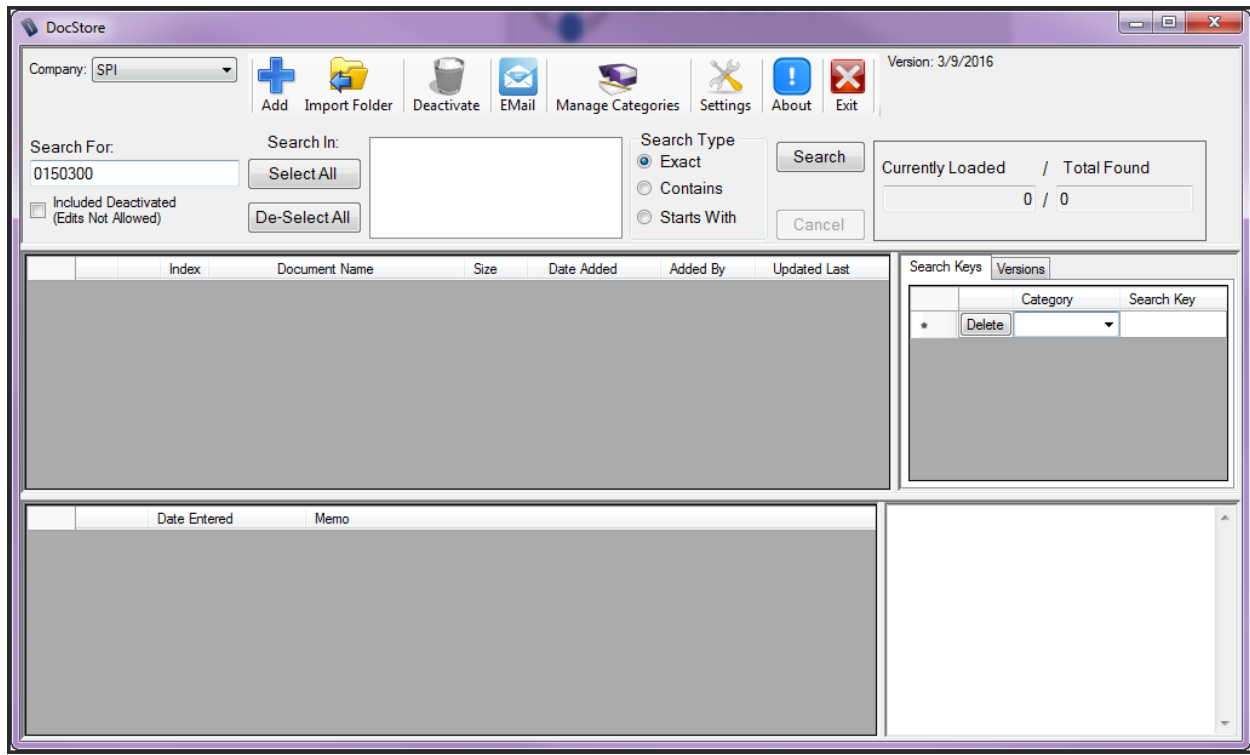


Suburban Software Systems

DocStore

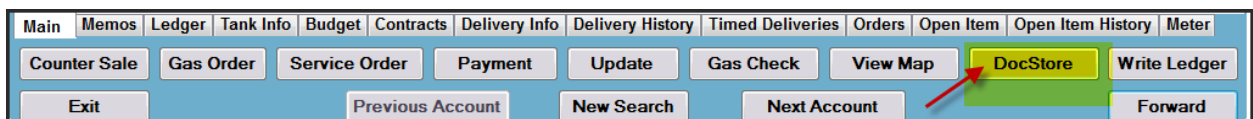
Using DocStore:



Purpose: DocStore is a robust document storage solution that integrates with the Suburban Software Systems Propane application.

Access to DocStore:

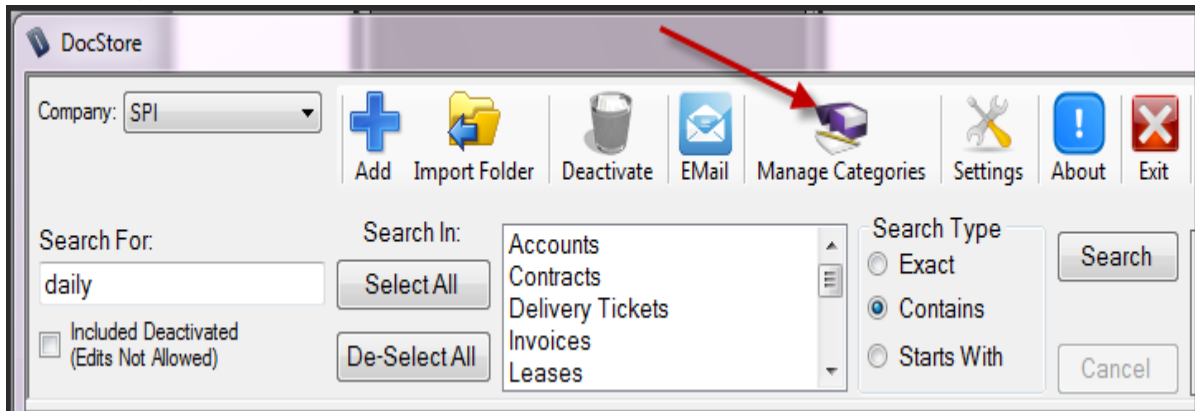
1. To access DocStore, click on Customer Inquiry located in the bottom right corner of the window in Suburban. It doesn't matter what customer you pull up.
2. The DocStore button is located at the bottom of the window:



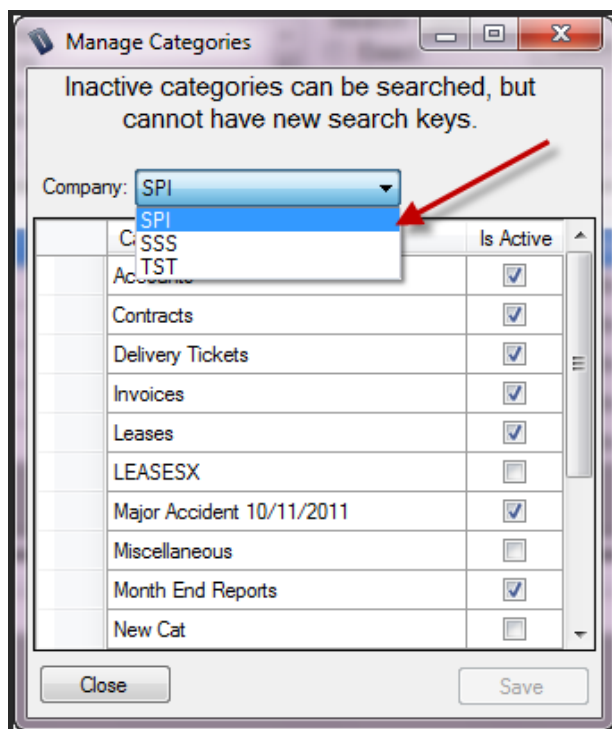
****NOTE: IF the button is not enabled, please contact Suburban Software Systems for assistance.****

Managing Categories:

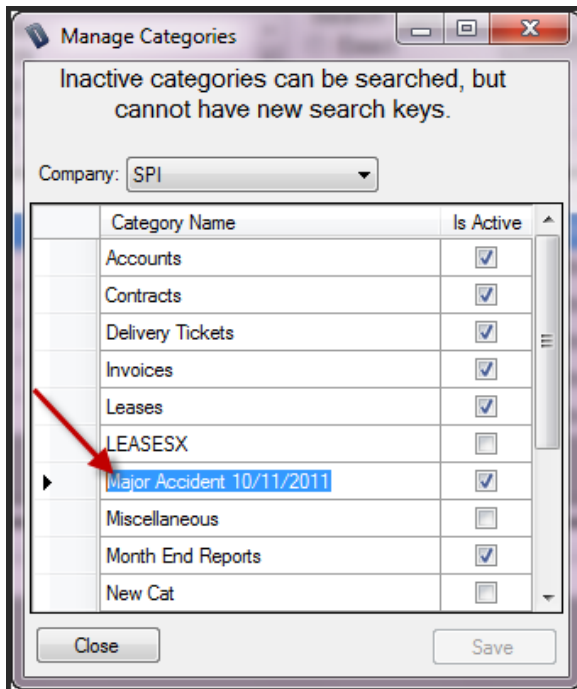
1. To make changes to the categories click on the **Manage Categories** icon at the top of the page.



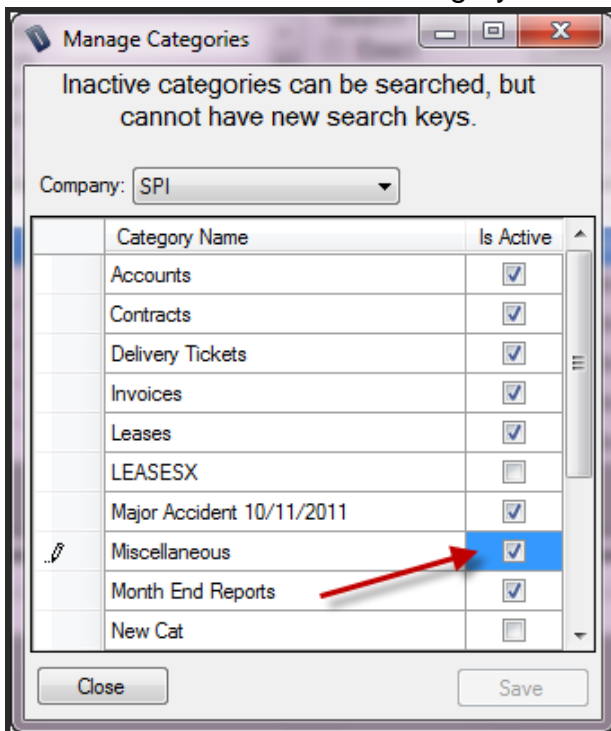
2. Click on the company you wish to change.



