

Using Document Scanner App in



Your Business • See It • Manage It • Expand It

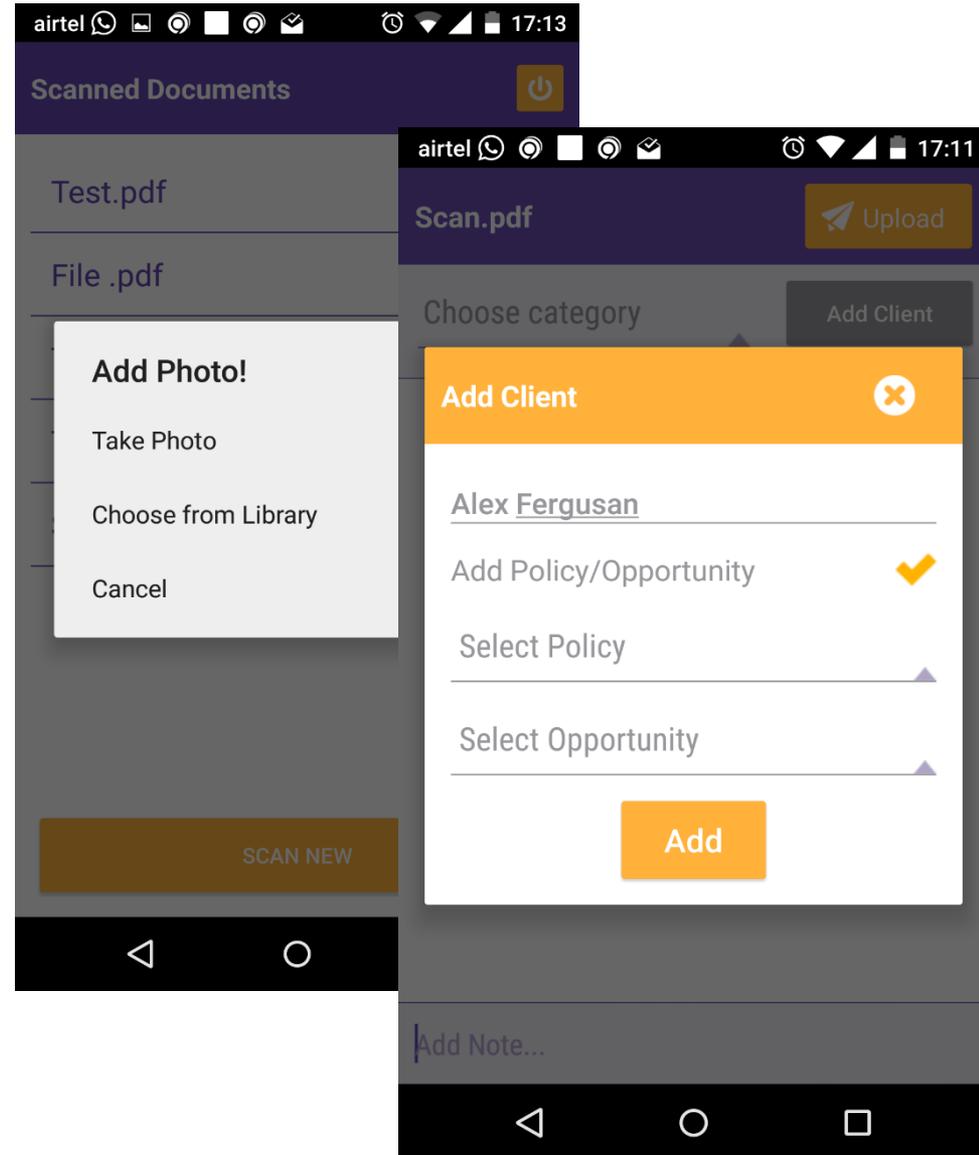
An user guide to the new Document Scanner App



