



Doc Store

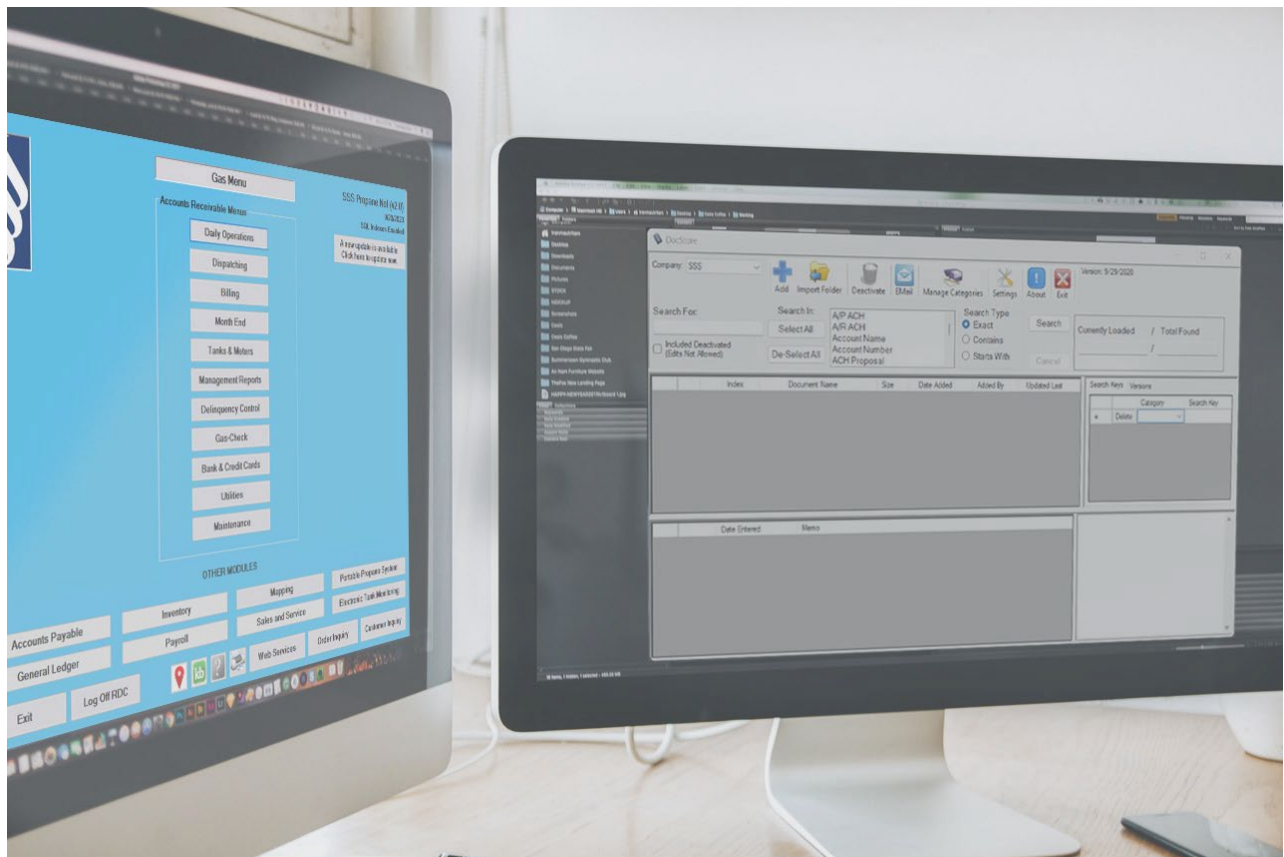
Training Manual

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Introduction

DocStore is a robust document storage solution that integrates with the Suburban Software Systems Propane application. In it you will be able to import, scan, view, and email documents. By assigning account numbers and key words you will be able to locate documents easily through customer inquiry.



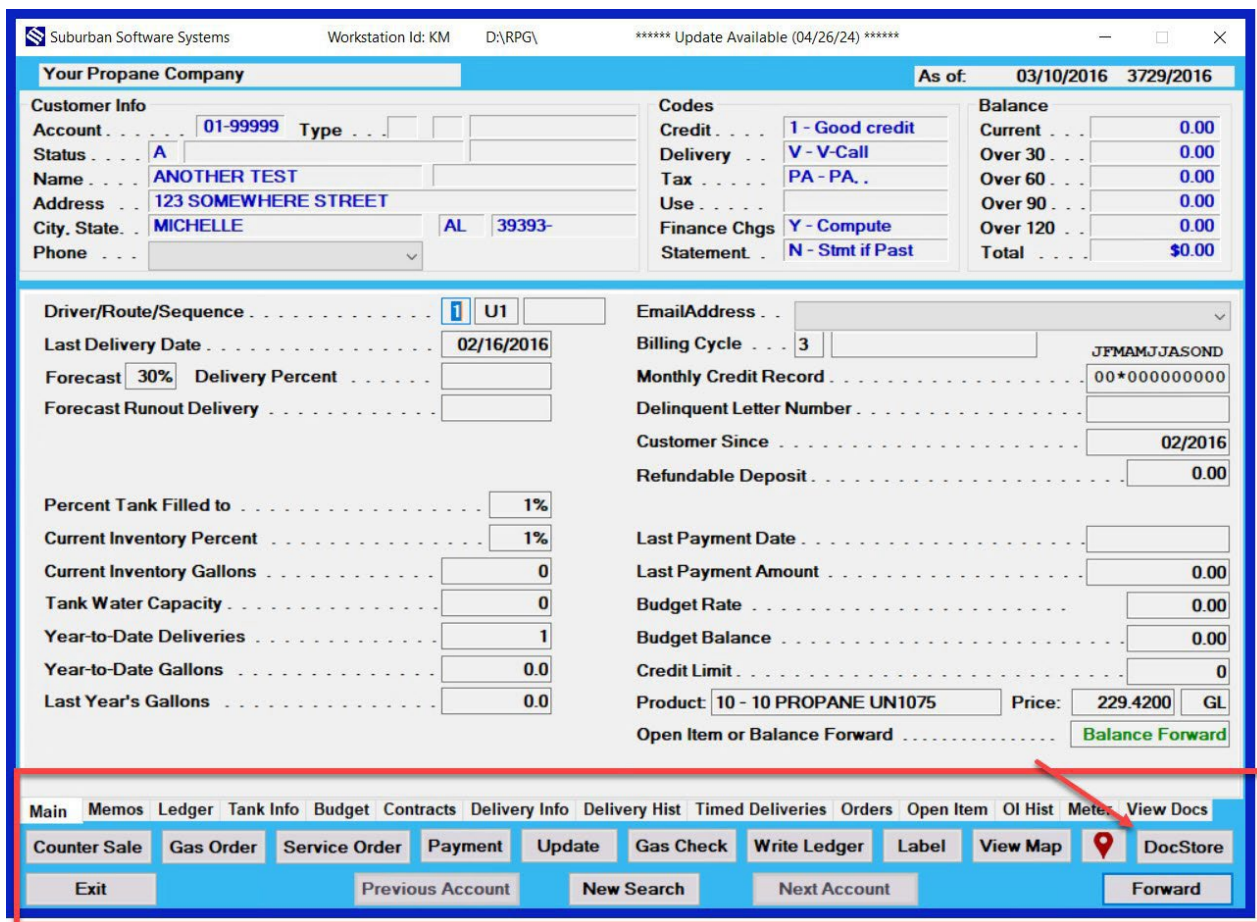
Getting Started/ Requirements

- A SQL connection is required. This can be through a local SQL server or if you are connected to the Suburban Cloud, it will automatically be set up.
- Your scanner must be TWAIN compatible. Canon and Epson have several document scanners that work well with DocStore.
- Please feel free to contact Suburban with any questions and we will be happy to fill in the blanks.



Access to DocStore- Customer Inquiry:

DocStore can be accessed a couple of ways depending on if you are connected to the Suburban Cloud Connection. If you are connected to a local SQL Server, you will be able to access and import documents through Customer Inquiry. If your connection to the SQL Server is through the Suburban Cloud (see section concerning cloud connection) you will be able to access DocStore through Customer Inquiry, but you will **not** be able to import documents.



