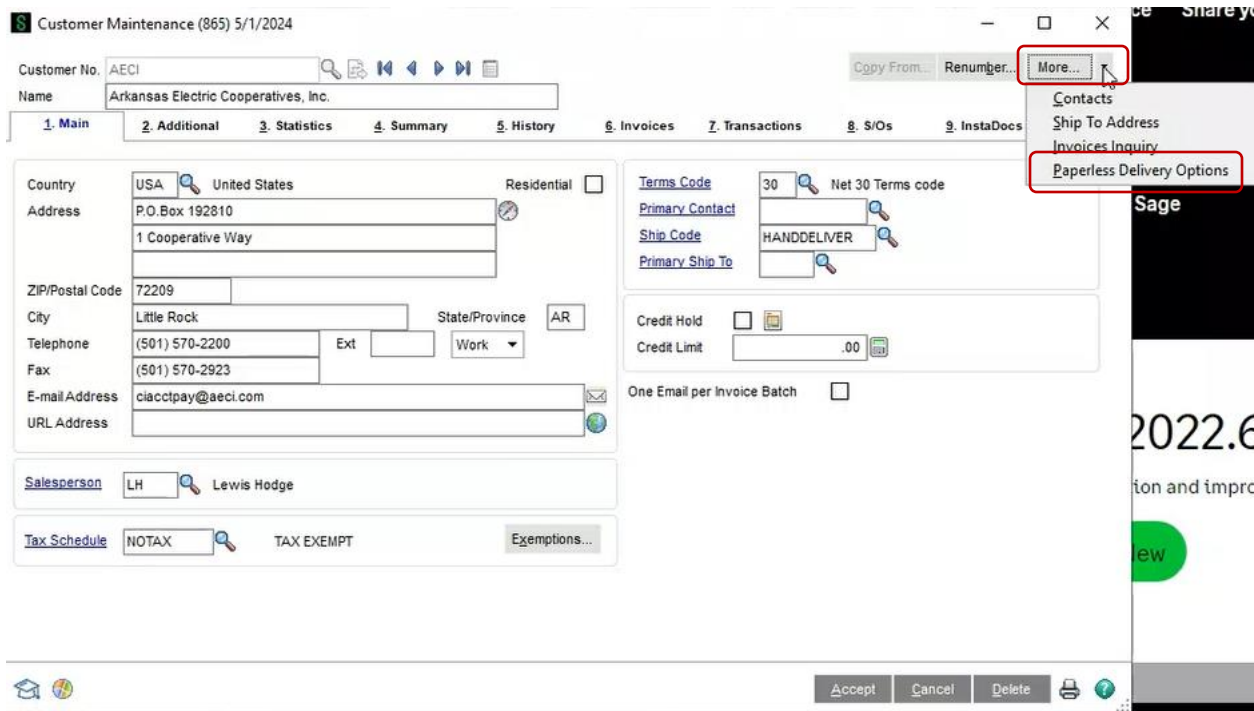


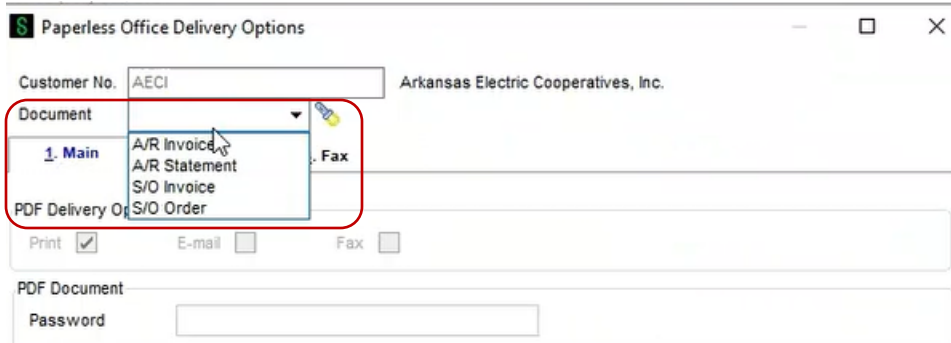
Setting up Paperless office for a Customer

This will allow emails from Sage to go directly to the customer.