3. To change the name of a category double click and highlight the field and type in a new name.

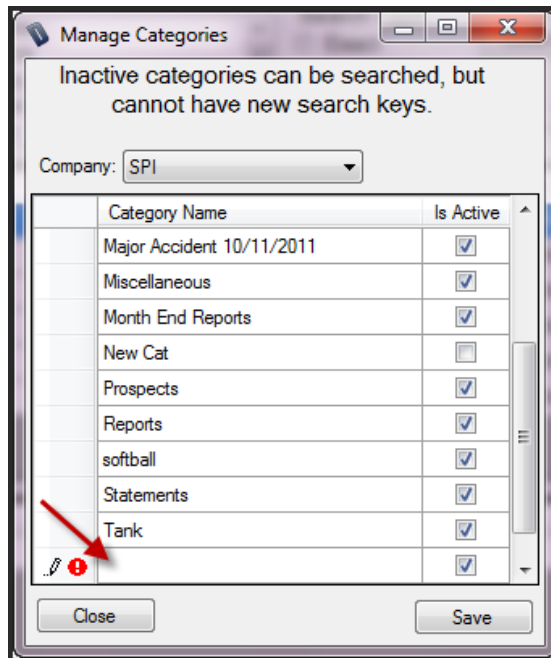


4. To activate or deactivate a category click on the button to the right.

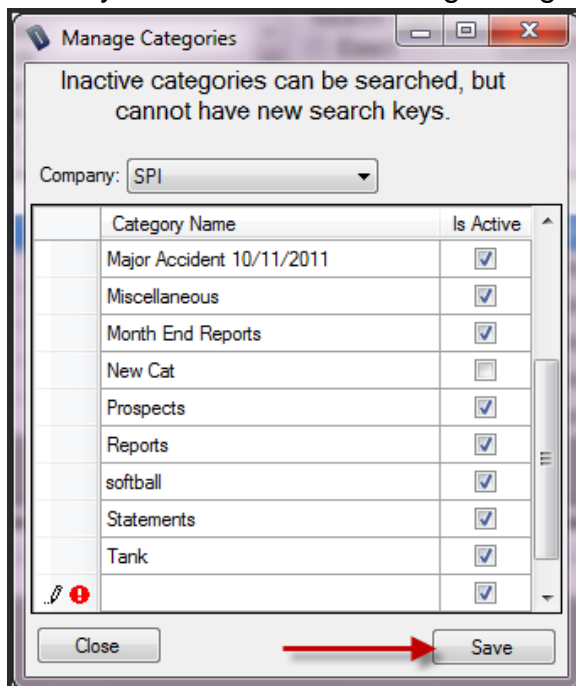


*****Note: Once you deactivate a category, it can be searched but you cannot add new search keys*****

5. To add a new category scroll to the bottom of the list and type in the category name.

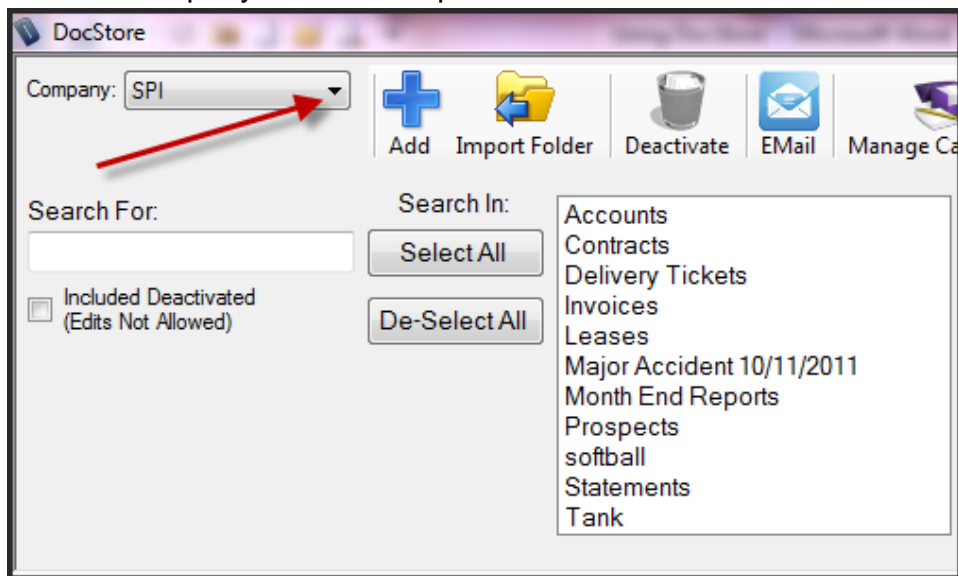


6. When you have finished making changes click save.

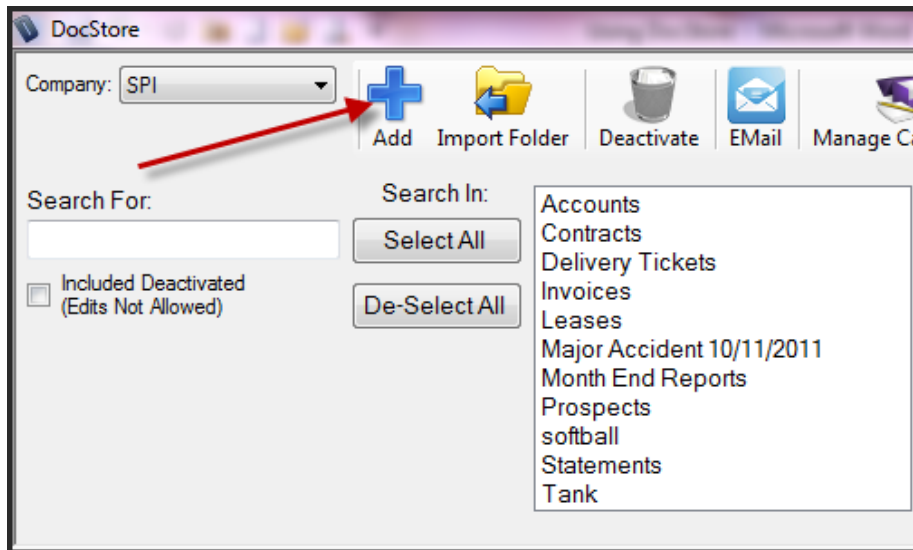


Adding Files:

1. Choose company from the drop down menu:



2. Click on add file:



3. Choose which way you want to add your file:import or scan:

Company: SPI

Import Scan

File Name	Ext	Size (bytes)	Directory
-----------	-----	--------------	-----------

Category: * Search Key

Memo

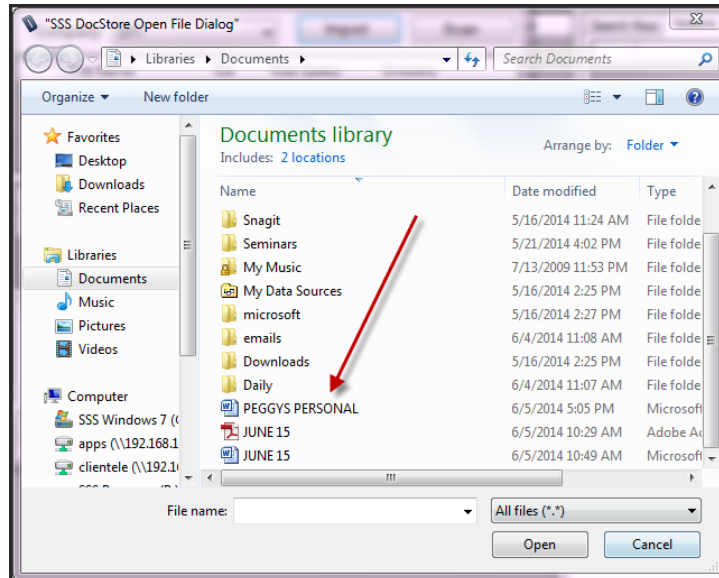
Cancel Save

Import: Allows you to import documents located on your computer

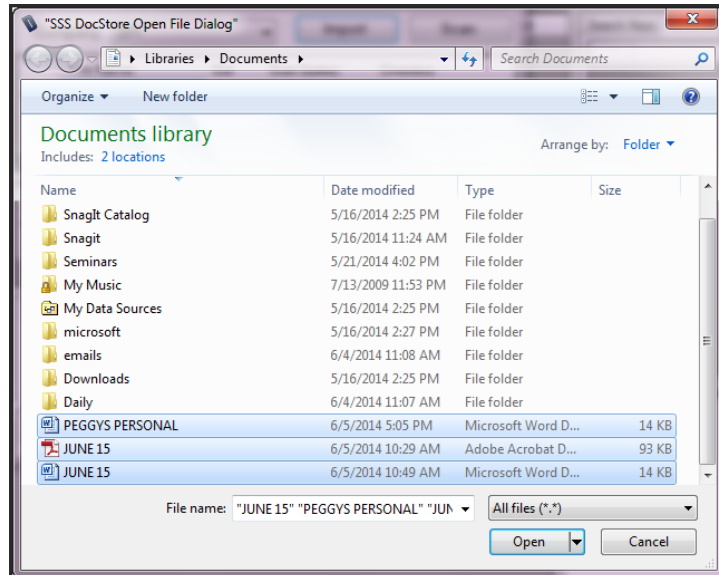
Scan: Allows you to scan documents directly into DocStore.

