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Max Recall Document Scanning and Retrieval

Standard Operating Procedures Manual

Max Recall Standard Operating Procedures

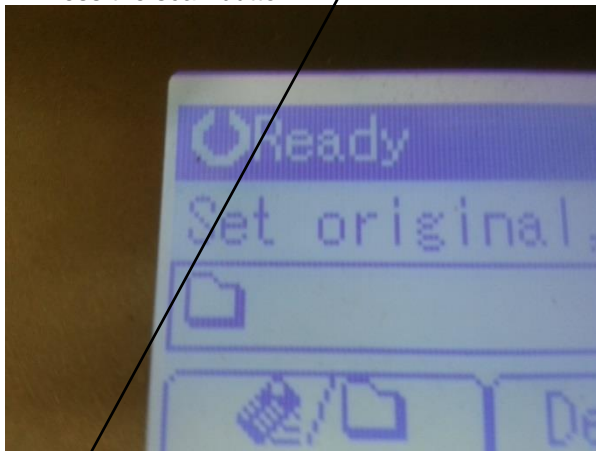# Table of Contents

SCANNING

Scanning Invoices / POD's into Max Recall

When Scanning invoices / POD's, do the following:
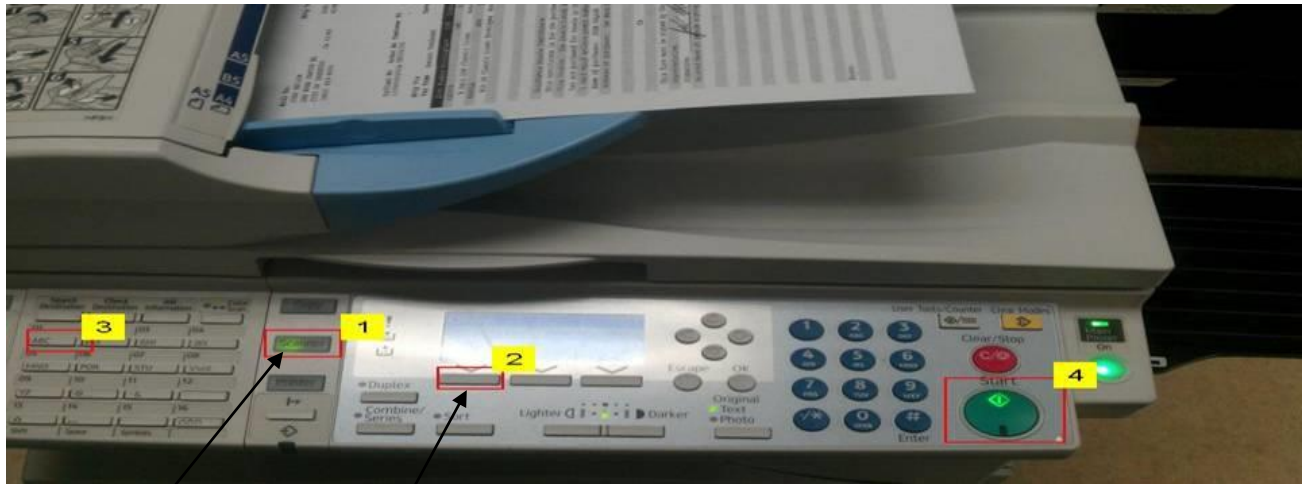
Place document to be scanned face up, with customer address information going in first, on your scanner

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
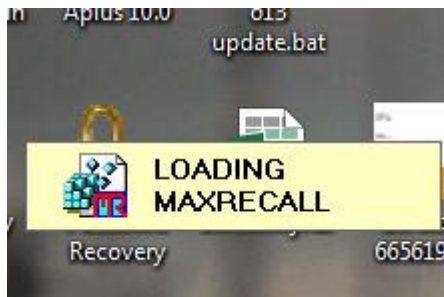
RETRIEVAL