Suburban Software Systems Workstation Id: KM D:\RPG\ ***** Update Available (04/26/24) *****

Your Propane Company As of: 03/10/2016 3729/2016

Customer Info		Codes		Balance	
Account	01-99999	Credit	1 - Good credit	Current	0.00
Status	A	Delivery	V - V-Call	Over 30	0.00
Name	ANOTHER TEST	Tax	PA - PA .	Over 60	0.00
Address	123 SOMEWHERE STREET	Use		Over 90	0.00
City, State	MICHELLE AL 39393-	Finance Chgs	Y - Compute	Over 120	0.00
Phone		Statement	N - Stmt if Past	Total	\$0.00

Driver/Route/Sequence: U1 EmailAddress: Billing Cycle: 3 JFMAMJJASOND

Last Delivery Date: 02/16/2016 Monthly Credit Record: 00*000000000

Forecast: 30% Delivery Percent: Delinquent Letter Number: Customer Since: 02/2016

Forecast Runout Delivery: Refundable Deposit: 0.00

Percent Tank Filled to: 1% Last Payment Date: Last Payment Amount: 0.00

Current Inventory Percent: 1% Budget Rate: 0.00

Current Inventory Gallons: 0 Budget Balance: 0.00

Tank Water Capacity: 0 Credit Limit: 0

Year-to-Date Deliveries: 1 Product: 10 - 10 PROPANE UN1075 Price: 229.4200 GL

Year-to-Date Gallons: 0.0 Open Item or Balance Forward: Balance Forward

Last Year's Gallons: 0.0

Main Memos Ledger Tank Info Budget Contracts Delivery Info Delivery Hist Timed Deliveries Orders Open Item OI Hist Meter View Docs

Counter Sale Gas Order Service Order Payment Update Gas Check Write Ledger Label View Map **DocStore**

Exit Previous Account New Search Next Account Forward

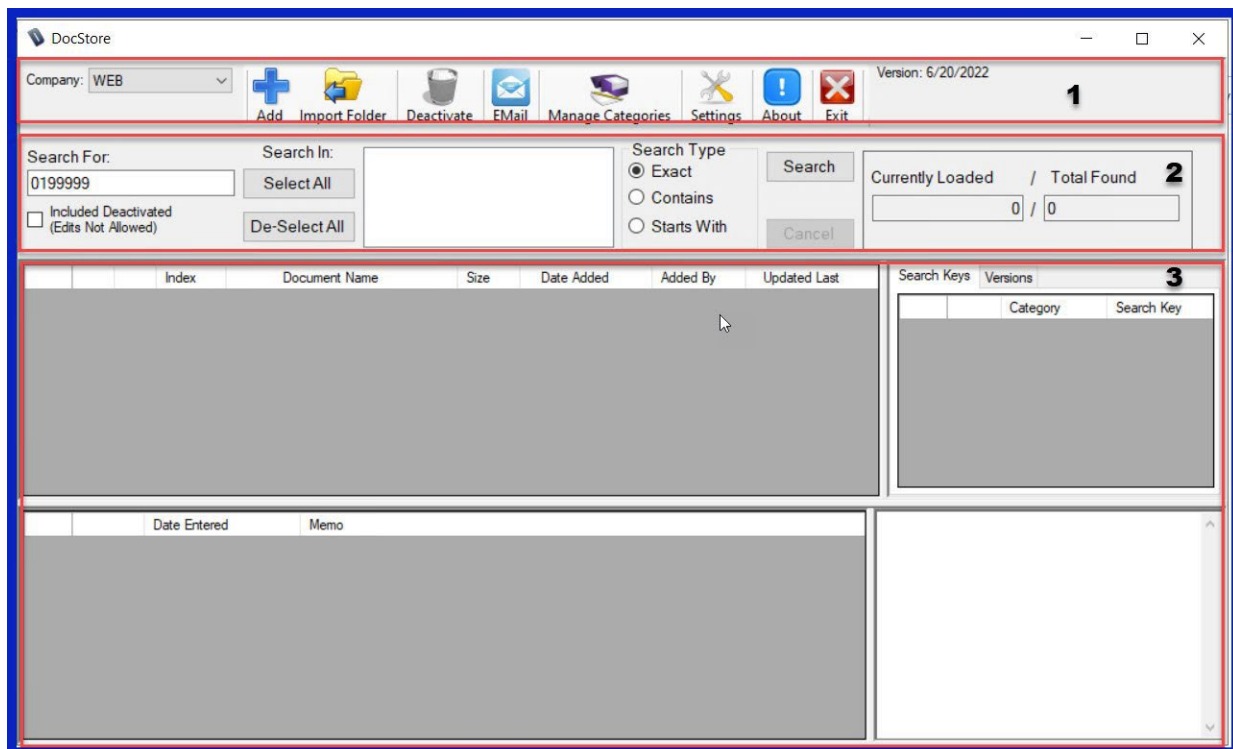
Note: It does not matter which customer you click on if you are just wanting to enter into DocStore. However, whatever customer you are on will automatically be entered into the Search box.

Using DocStore

The DocStore Window can be broken down into 3 section types.

- 1.** Header: This section will allow you Manage, scan, import, and email documents and folders.
- 2.** Search: This section will allow you to Search documents by search keys and categories
- 3.** Documents: This section allows you to View or Edit different versions and Add or Delete Memos.

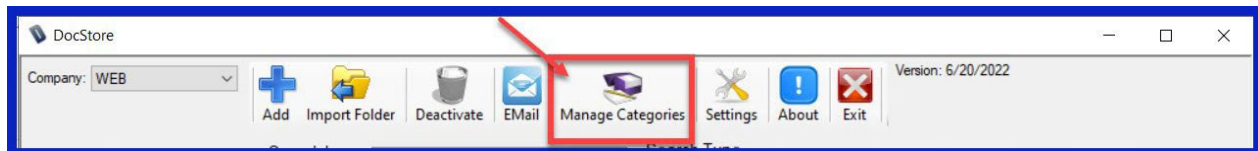
Each Section has specific functions to manage and use the DocStore Program.



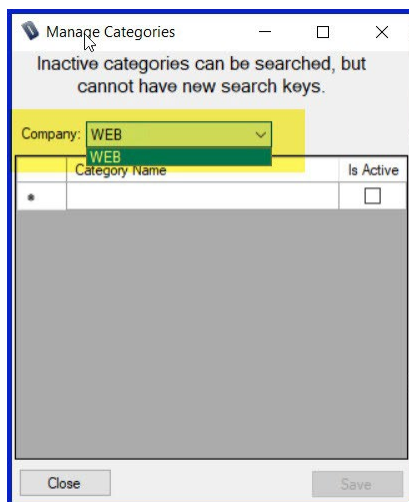
Header

Managing Categories:

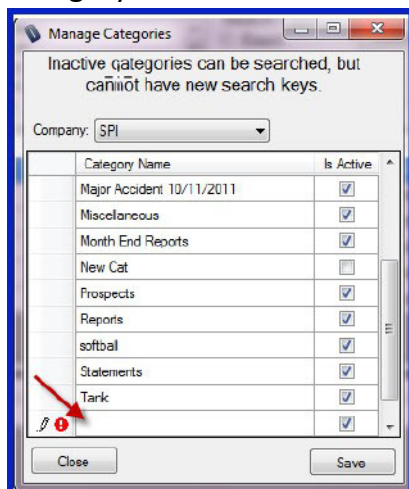
This button allows you to add, edit or delete Categories for a specific company id.



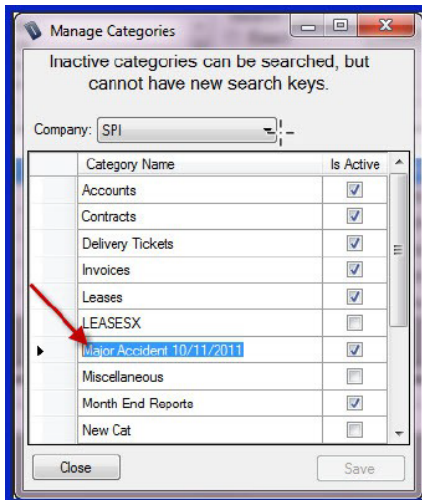
1. Click on the Company ID you will be adding the Categories to.



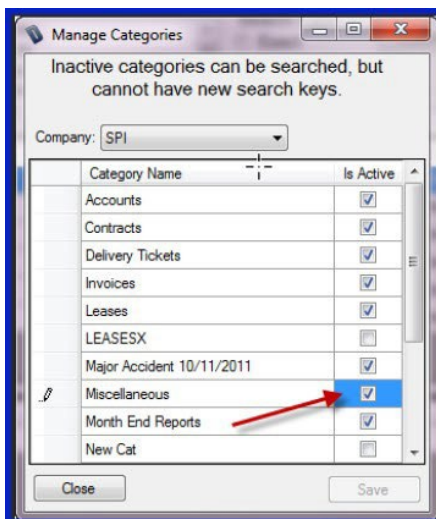
2. To add a category, scroll to the bottom of the list and type in the name of the new Category. Make sure to click the check box to make it Active.



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

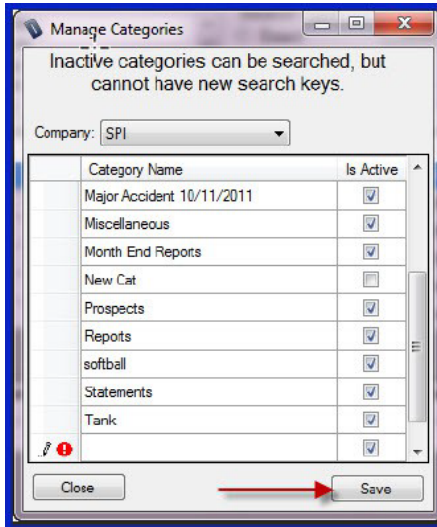


4. To activate or deactivate a category click on the button to the right.



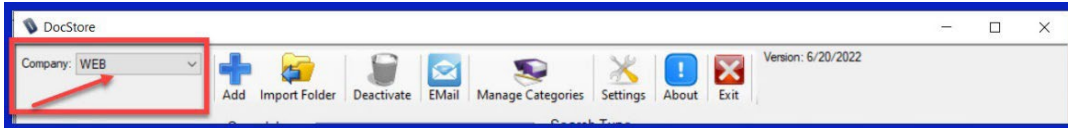
*****Note: Once you deactivate a category, it can be searched, but you cannot add new search keys*****

