

Batch Scan Process

Step 1:



Client opens program. Program queries server, assuming it has username/password setup, for Client's customer list. Once customer list is obtained, program proceeds to next step automatically. This process may be best served if a list is kept on the client machine and compared each Load to the live database as Customer list may be thousands of customers long.

Customer list contains list of Customers First, LastName, Business Name, Address and Accounts. Additional keys sent to client for upload later. SQL would be on server and AgentID is provided by server upon successful login from batch process tool:

```
SELECT AgentID, LastName + ', ' + FirstName as ClientName, BusinessName, Address1,  
City, State, Zip, Number, customers.Key, accounts.Key  
FROM customers INNER JOIN accounts on customers.Key = accounts.Key  
WHERE customers.AgentID = AgentID
```

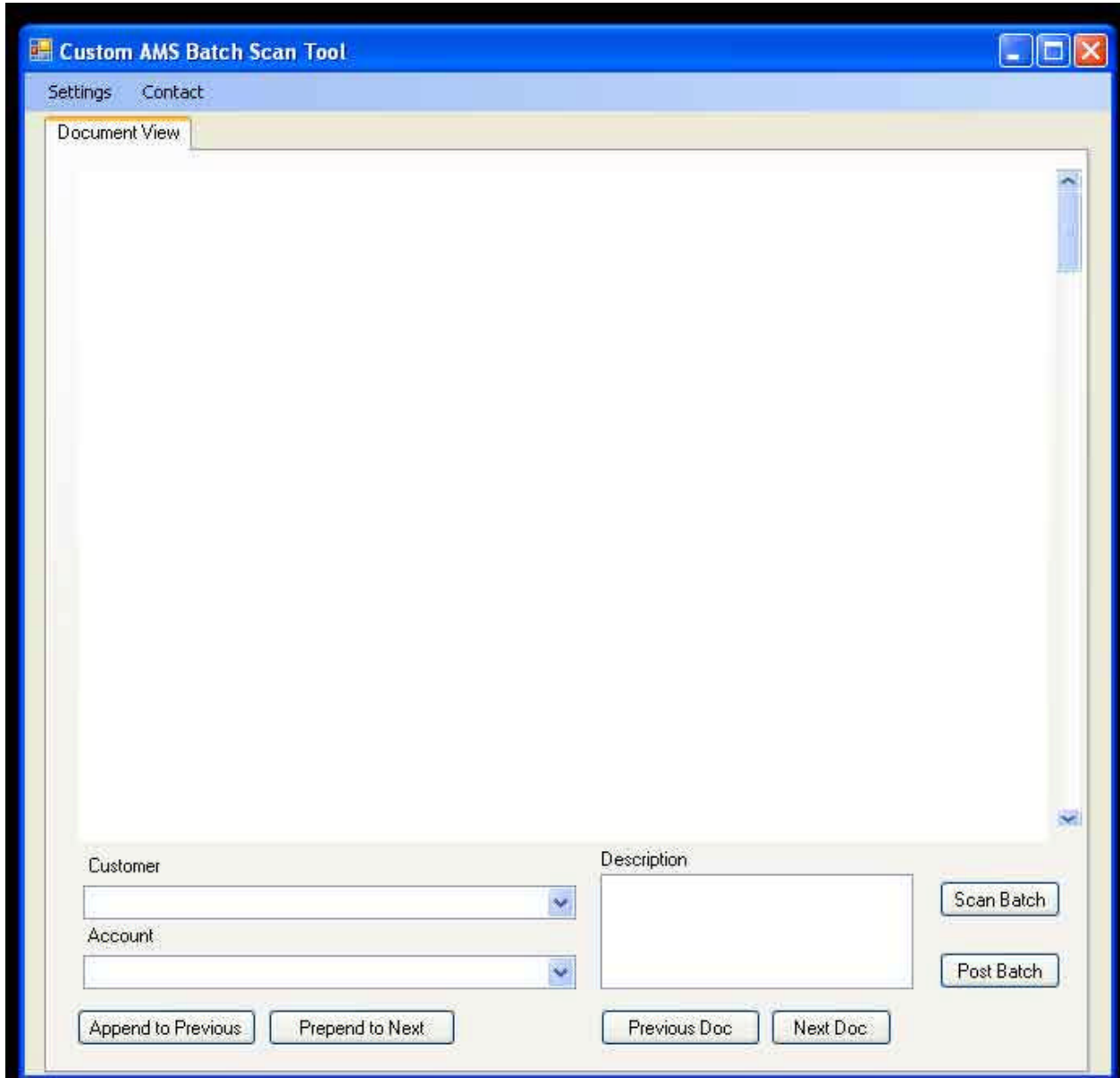
Step 1a:



The image shows a standard Windows-style dialog box titled "Server Settings". It has a blue title bar with a close button (X) in the top right corner. The main area has a light beige background. There are two text input fields: the first is labeled "Username" and the second is labeled "Password". Both fields are currently empty. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Update" on the right.

