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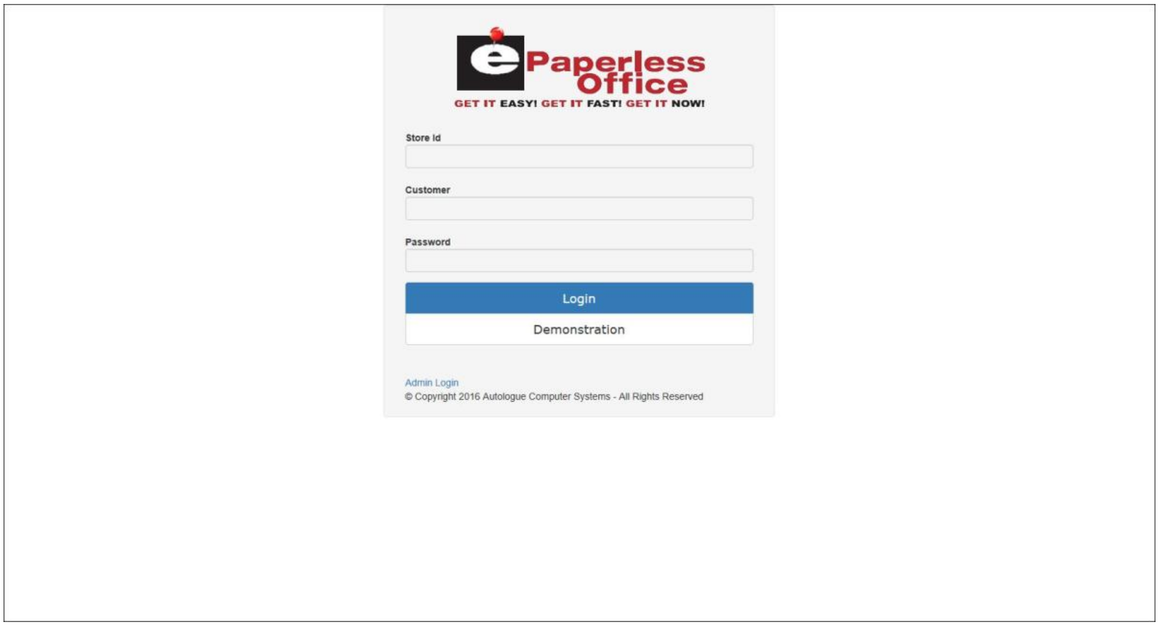
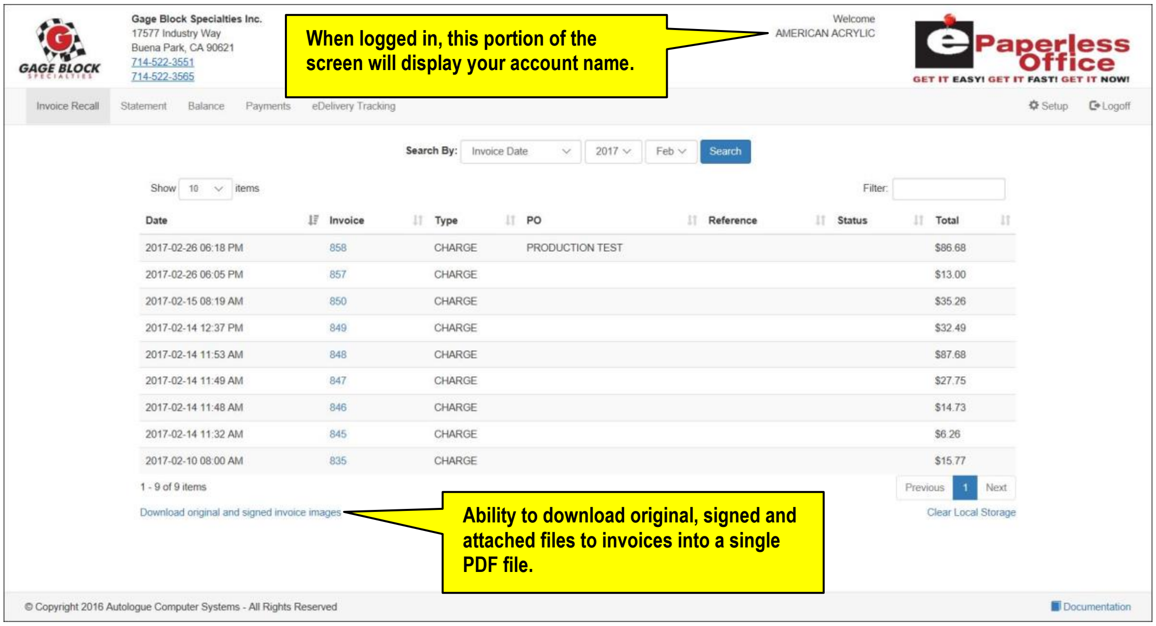
Loggin Into eOffice

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



- Enter your suppliers *Store ID*, your *Customer* account number and your *Password* and then left click on the blue *Login* button.

The *Invoice Recall* tab screen will now be displayed when you've successfully logged into your account as shown:



Using the various screen tabs along the top, you have the ability to perform the following functions:

- View current and past invoices
- Download original, signed and attached invoice images (PDF format)
- View current and past statements (and optionally make a payment online)
- View your current balance
- View current and past payments
- View eDelivery information (if the supplier has eDelivery)
- Setup your email addresses for receiving invoices and statements
- View online documentation information

