Customer Explorer Documents-Scan

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Follow the steps below to scan a document to a Customer, Site or System Documents list. The right-click Document functions shown on Customer Documents are the same for Site and System Documents. The process described below applies to scanning Documents for Customers, Sites and Systems. Make certain to attached documents to the appropriate area of the customer tree.

Document Scanning may only be done if your company has purchased this add-on feature. Follow the steps below to Scan and add a document to the General Documents list.
Note: The scanning illustrations assume the User performing Scans has a scanning device installed at their workstation.

1. Highlight the Documents option from the customer tree; right-click and select the Scan New Document option.

2. The SedonaScan interface will be displayed. If this is the first time a document is being scanned into SedonaDocs, you will need to select the device installed at your workstation.

a. From the SedonaScan form, click on the Setup button at the lower left of the form.

b. The Select Source form will be displayed. Click on the scanning device you will be using, then click on the Select button. Click on the in the upper right of the form to return to the SedonaScan form.

3. On the SedonaScan form, type in the name for the File, a Description, select the appropriate Security Level from the drop-down list, and finally, select the appropriate Document Type from the drop-down list. When finished filling out the form, click on the Scan button located at the lower right of the SedonaScan form.
The interface of your scanning device will be launched.

4. Your Scanner device will begin scanning the document. Once the scanning has completed, a pop-up message will appear stating the scan is complete along with the number of pages that were successfully scanned and saved. Follow the same process to scan additional documents.