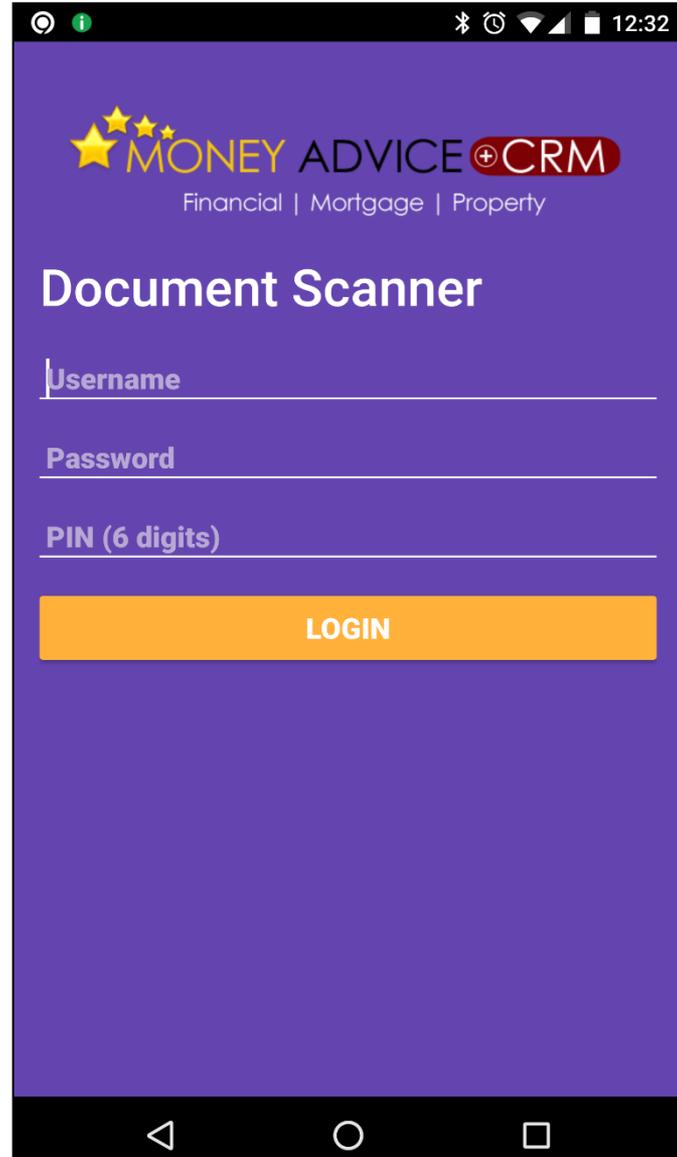
Document Scanner App

INTEGRATED WITH CAMSCANNER APP, THIS MOBILE APP PROVIDES A WAY FOR THE USERS TO SCAN IMPORTANT DOCUMENTS USING THEIR PHONE

- ✓ The **Camscanner** app provides options to enhance the scanned image.
- ✓ Option to scan multiple pages and create a single PDF document of all the scanned images.
- ✓ Users are able to search the client bank in **Money Advice + CRM** and associate the documents to a particular client / policy / opportunity.
- ✓ The PDF of the scanned images created can also be shared using email.



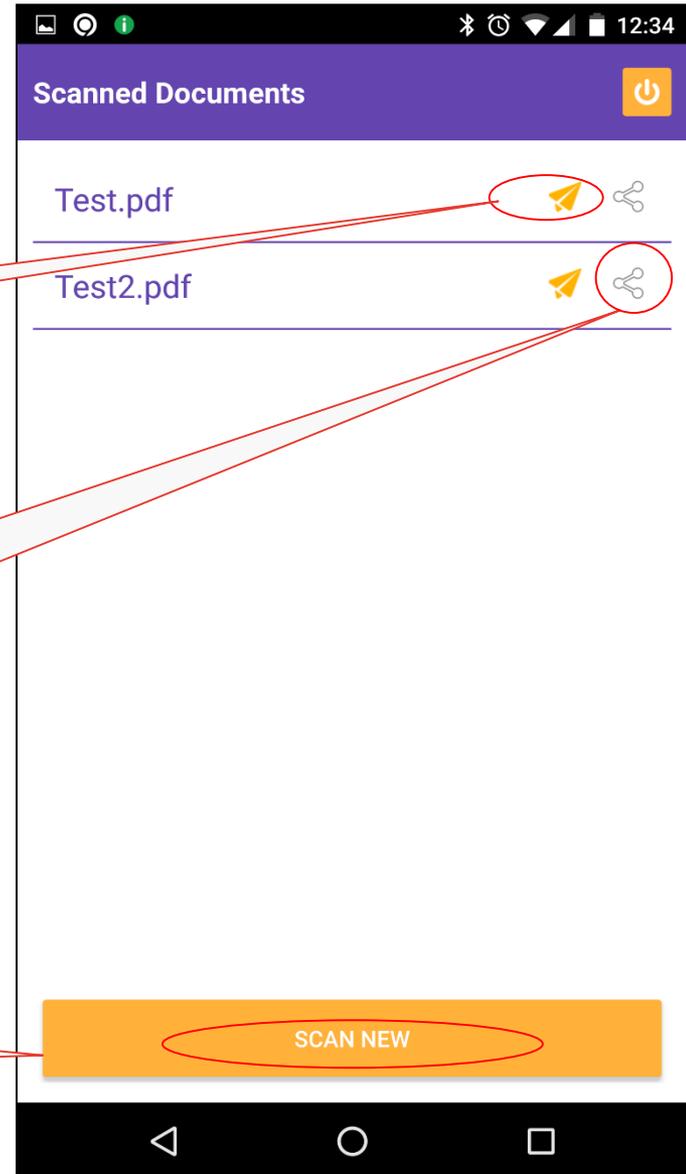
An authorized user of Money Advice +CRM who have the license for the document scanner app can login using their usual Money Advice credentials