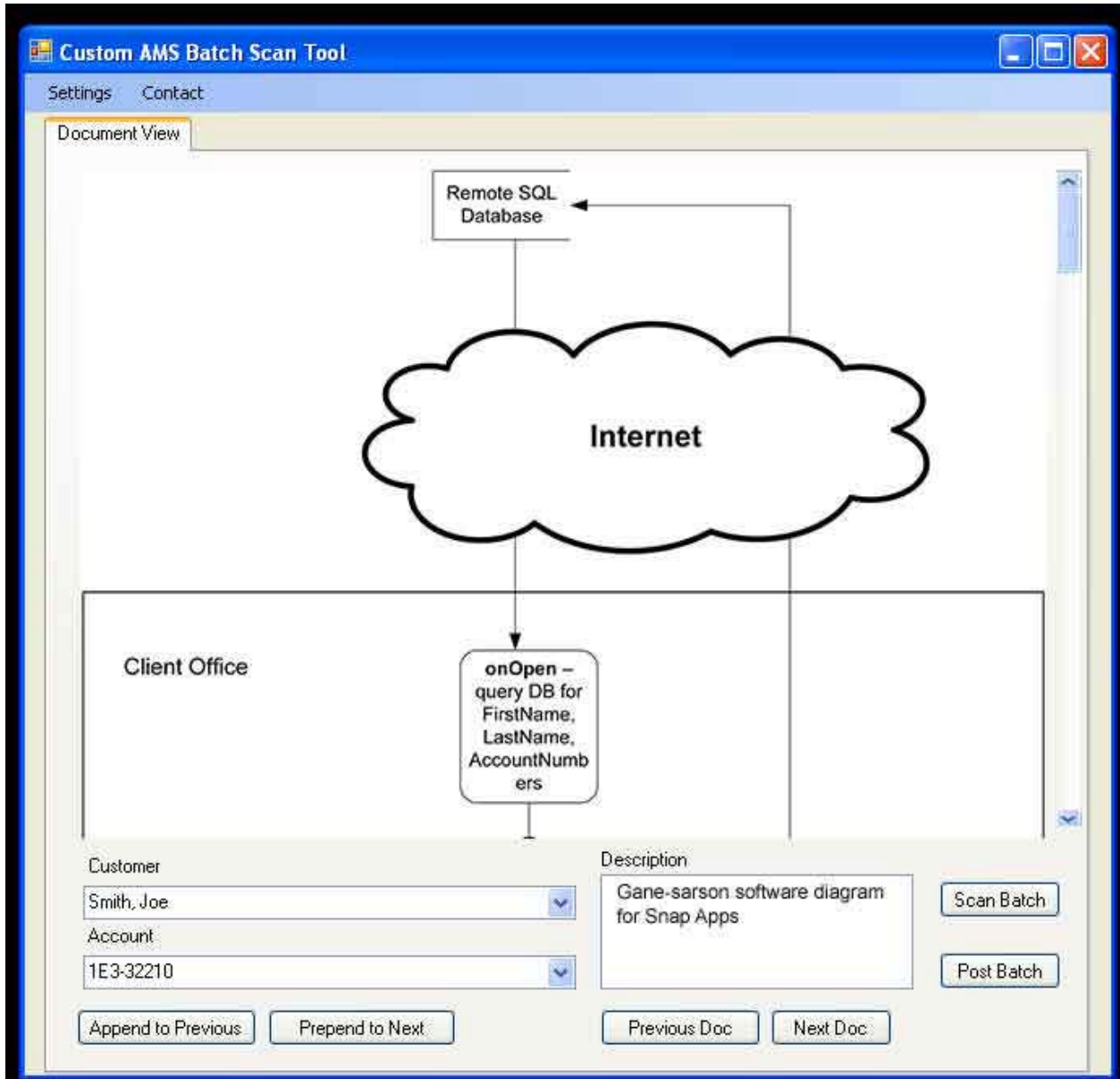
On first activation server/username/password values will be blank. On first use show this form instead of loading screen. Add server box for IP or URL. Add SQLUsername/SQLPassword as well?