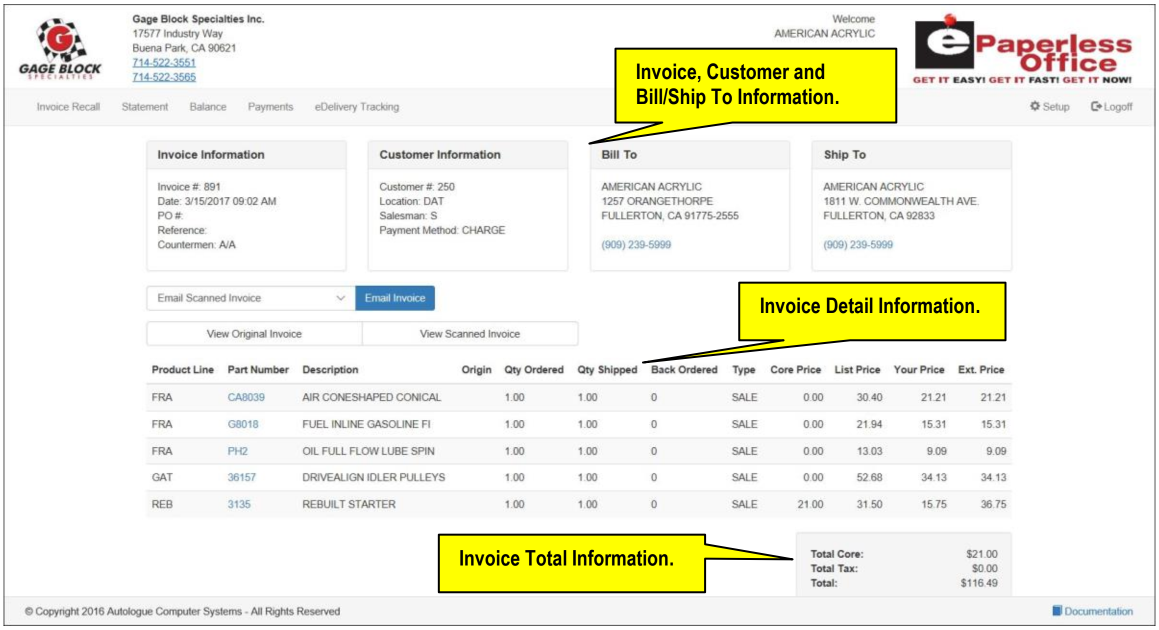
Viewing Your Invoices

The *Invoice Recall* tab screen is the default screen shown when logging into your eOffice account. The screen will default to showing your last 10 invoices in descending date order from the year and month of your 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 of information for the Invoice, Customer, Bill To and Ship To information.

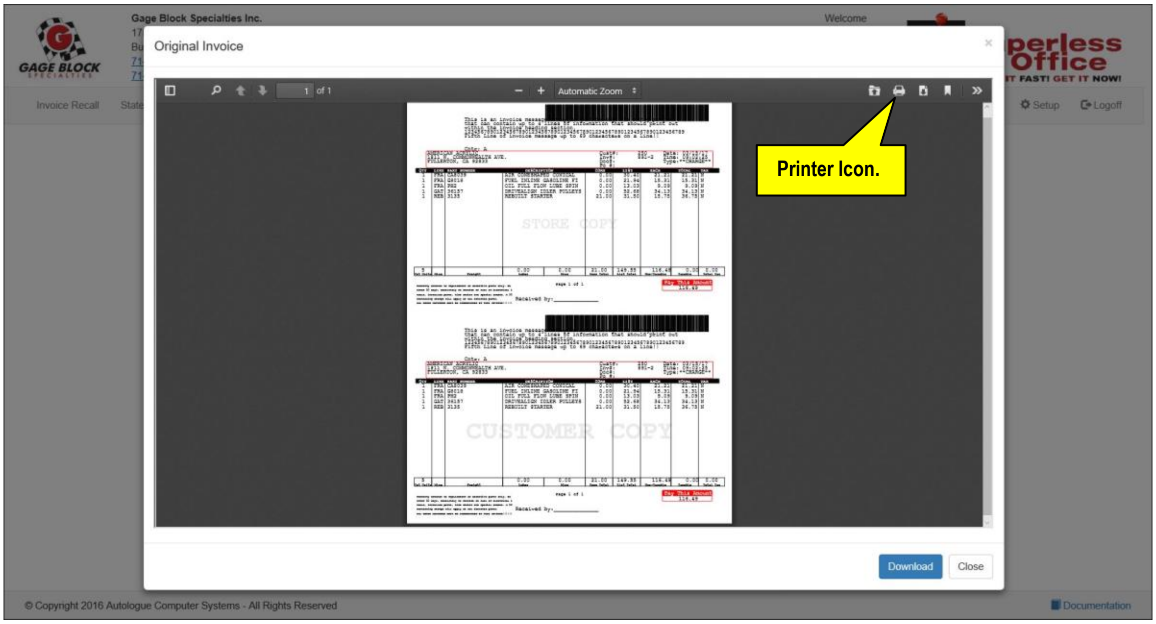
Email Invoice

- 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*) 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:



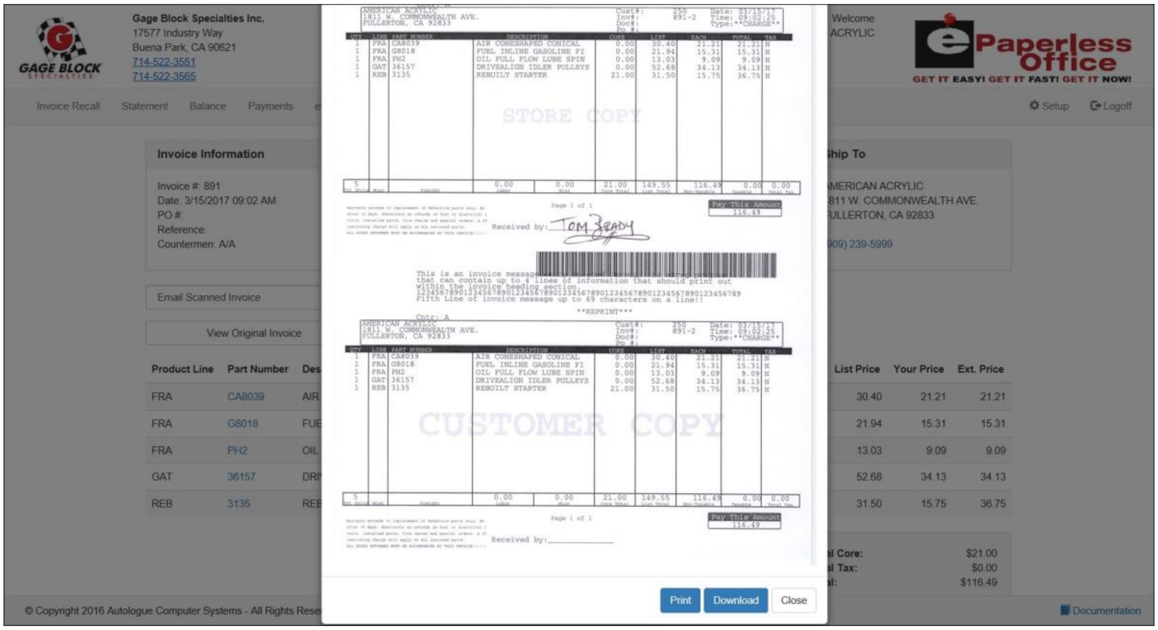
You have the option to download and save the file as a PDF formatted file by clicking on the blue *Download* button. The filename would be the invoice number with a .pdf filename extension (i.e. *891.pdf*).

