

FEATURE SUMMARY

Paperless Office

for Sage 100cloud



Save time, money, and the environment by using the paperless office capabilities provided to you in Sage 100cloud. Improve communications and save postage by efficiently emailing and faxing documents to your customers, prospects, vendors, resellers, and employees in the same office or remote locations. Go green by utilizing the powerful paperless office features—you'll reduce paper costs and help the environment by eliminating the need to use stacks of paper, print lengthy reports, and waste precious office space for storage. With Paperless Office, you can quickly and easily find files, view reports and forms, and print only the pages you want. And, when you need them again, retrieve them from the archives using intuitive search and sort tools, reducing the time you and your employees spend searching through old files and reports.

Paperless Office can extend the reach of documents to multiple people in separate locations, where they can be accessed quickly and simultaneously. In addition, the powerful electronic forms delivery capabilities allow Sage 100cloud users to email or fax documents on a timely basis to vendors and customers, which ultimately improves business-to-business communications.

Benefits

- Go green—save time, money, and the environment
- Improve communications with immediate electronic delivery by email or fax
- Save postage costs by distributing electronically
- Increase efficiencies with easy access to archived files
- Enhance document security

Gain back office space by storing your documents electronically using Sage 100cloud Paperless Office—on average, save about 20 percent of office space that was set aside for storage. Save time and money by efficiently retrieving your documents saved electronically, and easily access them from a new folder on your Business Desktop instead of manually searching for them. Reduce the costs you may incur for the loss of those files. Reduce the possibility of loss or damage to your valuable printed records, including journals and registers, period-end reports, and all standard menu reports. Save all the costs you may incur for the loss of those files.

Features

Journals and Registers	Convert journals and registers to PDF format, eliminate paper waste, and save money. Plus, you can still print out hard copies and specify the pages that you want. Storing your journals and registers as PDFs lets you search and archive much easier—saving you time and space. All journals and registers are viewable from one location with the ability to determine if they have been updated. What’s more, you can quickly send any of these large documents by email to your auditors. You may also choose to archive the last copy or all previous versions.
Period-End Processing	Using period-end reports in PDF format saves on paper costs; plus you can archive reports in a secure and searchable digital format. All documents are available for electronic retrieval through the PDF Viewer. The Viewer enables you to specify any combination of company codes, modules, and documents to view—so you see only what you want to see. Automatically name and save PDF files, eliminating the risk of accidental overwrites.
Report Viewer	All standard reports are available in PDF format from the Paperless Office Report Viewer.
Sales Orders and Sales Order Invoices	Save sales orders and sales order invoices as PDFs and send a copy to the customer. This way, if a customer calls with a question, your computer screen will display the customer’s exact copy. Save postage costs by distributing electronically. Resend the customer a copy of an invoice with the click of your mouse. Users can view these forms by date, source, user ID, and file name. You can see if the form still exists and whether it was sent electronically as well. You also may choose to archive the last copy of the invoice or all previous versions.
Accounts Receivable Invoices	Convert Accounts Receivable (AR) invoices to PDF format, print a copy to send to a customer, and save a copy electronically—all in one step. View invoices by invoice date, invoice source, user, or file name. It’s also possible for you to see whether an invoice still exists and whether it was sent electronically and decide whether to archive the last copy of the invoice or all invoices.
Job Cost Invoices	View and reprint Job Cost invoices by date, source, user, and file name. Also, you can see if an invoice still exists and whether it was sent electronically, and decide either to archive the last copy of the invoice or all invoices. Recalling and printing PDF files can be done on either a customer or job basis.
Purchase Orders	Save purchase orders (POs) as PDFs and send email copies directly to the vendor within the same process, improving turnaround time and communication with your vendor. You can retrieve archived POs by date, source, user ID, and file name. You also may choose to archive the last copy of the PO or all previous versions.
Payroll Direct Deposit Stubs	Gain easy access to Payroll direct deposit stub information, such as how benefits (sick time, vacation, and more) were recorded. The Direct Deposit Stubs application allows you to save all your stubs in PDF format. Reprint and quickly retrieve exact copies of stubs and never again run a report to approximate stub data. All PDFs are available for electronic retrieval using the Direct Deposit Stubs Viewer. This enables you to view and sort records by check date, employee number, check entry number, stub number, sequence number, user ID, run date/time, sent-to email address, path, and document name, plus whether the record exists, was updated, and sent by email. You also have the option to make the Stub Viewer available to all employees. Individual stubs are secured with employee-specific passwords that can be randomly generated, employee created, or defaulted from the employee’s Social Security number.
Electronic Forms Delivery	Use Electronic Delivery of Forms to speed up communications and eliminate the need to print on letterhead, stuff envelopes, and pay postage costs. Select the delivery method for your documents: Print and mail, email, or fax. Documents that can be sent electronically include: AR Statements, AR Invoices, Payroll Direct Deposit Stubs, Purchase Orders, Sales Orders, Sales Order Invoices, Job Cost Invoices, and Customer RMAs. Forms can be sent to multiple email addresses and fax numbers.

For more info, visit: www.sage.com/en-us/products/sage-100