



## Archiving of documents

From now on EuroFib for Windows supports the automatic archiving of all reminders, balance confirmations, avisos and invoices (incl. interests/arrears account current) for your customers/suppliers.

Additional you are able to add other documents (offers, contracts etc.) manually and open all the documents from the basic data of debtors/creditors directly.

### Activate the automatic archiving process:

You are able to activate the automatic archiving of the created documents within the option/settings for the following modules:

- **Reminder** (Remind => Reminder => Options)

- **Balance confirmation** (Remind => Balance confirmations => Options)

- **Avisos** (Incoming payments/Outgoing payments => Aviso => Settings)



- **Invoice** (Basic data => Company index => Voucher types)

- **Interests/arrears** (Remind => Interests/arrears Account current => Options)

- **UID number level 2** (Basic data => Company index => Tax definitions => Tax office)



You **have to use type "Crystal Reports"** for the creation in each module.  
Otherwise you won't be able to activate the automatic archiving.

In the field „**path**“ you can enter the desired path for saving the documents later.  
(PDF-files)

If the field is empty, the system will use the **default-path** of the accounting software.  
**(PwEuro\Programm\Temp\Archiv\)**

From the time you activate the archiving all documents will be saved in the desired folder as a PDF file and will be assigned to the debtor/creditor automatically.

### Structure of the file name:

Type (4 digits)	0001	Reminder
	0002	Balance confirmation
	0003	Aviso
	0004	Invoices
	0005	Interests/arrears Account current
	0006	UID number check - level 2

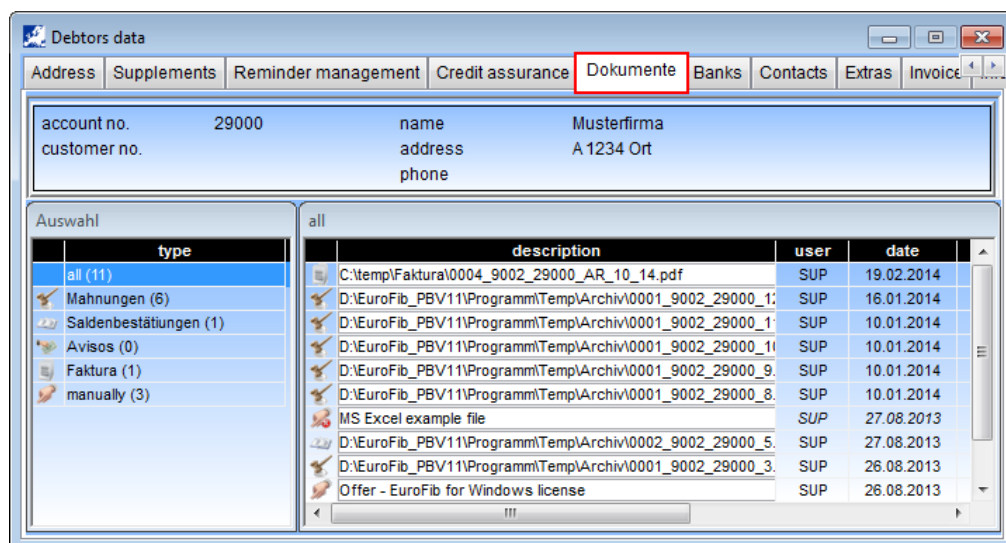
after that client, account number and a counter.

Example: 0001\_9002\_29000\_1.pdf => Reminder in client 9002 from account 29000

### Open of archived documents









Basic data => Accounts data => Debtor, Creditor

On tabpage „documents“ you will see all automatic saved documents – grouped by the modules.





In the left window „type“ you are able to choose from the following menu items:

-  **All**
-  **Reminder**
-  **Balance confirmations**
-  **Avisos**
-  **Invoices**
-  **Interests/arrears account current**
-  **UID number check – level 2**
-  **Manual (see below)**

According to your choice you will see all documents or only these documents of the selected area in the right window.

With a click on the right mouse button you are able to **sort** all displayed **columns**.