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 back 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 back 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 Signature* button will be displayed. Clicking on this button will display an *eDelivery Signature* screen as shown:

You have the option to email the displayed signature file by simply entering in email addresses within the *Email From:* and *Email To:* fields and then clicking on the grey *Email* button displayed below the signature.

You have the option to print a copy of the signature file being displayed by clicking on the grey *Print* button that is displayed below the signature.

- Click on the *Exit* button to return back to the invoice data information screen.

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 have the ability to 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 Type
- PO Number
- Reference Number
- Status
- Invoice Total

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
- Sell 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 Sell Price

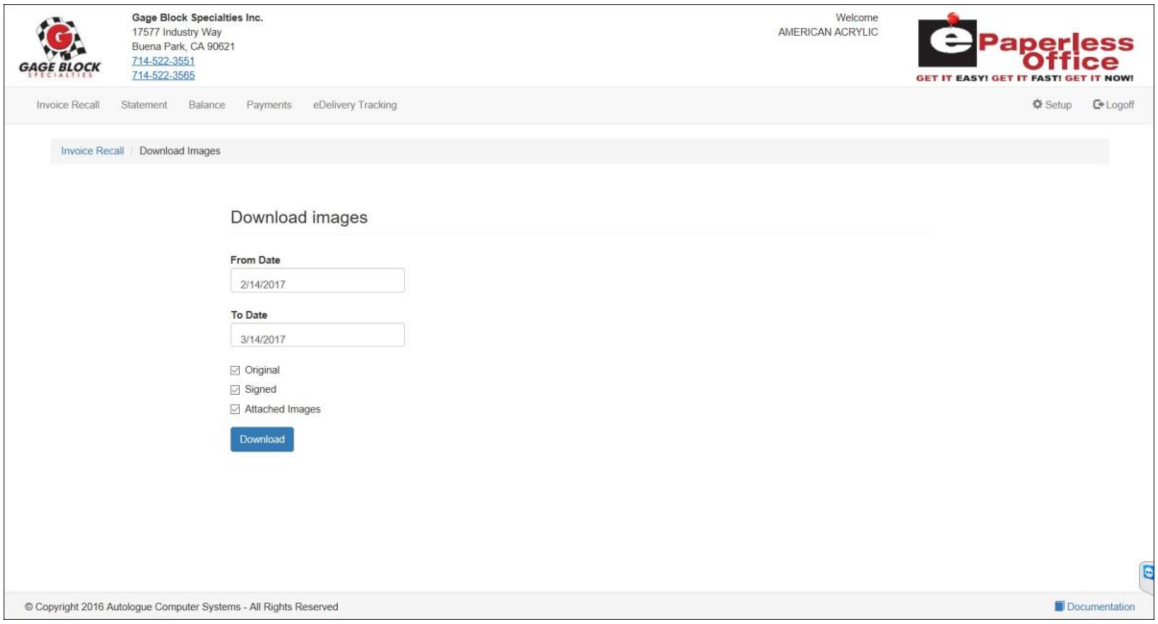
- To display invoice information for parts numbers with a specific sell price, left click within the *Search By:* drop down field list and left click on the *Sell Price* menu selection.
- Left click within the blank field now displayed to the right of the menu selection, enter in the specific sell price 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 sell price.

Download Original And Signed Invoice Images

- You have the ability to 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:



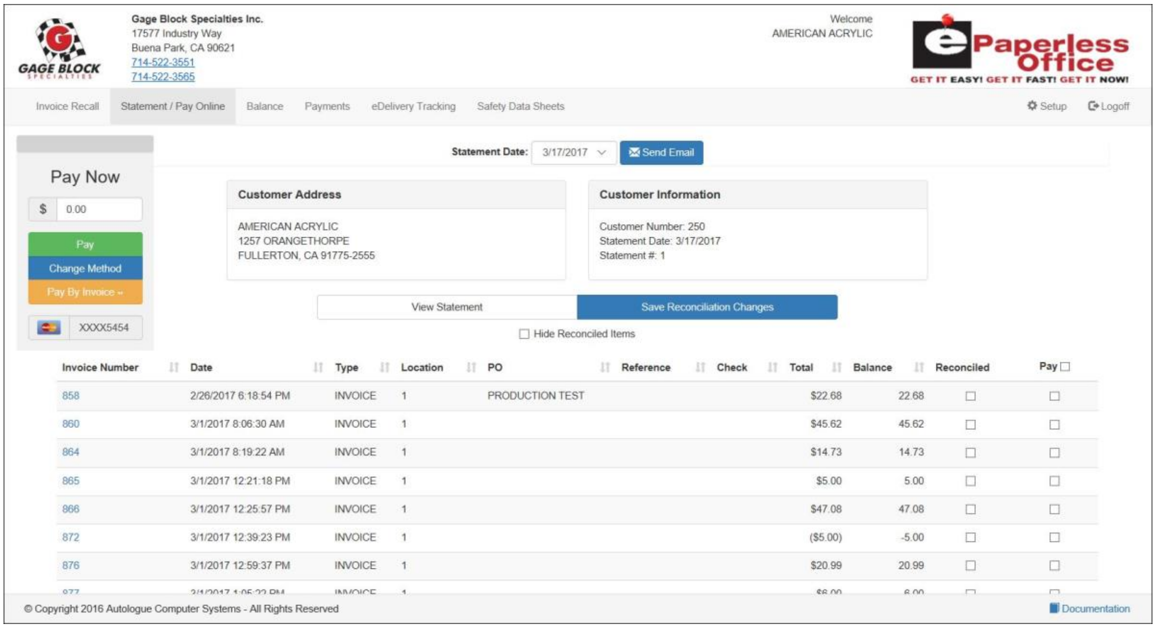
- Click within the *From Date* and *To Date* range fields to change the selected date ranges of the invoices.
- By default all the specific types of invoices (Original, Signed, Attached Images) will be check marked. Check or uncheck the specific types and then click on the blue *Download* button to create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