5. When you have finished making changes click save.

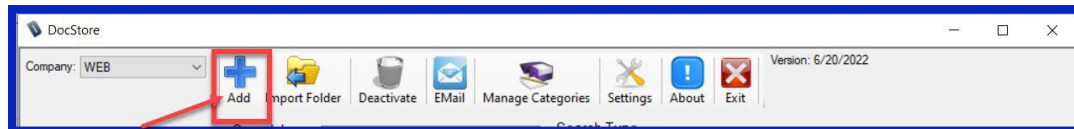


Adding Files:

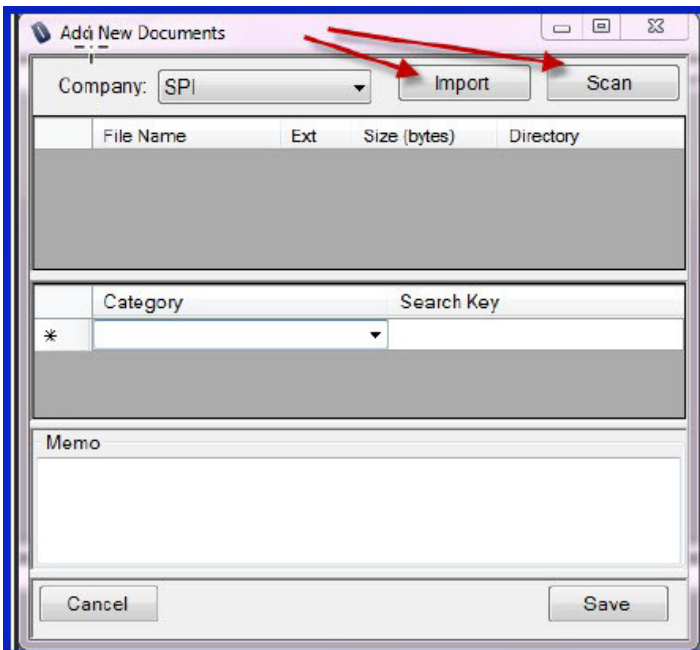
1. Choose company from the drop-down menu:



2. Click on **Add**:

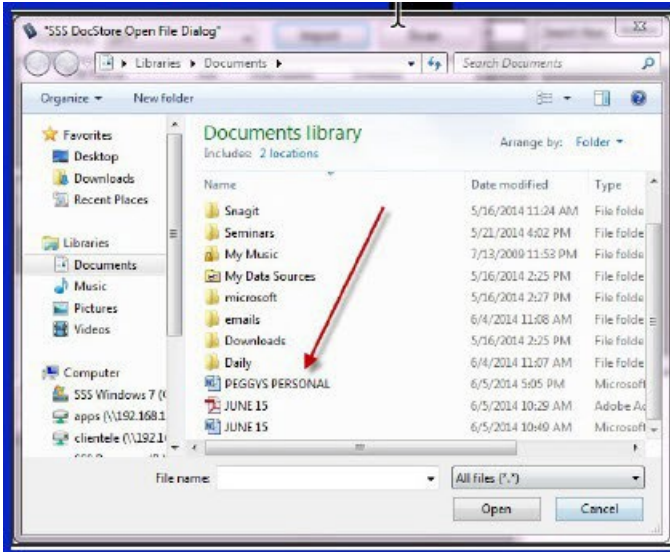


3. Choose how you will be adding your file:
Import allows you to import documents that are already located on your computer or drive.
Scan allows you to scan a document directly into DocStore via a scanner.

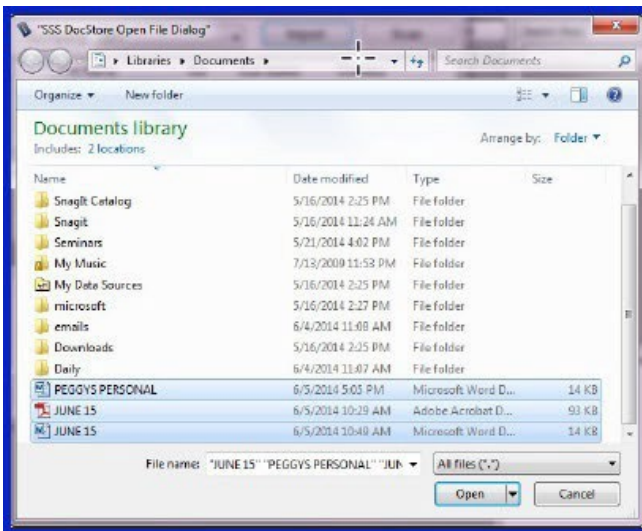


Importing Documents:

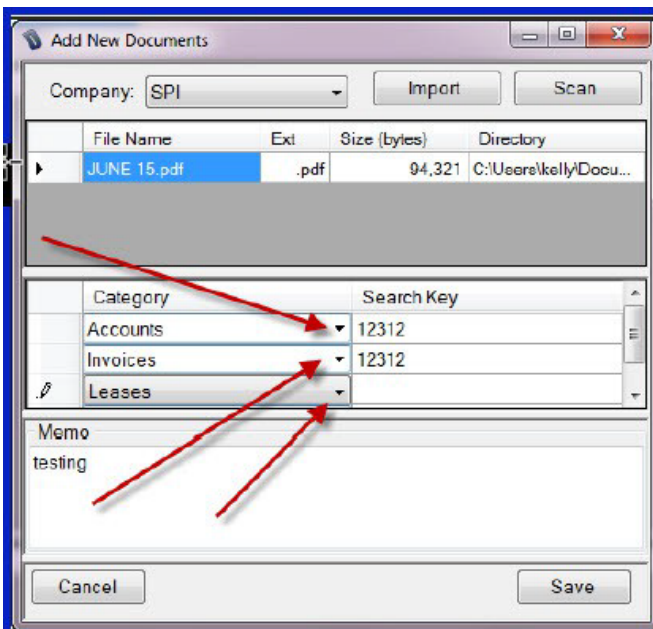
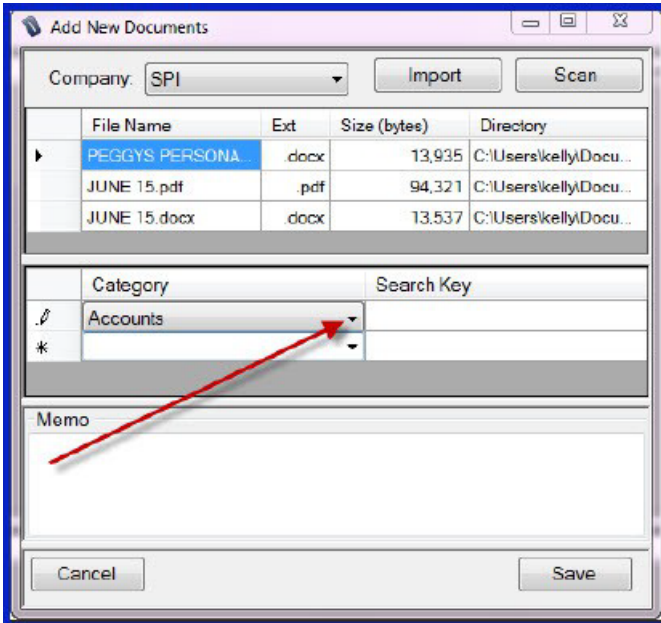
1. Choose the file you want to add from your document library on anywhere you have files saved on your computer:



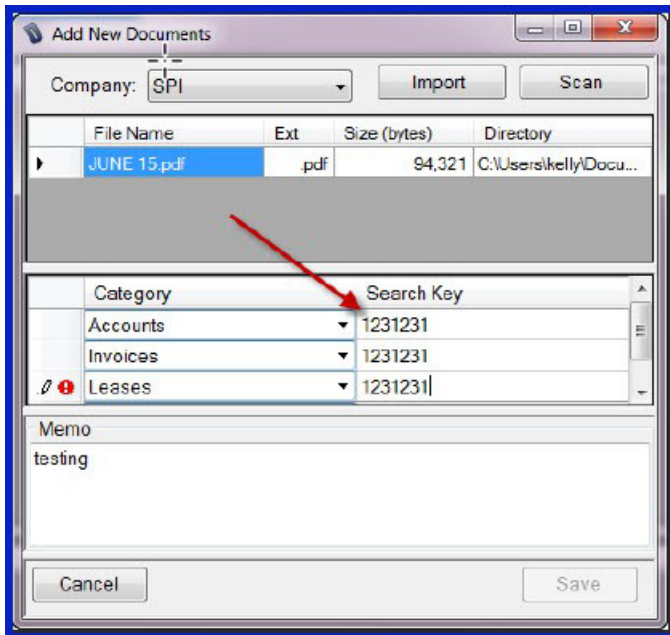
2. You may choose multiple files by holding the Control button down on your keyboard while you click on the files you want to add.



