

Scanning Client Documents to Server

[Getting Started](#)

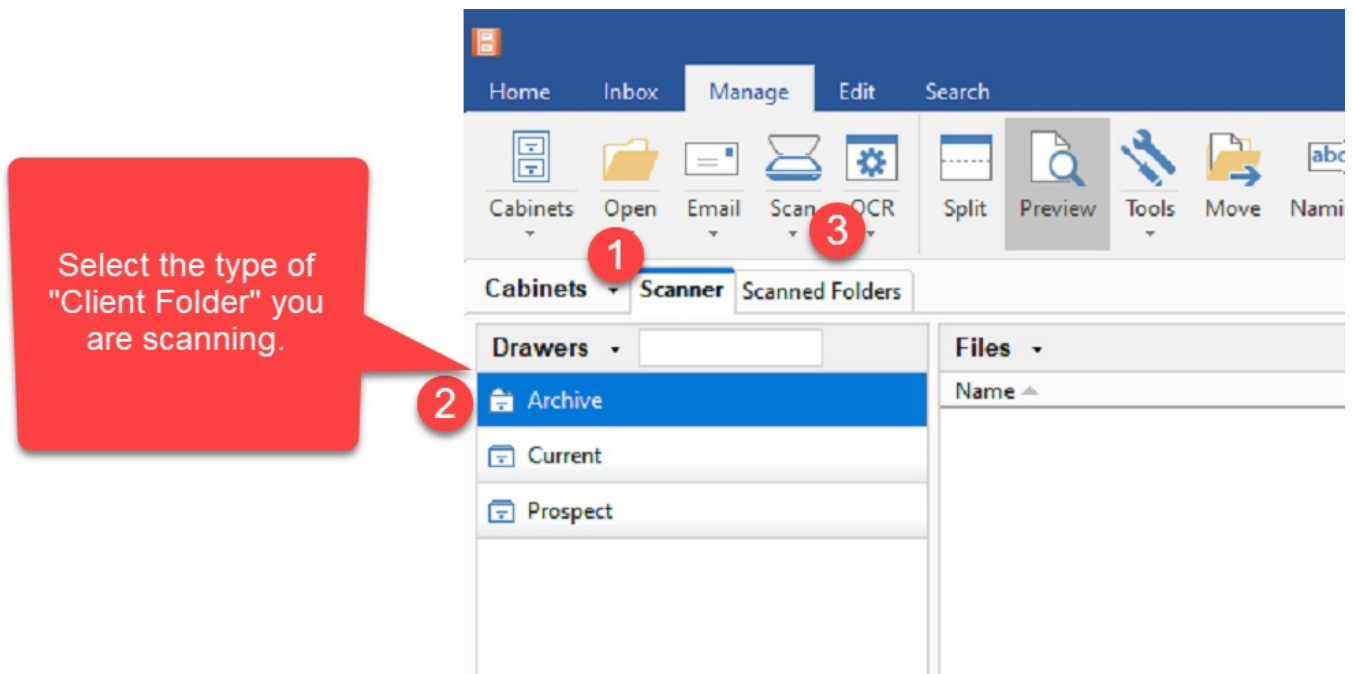
- Use Computer with Panasonic Scanner
 - QuikBox FileCenter Software
 - QuikBox Office Appliance
 - Server
-

[Document Preparation](#)

1. Make sure the scanner glass is clean. Use a microfibre cloth to scan both scan heads.
2. Ensure that you have all pages of all documents are in the correct page sequence.
3. Ensure that your pages will not jam in the scanner:
 - smooth all pages
 - remove all staples
 - remove all paper clips



[Pick Where to Scan](#)



1. Go to **[Manage]** tab >> Select **[Scanner]**
2. Select the Type of Client Folder you are Scanning.
 - Archive
 - Current
 - Prospect
3. Select the **[Scan]** button on the ribbon bar>> **[New Scan]**

Name your Scan File

New Scan

Action

☒ New Scan
 ☐ Scan to Word
 ☐ Scan toEmail
☐ Append Scan
 ☐ Prepend Scan
 ☐ Insert After Page

Save As

1 **FileName:** 2012-3006 Trinity Pass Ct-Stevenson ... PDF

Keywords: ... **Bookmark:** ...