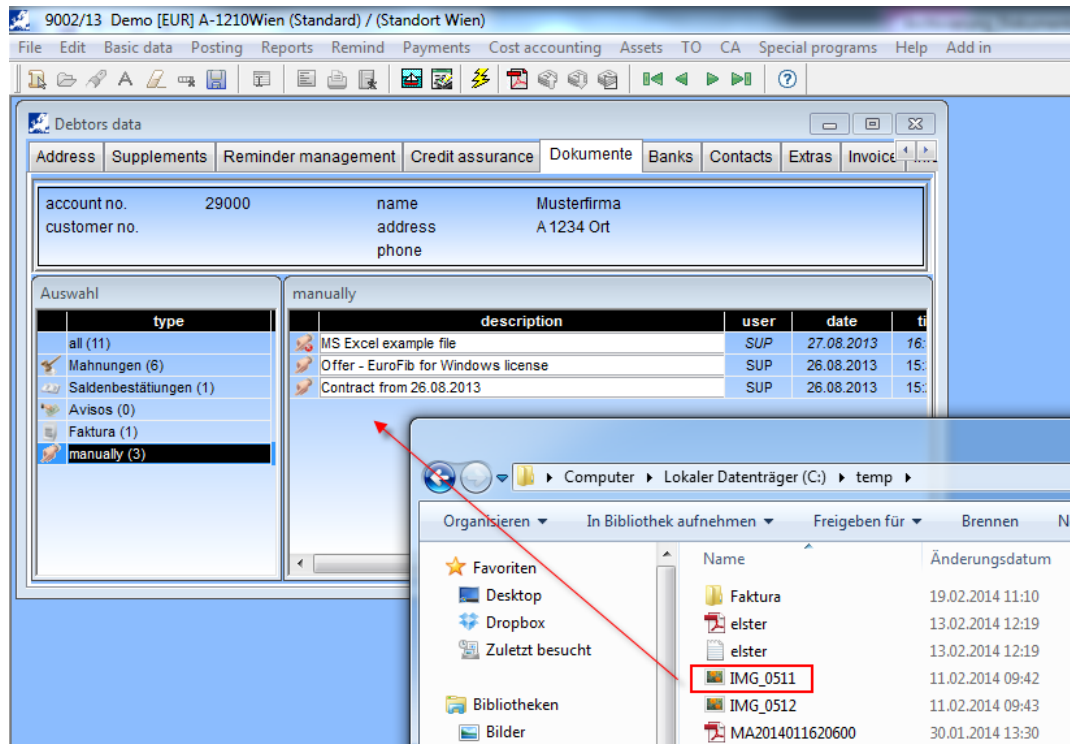
With a **double click** on the desired document, the file will be opened.

### **Add other documents manually**

Another „type“ in the list is „manual“.

Here you will see all documents **you added manually to the desired debtor/creditor** (e.g. from Windows Explorer). To do so, just pull the desired document via **Drag & Drop** to the right window.

**All file extensions are possible! (DOC, CSV, TXT, XLS, PDF, MSG, JPG, BMP, ...)**





Now you can enter a **description** for this document – the path will be displayed in column “filename” on the right in addition.

To see all columns on the screen (without scrolling) you are able to open the window to the right side.

You can delete a manual added document with **File => Delete**.

manually					
	description	user	date	time	file name
	MS Excel example file	SUP	27.08.2013	16:54:09	C:\temp\example.xls
	Offer - EuroFib for Windows license	SUP	26.08.2013	15:33:44	
	Contract from 26.08.2013	SUP	26.08.2013	15:23:42	

If you **rename, move or delete a file from your filesystem**, the document in EuroFib will be displayed with **another icon** and all informations are displayed in **italic font**.

all					
	description	user	date	time	file name
	MS Excel example file	SUP	27.08.2013	16:54:09	C:\temp\example.xls
	D:\EuroFib_PBV11\Programm\Temp\Archiv\0002_9002_29000_5_	SUP	27.08.2013	13:18:24	
	D:\EuroFib_PBV11\Programm\Temp\Archiv\0001_9002_29000_3_	SUP	26.08.2013	15:35:57	

### Document has been moved:

Click the right mouse button on your document and choose „**Documents – Change path**“.