Importing Documents:

1. Choose the file you want to add:



2. You may choose multiple files by holding the Control button down on your keyboard while you click on the files you want to add:



3. Choose the category you want to add the file under. You may choose 1 category or multiple categories:

Company: SPI Import Scan

	File Name	Ext	Size (bytes)	Directory
▶	PEGGYS PERSONA...	.docx	13,935	C:\Users\kelly\Docu...
	JUNE 15.pdf	.pdf	94,321	C:\Users\kelly\Docu...
	JUNE 15.docx	.docx	13,537	C:\Users\kelly\Docu...

	Category	Search Key
✎	Accounts	
*		

Memo

Cancel Save

Company: SPI Import Scan

	File Name	Ext	Size (bytes)	Directory
▶	JUNE 15.pdf	.pdf	94,321	C:\Users\kelly\Docu...

	Category	Search Key
	Accounts	12312
	Invoices	12312
✎	Leases	12312

Memo
testing

Cancel Save

4. Add search key information that will define what to search for:

The screenshot shows the 'Add New Documents' window. At the top, there is a 'Company' dropdown set to 'SPI', and 'Import' and 'Scan' buttons. Below this is a table with columns: File Name, Ext, Size (bytes), and Directory. The first row is highlighted with 'JUNE 15.pdf', '.pdf', '94,321', and 'C:\Users\kelly\Docu...'. Below the table is a 'Category' dropdown menu with 'Accounts', 'Invoices', and 'Leases' options. The 'Search Key' field is currently empty, and a red arrow points to it. Below the category and search key fields is a 'Memo' text area containing the text 'testing'. At the bottom are 'Cancel' and 'Save' buttons.

File Name	Ext	Size (bytes)	Directory
JUNE 15.pdf	.pdf	94,321	C:\Users\kelly\Docu...

Category	Search Key
Accounts	1231231
Invoices	1231231
Leases	1231231

Memo
testing

If you are adding an account number make sure to use the full 7 digit number!!!

5. Add memo (if needed):

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Memo' text area, which contains the text 'testing'. The 'Search Key' field is still empty.

File Name	Ext	Size (bytes)	Directory
JUNE 15.pdf	.pdf	94,321	C:\Users\kelly\Docu...

Category	Search Key
Accounts	1231231
Invoices	1231231
Leases	1231231

Memo
testing

6. Click save:

Add New Documents

Company: SPI Import Scan

	File Name	Ext	Size (bytes)	Directory
▶	JUNE 15.pdf	.pdf	94,321	C:\Users\kelly\Docu...

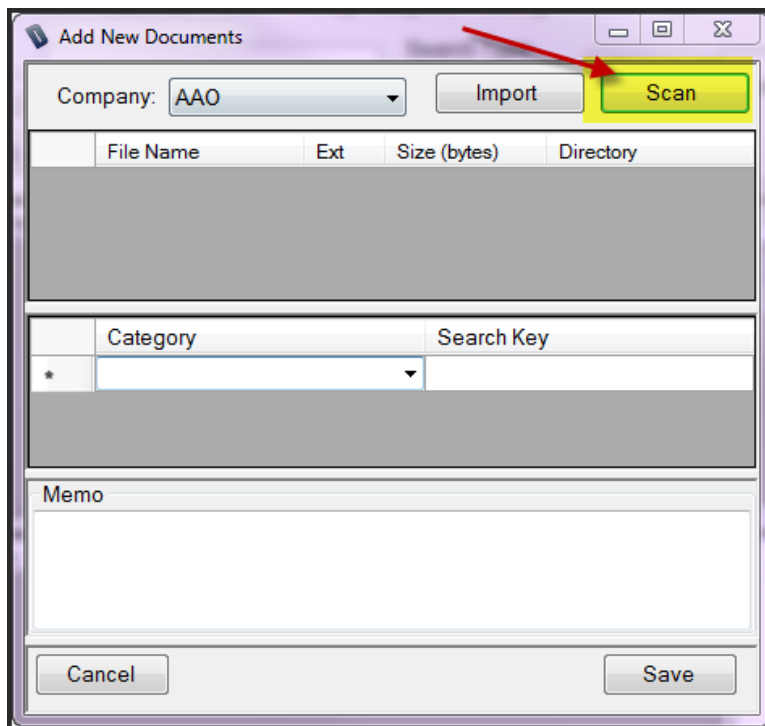
	Category	Search Key
	Accounts	1231231
	Invoices	1231231
▶	Leases	1231231

Memo
testing

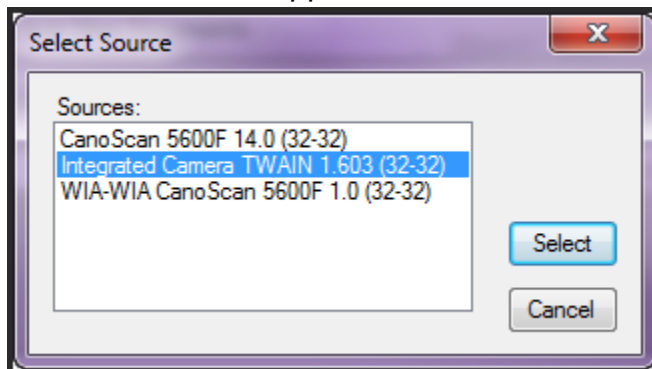
Cancel Save

Scanning Documents:

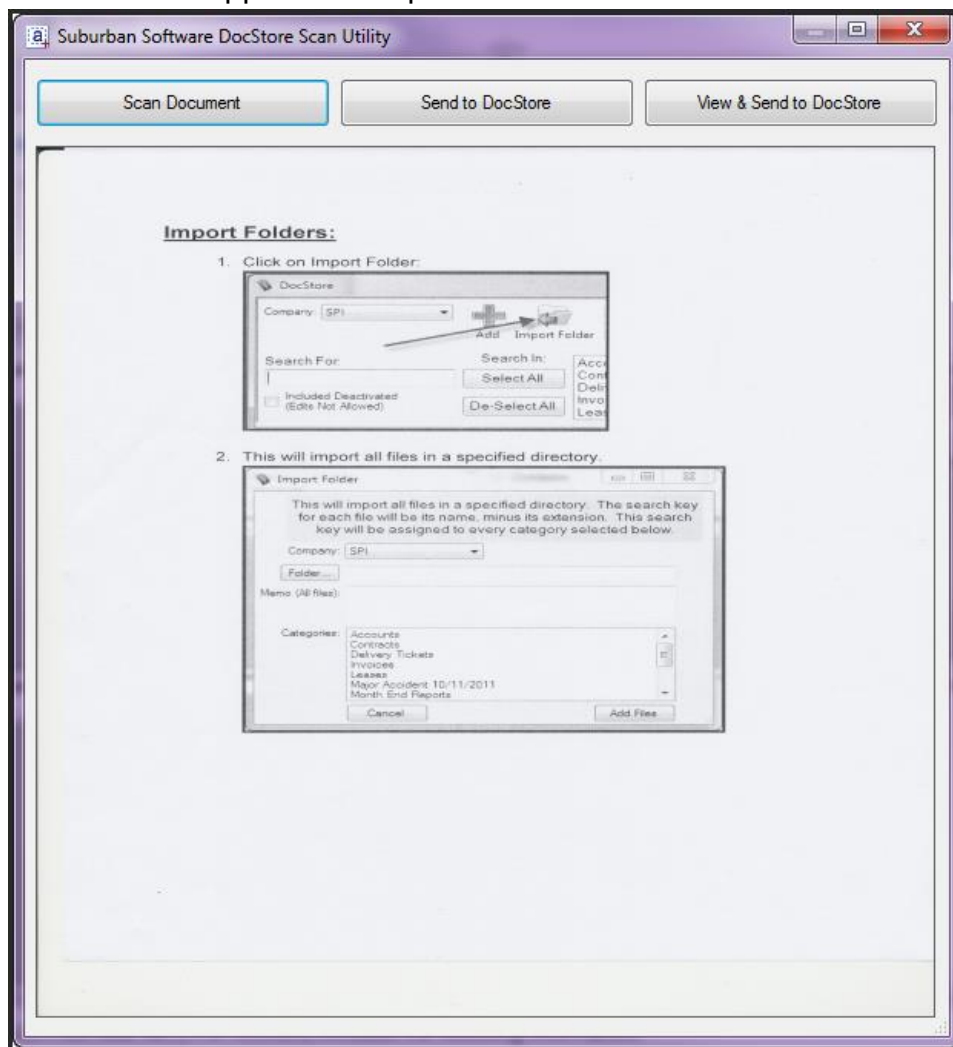
1. Click on the Scan button.