The screenshot shows the login interface of the Money Advice +CRM Document Scanner app. The app's logo and tagline "Financial | Mortgage | Property" are displayed at the top. Below the logo, the title "Document Scanner" is prominently shown. The login form consists of three input fields: "Username", "Password", and "PIN (6 digits)". A large orange "LOGIN" button is positioned below the input fields. The screen also displays standard Android status bar icons at the top and navigation icons at the bottom.

Start screen

You can view the list of scanned documents already created and can also add a new scanned document from this screen.



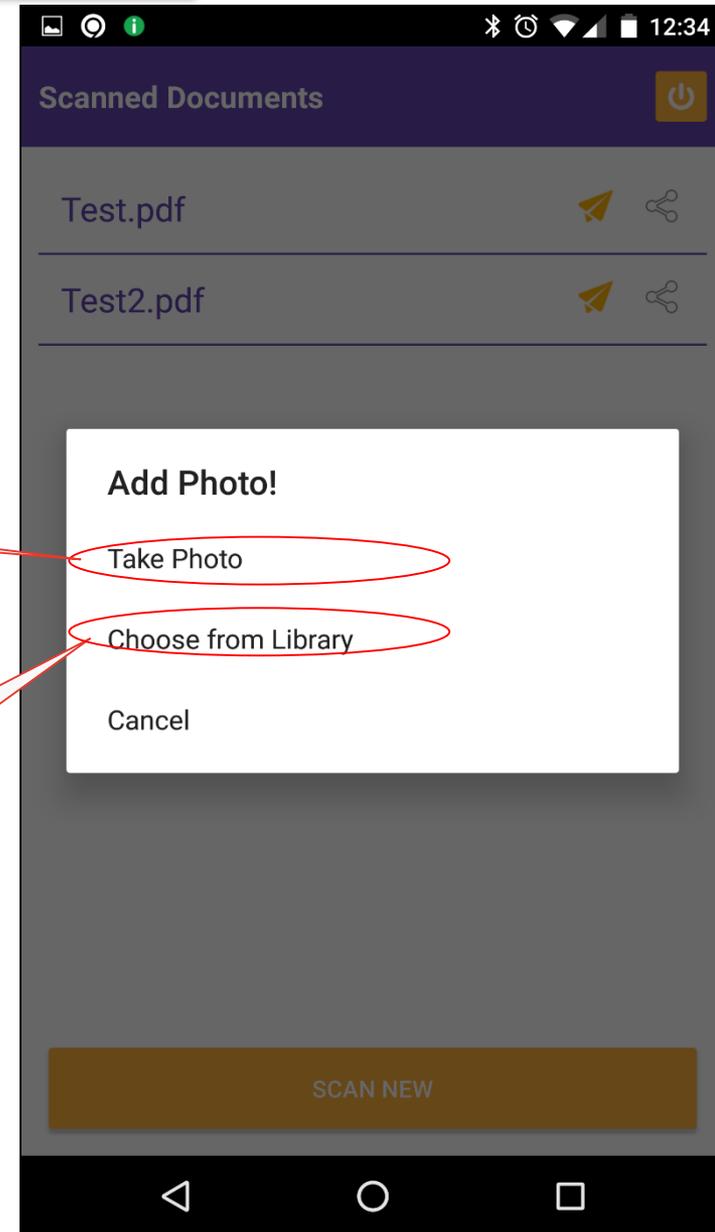
Click to upload an existing scanned document to Money Advice

Click to share an existing scanned document to other apps (like email etc.) in Android or to Air drop in iOS.

Click to create a new scanned document

Scan a new document

Click to activate the camera and take a new picture of the document that you want to scan to Money Advice.



Click to use an image that you already have in the phone and upload it as a scanned document to Money Advice.