1. Go to Accounts Receivable > Main > Customer Maintenance
2. Select the Customer
3. Click the More button in the top-right corner
 - a. Select Paperless Delivery Options



4. In Paperless Office Delivery Options - Select which document you will set up.



5. Select E-mail under PDF Delivery Options for each document you will be emailing out.



Paperless Office Delivery Options

Customer No. Arkansas Electric Cooperatives, Inc.

Document

1. Main 2. E-mail 3. Fax

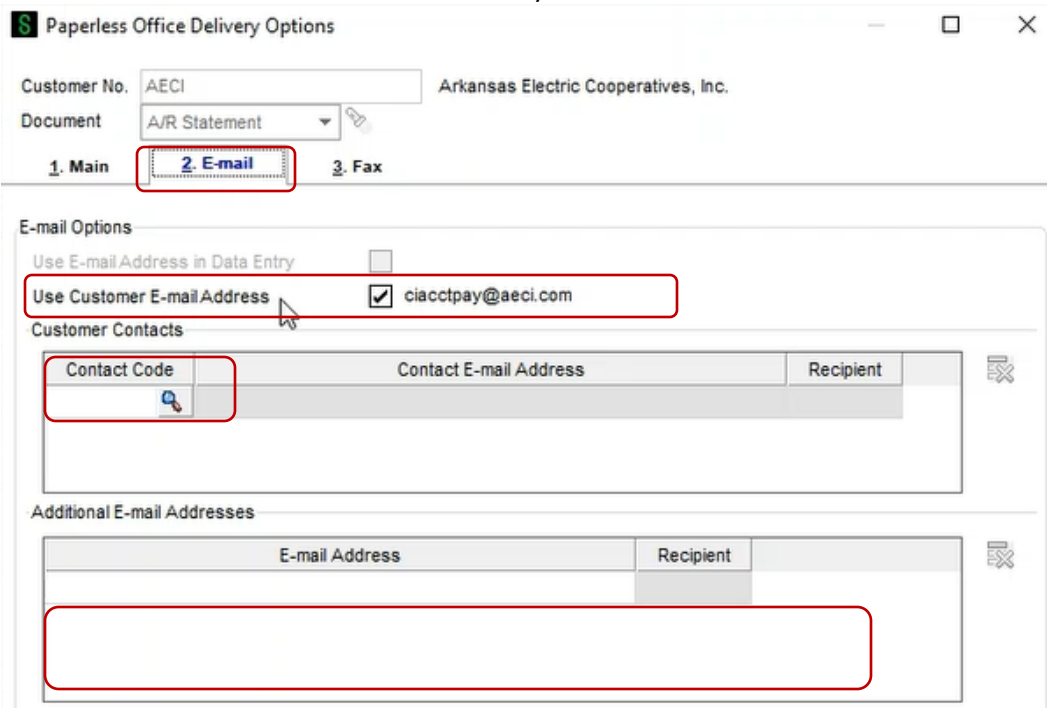
PDF Delivery Options

Print E-mail Fax

PDF Document

Password

6. Select Email Tab which tells the system where to email the document.



Paperless Office Delivery Options

Customer No. Arkansas Electric Cooperatives, Inc.

Document

1. Main 2. E-mail 3. Fax

E-mail Options

Use E-mail Address in Data Entry

Use Customer E-mail Address

Customer Contacts

Contact Code	Contact E-mail Address	Recipient
<input type="text"/>		

Additional E-mail Addresses

E-mail Address	Recipient
<input type="text"/>	

7. If you would like to use another email address other than what is in the customer E-mail address, you can use the Contact Code
8. The Additional Email Addresses box is used to include additional email addresses in that document.
9. To set up a new Contact Code you will need to go to the main Customer Maintenance screen, select Primary Contact hyperlink.

S Customer Maintenance (865) 5/1/2024

Customer No.

Name

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os

Country Residential

Address

ZIP/Postal Code

City State/Province

Telephone Ext Work

Fax

E-mail Address

URL Address

Terms Code

Primary Contact

Ship Code

Primary Ship To

Credit Hold

Credit Limit

One Email per Invoice Batch

Salesperson

Tax Schedule TAX EXEMPT

10. Fill in all the information in the Customer Contact Maintenance
 - a. Once information is entered selected Accept.

S Customer Contact Maintenance ? X

Contact Code Primary

Name

Salutation Title

Country

Address

ZIP/Postal Code

City State/Province

Telephone 1 Ext Work Primary

Telephone 2 Ext Work Primary

Fax

E-mail Address

Notes