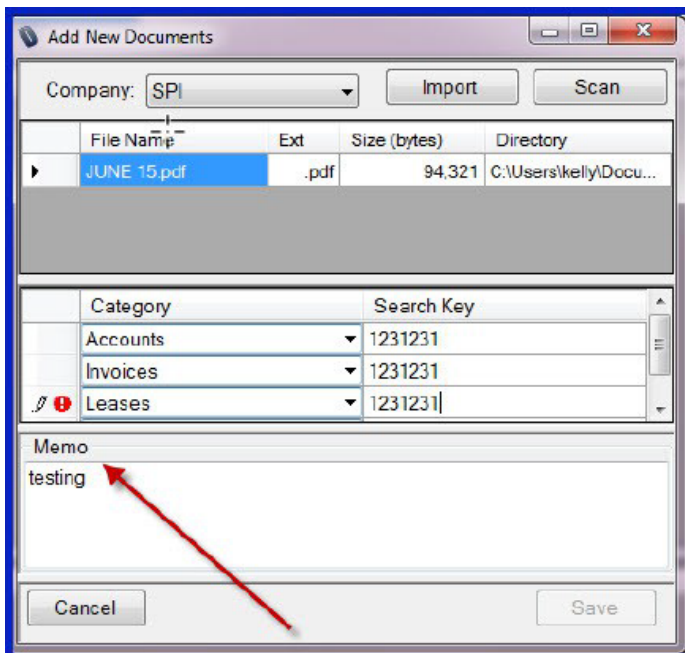
3. Choose the category by clicking on the down arrow. You may choose 1 category or multiple categories.



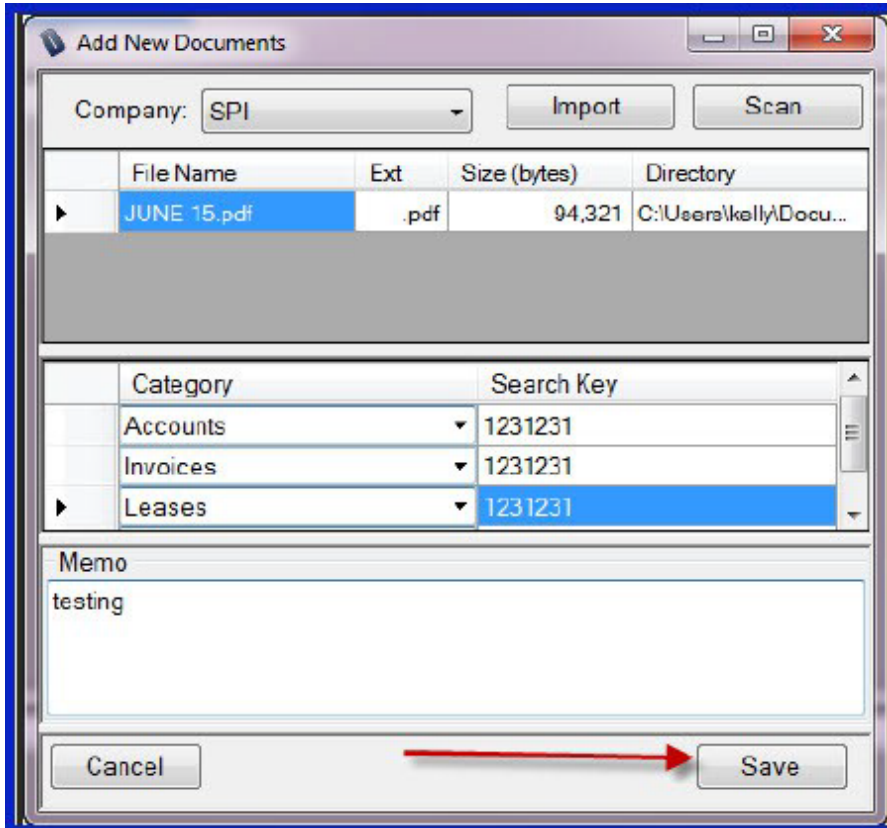
4. Add search key information that will define future searches. If you want to add something to a specific account, you will need to enter the account number using the full 7-digit number.



5. Add memo to the bottom if needed.

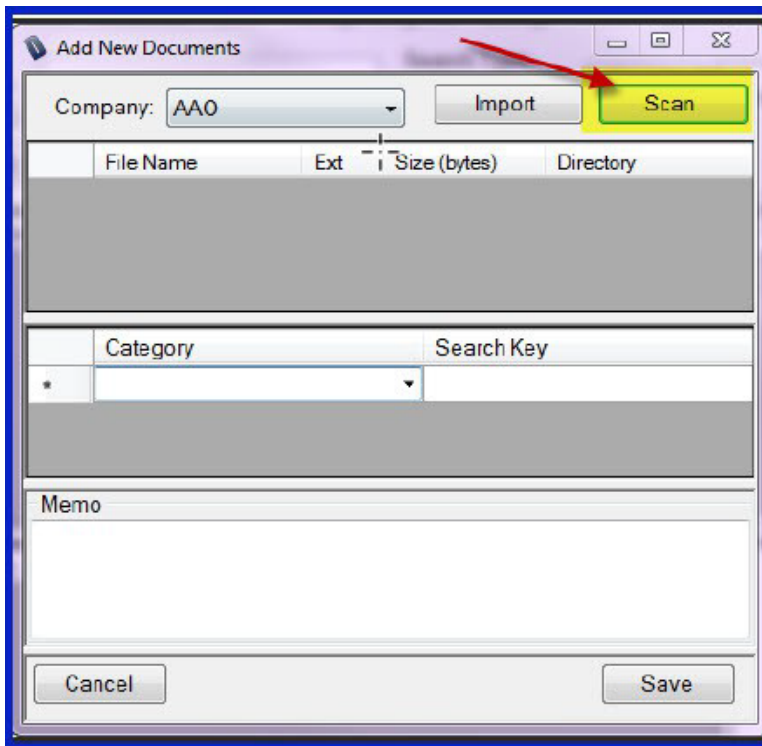


6. Click SAVE to save any changes made.

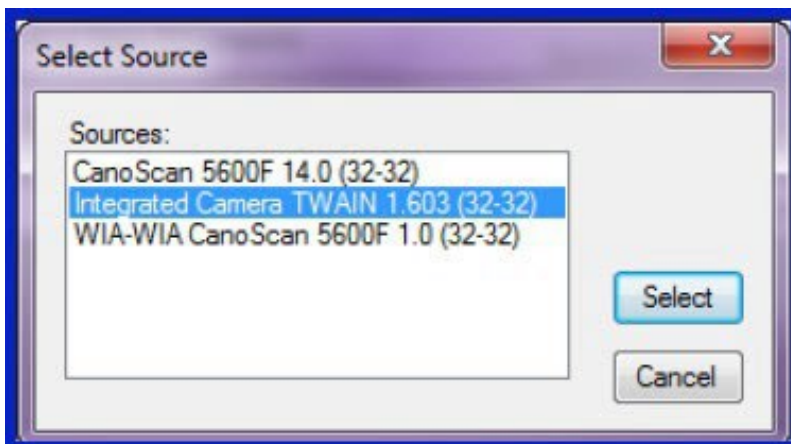


Scanning Documents:

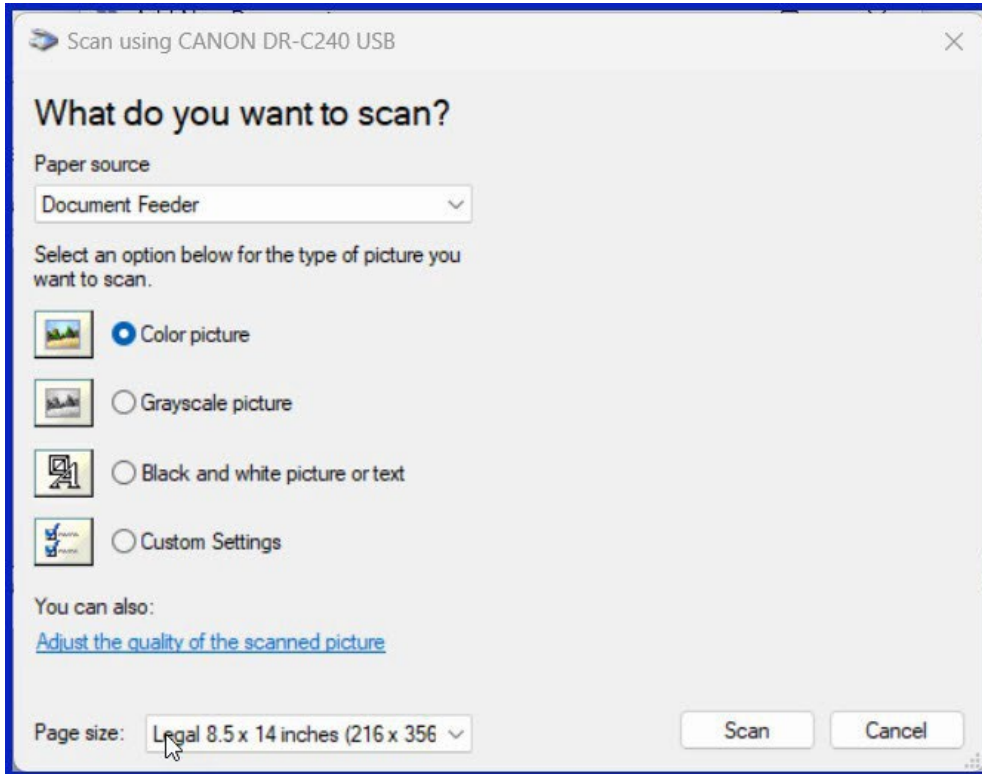
1. Click on the Scan button:



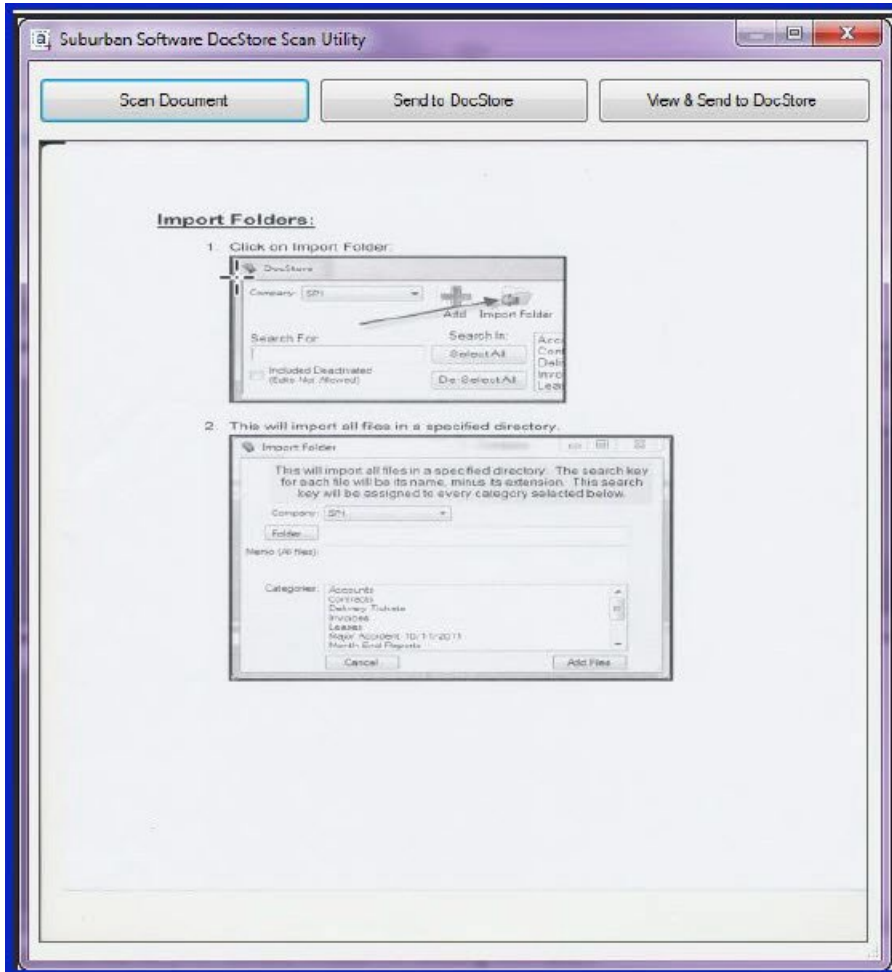
2. Choose from the list of scanners that will pop up:



3. Your Scanner Window will open with a list of options for your specified scanner.



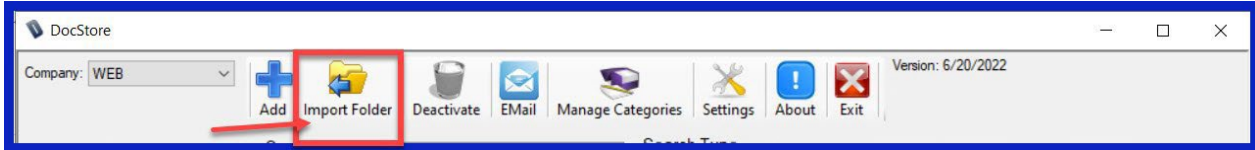
4. Once the document has been scanned you will see a preview window where you will be able to do one of the following:



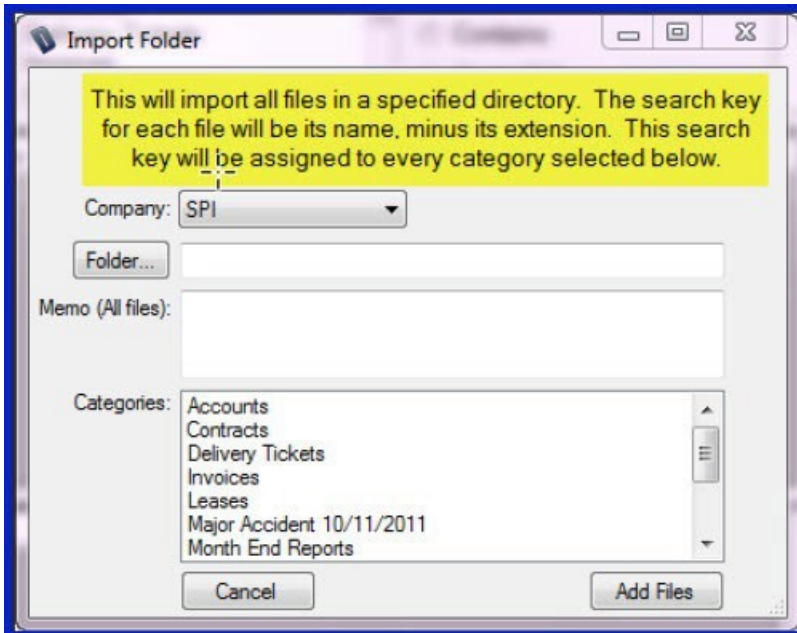
- Scan Document: to rescan document
- Send to DocStore: Allows you to save the document
- View & Send to DocStore: allows you to view and edit (if the capability is there) then send to DocStore.

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

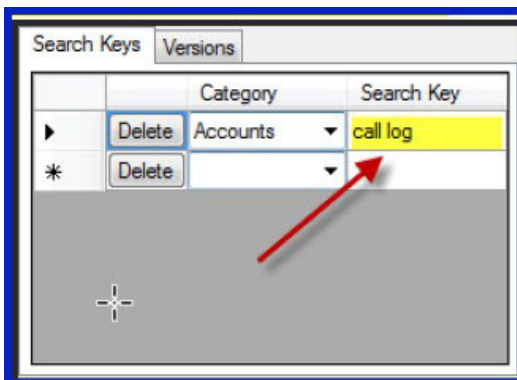
Import Folders:



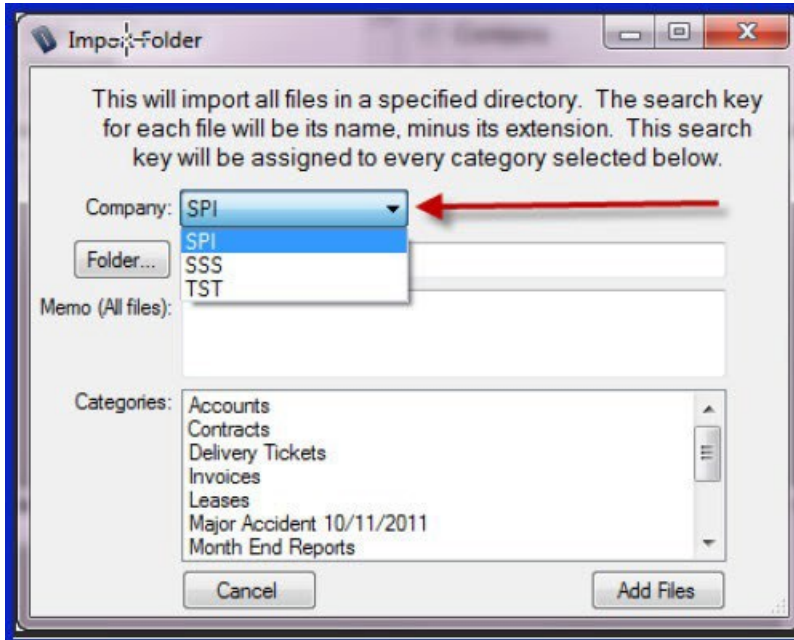
This will import all files in a specified directory. The search key for each file will be its name, minus its extension. The search key will be assigned to every category selected.



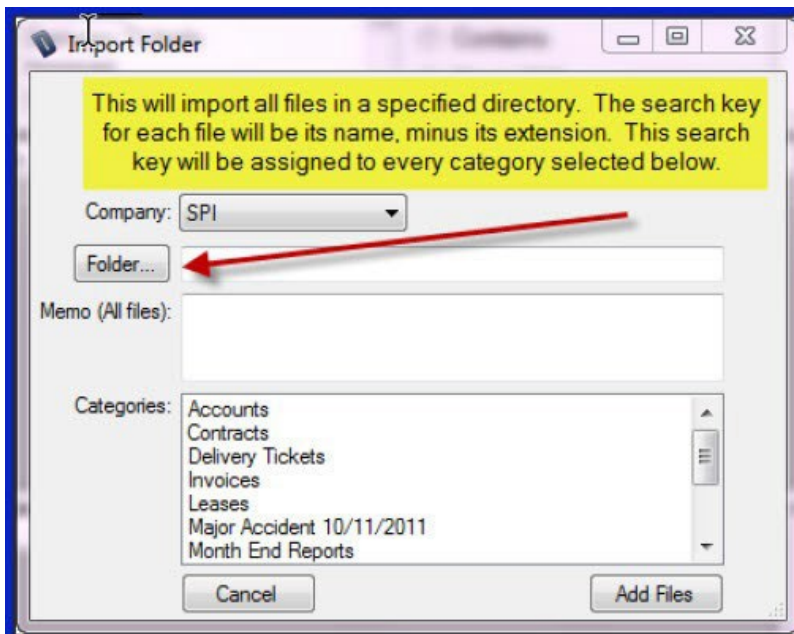
NOTE: ALL FILES WILL BE GIVEN A SEARCH KEY ACCORDING TO THE FILE NAME MINUS THE EXTENSION.



