

Standard Operating Procedures Manual

KELLY PAPER EDI PURCHASING

Max Recall Standard Operating Procedures

Kelly Paper
A Division of PaperlinX, Limited
288 Brea Canyon Road
City of Industry, CA 91789
Phone 909.859.8200 • www.kellypaper.com

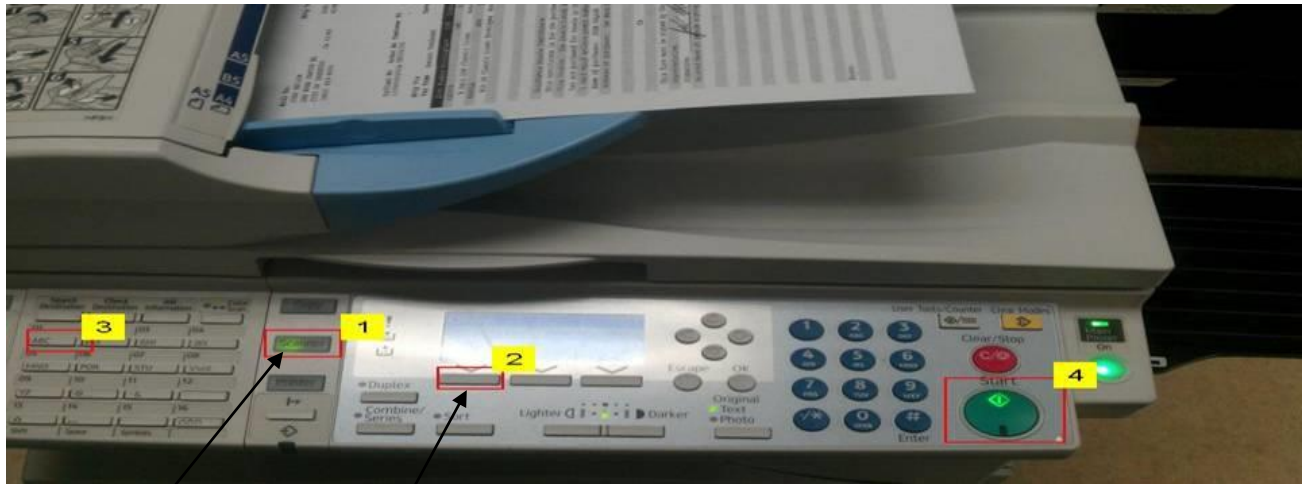
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SCANNING

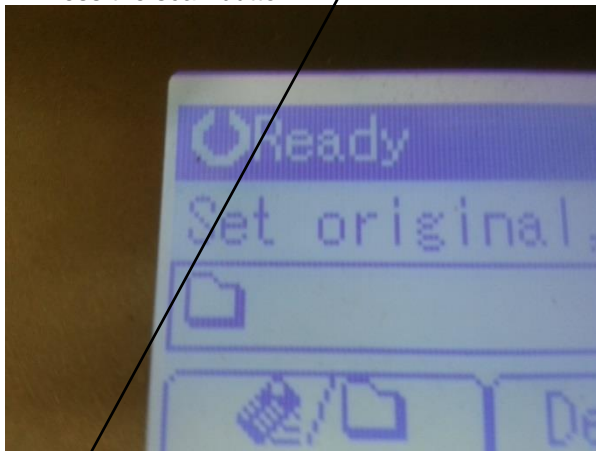
Scanning Invoices / POD's into Max Recall

When Scanning invoices / POD's, do the following:



Place document to be scanned face up, with customer address information going in first, on your scanner

1. Press the scan button



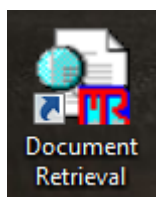
2. Press the left button under the window and make sure you see the folder below.
3. Press your first preset speed dial button noted as "ABC" on the left side of your machine.
4. Push Start

The document will scan and will be stored for later retrieval from the Max Recall system

RETRIEVAL

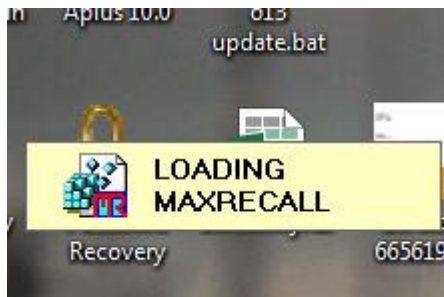
Retrieving a scanned document from Max Recall

When retrieving a scanned document from Max Recall, do the following:



