

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

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ame Arl	ansas Electric Cooperatives, Inc.				Conta	acts
<u>1</u> . Main	2. Additional 3. Statistics 4. Summary 5. His	story <u>6</u> .	Invoices <u>7</u> . Transac	ctions <u>8</u> . \$/Os	9. InstaDocs Ship T	To Address
Causta -		sidential 🗖	Terms Code	20 0 Not 20 Torms and	Paper	less Delivery Options
ountry Address	DO Boy 102910	identiai	Primary Contact		e 🦲	Sage
Address	1 Cooperative Way		Ship Code			
			Primary Ship To	Q		
ZIP/Postal Code	72209		L			
City	Little Rock State/Province	AR	Credit Hold	ñ		
Telephone	(501) 570-2200 Ext Work -		Credit Limit	.00		
Fax	(501) 570-2923			100		
E-mail Address	ciacctpay@aeci.com	No.	One Email per Invoice B	Batch		
JRL Address						2022
	P					2022.
Salesperson	LH 🔍 Lewis Hodge					ion and imp
ax Schedule	NOTAX 🔍 TAX EXEMPT Ex	emptions				
						lew
				International Distances		<u></u>
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Customer No.	AECI		Arkansas Electric Cooperatives, Inc.	
Document		- 🃎		
<u>1</u> . Main	A/R Invoice	, Fax		
PDF Delivery O	S/O Invoice S/O Order			
Print 🖌	E-mail	Fax		
PDF Document	t			
Password				



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

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Customer No.	AECI		Arkansas Electri	c Cooperatives	s, Inc.		
Document	A/R Statement	• 8					
<u>1</u> . Main	2. E-mail	<u>3</u> . Fax					
DF Delivery O	ptions						
Print	E-mail 🖌	Fax [
DF Document							
Password							
Istomer No. A ocument A <u>1. Main</u>	ECI VR Statement	Arkar Fax	nsas Electric Coopera	tives, Inc.			
Jse E-mail Addr	ress in Data Entry						
Jse Customer E Customer Conta	E-mail Address	 ciacctpay 	@aeci.com				
Contact Co	de Q	Contact E-	mail Address		Recipient		
Additional E-mai	il Addresses						
	E-mail A	ddress		Recipient		5%	

- 7. If you would like to use another email address other than what is in the customer Email 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.



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ansas Electric Cooperatives, Inc.			
2. Additional 3. Statistics 4. Summary	5. History 6	Invoices <u>7</u> . Transactions	<u>8</u> . \$/Os
USA 🔍 United States	Residential	Terme Code 00	Net 30 Temps co
P.O.Box 192810	0	Primary Contact	9
1 Cooperative Way		Ship Code HANDDELN	VER Q
72209		Primary Ship To	0
Little Rock State/Pr	ovince AR	Credit Hold	
(501) 570-2200 Ext Work	. •	Credit Limit	.00
(501) 570-2923			
ciacctpay@aeci.com	M	One Email per Invoice Batch	
H 🔍 Lewis Hodge			
	Ansas Electric Cooperatives, Inc. 2. Additional 3. Statistics 4. Summary USA Q United States P.O.Box 192810 1 Cooperative Way 72209 Little Rock (501) 570-2200 Ext Work (501) 570-2923 clacctpay@aeci.com H Q Lewis Hodge	Ansas Electric Cooperatives, Inc. 2. Additional 3. Statistics 4. Summary 5. History 9 USA Q United States Residential □ P.O.Box 192810 1 Cooperative Way 72209 Little Rock State/Province AR (501) 570-2200 Ext Work ▼ (501) 570-2923 ciacctpay@aeci.com ♀ H Q Lewis Hodge	Ansas Electric Cooperatives, Inc. 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions USA United States Residential PO.Box 192810 1 Cooperative Way 72209 Lattle Rock (501) 570-2200 Ext Work (501) 570-2293 ciacctpay@aeci.com H Cuevis Hodge

S 🛞 Accept Cance

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

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ame	amie McCrillis	-6 14 4		Primar		
Salutation		Title	CPA			
Country	USA 🔍	United States				
Address	P.O.Box 192	810		\otimes		
	1 Cooperativ	e Way				
ZIP/Postal Code	72209					
City	Little Rock			State/Province	AR	
elephone 1	(501) 570-23	321	Ext	Work 🔻	Primary	
elephone 2			Ext	Work 👻	Primary	
ax						
-mail Address	jamie.mccrilli	s@aeci.com				
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