2. A little window will appear with a list of available scanners.



3. Your Scanner window open. Follow the directions that are for **your specified scanner**.
4. A window will appear with a preview of the document:



You can choose from the following options:

Scan Document: Allows you to scan the document again

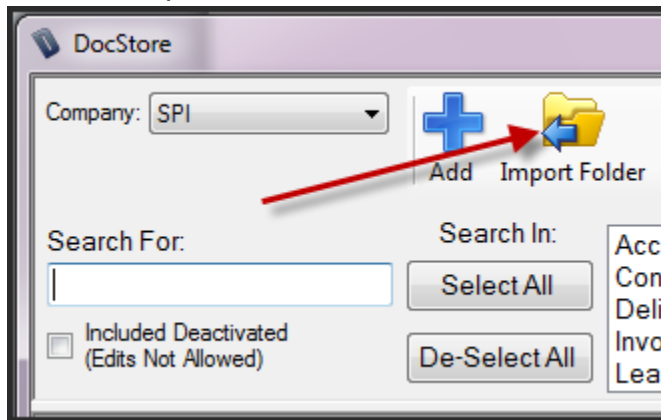
Send to DocStore: Allows you to save the image in DocStore **

View & Send to DocStore: Allows you view and edit the document in your document viewer such as Adobe Acrobat Reader **

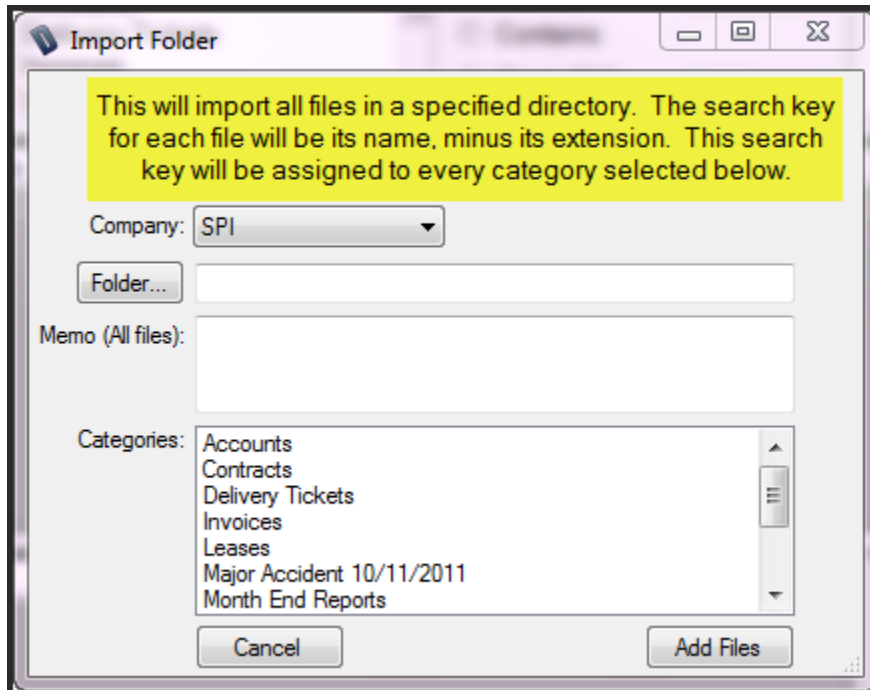
****Note: See Importing Documents for directions on how to save the document****

Import Folders:

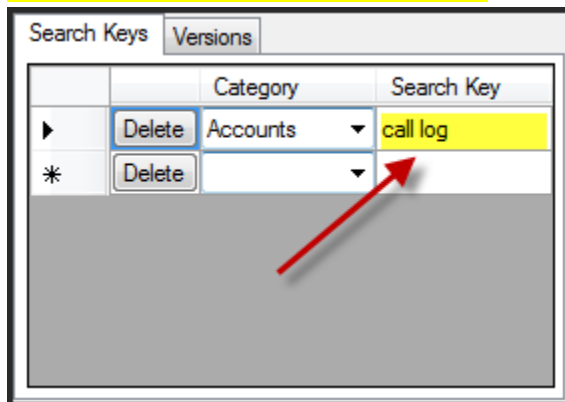
1. Click on Import Folder:



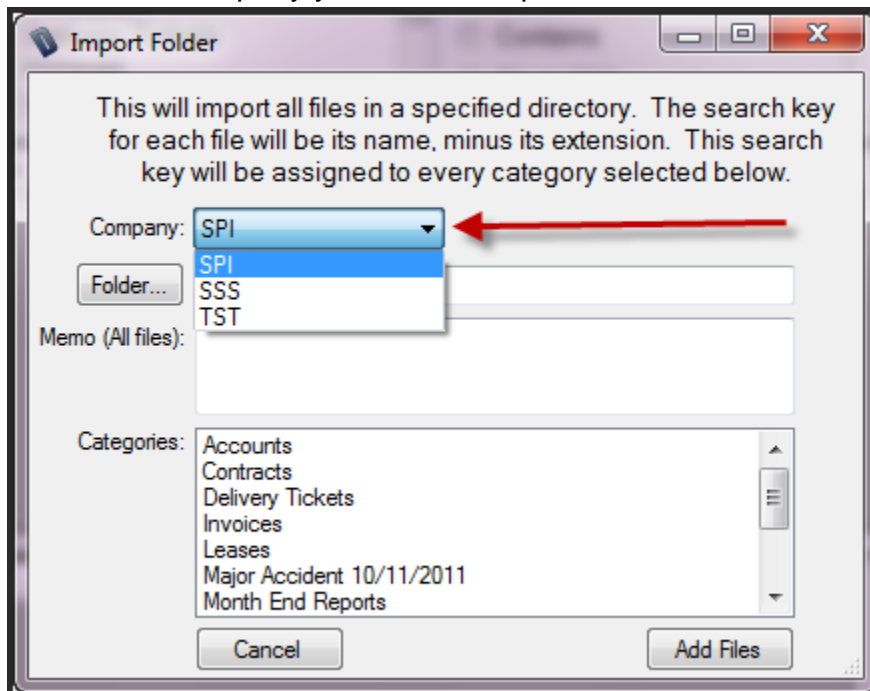
2. This will import all files in a specified directory.



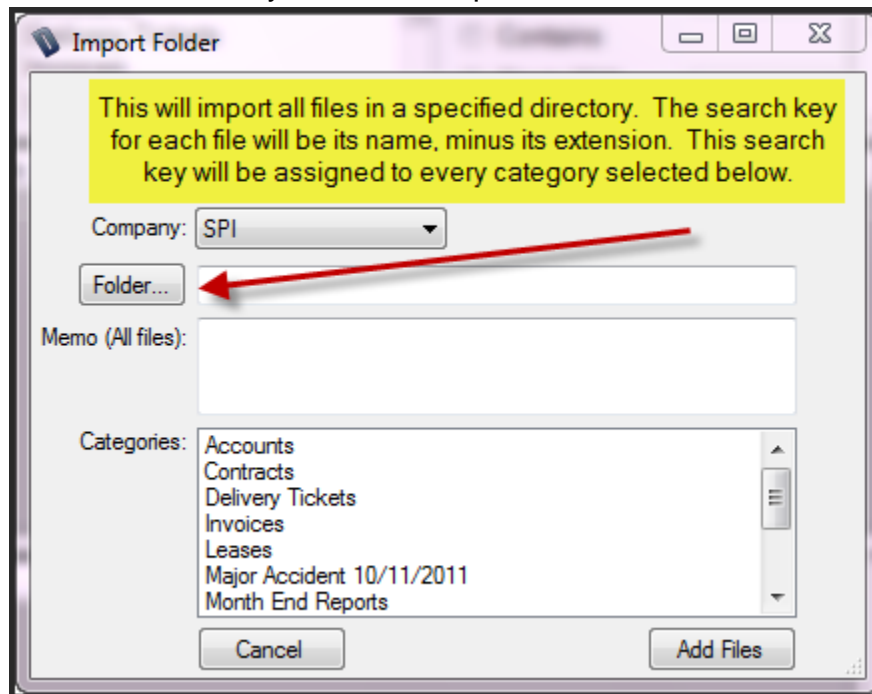
ALL FILES WILL BE GIVEN A SEARCH KEY ACCORDING TO THE FILE NAME MINUS THE EXTENSION!



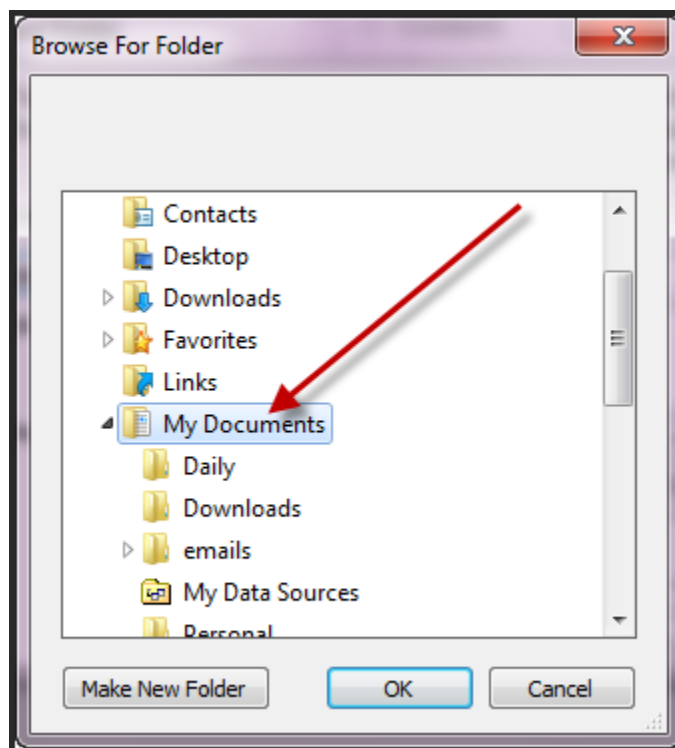
3. Click which company you want to import the files to.