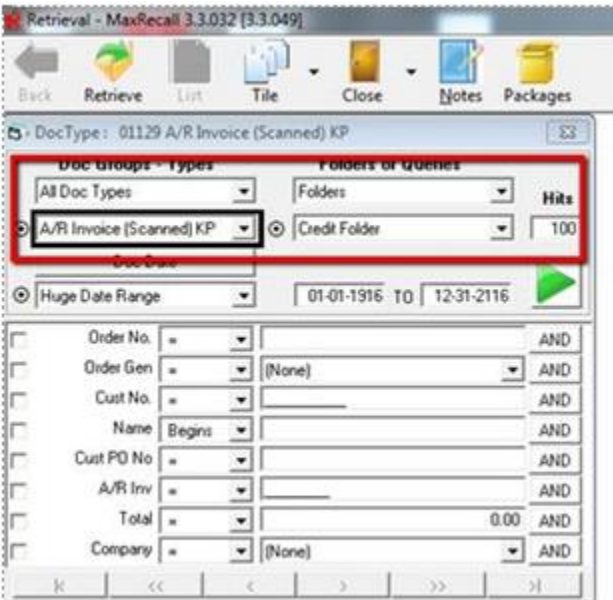
From your desktop on your computer, do the following:

Click on the Document Retrieval Icon



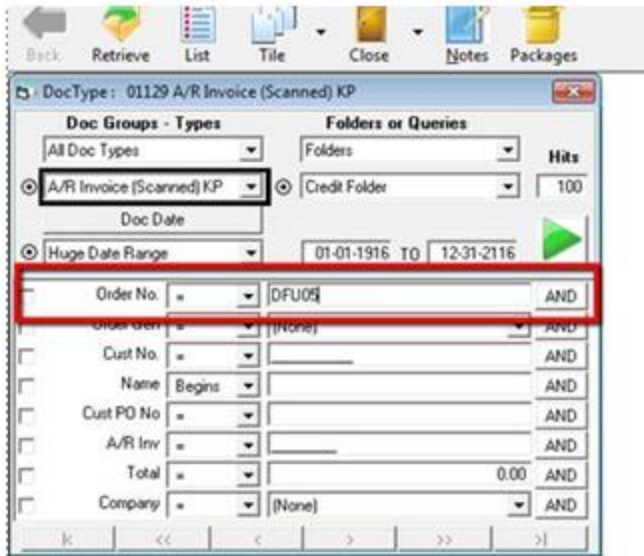
You will see the Loading Max Recall screen as this could take a minute to open

MAXRECALL: STANDARD OPERATING PROCEDURES



From the Retrieval MaxRecall Screen, do the following:

Verify or change to match what is in the red boxes



From the Retrieval MaxRecall Screen, do the following:

You can choose to search by:

Date Range: This will result in all invoices scanned over the time period specified. Even those not for your store.

Order No.: This will result in a pop up of one specific invoice that matches the order number. This field is not case sensitive.

Cust. No.: You can search for all invoices scanned in to the system for a specific customer account number.

Enter your information and hit enter or click on green arrow.

Note: When retrieving a consolidated invoice, you must enter the parent order number. Failure to enter the parent order number on a consolidated invoice will result in not finding your document.

MAXRECALL: STANDARD OPERATING PROCEDURES

The screenshot displays the MaxRecall software interface. On the left, the 'Doc Groups - Types' and 'Folders or Queries' panels are visible. A right-click context menu is open over a blank space, with a red arrow pointing to it and a text box that says 'Right click in the blank space.' The menu options include 'Macro Options', 'Remove Macro', 'Show Macros', 'Display File Type Doc Groups', 'Show Last SQL Statement', and 'Search Subs'. Below the menu, a 'Results' window shows a search result for 'DocType: 01129 A/R Invoice (Scanned) KP, Order No. = KNO2H'. On the right, a scanned invoice from Kelly Paper is displayed. The invoice includes the company name 'KELLY PAPER', address '298 Brea Canyon Rd, City Of Industry, CA 91789', and contact information. It also lists the order number 'KNO2H', customer PO number '000088421', and the name 'KENNY THE PRINTER'. The invoice details a purchase of '22x35-180# Cougar Opaque Smooth White 310#' paper with a total price of \$67.97. The invoice is signed by 'Mashin' and 'Mashin'.

