



## Welcome to WebDocs

- WebDocs provides anytime access to search your purchase history and view or print your invoices, credits, and statements.
- Using WebDocs, you can choose to have your statements automatically emailed to you in addition to or in lieu of your mailed statement copy.
- Should you choose to receive emailed statements, you can also choose to automatically receive copies of all invoice and credit memos listed on the statement in question.
- WebDocs will not have records from our old imaging system. If you need paperwork for an invoice dated prior to 10/01/17 please give us a call.
- This guide was created to assist you in registering to use WebDocs and configuring the system to your personal preferences.
- Please give us a call if you encounter any problems registering or using WebDocs.

We are happy to help!

Credit Manager	Norma Gantt	(315) 731-5538	ngantt@usawood.com
IT manager	Bob Burt	(315) 731-5536	bburt@usawood.com

## Lets get started

To get to WebDocs, you can always find a link on our main website [www.jay-k.com](http://www.jay-k.com)  
The link is under the “Customer Support” heading of the navigation menu.

Alternatively if you would like to go WebDocs right now, please [click here](#).

Or copy and paste the link below

<https://webdocs.epicor.com/site/cgi-bin/3pp.pl/cname/jayk>

On the login page for WebDocs you will find a link to create your new account.

This will take you to the first step in self registration.



**USER ID:**

**PASSWORD:**

**Need to create a new account?** [Click here.](#)

**Forgot your user name or password?** [Click here](#)

This site is compatible with [Internet Explorer](#) 8.0 or higher,  
[Google Chrome](#) 30.0 or higher,  
and [Adobe Acrobat Reader](#) 9.0 or higher.  
[Jenkins build#813](#)

From here you just need to verify a few details from a JAY-K Lumber invoice you have that is **dated on or after 10/01/2017**. Enter the data requested and click "register".

**Self-registration**

Please enter information below. Your answers will be matched against **Invoicess** we have on file. If the information checks out, you can create a user account.

Enter your Jay K customer code -

Enter one of your Jay K invoice #'s -

Enter date of your selected Jay K invoice -

[Cancel](#) [Register >](#)

TERMS: CASH 10TH OF MONTH AFTER RECEIPT OF MERCHANDISE. MASTER CHARGE, VISA AND DISCOVER ARE THE ONLY INSTALLMENT PLANS OFFERED. PAST DUE ACCOUNTS ARE SUBJECT TO UP TO A 2% LATE CHARGE PER MONTH (AN ANNUAL PERCENTAGE UP TO 24%) MINIMUM CHARGE \$2.00. THE SIGNING OF THIS INVOICE BY BUYER SHALL CONSTITUTE A GRANT TO SELLER OF A SECURITY INTEREST IN THE AFOREMENTIONED ITEMS UNTIL FULL PAYMENT IS RECEIVED.

CUST CODE	CUSTOMER P.O. #	TERMS	STORE	ORDER #	ORDER DATE	SLSMN	INVOICE #	INVOICE DATE
SARUS			1			80	260921	09/28/17
ITEM CODE	QO	QS	DESCRIPTION		U/M	PRICE/UNIT	EXTENSION	
1 TREXSO	2	2	1X8X12' SPICE RUM		EACH	60.220	120.44	

If the window below appears, call Deb Kosek or Bob Burt to have your account on JAY-K WebDocs reset.

**A folder account already exists**

**Self-registration**

Please enter information below. Your answers will be matched against **Invoicess** we have on file. If the information checks out, you can create a user account.

Enter your Jay K customer code -

Enter one of your Jay K invoice #'s -

Enter date of your selected Jay K invoice -

[Cancel](#) [Register >](#)

Upon acceptance of the information provided, you will be prompted to create your account. Go ahead and click "proceed" to continue.

**Create Account**

You will now be asked to create an account. Once you create an account, you can use it to view your documents.

[Proceed >](#)

On the first page of account creation most of the fields are optional. Only the Name field is required. The name being requested on this page is your business name. Then click "Proceed"

**Please fill out the following information for your account.** Only name is required. The rest of the fields are optional.