Debitor - Dokumente (Anpassen Pfad)

information

manually

File: C:\temp\example.xls

description: MS Excel example file

change

path: C:\temp\

neuer Pfad: C:\temp\_new\

type: aktuellen Eintrag

Ok

aktuellen Eintrag  
alle Einträge mit aktueller Art  
alle Einträge

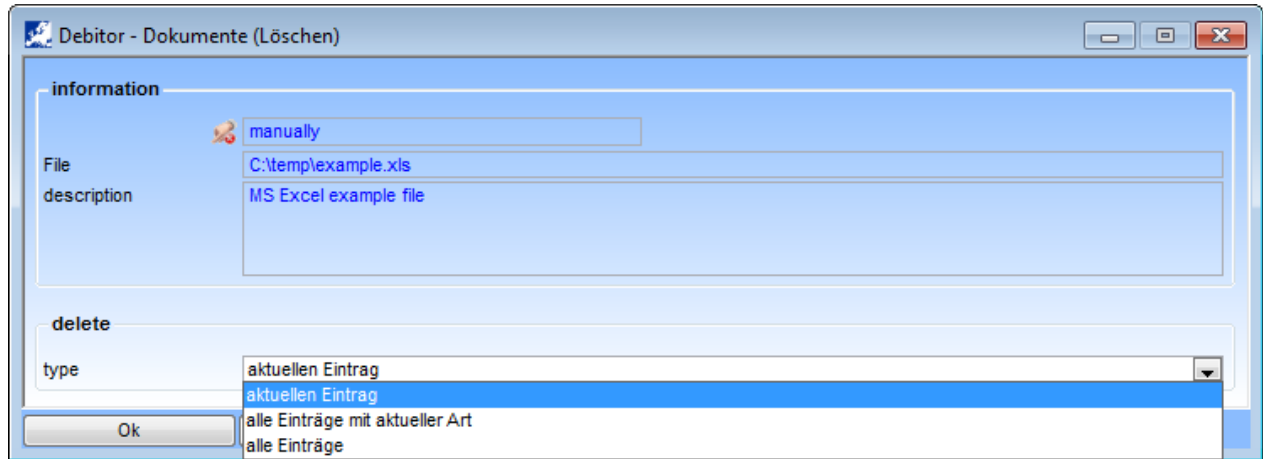
Here you are able to enter the new path and assign this path-change to the following documents:

- Current selected document
- All documents from the chosen type will be changed to the new path
- All documents of this debtor/creditor will be changed to the new path



### **Document has been deleted:**

Click the right mouse button on your document and choose „**Documents – Delete**“.



- Delete selected entry
- Delete all italic entries from the chosen type
- Delete all italic entries from the chosen debtor/creditor

### **Advice:**

EuroFib for Windows doesn't delete any files– it just deletes the entry from tabpage „documents“.





Additional it's also possible to archive your **STS** documents.

Basic data => Company index => Tax definitions => Tax office

**Tax office**

tax office FAOnLine Dokumente

**selection of tax office**

number 1

title Tax office AT

cou. A

street Vordere Zollamtsstrasse 22

post code/place 1030 Wien

fax

phone

main company

Employees

**Internal selection**

tax office number 01

TONo/TaxNo Tax adv.

tax number 1234578

section

contact

date for STS posting date

Exchange average

**form**

tax form Austria

STS form Crystal Reports ab 2013/01 Österreich

file name D:\EuroFib\Programm\CRReports\UVAAT201301.rpt

recalc of taxes accor ☒ Calculation basis acc. tax

chamber contribution ,000 promill

bank account

clearing account

Archivieren ☒ C:\temp\UVA\

**Tax representative**

Mailing address

You can open your already archived documents from tabpage "Documents".

**Tax office**

tax office FAOnLine Dokumente

number 1 Tax office AT

tax office number 01

tax number 1234578

contact

description	user	date	time	
201302	SUP	10.09.2013	14:07:30	C:\temp\UVA\0001
201301	SUP	10.09.2013	14:07:05	C:\temp\UVA\0001