Step 2:



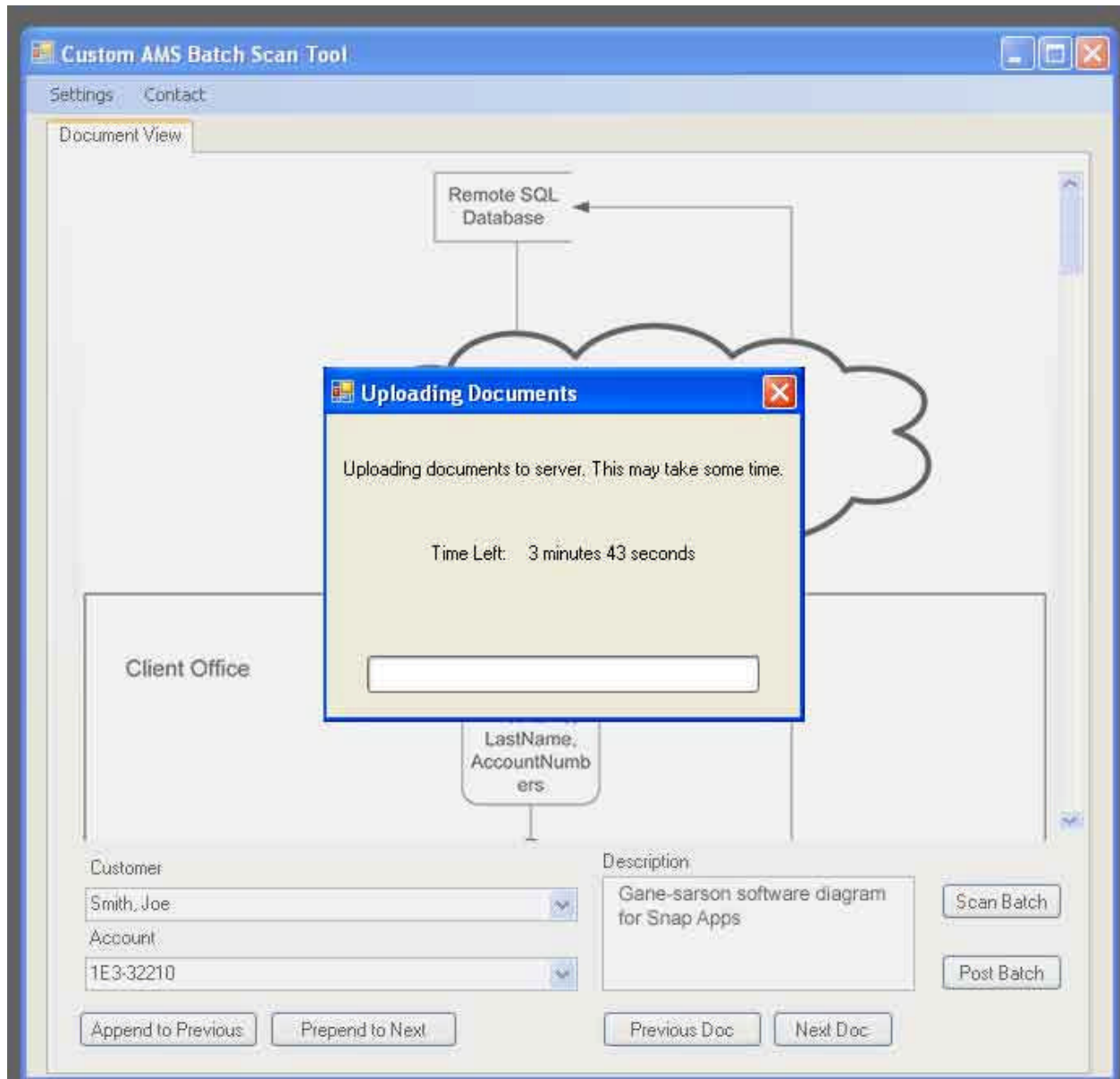
Tool opens with no documents, customers chosen. Default state. Disable all controls except Scan Batch button. Upon pressing Scan Batch button program interfaces with Twain driver and hooks scanner. Grabbing each document scanned in one page at a time and making a separate document for each page scanned.