*Name	Sample Customer
Address	
City	
State	▼
ZIP Code	
Phone:	
Fax:	
FEIN:	

[< Previous](#) [Cancel](#) [Proceed >](#)

On the second page of account creation is where you will choose your username and password for the login page.

**Please observe the password complexity rules noted in the picture below.**

**Please fill out the information below for your account.**

After registering, you can create other users and groups through the **Manage Users And Groups** wizard. You may change this information, except Login ID, throughout the **My Account** screen.

*First name	Sam
*Last name	Wise
Phone	315 - 555 - 1212
*E-mail	Samwise@gmail.com
Password hint	
*Login ID	Sam12Wise
*Password	.....
*Reconfirm Password	.....

[< Previous](#) [Cancel](#) [Create Account >](#)

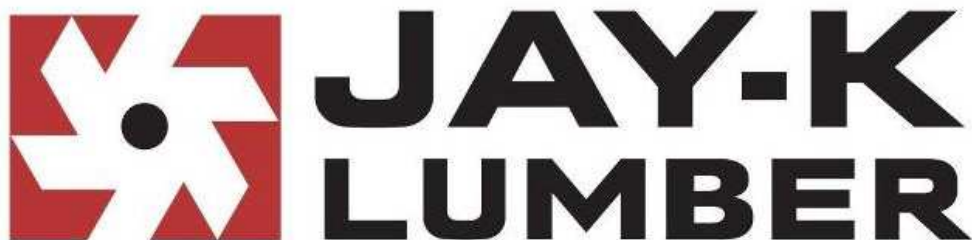
Please keep in mind the following password rules

The password must:

- Be at least 8 characters long
- Contain no repeating characters
- Contain at least one upper case and lower case character
- Contain at least one special character

!@#%&\*( )\_+.,^{}[]<>?

**Upon successful account creation, you will be returned to the login page which will now have a message in red indicating the successful account creation.**



Your account has been successfully created

USER ID:   
PASSWORD:

Need to create a new account? [Click here.](#)

Forgot your user name or password? [Click here](#)

This site is compatible with [Internet Explorer](#) 9.0 or higher and [Adobe Acrobat Reader](#) 6.0 or higher.

Please login using the username and password you chose in the previous step.

After logging in for the first time, you will be asked to choose from a few options for statement delivery.

These preferences can easily be changed at a later time if you change your mind.

**Document Delivery Preferences for Jay-K Lumber AR cabinet**

Set preferences on how you would like to receive various types of documents.

Statements

- I have no preference. Delivery method will be determined by the sender.
- I would like to receive this Document Type by the following method(s). If you don't pick any method, you won't be notified when a new document is available, but you can access the document via this web site.

Selecting “I have no preference” will mean you will continue to receive your monthly statement as you currently do, whether by e-mail or USPS.

You can choose to receive only a mailed paper statement, only an email statement or you may choose to receive both.

**Document Delivery Preferences for Jay-K Lumber AR cabinet**

Set preferences on how you would like to receive various types of documents.

Statements

I have no preference. Delivery method will be determined by the sender.

I would like to receive this Document Type by the following method(s). If you don't pick any method, you won't be notified when a new document is available, but you can access the document via this web site.

Email

**Email**

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Even if supporting documents are available, I do not want to receive them

I would like to receive all e-mails for linked folders as **combined** e-mail(s)

Do not send e-mails to linked folders

How would you like to receive Statements documents via e-mail?

As a PDF attachment to the e-mail

ZIP (password protected zip )

An e-mail that contains a link back to this site

Who would you like to receive the e-mail?