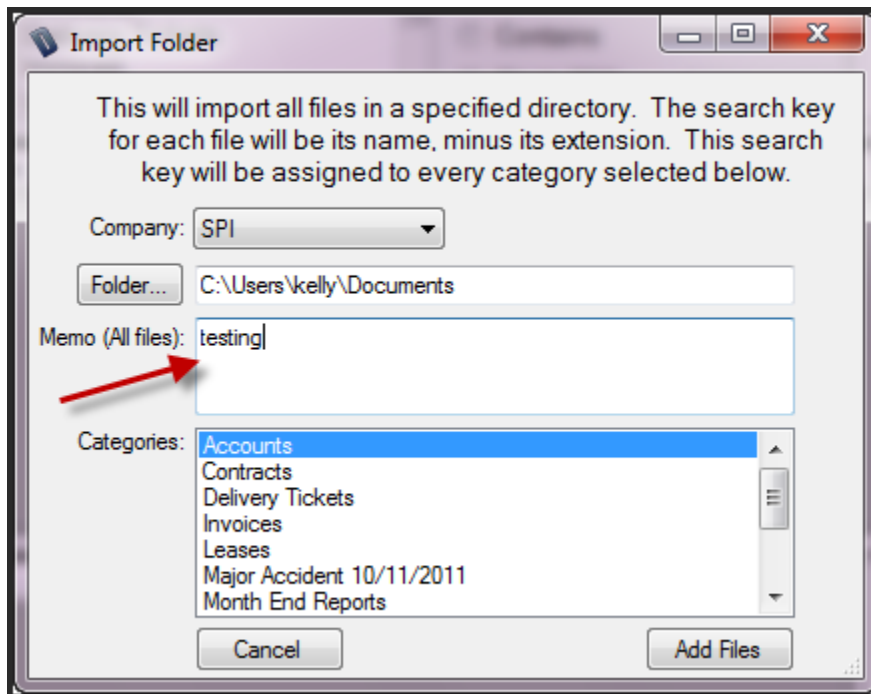
4. Click which folder you want to import:



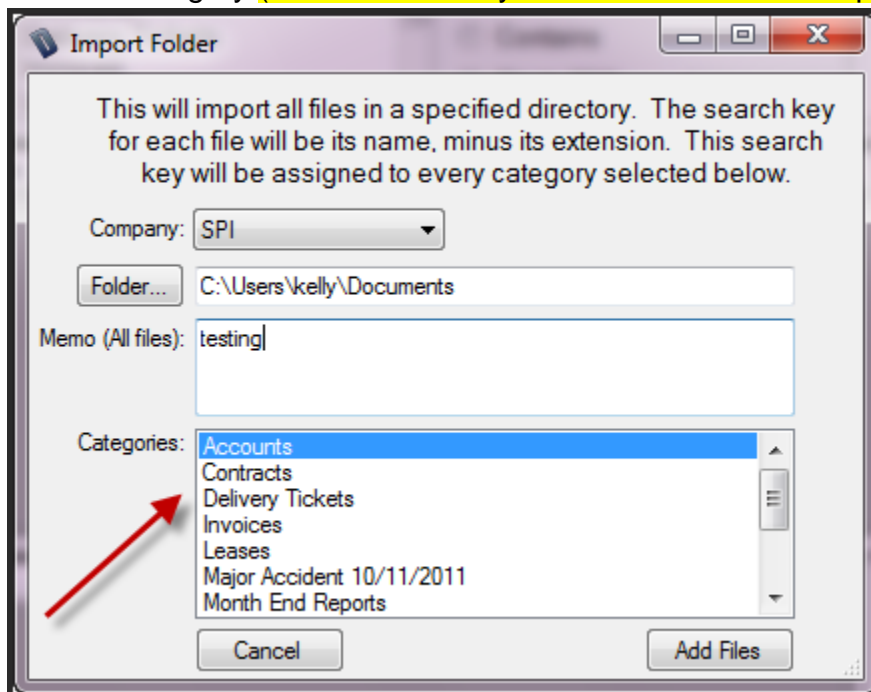
5. Click on the folder:



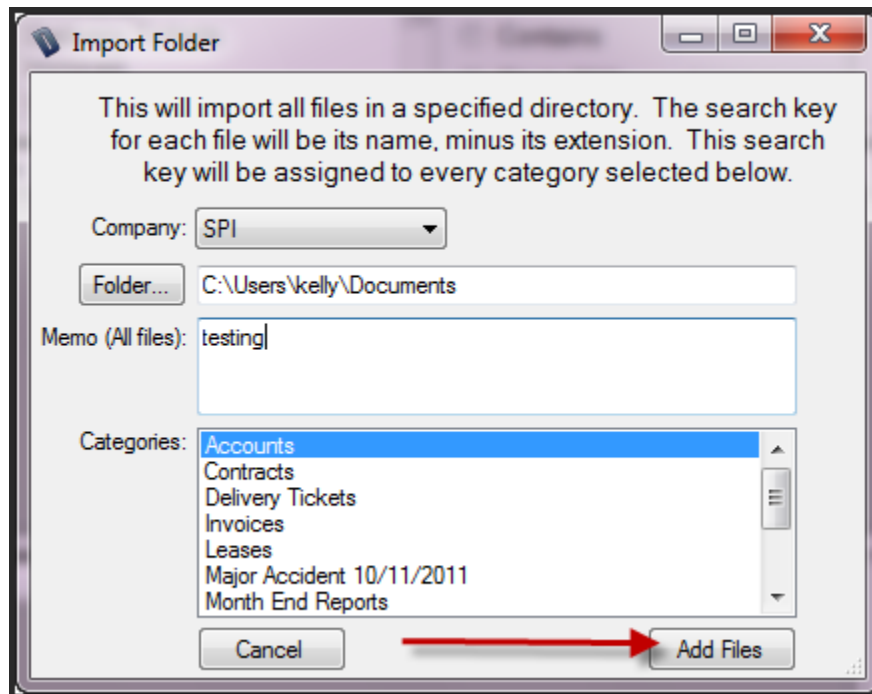
6. Add memo if needed:



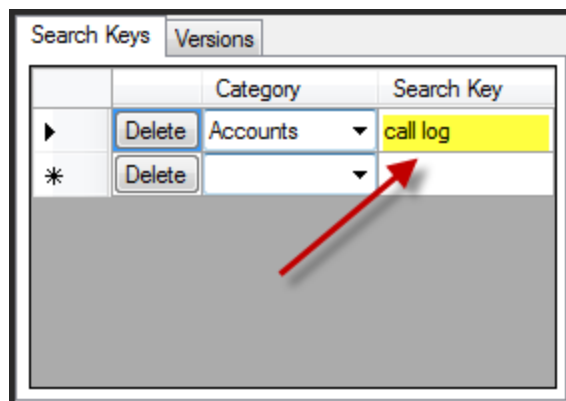
7. Choose category (Hold the shift key down and click for multiple categories):



8. Click add files when finished:

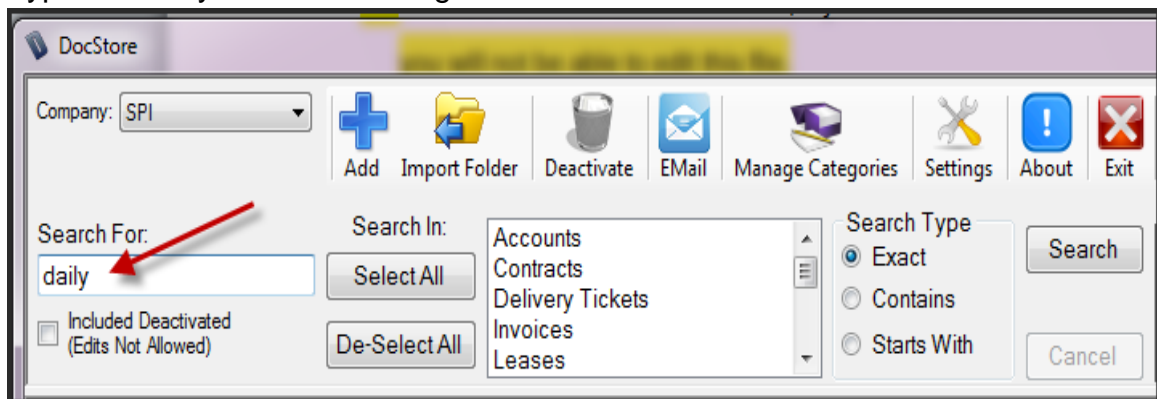


9. To add a search key click on the Search Key box and type in what you want the search information to be. **Note: If using an account number make sure the number is 7 characters long.**