Options

Scanner: Panasonic KV-S1057C/27C MK2(USB) **Select**

Profile: HME **New Delete Save**

Scan Adjust OCR Separate Advanced MetaData

Type: PDF ☒ Use Scanner Dialog ☐ Auto Crop Pages
Color: Black & White ☐ Use Flat Bed ☐ Deskew Pages
DPI: 300 X 300 ☐ Scanner Duplex ☐ Invert Pages
Paper: US Letter ☐ Manual Duplex ☐ Prompt for More
Order: Normal

[Help](#)
[Scanning Problems?](#)
2 **Start Scan** **Cancel**

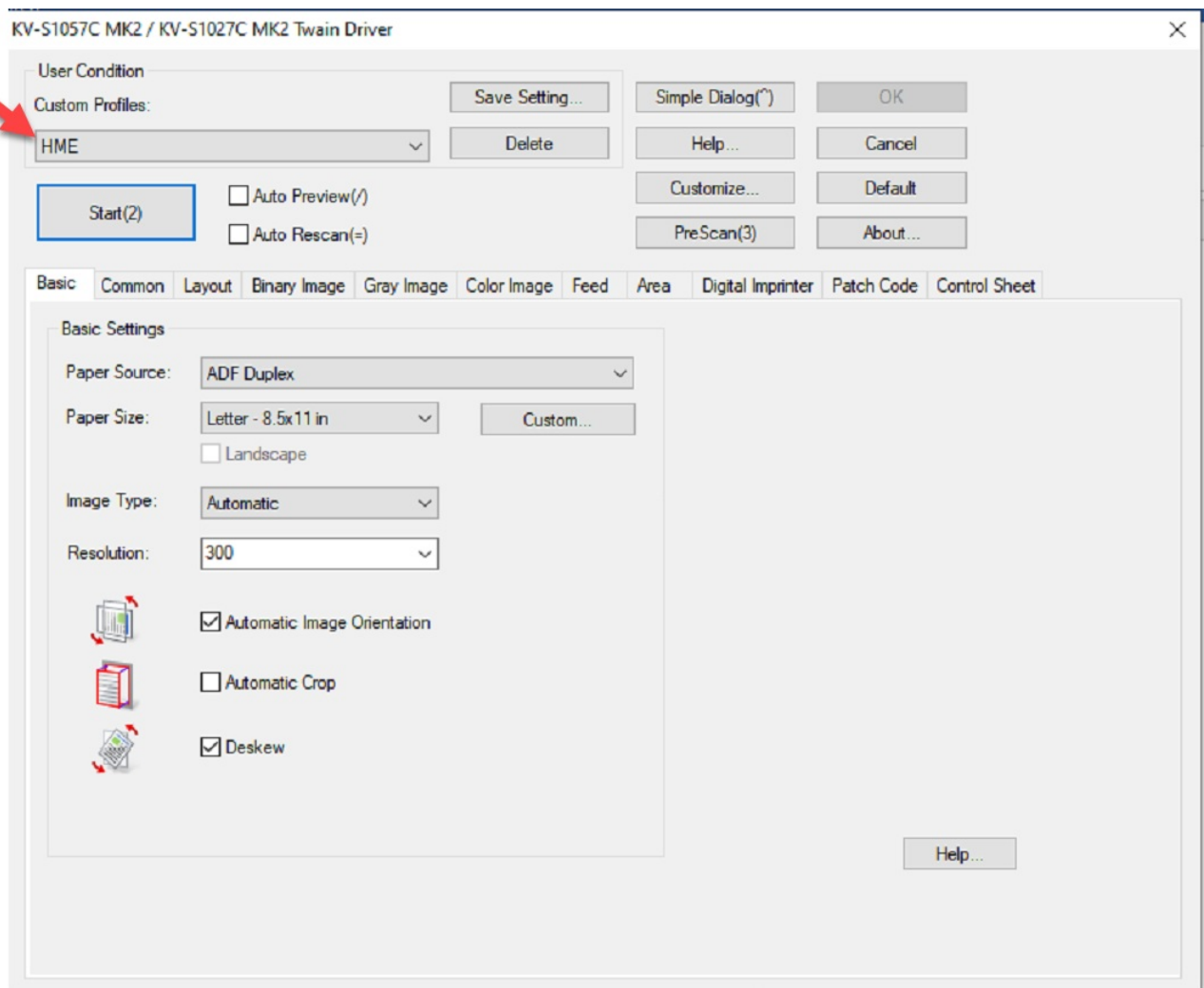
Add the "Year of Service" - "Street Address" - "Last Name"

4. Give the new file a name [FileName]. Be sure to follow the Naming Options as configured on FileCenter - Add "Year of Service" - "Street Address" - "Last Name"

5. Ensure that [HME] is the Profile used for scanning

6. Select [Start Scan]

Select Your Panasonic Scan Profile



7. The Panasonic scanner will launch a user interface - select the correct scanning profile

Document Processing

Files are processed by the QuikBox. It may take 3 to 10 minutes for it to show up on the server depending on the scanned document's page length and content. The server has been set up to index the scanned PDFs content, thus, making document searches fast and easy from any networked Windows computer. Now Users can find documents by searching by any document content. Content search has been configured on the server for PDFs, Word, Excel, & PowerPoint documents.

Troubleshooting

⚠ If lines are on the scanned images, clean the scan heads. This should be done regularly. Use a microfiber cloth to scan both scan heads.

🔄Revision #8

★Created 19 November 2021 20:25:50 by Admin

✍Updated 20 November 2021 00:28:02 by Admin