Going Paperless

FBS Systems

Why should you go paperless

- Saves money

- Efficiency

- Better for the environment

Steps to become paperless

- Have a pdf printer (www.primopdf.com)
- Have a scanner
- Have FBS scanner interface

Setting up pdf printer

- Several free ones

- Install as a printer on your computer

- Select it as your default printer in FBS

Uses for PDF printer

- Printing reports

- Sharing reports

Setting up Scanner Interface

- Purchase module and get authorization

- Make invoices folder under your data folder

- Move file FBS_Scan.pdf to the invoices folder

- Set preferences (Utilities, set preferences)

  - CM: Scanner Delay Seconds

  - CM: Scanner Entry Type

Scanning Documents

- If scanner is at your desk beside you
  - Put item on scanner
  - Open scanner interface
  - Click Scan new invoice
- Shared scanner
  - Save files to Invoice folder
  - Rename files – YYY-XX-nnnn

Linking Documents

- Open document to link
- Open FBS entry you want to link it to