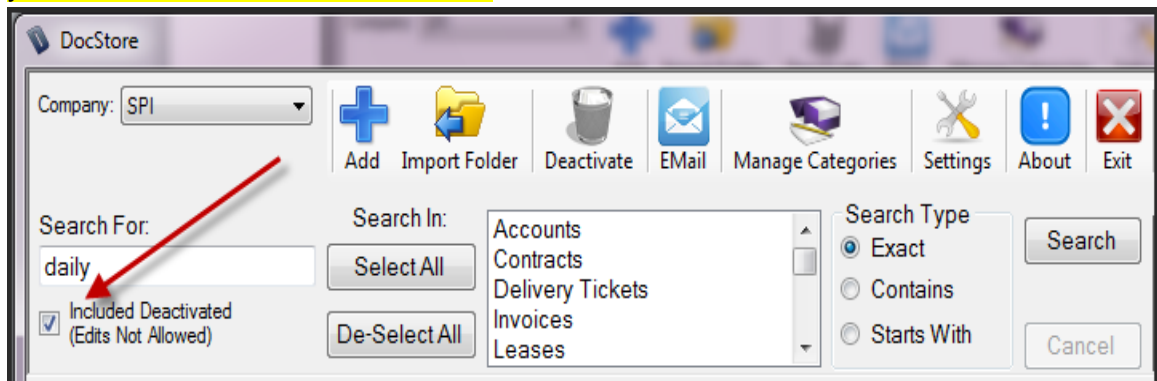


Searching for a File:

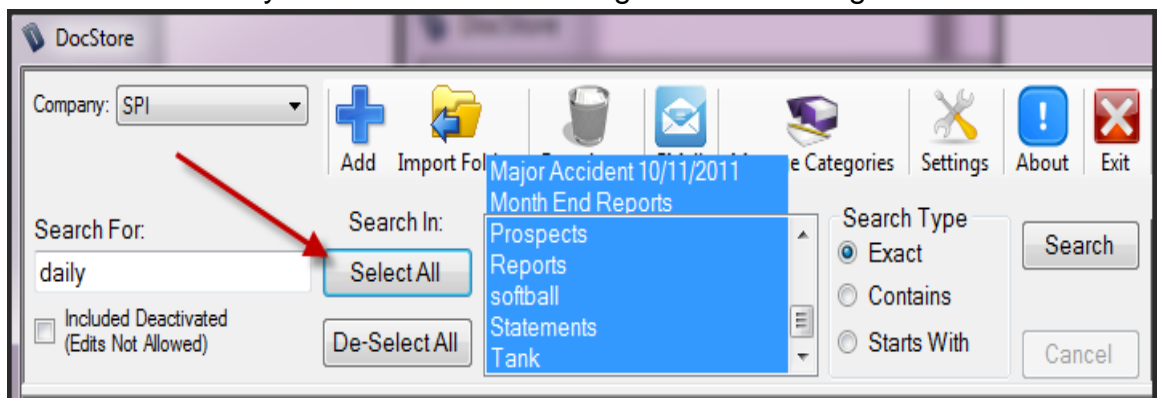
1. Type in what you are searching for in the Search box.



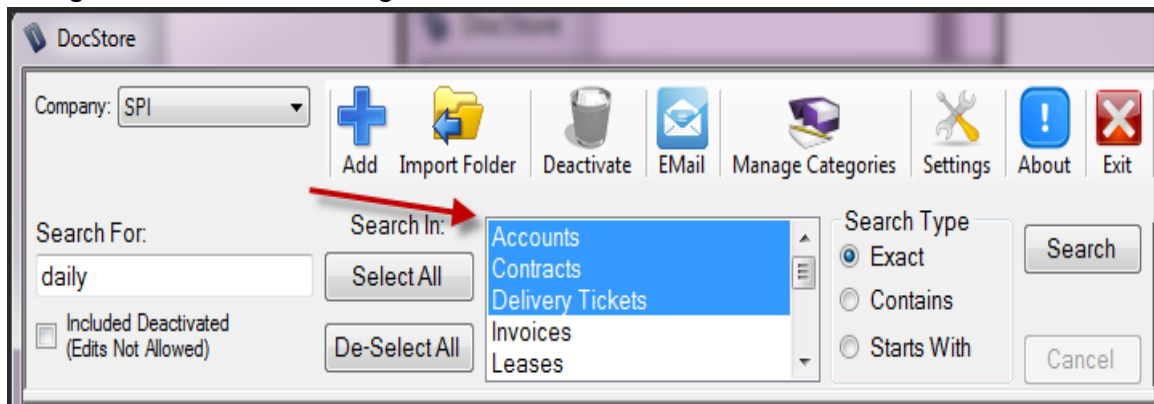
2. Click the Included deactivated box, if you want to search deactivated files. **Note:** you will not be able to edit this file.



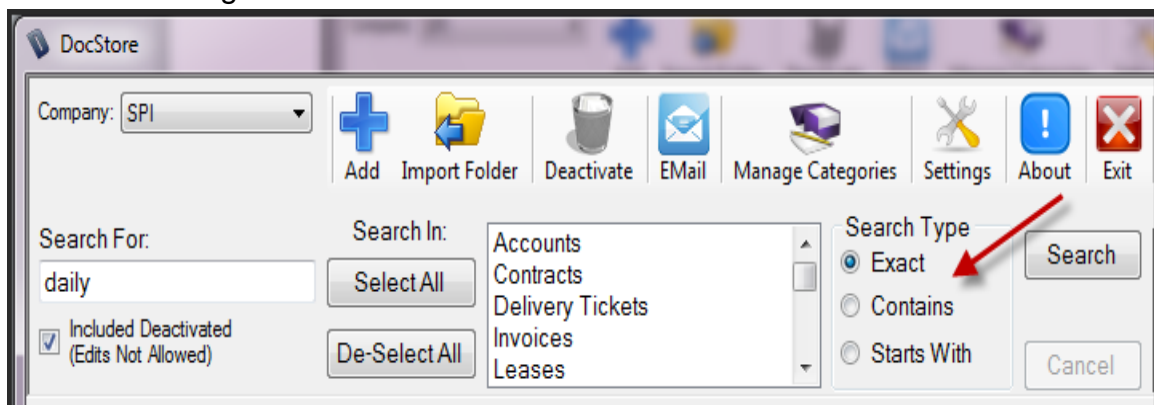
3. Click **Select All** if you want to search through all of the categories.



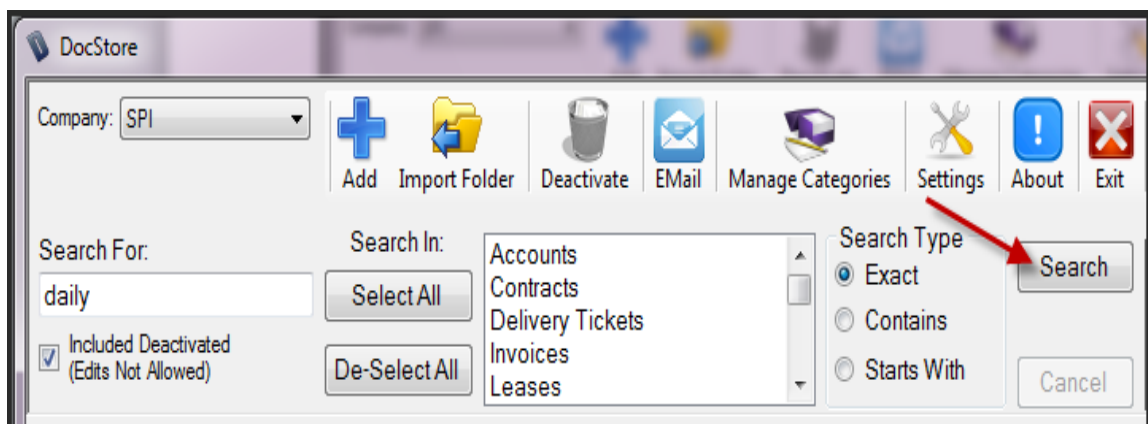
4. If you do not want to search through all categories, you may choose 1 or more categories to search through.