View Your Statements

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

Note: If your supplier is setup to take online payments, the *Statement* tab will instead display *Statement / Pay Online* at the top of the screen.

The screen will default to showing your last statement from the year and month of your open balance 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 year and month, 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)
- Status
- (Invoice) Total
- Balance
- Reconciled
- Pay (optionally displays when you can pay by invoice with check/credit card)

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

Column Sorting

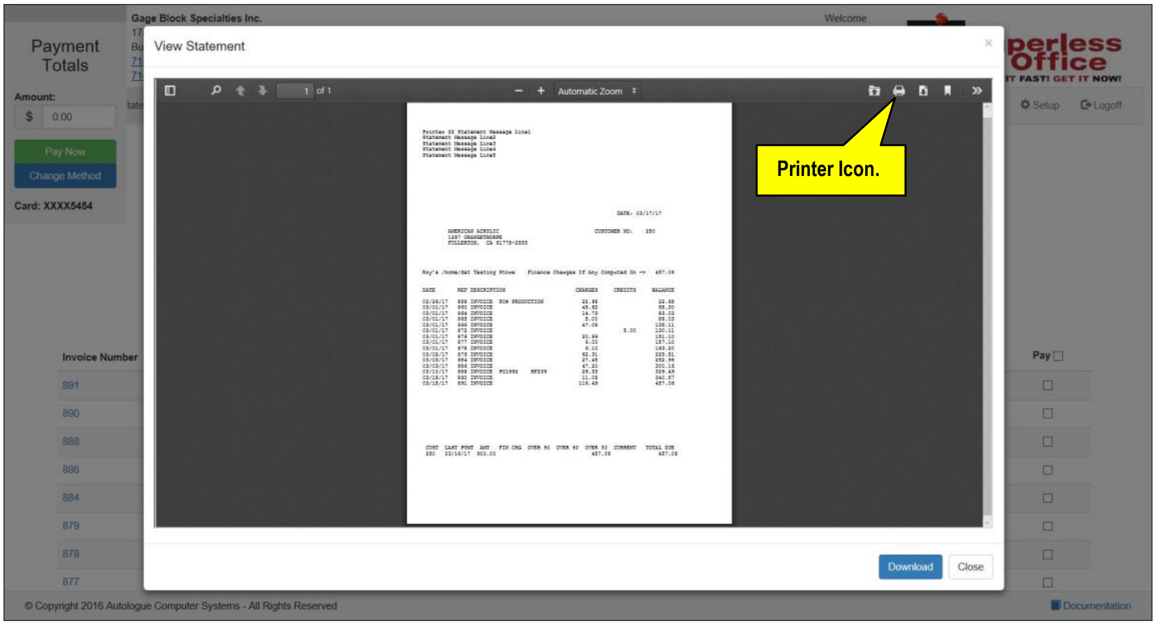
The statement screen information can be resorted by simply left clicking on any of the column headings. The information will be displayed in ascending order based upon the column clicked on. Clicking again on the same column will then display the information in descending order.

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 back 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 have the ability to have the screen redrawn and hide the invoices that have been marked and saved by clicking on the *Hide Reconciled Items* check box.

Paying The Statement

If your supplier is setup to accept electronic payments, a *Payment Totals* pop up window will be displayed in the upper left portion of the *Statement / Pay Online* screen. An extra column check box field (*Pay*) will be displayed for each of the invoices listed on the statement screen. You have the option to pay specific invoices or a flat dollar amount. This is based upon the payment option that is displayed (*Pay By Invoice* or *Pay Any Amount*).

Pay By Invoice – Selecting Invoices To Pay

- If the *Pay By Invoice* option is selected, all the unpaid invoices and credits listed can be quickly selected (check marked) by clicking on the checkbox (□) besides the *Pay* heading. Alternatively, you can just click on the *Pay* check box besides only the specific invoices and credits you want to pay. Invoices that have been previously paid will not display a check box and will instead display *Paid*.

Pay Any Amount

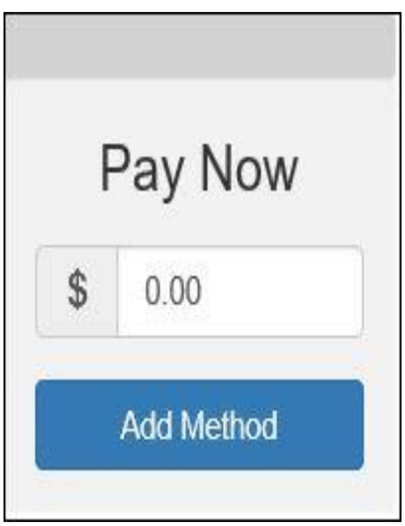
- If the *Pay Any Amount* option is selected, all the unpaid invoices and credits listed check boxes will be grayed out as well as the checkbox (□) besides the *Pay* heading. Click within the dollar amount field and enter in the specific dollar amount you want to pay.

