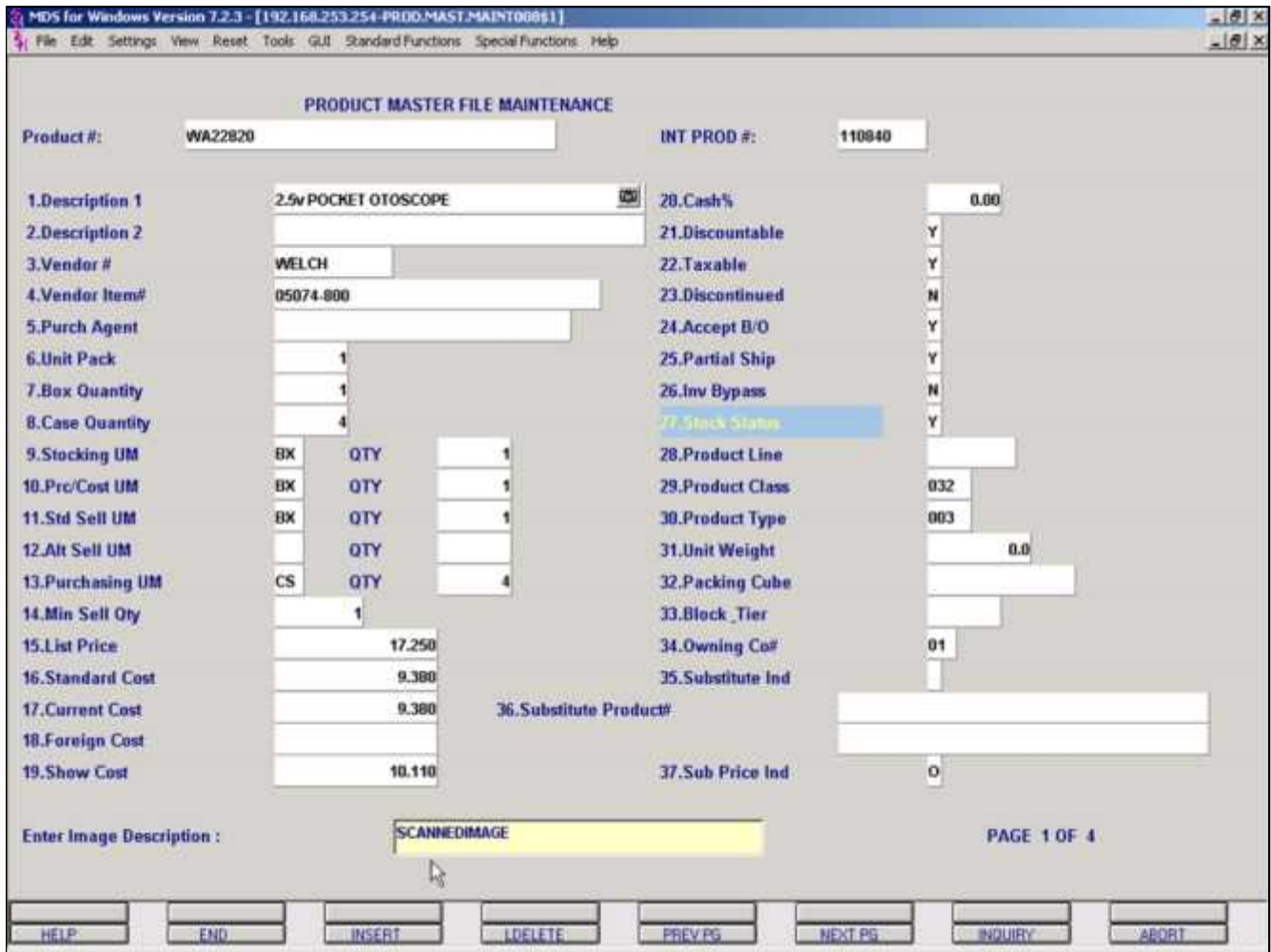
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Document Management System

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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File Edit Settings View Reset Tools GUI Standard Functions Special Functions Help

### PRODUCT MASTER FILE MAINTENANCE

Product #:  INT PROD #:

Description 1:  

Description 2:

Vendor #:

Vendor Item#:

Purch Agent:

Init Pack:

Box Quantity:

Case Quantity:

Stocking UM: BX QTY

Prc/Cost UM: BX QTY

Std Sell UM: BX QTY

Alt Sell UM:  QTY

Purchasing UM: CS QTY

Min Sell Qty:

List Price:

Standard Cost:

Current Cost:

Foreign Cost:

Show Cost:

20.Cash%:

21.Discountable:

22.Taxable:

23.Discontinued:

24.Accept B/O:

25.Partial Ship:

26.Inv Bypass:

27.Stock Status:

28.Product Line:

29.Product Class:

30.Product Type:

31.Unit Weight:

32.Packing Cube:

33.Block Tier:

34.Owning Co#:

35.Substitute Ind:

36.Substitute Product#:

37.Sub Price Ind:

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :  PAGE 1 OF 4

HELP END INSERT LDELETE PREV PG NEXT PG INQUIRY ABORT

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

Notes:

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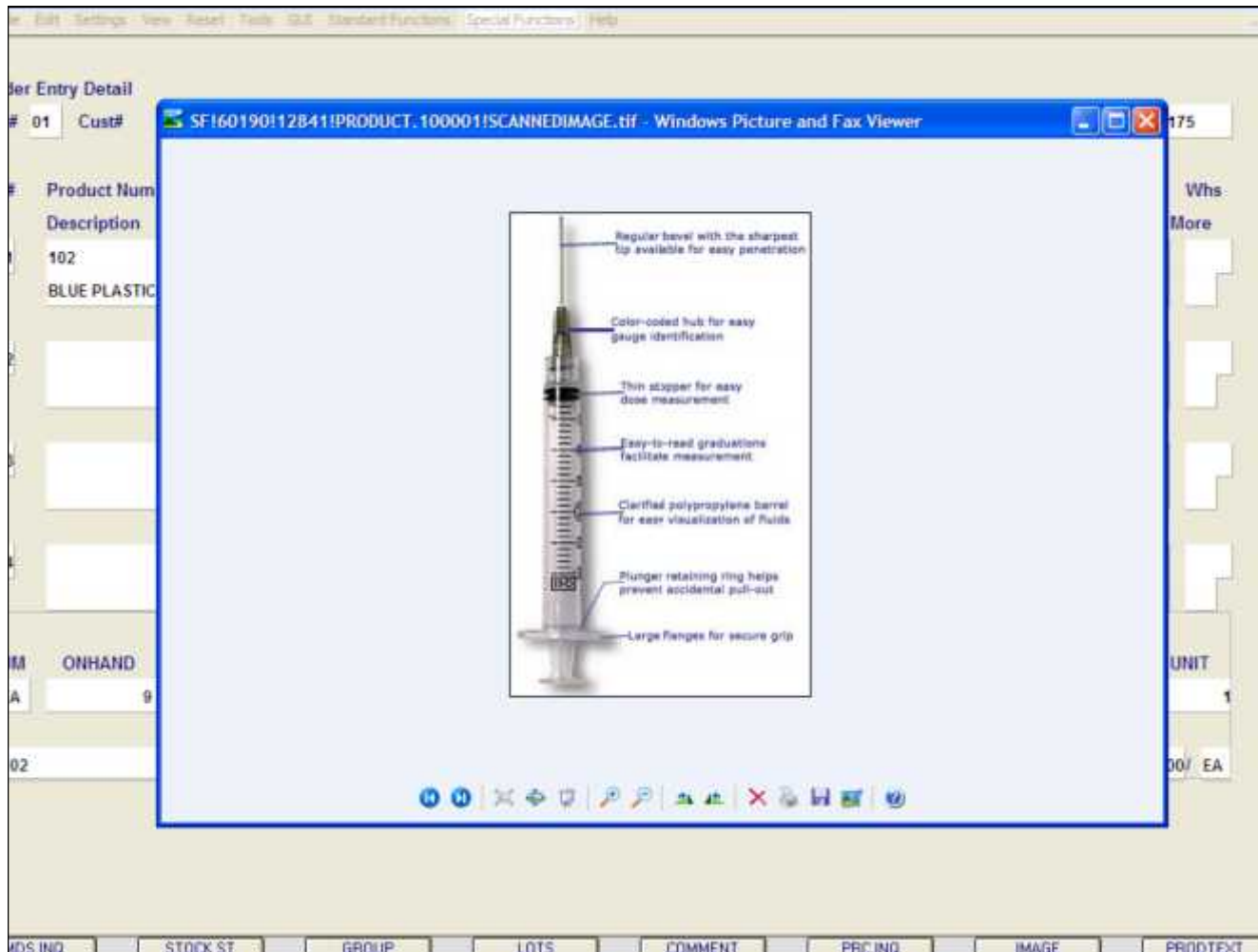
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## Document Management System

### 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.

Notes:

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Comments:



## Where to Get More Information

- To contact support call **973-777-8050** or fax **973-777-3063**.
- To access the The System's House website the address is:  
**[www.tshinc.com](http://www.tshinc.com)**.

Document Management System

Notes:

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