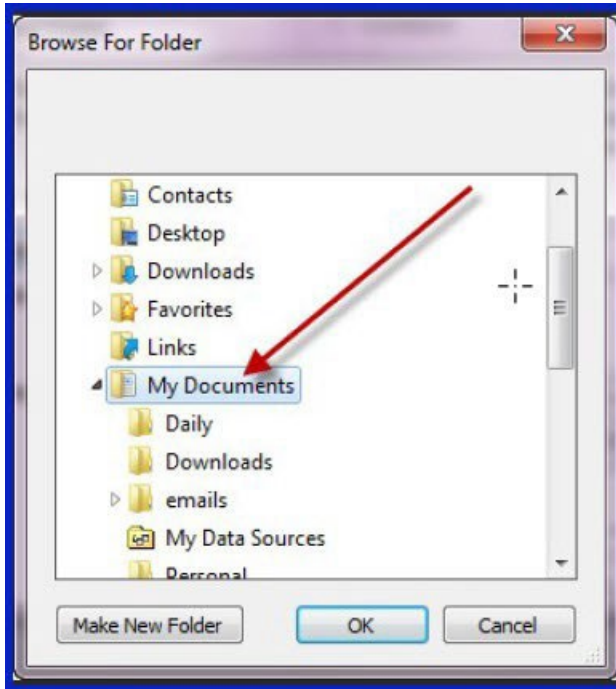
1. Choose which company ID you want to import the files to.



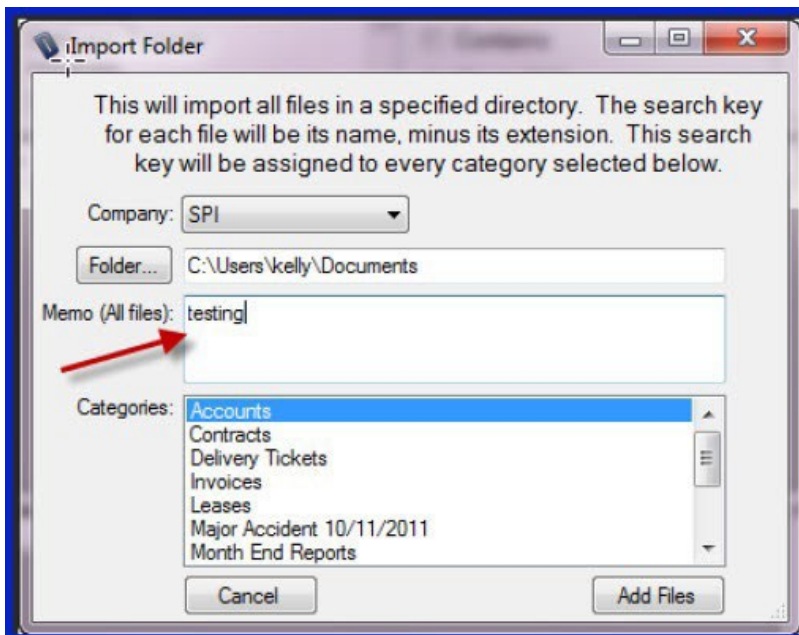
2. Click folder to browse your computer for the folder you want to import.



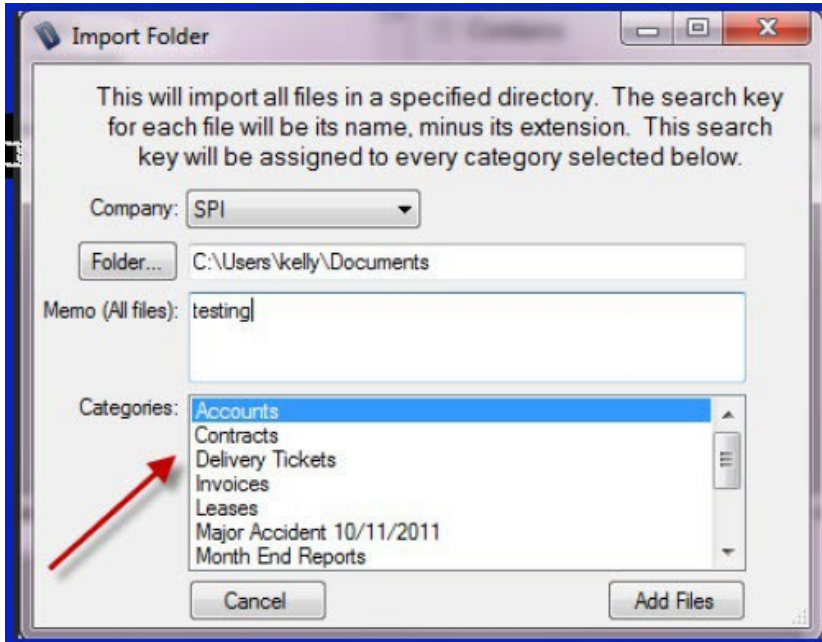
3. Click on the folder you want to import.



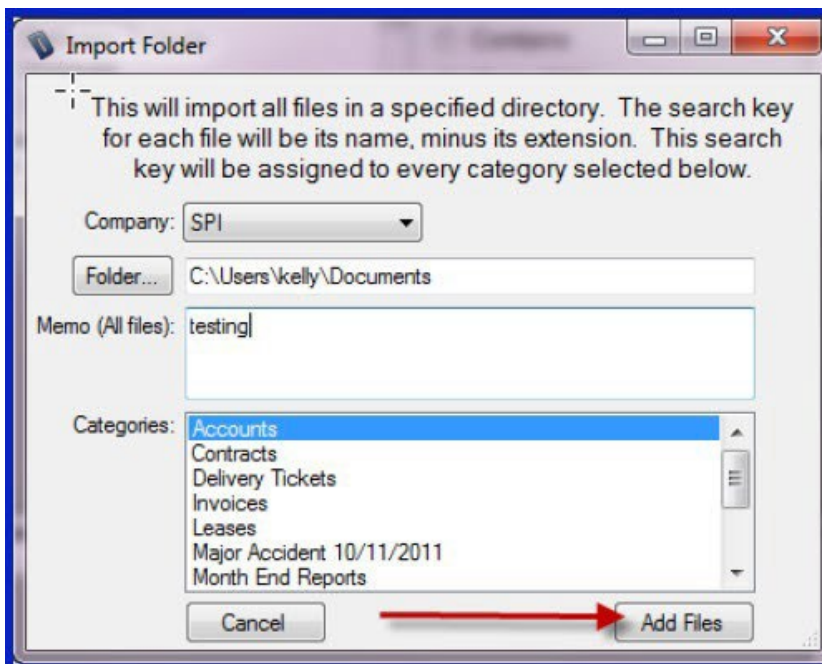
4. Add a memo if needed.



5. Choose the Category. Hold the shift key down and click for multiple categories.

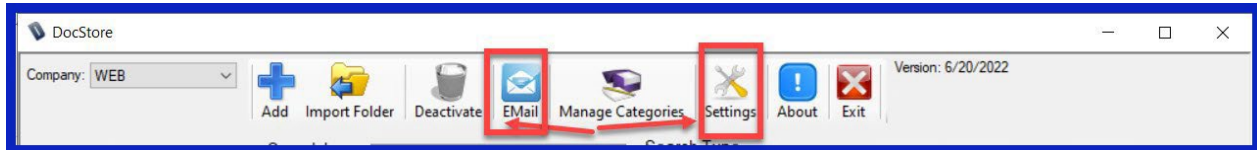


6. Click Add files to save.



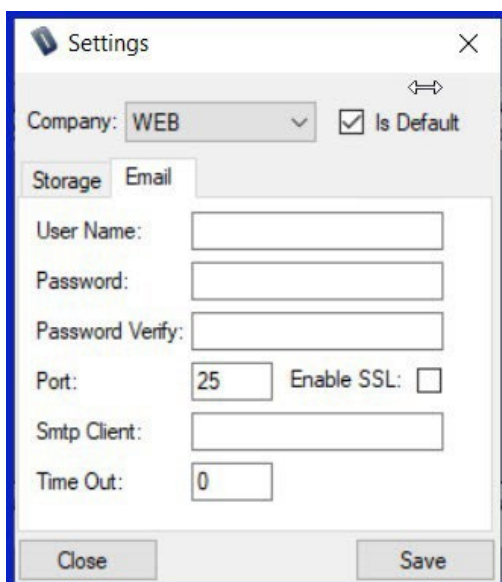
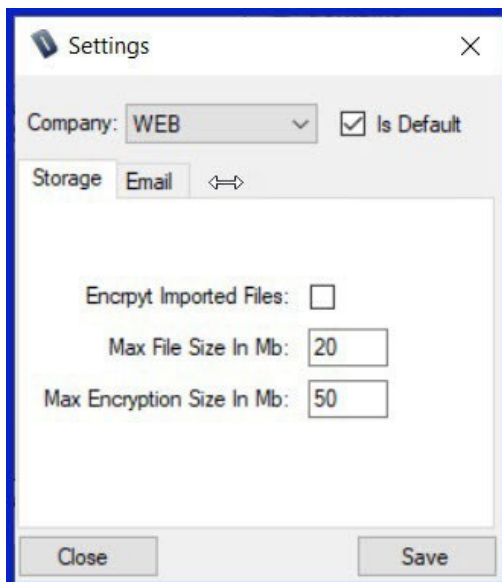
7. Click on the Search Key box to add your search information. Note: If you are using a specific account number it must include all 7 digits.