Pay Now

- Once all the desired invoices to be paid have been selected or a flat dollar amount has been entered within *$* amount field, click on the green *Pay* button.

Payment Totals Window

The *Pay Now* pop up window shows the dollar amount (within the *$* field) that will be paid when specific invoices have been check marked for paying or a flat dollar amount has been entered. The bottom portion of the *Payment Totals* pop up window will either display a blue *Add Method* button (which means there currently is no payment method setup), or a blue *Change Method* button along with a gold *Pay By Invoice* or *Pay Any Amount* along with a green *Pay* button (which means there is a method setup). The very bottom of the window will display the current payment method symbol (*Visa*, *Master Card*, *eCheck*, etc.).

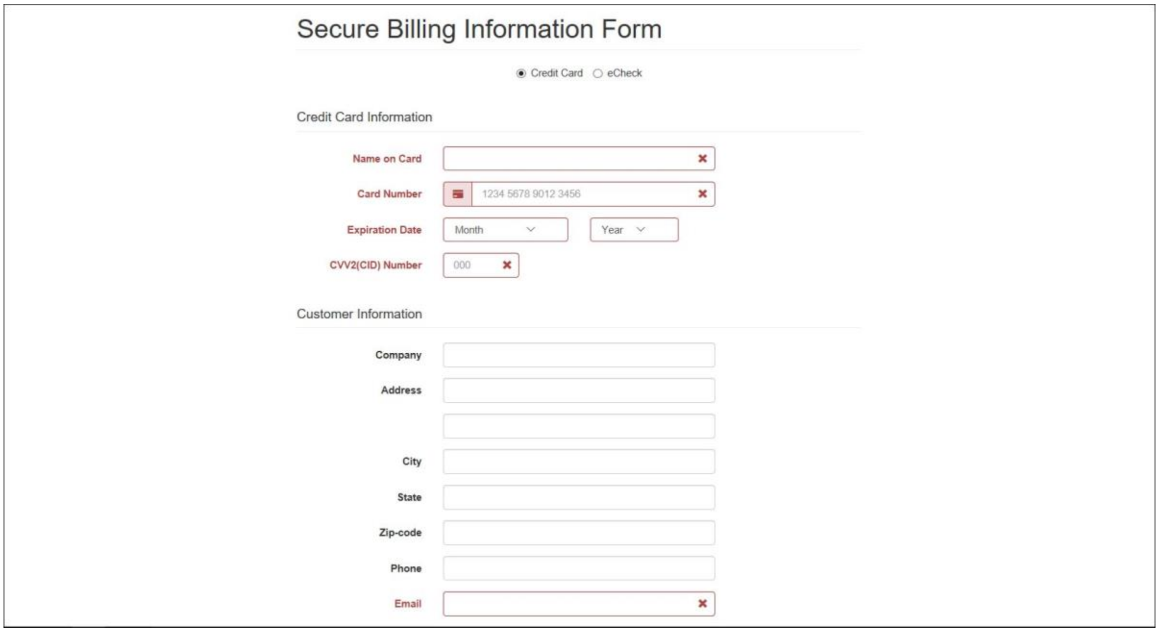


Payment Method Not Setup

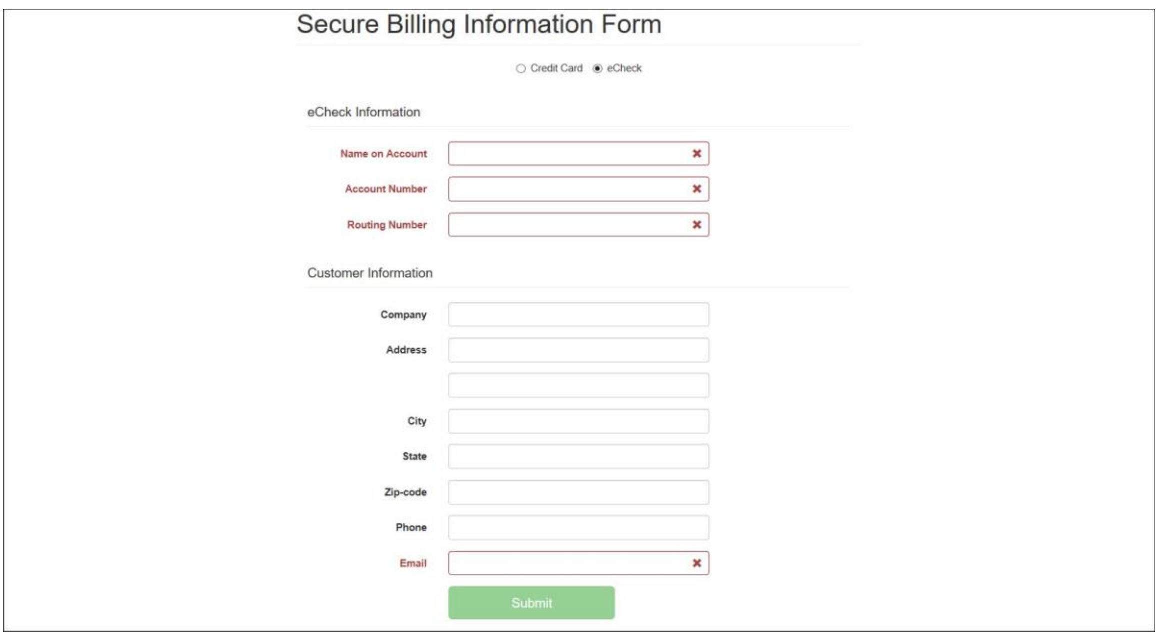
Payment Method Setup

Adding A Payment Method

- To add a payment method (Credit Card or eCheck), click on the blue *Add Method* button and a *Secure Payment Form* screen will be displayed that will need to be filled in to process a payment:



Credit Card Form



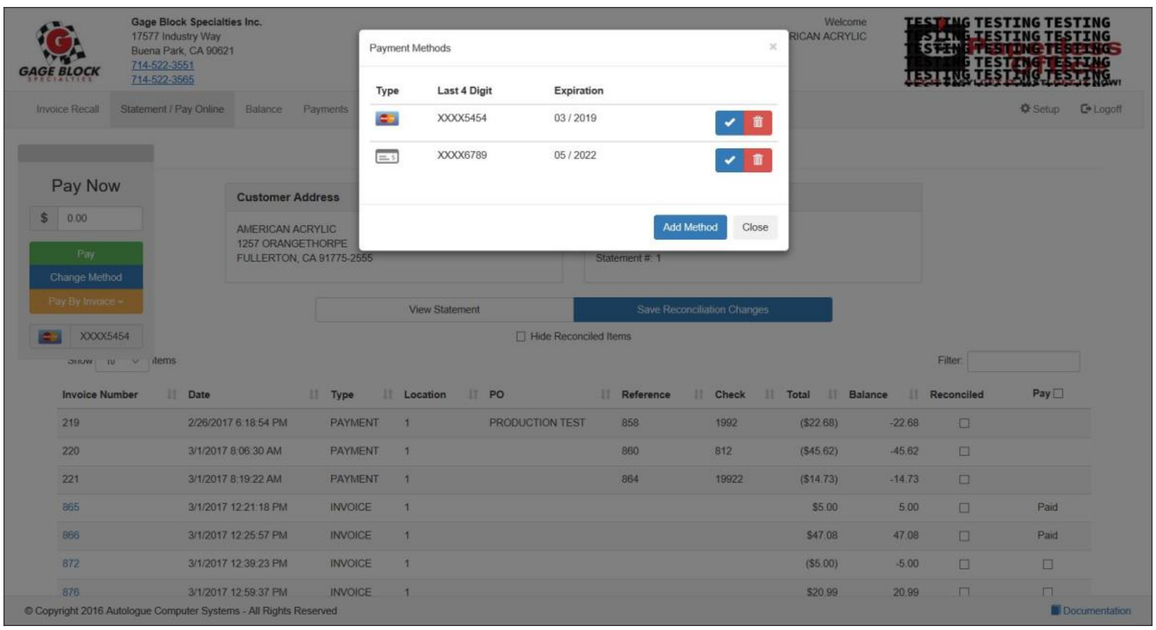
eCheck Form

By default, the screen will display the *Credit Card* form which is denoted at the top of the screen. If you want to fill out an *eCheck* form, click on the *eCheck* selection at the top of the screen and a new form will be displayed.

Fill in the form as completely as possible. Please note that all the required fields are denoted in red and each must be filled out. Once all the required fields have been entered, click on the green *Submit* button and the payment method information will be saved.

Changing A Payment Method

- To select or add a secondary payment method (*Credit Card* or *eCheck*), click on the blue *Change Method* button. The following *Payment Methods* pop up window will be displayed:



The *Payment Methods* window will display a selection list of all the available payment methods that have been setup. It will display the payment type, last 4 digits of the account/credit card and the expiration month/year.

- To select a different payment method, click on the blue check mark button for the desired method and the screen will return to the statement screen.
- You have the option to delete a specific payment method by clicking on the red trash can button for the desired method and the screen will return to the statement screen.
- To add another payment method (*Credit Card* or *eCheck*), click on the blue *Add Method* button and a *Secure Payment Form* screen will be displayed that will need to be filled in as previously described in the *Adding A Payment Method* section.

Pay Any Amount/Pay By Invoice

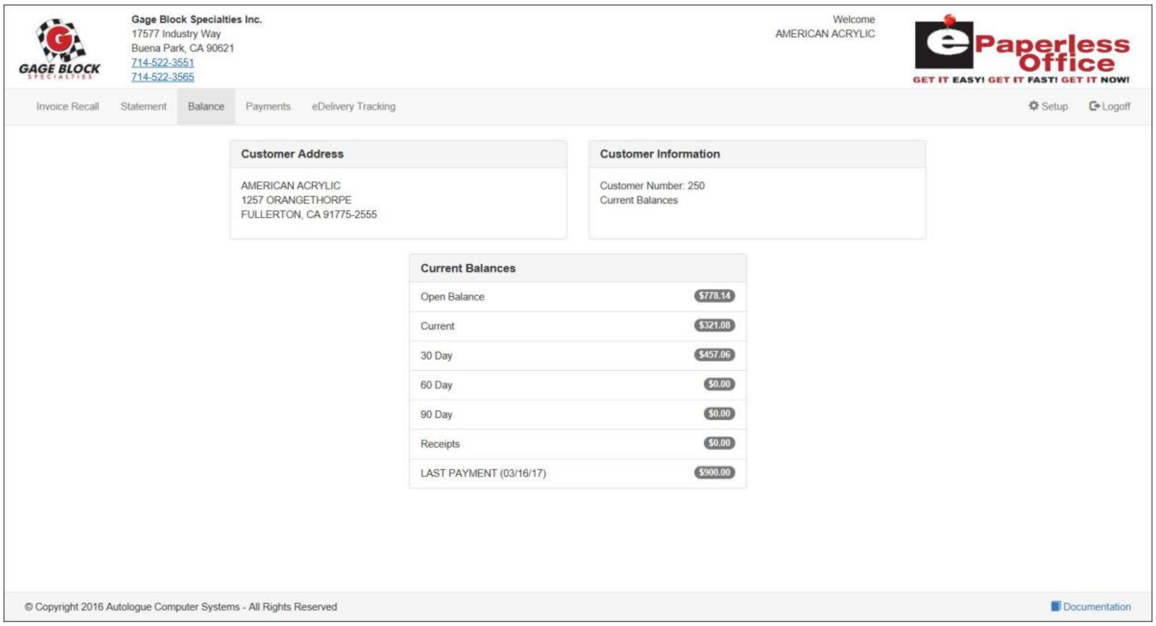
The yellow button bar displays whether payments are setup to pay by invoice or any dollar amount.