Retrieving a scanned document from Max Recall

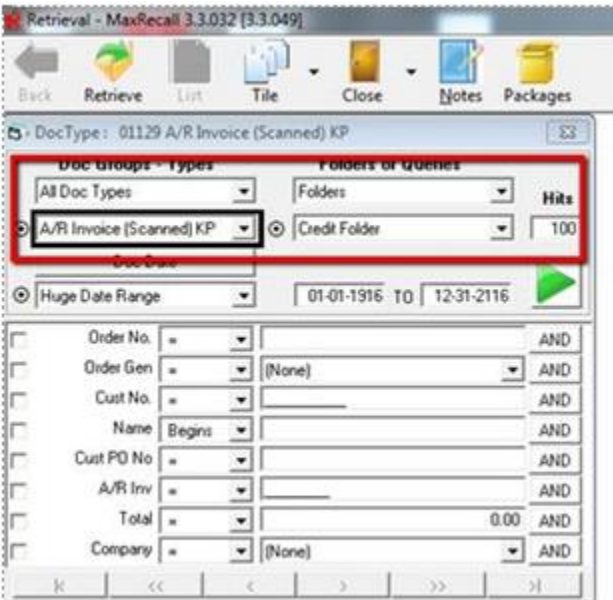When retrieving a scanned document from Max Recall, do the following:
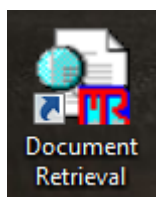
From your desktop on your computer, do the following:
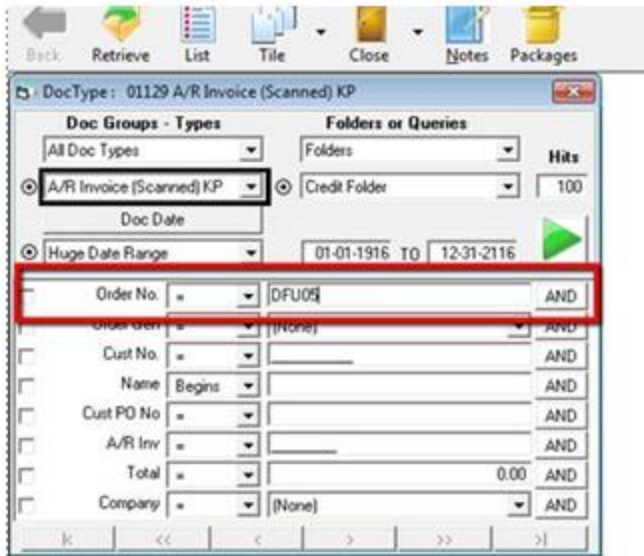
Click on the Document Retrieval Icon

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

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.

The screenshot above shows the results of a Max Recall search by order number

From this screen you can do the following
1. Simply view the signed copy on your computer monitor
2. Print a copy by pressing the print button on the tool bar at the top of your screen
3. Email a copy by pressing the email button on the tool bar at the top of your screen

Note: If the document has more than 1 page, but you are only seeing 1 page go to the next page and follow the instructions

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

Click on Include Duplicate Docs
Hit enter or click on green arrow
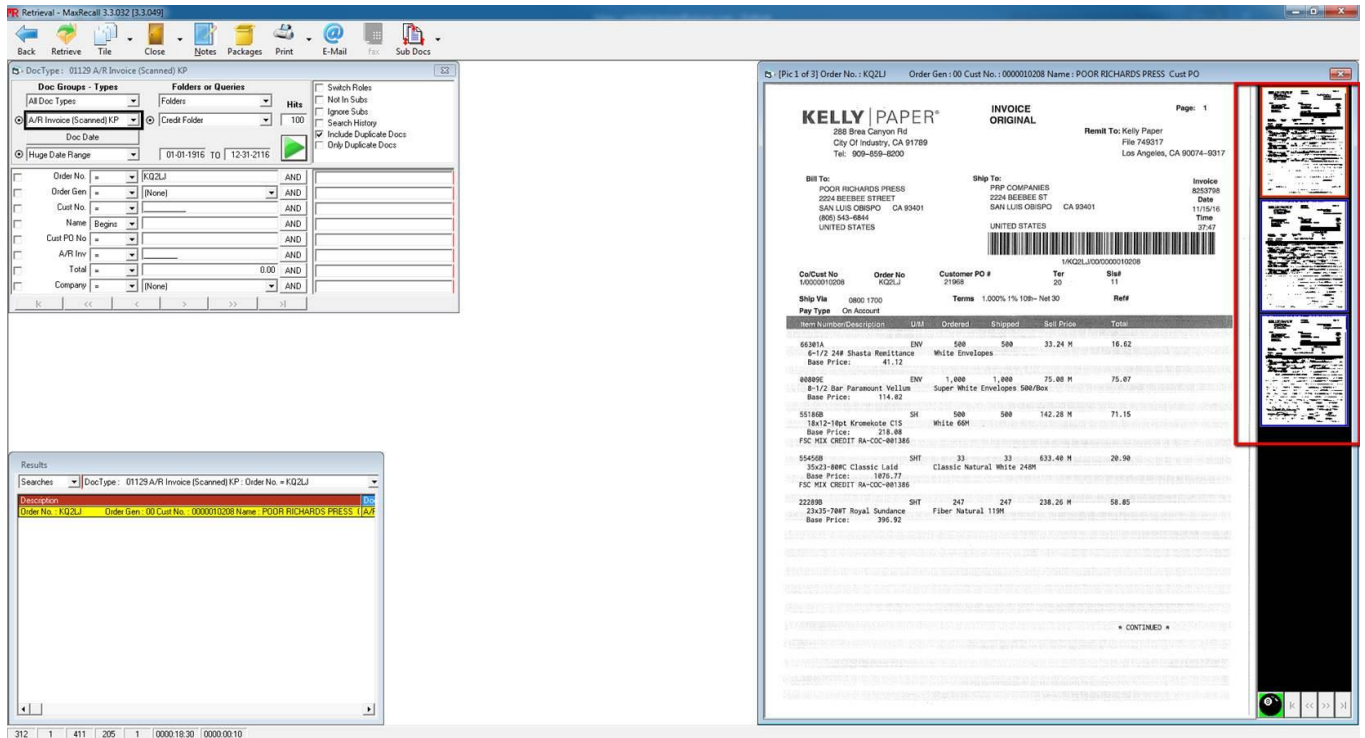
You now can see all pages associated with the document

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