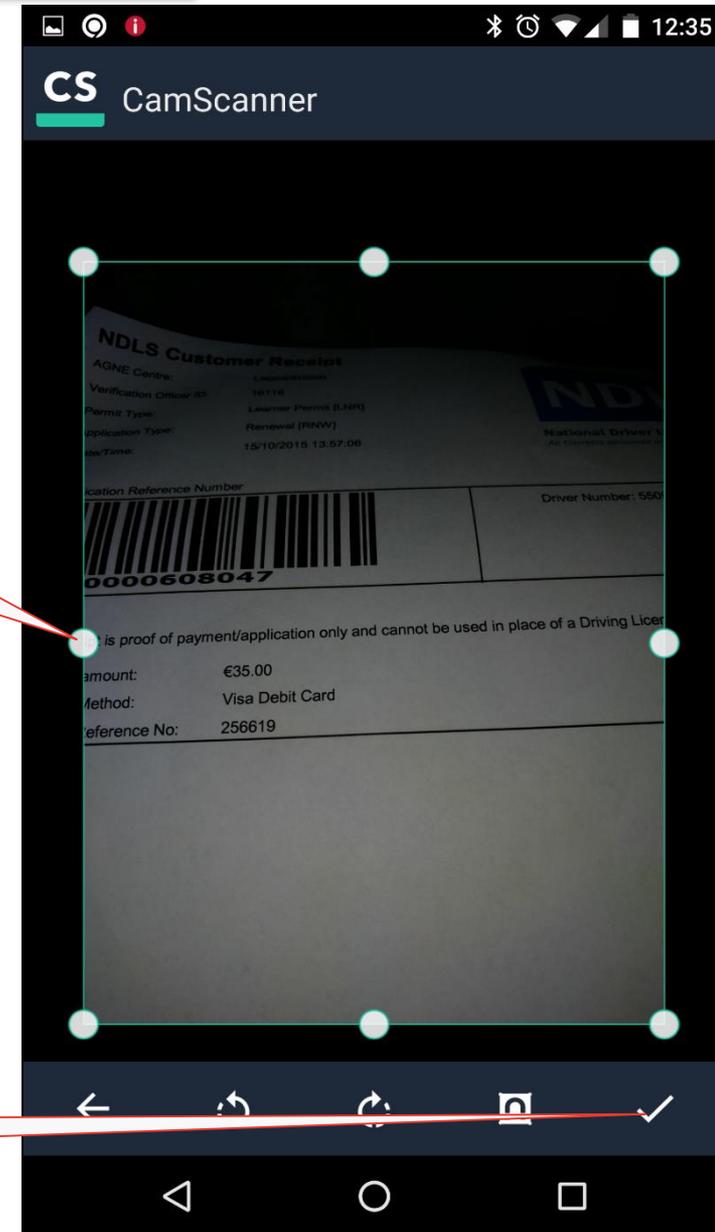
Scan a new document .contd

You can preview the picture taken in CamScanner app. If you do not have the app installed you will be prompted to download and install the app before proceeding.

You can use the CamScanner app to crop the image and get rid of any unwanted items that may have been included in the picture.

Click and drag these to adjust the size.