5. Click on the Search Type: **Exact** – for exact wording of search criteria, **Contains** – for files containing the wording of search criteria, **Starts With** – for files starting with the wording of search criteria



6. Click search

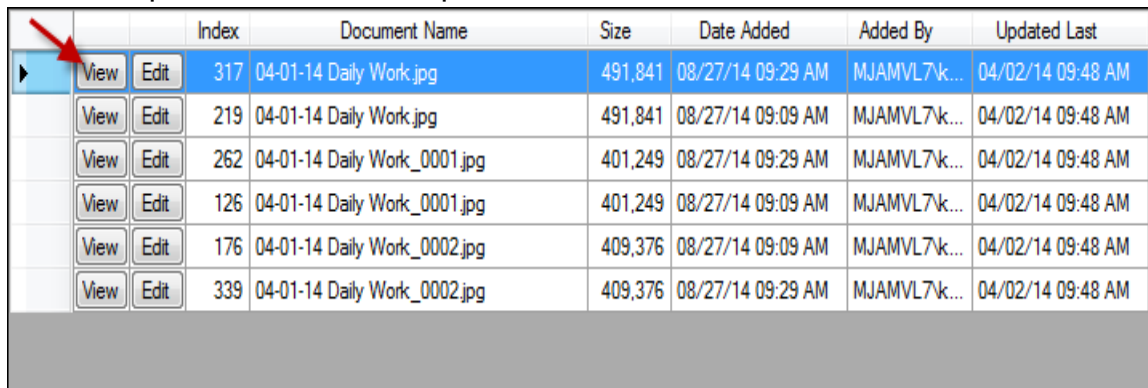


7. A list of files for come up related to your search.

		Index	Document Name	Size	Date Added	Added By	Updated Last
▶	View	Edit	393 call log.xlsx	11,375	08/27/14 01:53 PM	MJAMVL7k...	03/07/14 01:10 PM
	View	Edit	391 propane truck.snag	40,984	08/27/14 01:53 PM	MJAMVL7k...	05/30/14 02:47 PM
	View	Edit	395 SIGNINOUT - Copy (2).xls	324,096	08/27/14 01:53 PM	MJAMVL7k...	06/30/14 03:32 PM
	View	Edit	392 SSS Extensions.xlsx	11,665	08/27/14 01:53 PM	MJAMVL7k...	03/07/14 11:30 AM
	View	Edit	394 Using DocStore.docx	769,443	08/27/14 01:53 PM	MJAMVL7k...	06/10/14 08:17 AM

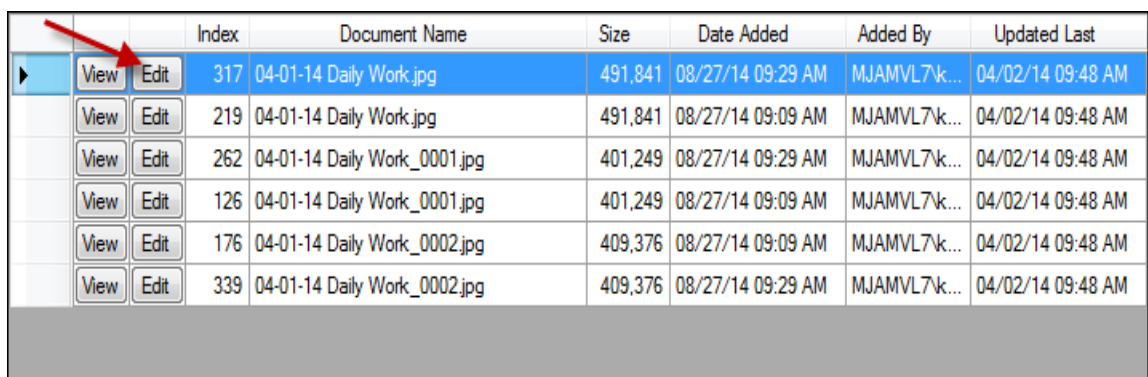
Using the File:

1. *To view the file click on **View**. You should not make changes/ modify anything with this option. It will not be updated or saved.



		Index	Document Name	Size	Date Added	Added By	Updated Last
▶	View	317	04-01-14 Daily Work.jpg	491,841	08/27/14 09:29 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	219	04-01-14 Daily Work.jpg	491,841	08/27/14 09:09 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	262	04-01-14 Daily Work_0001.jpg	401,249	08/27/14 09:29 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	126	04-01-14 Daily Work_0001.jpg	401,249	08/27/14 09:09 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	176	04-01-14 Daily Work_0002.jpg	409,376	08/27/14 09:09 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	339	04-01-14 Daily Work_0002.jpg	409,376	08/27/14 09:29 AM	MJAMVL7k...	04/02/14 09:48 AM

2. *To edit the file click **Edit**. This option allows you to make changes and update the file.

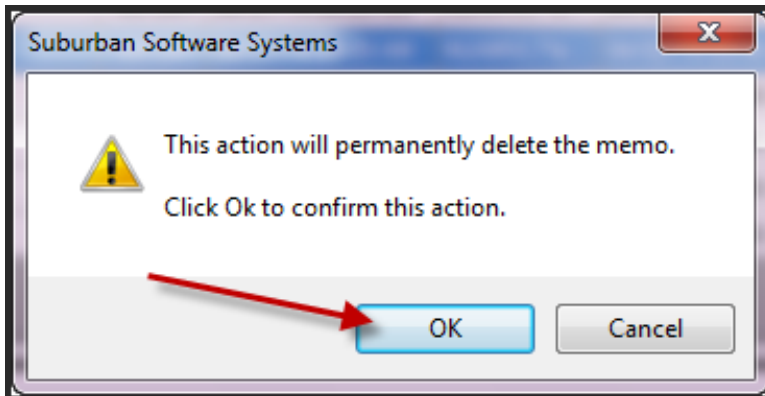


		Index	Document Name	Size	Date Added	Added By	Updated Last
▶	View	317	04-01-14 Daily Work.jpg	491,841	08/27/14 09:29 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	219	04-01-14 Daily Work.jpg	491,841	08/27/14 09:09 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	262	04-01-14 Daily Work_0001.jpg	401,249	08/27/14 09:29 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	126	04-01-14 Daily Work_0001.jpg	401,249	08/27/14 09:09 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	176	04-01-14 Daily Work_0002.jpg	409,376	08/27/14 09:09 AM	MJAMVL7k...	04/02/14 09:48 AM
	View	339	04-01-14 Daily Work_0002.jpg	409,376	08/27/14 09:29 AM	MJAMVL7k...	04/02/14 09:48 AM

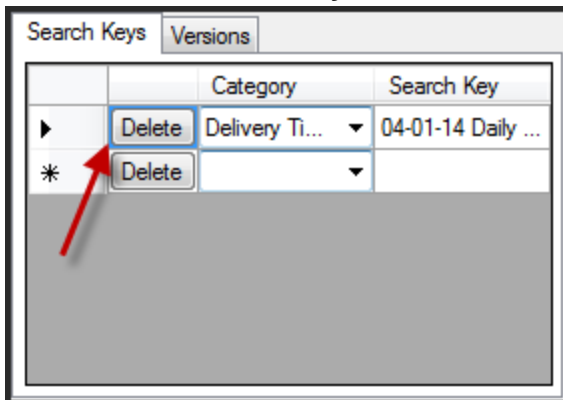
- The default program that was used to make the file will be the one that is used when you open the file....Such as Word, Excel etc...
3. To delete the **Memo** click delete in the memo box

	Date Entered	Memo	
▶	Delete	8/27/2014 9:09 AM	email
*	Delete		

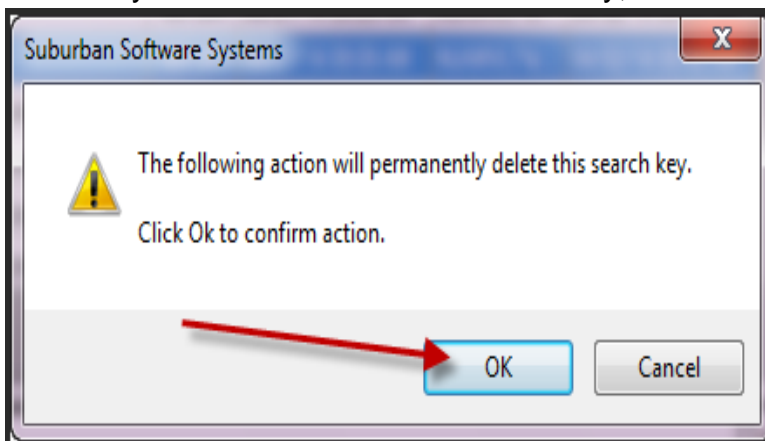
4. A message box will pop up to make sure that this is what you want to do. If you are sure you want to delete the memo click ok.



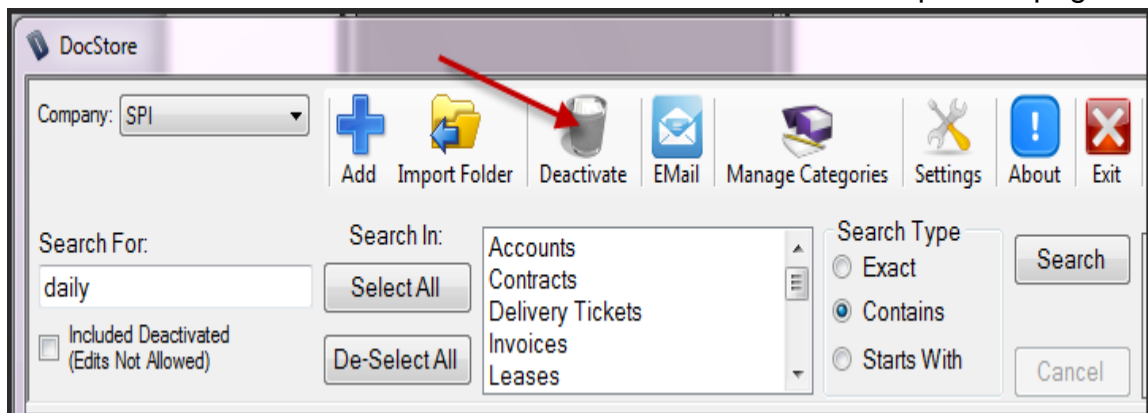
5. To delete a **Search Key** click delete in the Search Key box



6. A message box will pop up to make sure that this is what you want to do. If you are sure you want to delete the Search Key, click ok

