

Scanning Client Documents to Server

Getting Started

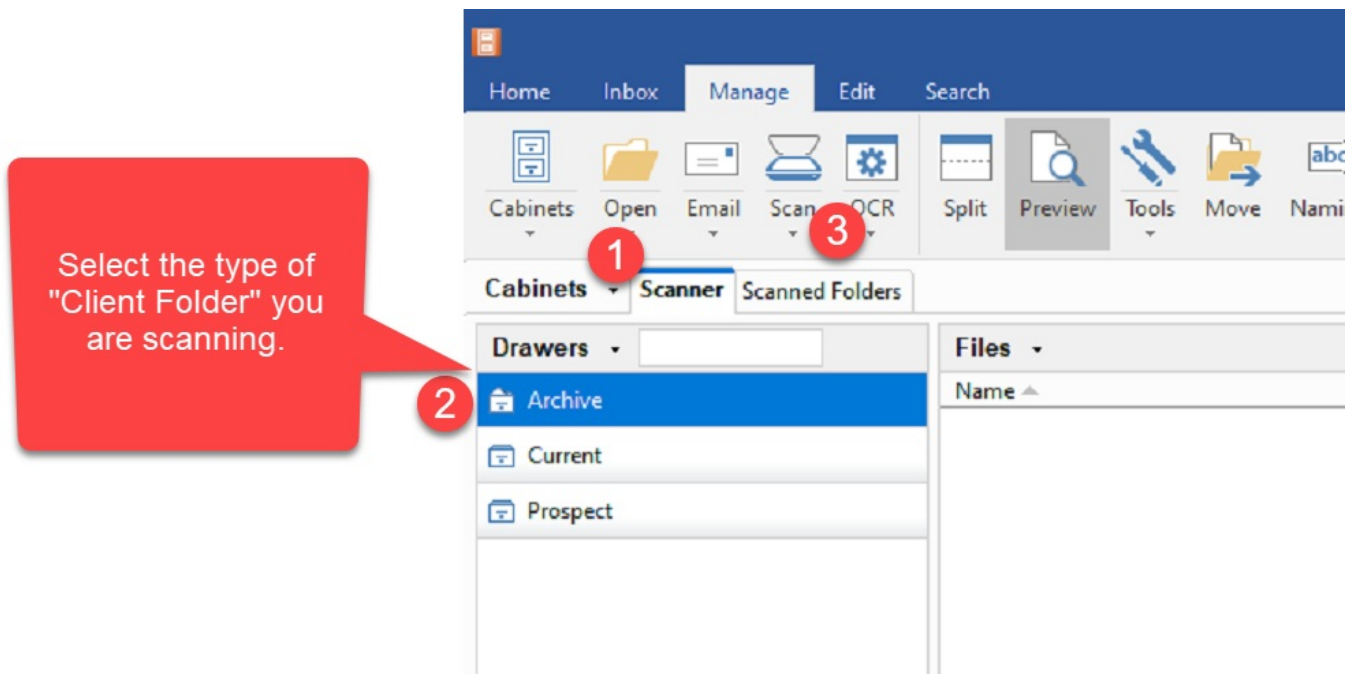
- Use Computer with Panasonic Scanner
 - QuikBox FileCenter Software
 - QuikBox Office Appliance
 - Server
-

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)

Profile: HME

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

[Scanning Problems?](#)

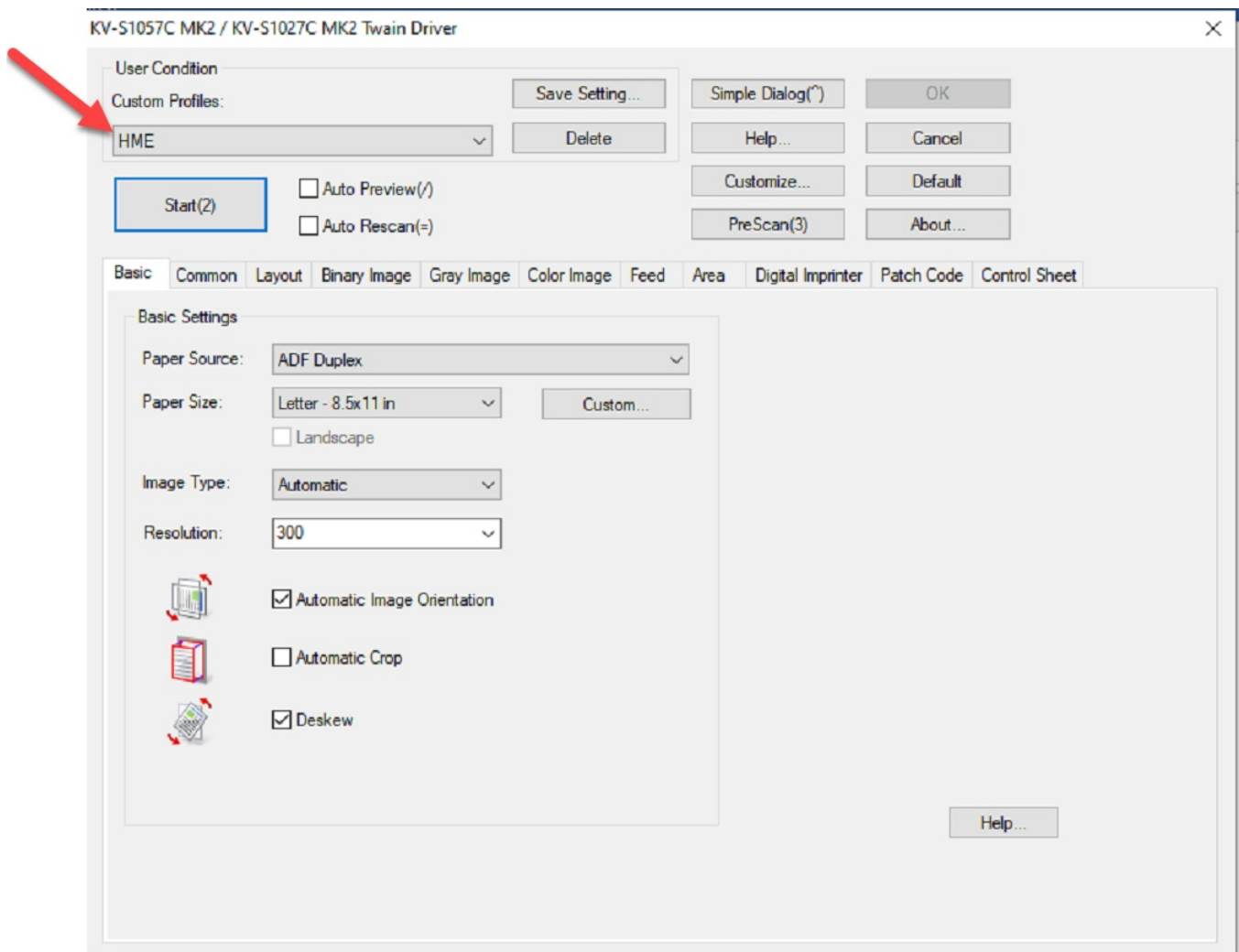
Add the "Year of Service" - "Street Address" - "Last Name"

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.

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