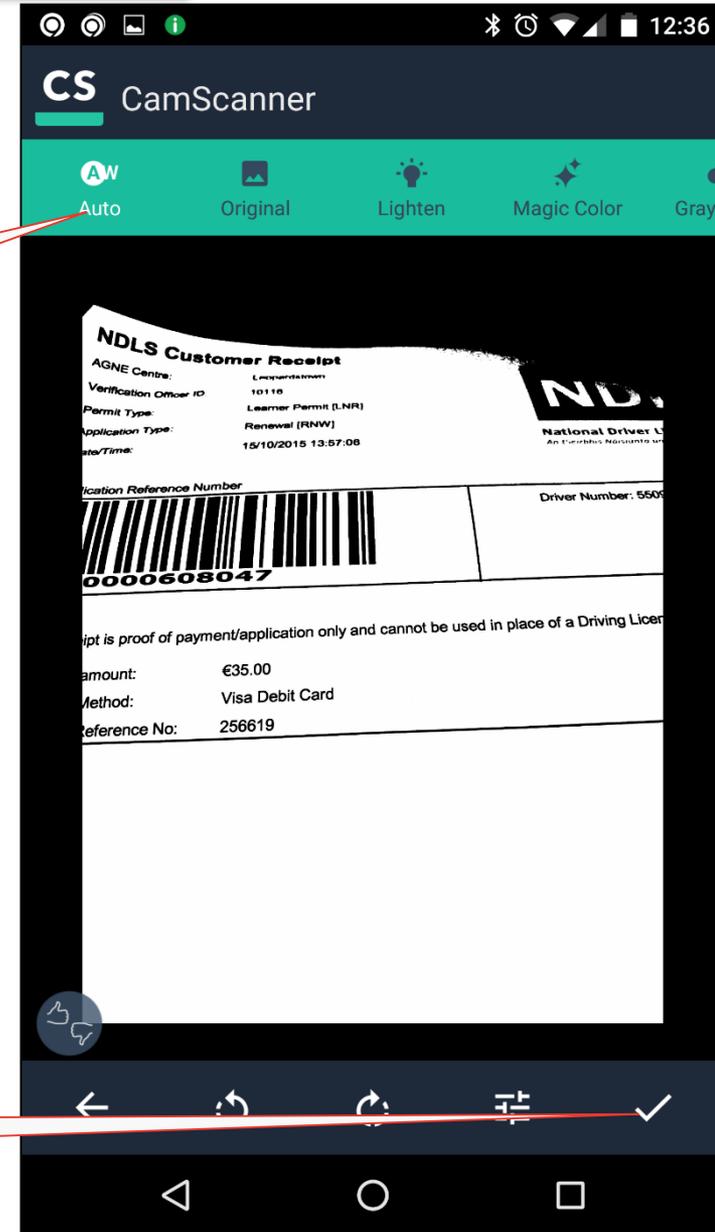
Once satisfied with the image, click here to confirm the changes.



Scan a new document .contd

You can use the CamScanner app to further enhance the image using the various enhance modes available or the smart enhance of the image done through Auto mode.

Once satisfied with the image, click here to confirm the changes.

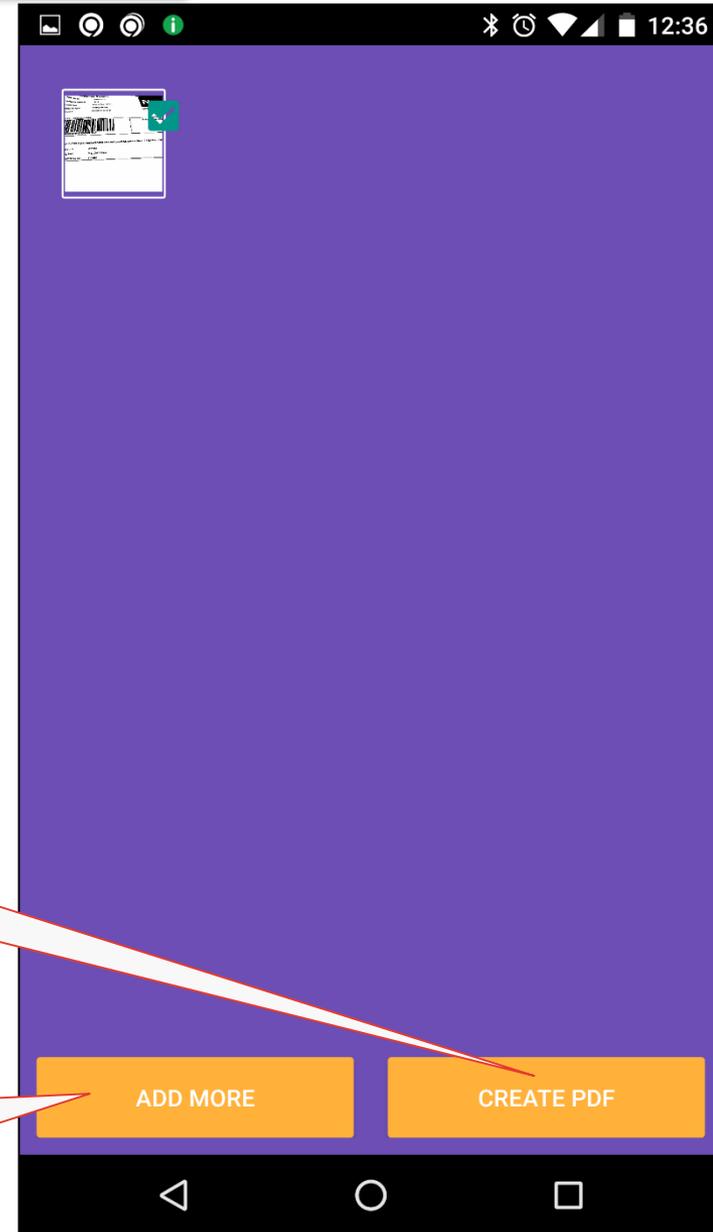


Scan a new document .contd

You can scan multiple page documents also using the app.