Emailing Documents:

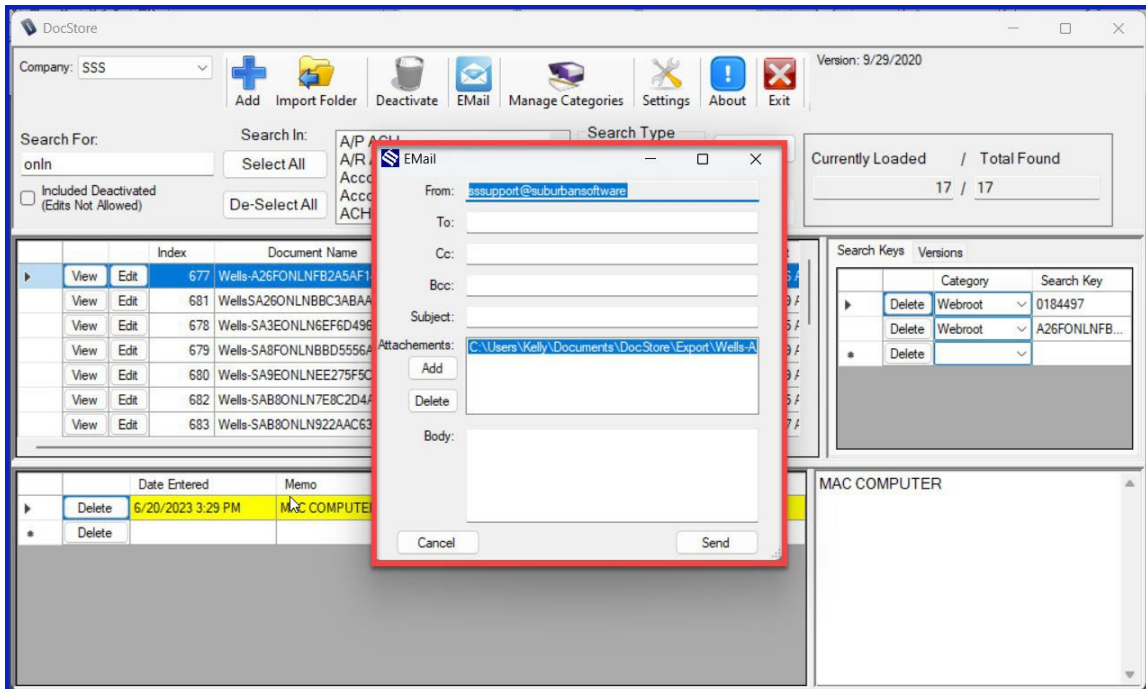


This will allow you to email a document saved in DocStore.

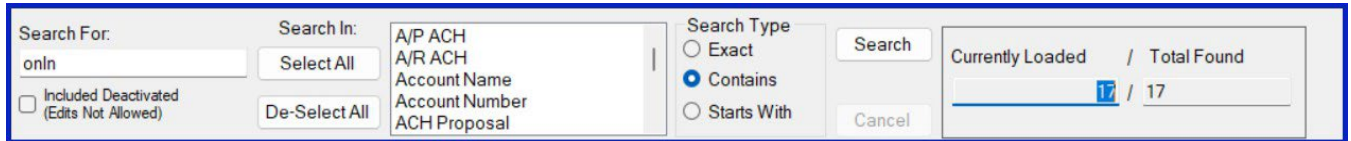
1. To set up the email option click on **Settings**:
2. Enter in the email information used in company/ebill settings.



3. Click on **Email**: On the pop window add to/from information including cc/bcc and subject. Any highlighted document will be automatically added to the email as an attachment. Add a body and send when ready.



Searching Documents:



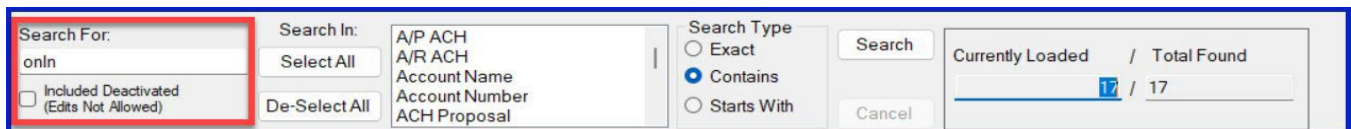
The screenshot shows a search interface with the following elements:

- Search For:** A text input field containing "onln".
- Included Deactivated (Edits Not Allowed):** A checkbox that is currently unchecked.
- Search In:** A dropdown menu with "A/P ACH" selected. Other options include "A/R ACH", "Account Name", "Account Number", and "ACH Proposal".
- Search Type:** Radio buttons for "Exact", "Contains" (which is selected), and "Starts With".
- Buttons:** "Search" and "Cancel".
- Results:** A progress bar showing "Currently Loaded" (with a blue bar) and "Total Found" (17).

This area allows you to set the search criteria for the documents you are looking for.

Search For:

Enter in all or part of the search key you have previously set up when adding documents.

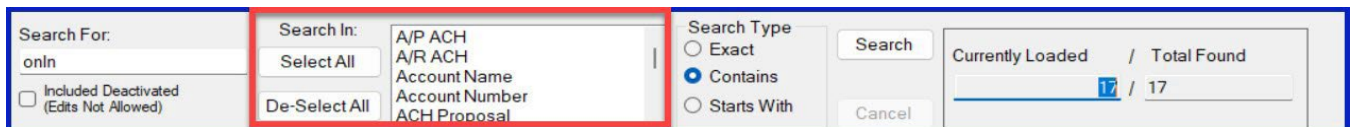


This screenshot is identical to the previous one, but a red box highlights the "Included Deactivated (Edits Not Allowed)" checkbox, indicating that clicking it will include deactivated documents in the search results.

Note: Click the box to include deactivated documents.

Search In:

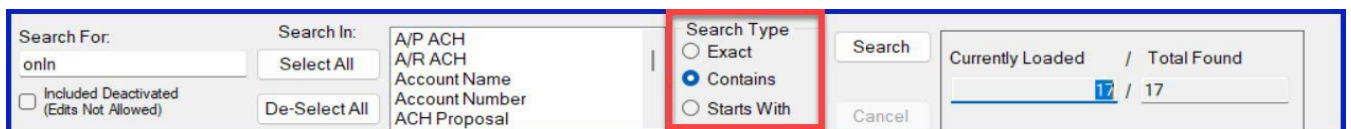
Allows you to choose the category the document may be located in. You can do this by highlighting individual categories, selecting all categories or deselecting all categories.



This screenshot is identical to the previous ones, but a red box highlights the "Search In:" dropdown menu, indicating that users can select different categories for their search.

Search Type:

Allows you to search by **Exact** wording, **Contains** the search Key entered or **Starts With** the search key entered.



This screenshot is identical to the previous ones, but a red box highlights the "Search Type:" radio buttons, indicating that users can choose between "Exact", "Contains", and "Starts With" search methods.

After you have entered your search criteria click **Search** and you will see how many documents were found and they will be listed in the document section.

Document Section:

		Index	Document Name	Size	Date Added	Added By	Updated Last	
▶	View	Edit	677	Wells-A26FONLNF2A5AF1468C00...	569,988	06/20/23 03:26 PM	MJ0FVV40...	02/15/23 09:06 /
	View	Edit	681	WellsSA26ONLNBBC3ABAADBCF.pdf	582,881	06/20/23 03:35 PM	MJ0FVV40...	01/19/23 11:59 /
	View	Edit	678	Wells-SA3EONLN6EF6D496444600...	567,299	06/20/23 03:28 PM	MJ0FVV40...	02/15/23 08:55 /
	View	Edit	679	Wells-SA8FONLNBBD5556AF8CF00...	522,052	06/20/23 03:30 PM	MJ0FVV40...	02/15/23 09:09 /
	View	Edit	680	Wells-SA9EONLNEE275F5CE3E600...	514,431	06/20/23 03:32 PM	MJ0FVV40...	02/15/23 09:09 /
	View	Edit	682	Wells-SAB8ONLN7E8C2D4AFF5400...	588,894	06/20/23 03:36 PM	MJ0FVV40...	02/15/23 09:05 /
	View	Edit	683	Wells-SAB8ONLN922AAC63A5FB00...	585,012	06/20/23 03:37 PM	MJ0FVV40...	02/15/23 08:57 /

Date Entered	Memo
▶ Delete 6/20/2023 3:29 PM	MAC COMPUTER
* Delete	

Search Keys Versions

Category	Search Key
▶ Delete Webroot	0184497
Delete Webroot	A26FONLNF...
* Delete	

MAC COMPUTER

This section allows you to View or Edit different versions and Add or Delete Memos.