Stat, Robert [bob@gmail.com]

Additional email recipients (separate email addresses by semi-colon)

Save Document Delivery Options

By default with email statements, the WebDocs system will also send copies of all invoices and credit memos associated with the statement in question. If you do not want to automatically receive invoice and credit memos with your emailed statement, please check the box that states **“Even if supporting documents as available, I do not want to receive them”**

You will notice there are also toggles to choose between receiving the emailed statement as a PDF attached to the email or instead receiving a link to view the statement online. Should you choose to receive your statement as a PDF you can also set a password to protect it from unauthorized viewing, which may be useful if the file will be going to a shared email account.

Make sure you check the box for the email address list in the box titled “Who would like to receive the e-mail?”

If you would like an additional person to receive the statement, enter the email in the “Additional recipients email” box.

Pictured below is the page you will normally see upon logging into WebDocs from now on.

The screenshot shows a web application interface with a top navigation bar containing buttons for 'Search', 'Utilities', 'Delivery', 'Folders', and 'Logout'. The 'Search' button is highlighted in blue. Below the navigation bar, the page is divided into two main sections. The left section contains search filters: 'Document Type' with options for 'Invoice' (checked), 'Credit', and 'Statement'; 'Document Indexes' with fields for 'Date' (From and To), 'Invoice/Credit', 'Release #', 'PO #', and 'Part #'; and an 'Advanced search' checkbox. The right section displays a red message: '\*Please enter search criteria and click the Search button'. At the bottom of the left section, there are 'Clear' and 'Search' buttons.

There are checkboxes towards the top left side to toggle the document type(s) you are searching for. You can enter as much or as little detail as you like to narrow your search.

Pictured below is a sample search for invoices dated between 08/22/16 and 08/31/16 with a purchase order of "Test". To view an individual invoice you can click the magnifying glass icon next to the line in question, this will open the invoice in a new window. If you would like to view all current search results at once, you may click the magnifying glass with multiple pages icon to combine them into one file which will open in a new window

Magnifying glass for multiple pages

Maignifying glass for single page

Account #	Account Name	Invoice/Credit #	# Pages	Release #	Date	PO #
99966	SAMPLE NAME	011V0002	1	01AD000002	08/31/2016	TEST
99966	SAMPLE NAME	011V0001	1	01AD000001	08/31/2016	TEST



Below we have an example of a broader search.

The search pictured below is looking for all invoices between 08/22/16 and 08/31/16 regardless of what the purchase order was.

To view a specific selection of invoices from the search results, you may highlight multiple lines (shown below in blue) by holding down the CTRL key on your keyboard while you click on the ones you want.

Once you have highlighted your selections, you can again click the magnifying glass with multiple pages icon to open only the selected invoices together in a new window.

Account #	Account Name	Invoice/Credit	# Pages	Release #	Date
99999	SAMPLE NAME	01IV0010	2	01AB0000010	08/31/2016
99999	SAMPLE NAME	01IV0009	2	01AB0000009	08/31/2016
99999	SAMPLE NAME	01IV0008	1	01AB0000008	08/31/2016
99999	SAMPLE NAME	01IV0007	1	01AB0000007	08/26/2016
99999	SAMPLE NAME	01IV0006	2	01AB0000006	08/26/2016
99999	SAMPLE NAME	01IV0005	1	01AB0000005	08/25/2016
99999	SAMPLE NAME	01IV0004	1	01AB0000004	08/25/2016
99999	SAMPLE NAME	01IV0003	2	01AB0000003	08/25/2016
99999	SAMPLE NAME	01IV0002	2	01AB0000002	08/24/2016
99999	SAMPLE NAME	01IV0001	1	01AB0000001	08/24/2016

To print specific signed or computer generated invoices, change the drop down box from “Grid” view to “Thumbnail” view. You will now see each computer generated invoice with the scanned copy if available to its right.

Select the specific invoices to print using “Ctrl” left mouse click. Select as many as needed. The documents selected will be outlined in red.

Near the lower right corner of the thumbnail window, left click the adobe reader icon. This will prepare and view all the selected documents in a pdf reader window. From there you can save the pages or print them.

The JAY-K accounting department scans invoices and credits daily. So there may be a day or two delay, in us getting the signature copy into our system.