Click on this button to create a PDF document out of the images that have been scanned. You can chose to not include a particular page in the PDF by de-selecting the image from the preview above.

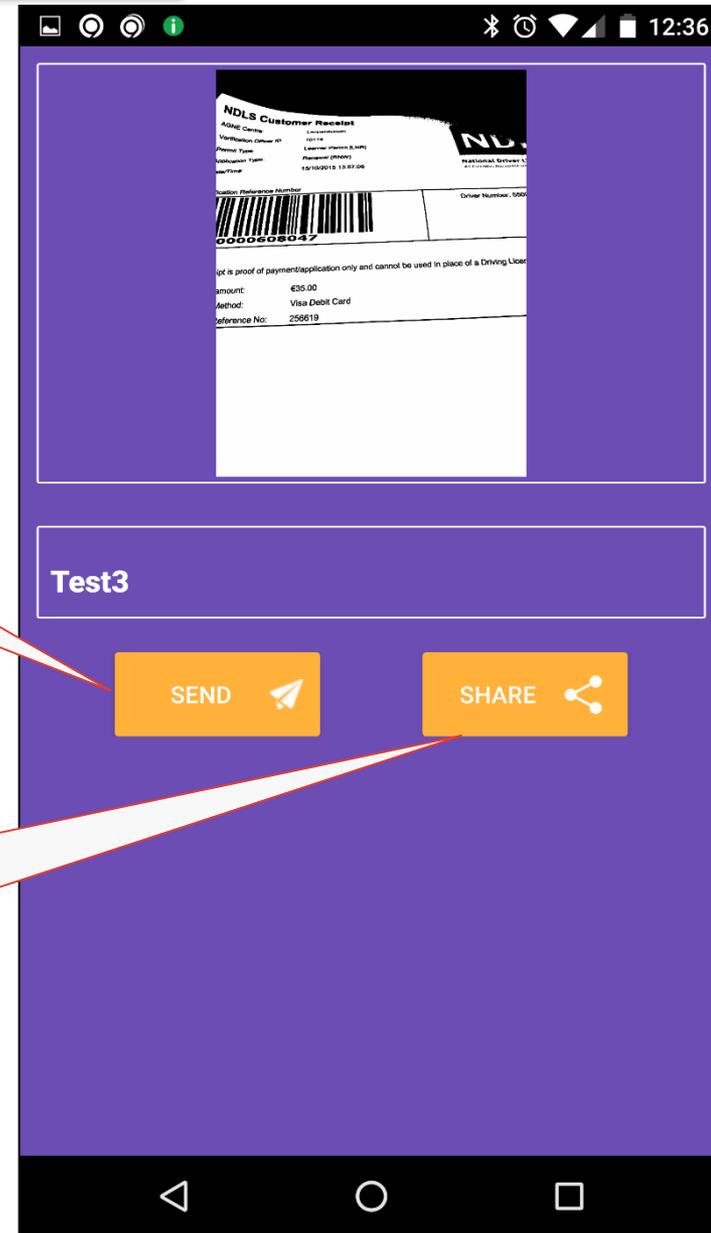
To add more pages of a multi page document, click on this button. The process detailed earlier for scanning an image would repeat. You can add as many number of pages by repeating the process.



Scan a new document .contd

Once you enter a name for the PDF file generated you can then click on this button to Upload the document to Money Advice indexed to a specific client.

Once you enter a name for the PDF file generated you can then click on this button to share the document with other apps like email etc in Android or send it to Air drop in iOS.