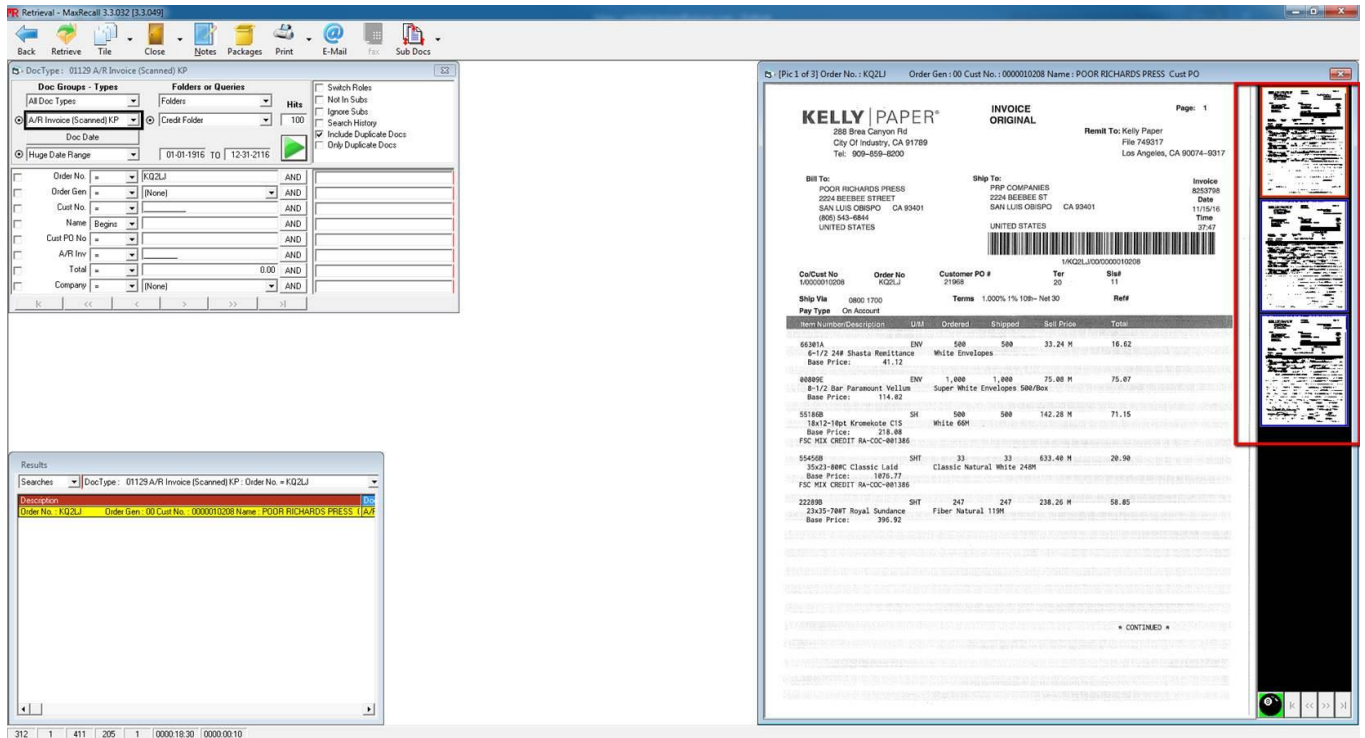
Right click in the blank space
Click on More Options
Click on Show Marcos

MAXRECALL: STANDARD OPERATING PROCEDURES

The screenshot displays the MaxRecall software interface. On the left, the 'DocType: 01129 A/R Invoice (Scanned) KP' search window is open. It features several filter sections: 'Doc Groups - Types' with 'A/R Invoice (Scanned) KP' selected; 'Folders or Queries' with 'Credit Folder' selected; and 'Hits' with '100' displayed. A red box highlights the 'Include Duplicate Docs' checkbox, which is checked. Below this, there are fields for 'Order No.', 'Order Gen.', 'Cust No.', 'Name', 'Begins', 'Cust PO No.', 'A/R Inv', 'Total', and 'Company', each with a dropdown menu and an 'AND' operator. A green arrow button is visible next to the 'Include Duplicate Docs' checkbox. Below the search window is a 'Results' pane showing a single search result: 'Description: Order No.: KNG2H Order Gen.: 00 Cust No.: 000088421 Name: KENNY THE PRINTER'. On the right, a scanned invoice for 'KELLY PAPER' is displayed. The invoice includes the company name, address (288 Brea Canyon Rd, City Of Industry, CA 91789), and phone number (909-809-8200). It also lists the ship-to address (Kenny The Printer, 17931 Sky Park Circle, Irvine, CA 92714) and invoice details (Invoice # 8234279, Date 11/02/16, Time 5:23:05). A barcode is present with the number 81KNG2H09039988421. The invoice table shows a total of 567.97. At the bottom, there is a signature area with a handwritten signature and the name 'Maxlin'.

**Click on Include Duplicate Docs
Hit enter or click on green arrow**

MAXRECALL: STANDARD OPERATING PROCEDURES



You now can see all pages associated with the document

From this screen you can do the following

1. Simply view the signed copy on your computer monitor by clicking on each page to the right of your document
2. Print a copy by pressing the print button on the tool bar at the top of your screen will print all copies
3. Email a copy by pressing the email button on the tool bar at the top of your screen will email all copies