Document Information:

		Index	Document Name	Size	Date Added	Added By	Updated Last	
▶	View	Edit	677	Wells-A26FONLNF2A5AF1468C00...	569,988	06/20/23 03:26 PM	MJ0FVV40...	02/15/23 09:06 /
	View	Edit	681	WellsSA26ONLNBBC3ABAADBCF.pdf	582,881	06/20/23 03:35 PM	MJ0FVV40...	01/19/23 11:59 /
	View	Edit	678	Wells-SA3EONLN6EF6D496444600...	567,299	06/20/23 03:28 PM	MJ0FVV40...	02/15/23 08:55 /
	View	Edit	679	Wells-SA8FONLNBBD5556AF8CF00...	522,052	06/20/23 03:30 PM	MJ0FVV40...	02/15/23 09:09 /
	View	Edit	680	Wells-SA9EONLNEE275F5CE3E600...	514,431	06/20/23 03:32 PM	MJ0FVV40...	02/15/23 09:09 /
	View	Edit	682	Wells-SAB8ONLN7E8C2D4AFF5400...	588,894	06/20/23 03:36 PM	MJ0FVV40...	02/15/23 09:05 /
	View	Edit	683	Wells-SAB8ONLN922AAC63A5FB00...	585,012	06/20/23 03:37 PM	MJ0FVV40...	02/15/23 08:57 /

View:

Click on **View** to see the document as you have saved it into DocStore. This is computer specific. If you do not have a way to open a specific file type, a window will open that will ask you to choose how you want to view the document.

Edit:

This is also computer specific. You will need to have a way to view and edit the document that you choose. For instance, if it is an image file you will need to have photo viewer and photo editor to amend it.

Index:

The number Suburban associates with the file.

Document Name:

Name assigned by Suburban when scanned or the name of the file imported from the computer.

File Size

How big the file, document or image is.

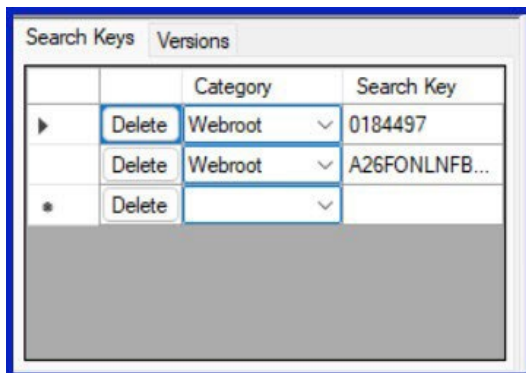
Added By:

The computer name or person who added the file.

Date:

The date the file was added or modified last.

Search Key Versions:



	Category	Search Key
Delete	Webroot	0184497
Delete	Webroot	A26FONLNFB...
Delete		

This shows you what category, search key and version a specific document is. You can delete a version or a specific key or modify the search key.

Memos:

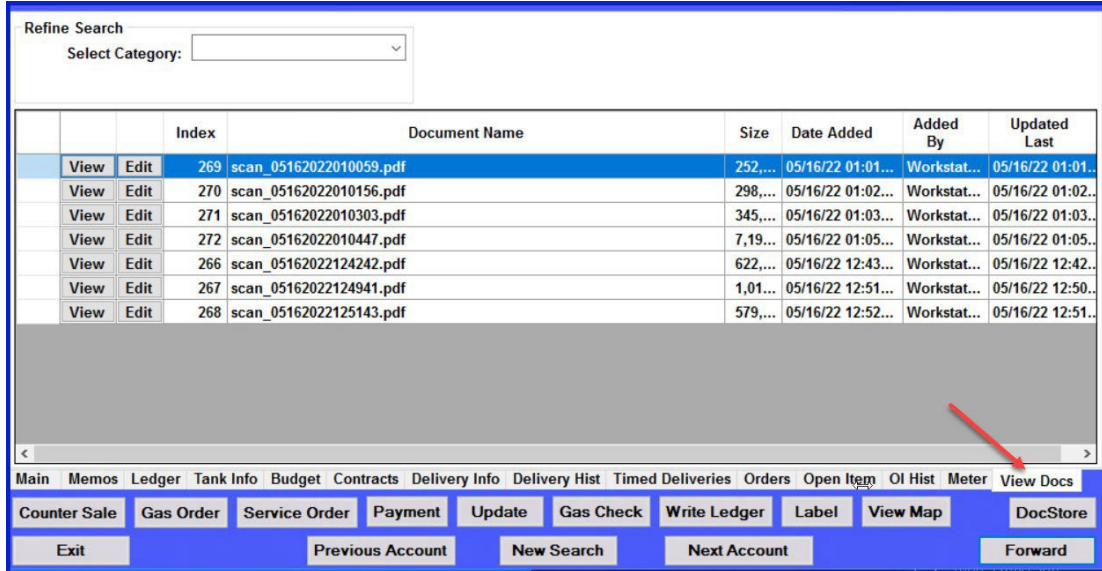


	Date Entered	Memo
Delete	6/20/2023 3:29 PM	MAC COMPUTER
Delete		

MAC COMPUTER

Allows you to View, Add or Delete a memo associated with a document.

View Document/Customer Inquiry



Refine Search
Select Category:

		Index	Document Name	Size	Date Added	Added By	Updated Last
View	Edit	269	scan_05162022010059.pdf	252,...	05/16/22 01:01...	Workstat...	05/16/22 01:01...
View	Edit	270	scan_05162022010156.pdf	298,...	05/16/22 01:02...	Workstat...	05/16/22 01:02...
View	Edit	271	scan_05162022010303.pdf	345,...	05/16/22 01:03...	Workstat...	05/16/22 01:03...
View	Edit	272	scan_05162022010447.pdf	7,19...	05/16/22 01:05...	Workstat...	05/16/22 01:05...
View	Edit	266	scan_05162022124242.pdf	622,...	05/16/22 12:43...	Workstat...	05/16/22 12:42...
View	Edit	267	scan_05162022124941.pdf	1,01...	05/16/22 12:51...	Workstat...	05/16/22 12:50...
View	Edit	268	scan_05162022125143.pdf	579,...	05/16/22 12:52...	Workstat...	05/16/22 12:51...

Main Memos Ledger Tank Info Budget Contracts Delivery Info Delivery Hist Timed Deliveries Orders Open Item Ol Hist Meter **View Docs**

Counter Sale Gas Order Service Order Payment Update Gas Check Write Ledger Label View Map DocStore

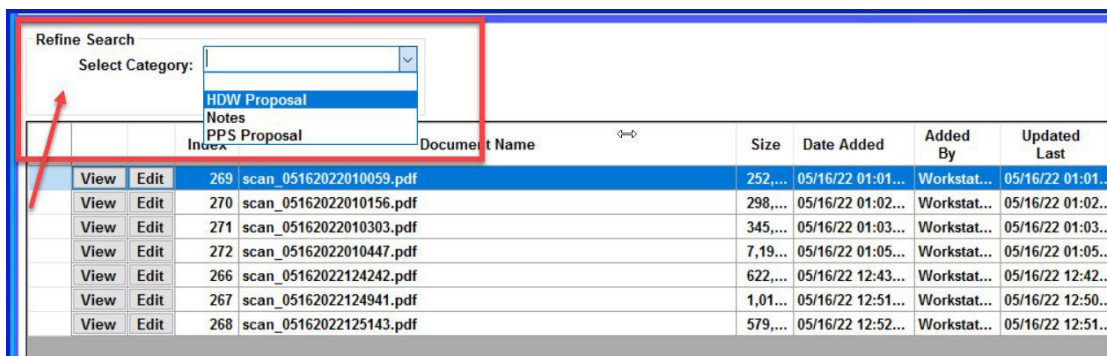
Exit Previous Account New Search Next Account Forward

Click on View Docs Button located Customer Inquiry to see all of the documents, folders and images you have associated with the customer. This screen functions like the document section of DocStore where you can view and edit a document as needed.

Note: To see the documents, you will need to have entered the entire 7digit account number when saving the document. To see a recent document, you will need to refresh the account.

Refine Search:

You can refine your search for a specific document by clicking on the down arrow by select Category. This will narrow down the documents to the specific categories associated with the account number.



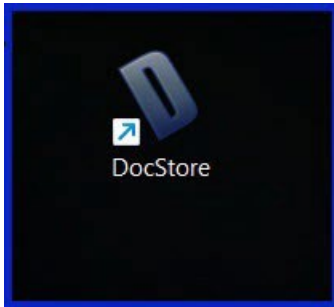
Refine Search
Select Category:

- HDW Proposal
- Notes
- PPS Proposal

		Index	Document Name	Size	Date Added	Added By	Updated Last
View	Edit	269	scan_05162022010059.pdf	252,...	05/16/22 01:01...	Workstat...	05/16/22 01:01...
View	Edit	270	scan_05162022010156.pdf	298,...	05/16/22 01:02...	Workstat...	05/16/22 01:02...
View	Edit	271	scan_05162022010303.pdf	345,...	05/16/22 01:03...	Workstat...	05/16/22 01:03...
View	Edit	272	scan_05162022010447.pdf	7,19...	05/16/22 01:05...	Workstat...	05/16/22 01:05...
View	Edit	266	scan_05162022124242.pdf	622,...	05/16/22 12:43...	Workstat...	05/16/22 12:42...
View	Edit	267	scan_05162022124941.pdf	1,01...	05/16/22 12:51...	Workstat...	05/16/22 12:50...
View	Edit	268	scan_05162022125143.pdf	579,...	05/16/22 12:52...	Workstat...	05/16/22 12:51...

Cloud Connection:

Connecting to DocStore when you are on a Remote Desktop Connection requires additional setup. Although you can view documents through Suburban, because you are accessing Suburban remotely you will **only** be able to add and edit through a local connection. To do that we add an Icon to your local computer desktop.



All other settings in the Desktop App vs the Suburban are the same.