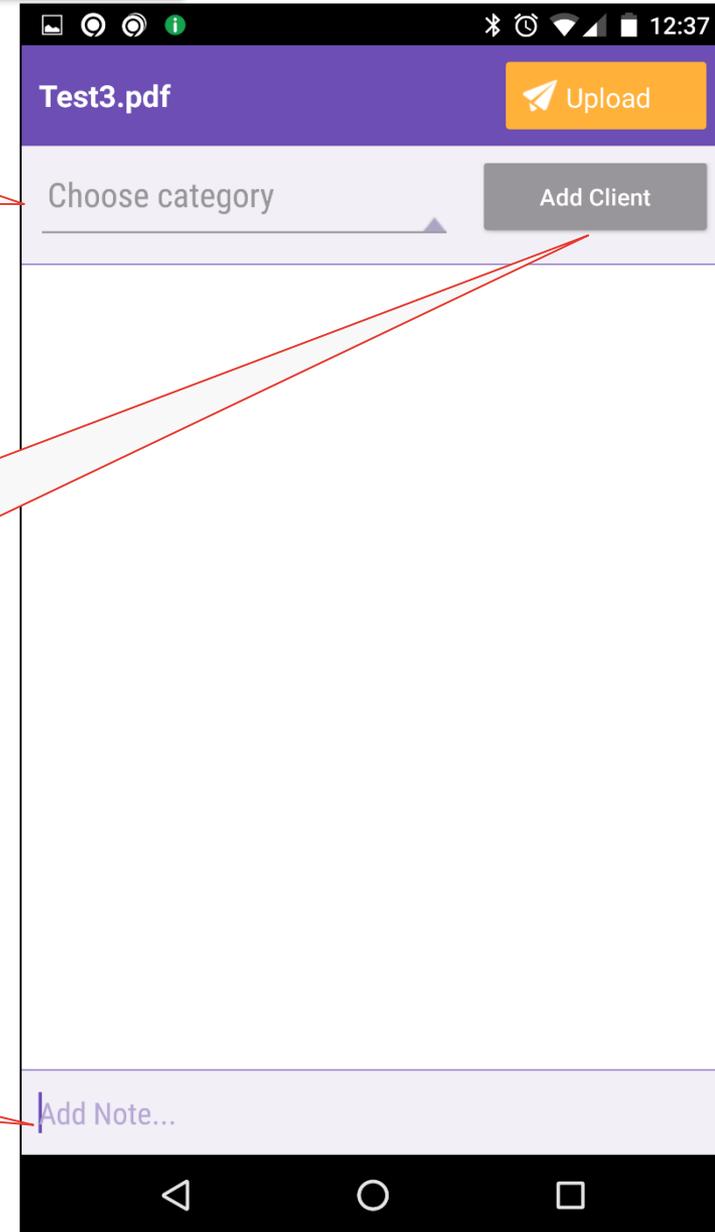
Scan a new document .contd

Select a category under which the document needs to be indexed.

The categories list is populated from Money Advice and is the same list available in Money Advice under Index document function.

Click on this button to select the client against which the document needs to be indexed. To index against multiple clients you can click on the Add client second time.

Enter any notes against the file that will be saved against the record in Money Advice