- To select a different payment type, click on the yellow button. Click on either the *Pay By Invoice* or *Pay Any Amount* menu selection from the drop down list.

Viewing Your Balance

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

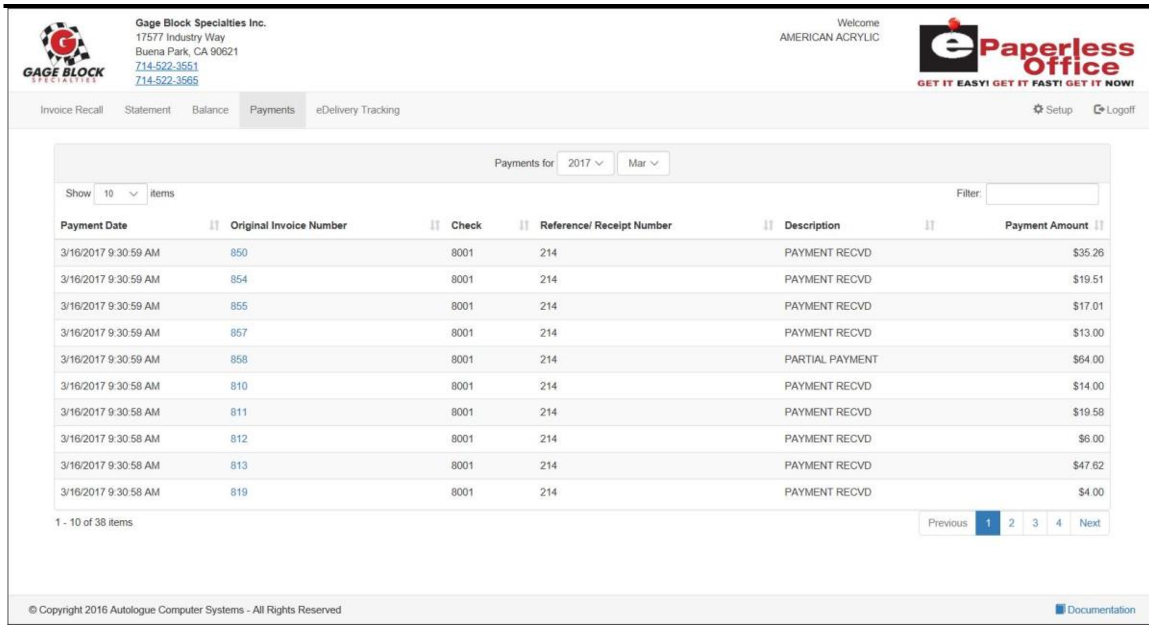
The screen will show a breakdown of your current balances as shown:



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*.

Viewing Your Payments

- To view your past payments, click on the *Payments* tab at the top of the screen.



Payment Date	Original Invoice Number	Check	Reference/ Receipt Number	Description	Payment Amount
3/16/2017 9:30:59 AM	850	8001	214	PAYMENT RECVD	$35.26
3/16/2017 9:30:59 AM	854	8001	214	PAYMENT RECVD	$19.51
3/16/2017 9:30:59 AM	855	8001	214	PAYMENT RECVD	$17.01
3/16/2017 9:30:59 AM	857	8001	214	PAYMENT RECVD	$13.00
3/16/2017 9:30:59 AM	858	8001	214	PARTIAL PAYMENT	$64.00
3/16/2017 9:30:58 AM	810	8001	214	PAYMENT RECVD	$14.00
3/16/2017 9:30:58 AM	811	8001	214	PAYMENT RECVD	$19.58
3/16/2017 9:30:58 AM	812	8001	214	PAYMENT RECVD	$6.00
3/16/2017 9:30:58 AM	813	8001	214	PAYMENT RECVD	$47.62
3/16/2017 9:30:58 AM	819	8001	214	PAYMENT RECVD	$4.00

The screen will default to showing your last 10 paid invoices in descending date order from the year and month of your 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 have the ability to 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

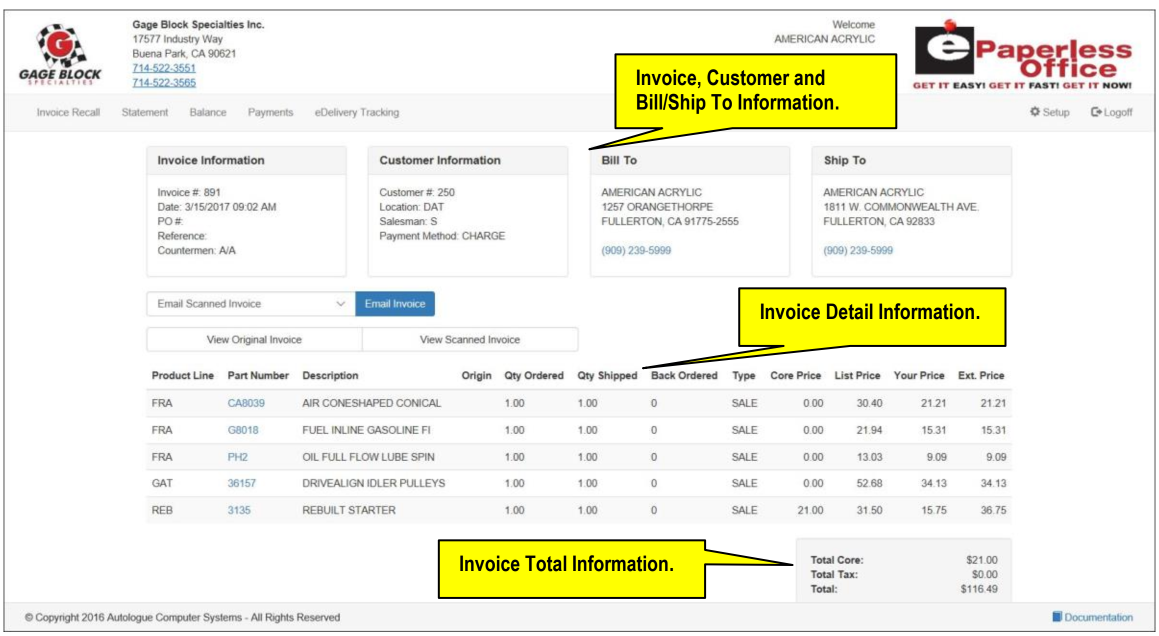
Column Sorting

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:

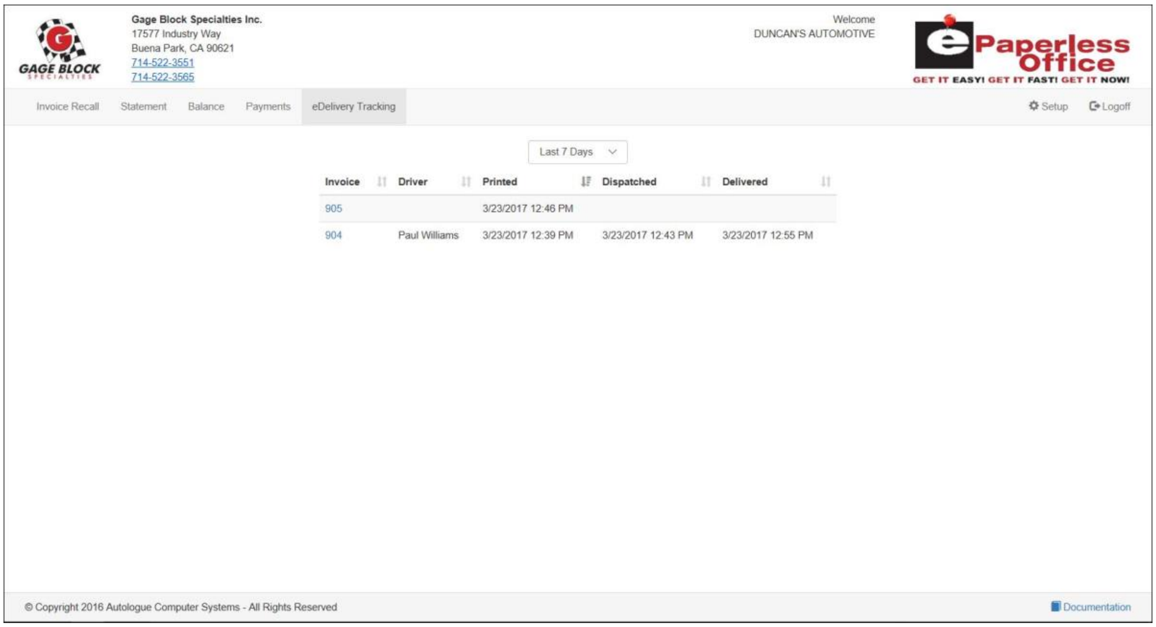


The top portion of the screen will display header sections of information for the Invoice, Customer, Bill To and Ship To information.

Tracking Your Deliveries

- If your supplier uses *eDelivery* and you want to track your 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)

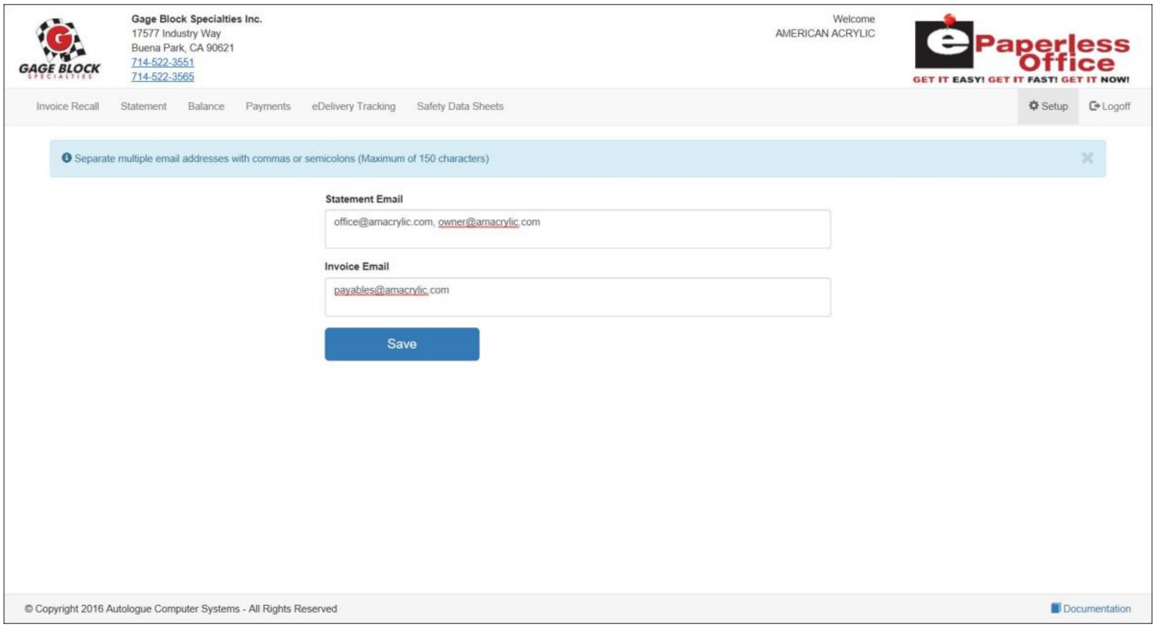
Column Sorting

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.

Setup

- To setup specific email addresses that you want 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:



Statement Email

- Within the *Statement Email* field, enter the specific email addresses that you want to notifications sent to when your supplier sends out statements and then click on the blue *Save* button.

Invoice Email

- Within the *Invoice Email* field, enter the specific email addresses that you want your finalized invoices sent to whenever you make purchases from your supplier and then click on the blue *Save* button.

Note: separate multiple email addresses with commas or semicolons (maximum of 150 characters).

Logging Off Of ePaperless Office

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