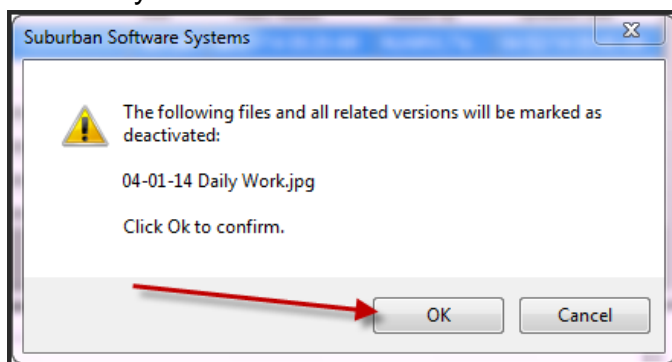


7. To deactivate a file click on the **Deactivate** icon located at the top of the page.

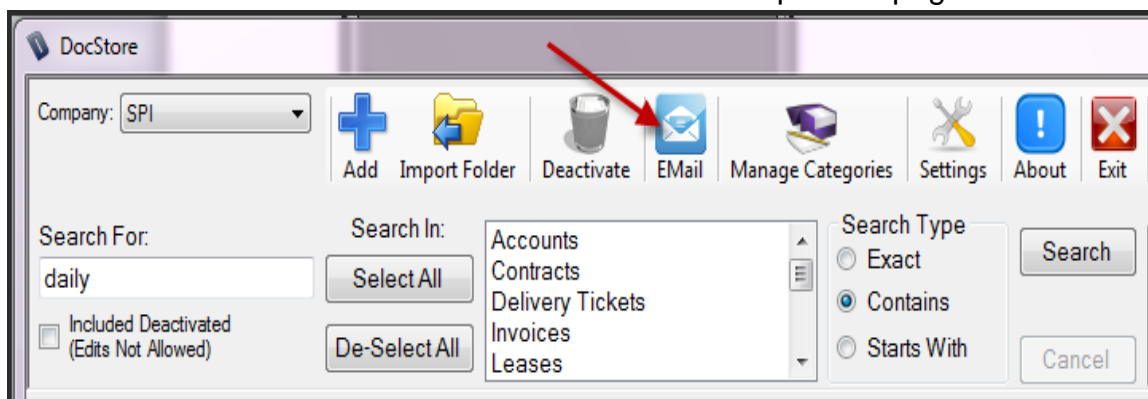


*****This is a safety precaution. It will not remove it from DocStore. You will only be allowed to view this file once it is deactivated. However, you will no longer be able to edit it through DocStore****

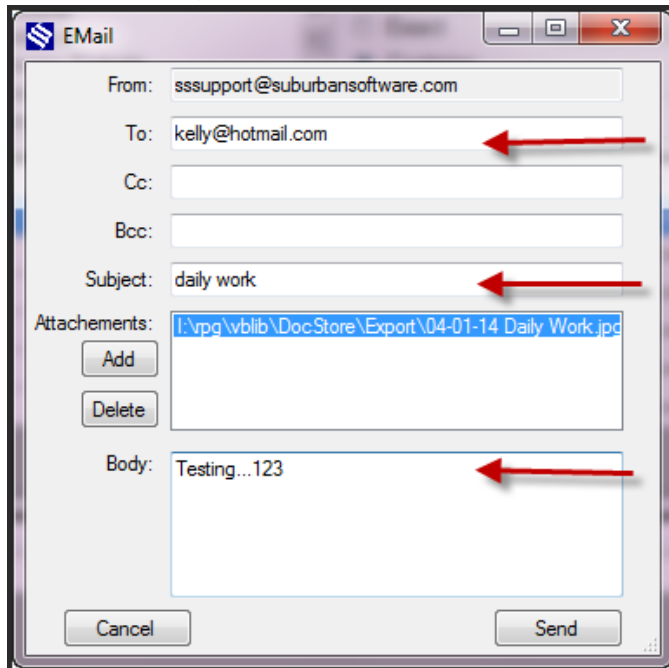
8. A message box will pop up to make sure that this is what you want to do. If you are sure you want to deactivate the file click ok.



9. To **Email** a file click on the Email icon located at the top of the page.



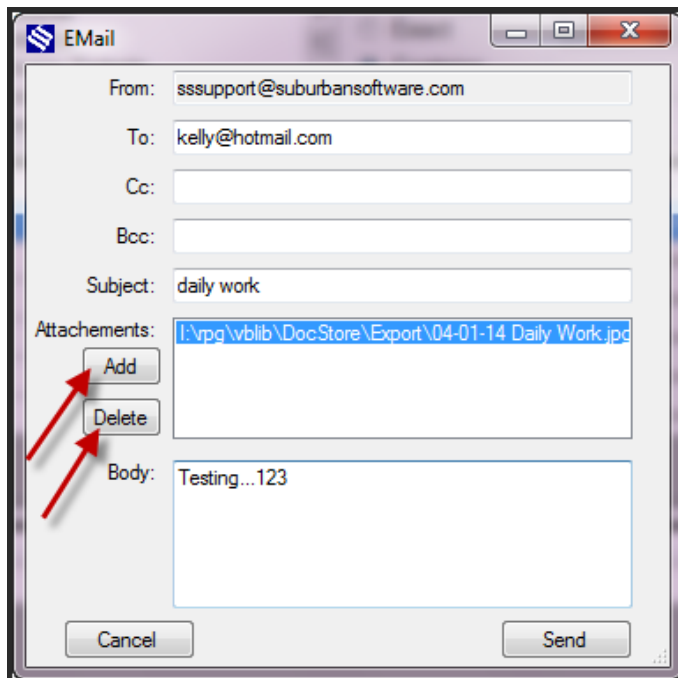
10. An email box will pop up. Fill in the email address and subject line. You may also add a message in the body of the email.



The screenshot shows an 'EMail' dialog box with the following fields and values:

- From: sssupport@suburbansoftware.com
- To: kelly@hotmail.com (indicated by a red arrow)
- Cc: (empty)
- Bcc: (empty)
- Subject: daily work (indicated by a red arrow)
- Attachments: I:\vpg\vblib\DocStore\Export\04-01-14 Daily Work.jpg
- Buttons: Add, Delete
- Body: Testing...123 (indicated by a red arrow)
- Buttons: Cancel, Send

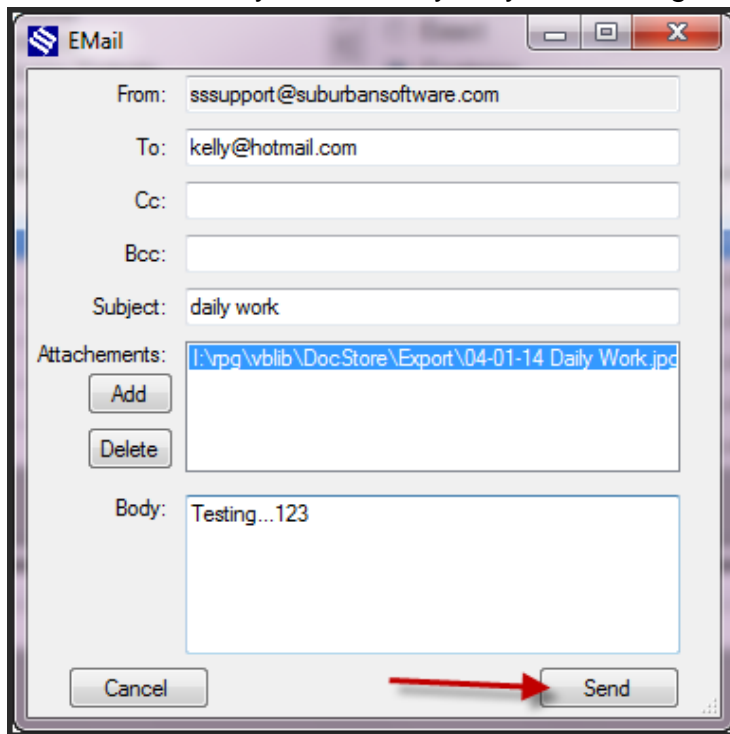
11. You can **Add** or **Delete** a file from the email as well.



The screenshot shows the same 'EMail' dialog box as above, but with red arrows pointing to the 'Add' and 'Delete' buttons in the Attachments section.

- From: sssupport@suburbansoftware.com
- To: kelly@hotmail.com
- Cc: (empty)
- Bcc: (empty)
- Subject: daily work
- Attachments: I:\vpg\vblib\DocStore\Export\04-01-14 Daily Work.jpg
- Buttons: Add, Delete (indicated by red arrows)
- Body: Testing...123
- Buttons: Cancel, Send

12. Click Send when you are ready for your message to be sent.



The image shows a screenshot of an "EMail" dialog box. The "From" field is filled with "sssupport@suburbansoftware.com". The "To" field is filled with "kelly@hotmail.com". The "Cc" and "Bcc" fields are empty. The "Subject" field is filled with "daily work". The "Attachments" section shows a file path "I:\vpg\vbilib\DocStore\Export\04-01-14 Daily Work.jpg" with "Add" and "Delete" buttons below it. The "Body" text area contains the text "Testing...123". At the bottom, there are "Cancel" and "Send" buttons. A red arrow points directly to the "Send" button.

From: sssupport@suburbansoftware.com

To: kelly@hotmail.com

Cc:

Bcc:

Subject: daily work

Attachments: I:\vpg\vbilib\DocStore\Export\04-01-14 Daily Work.jpg

Add

Delete

Body: Testing...123

Cancel Send