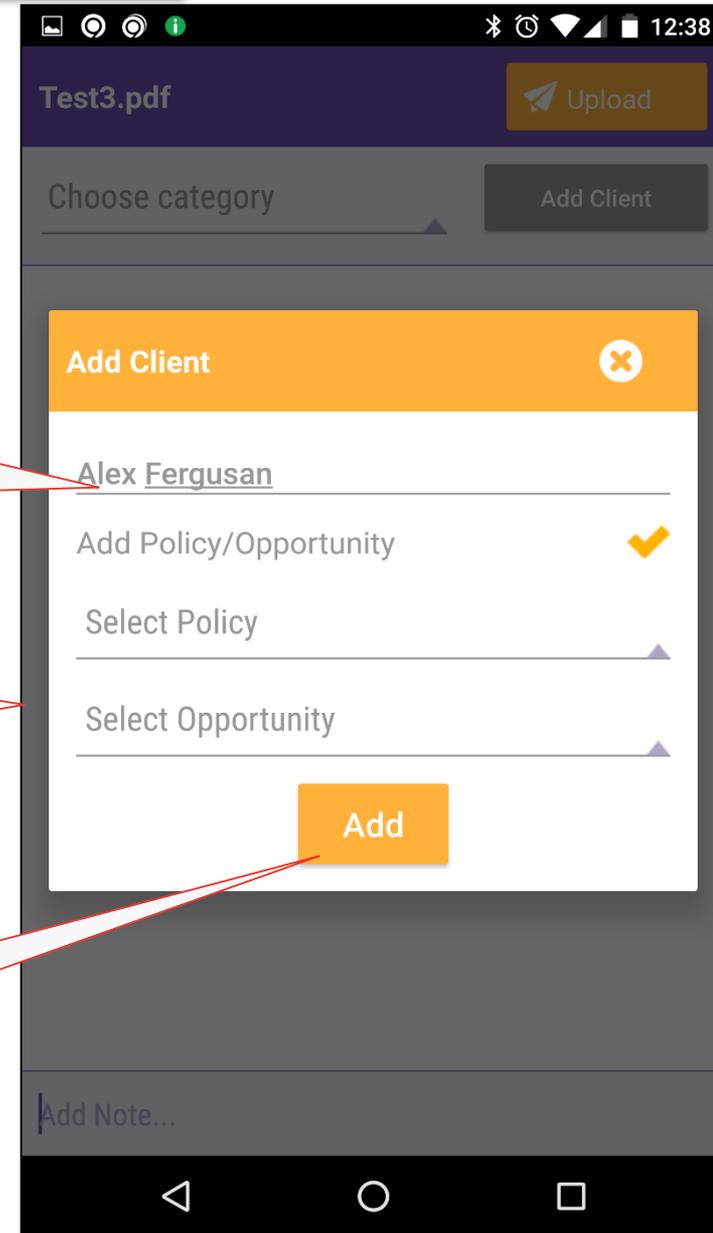


Scan a new document .contd

Type the name of the client against which the document needs to be indexed and the system would prompt the matched clients for selection. You can select the client by clicking on the name of the client of choice.

To index the document against a particular policy / opportunity against the client record, check the Add Policy / Opportunity box. You can then see the list of policies and opportunities against the client record and select an item for indexing

Click on this button to save the client, policy / opportunity (if any) selected for indexing. .



Test3.pdf Upload

Choose category Add Client

Add Client ✕

Alex Ferguson

Add Policy/Opportunity

Select Policy

Select Opportunity

Add

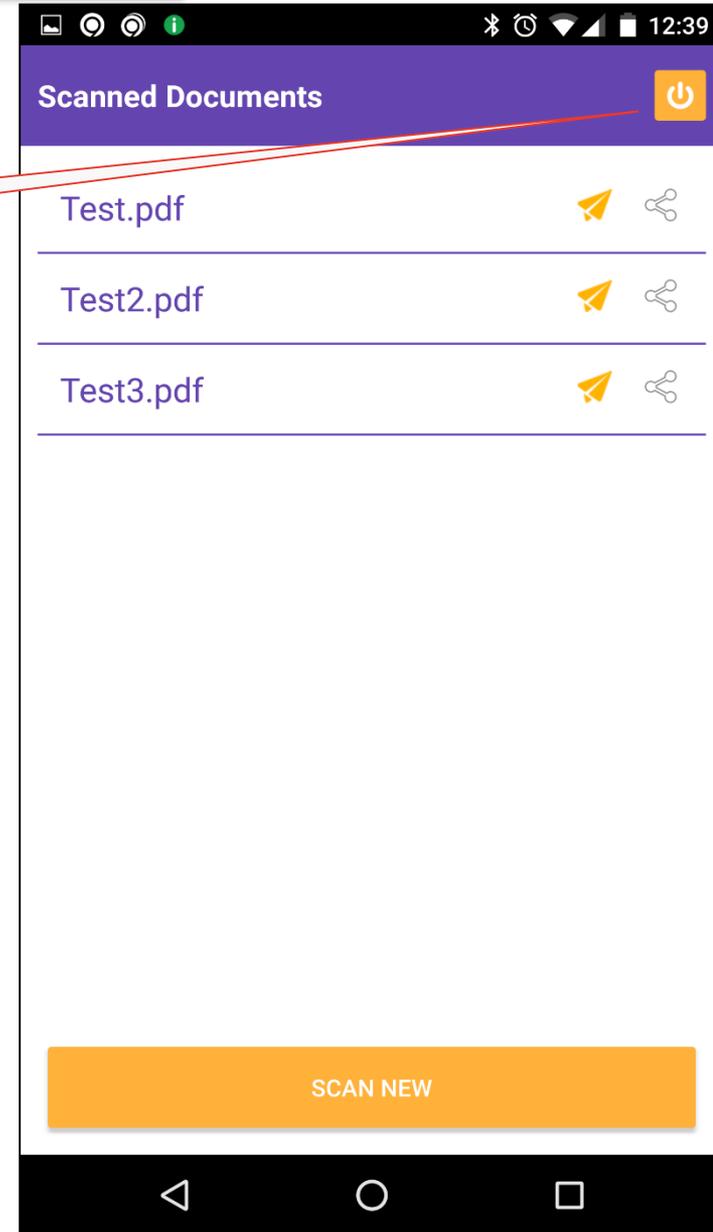
Add Note...

Scan a new document .contd

You can select multiple clients against which the document needs to be indexed by repeating the process. Once the client against whom the document needs to be indexed are chosen, click on this button to Upload the document to Money Advice against the client(s) record selected.



You can click on this icon to log out of the app.



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