Step 3:



After scan is complete, enable all controls except "Post Batch" button. User should be able to append documents/images (at this point either TIF or PDF, whichever is easiest to work with here) to one another with or without assigning a Customer to the documents. Once done appending user will assign Customers/Accounts/Descriptions to each document if not already done while appending. After all documents have Customer/Account/Description assigned to them, allow user to enact "Post Batch"

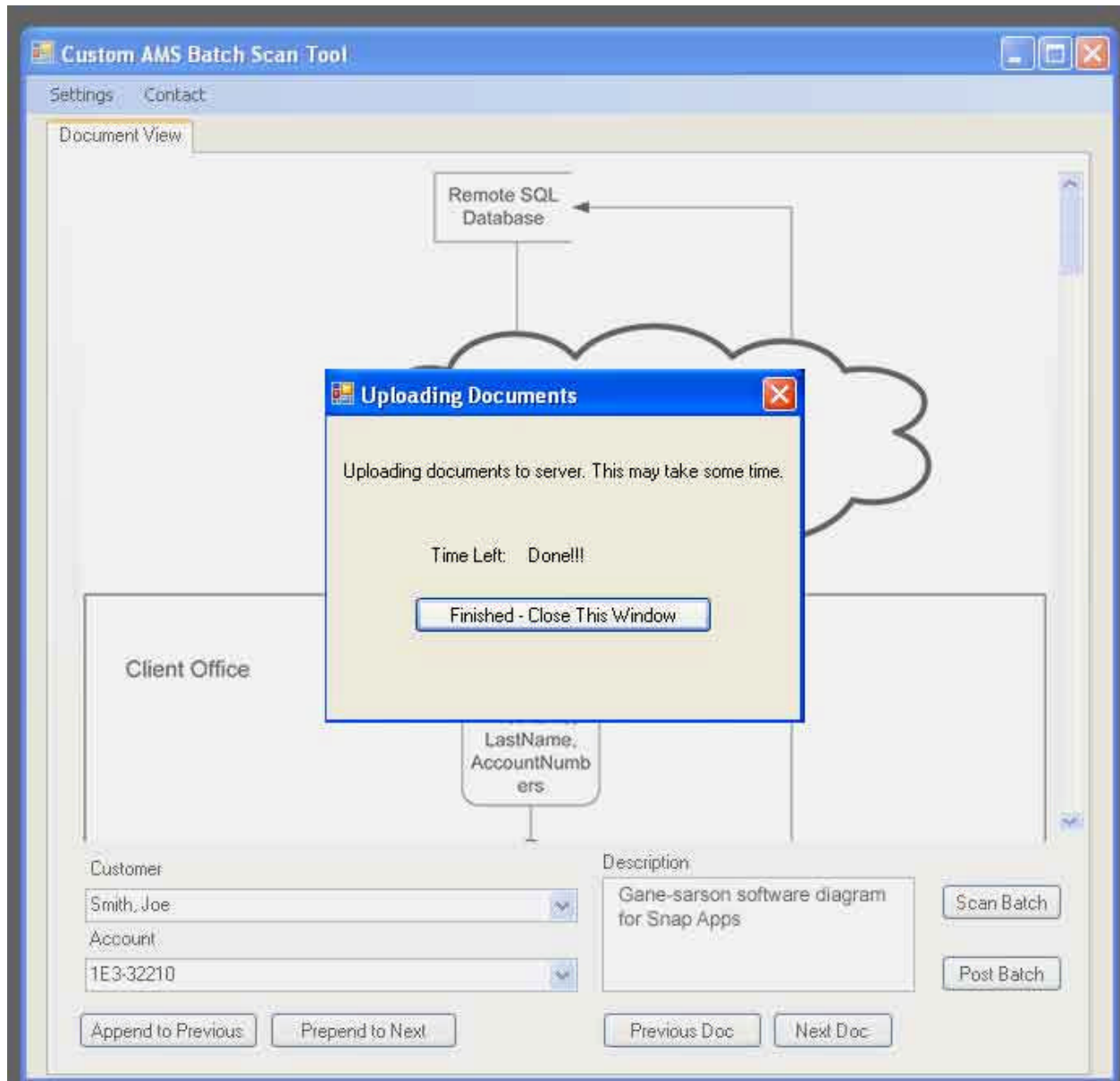
Step 4:



Post Batch is invoked, loading the progress screen above. In the background the program is uploading information to the server. The exact process is TBD. I foresee a login to the SQL Server and a direct upload, remembering the customer and account .Keys from the query, along with the AgentID.

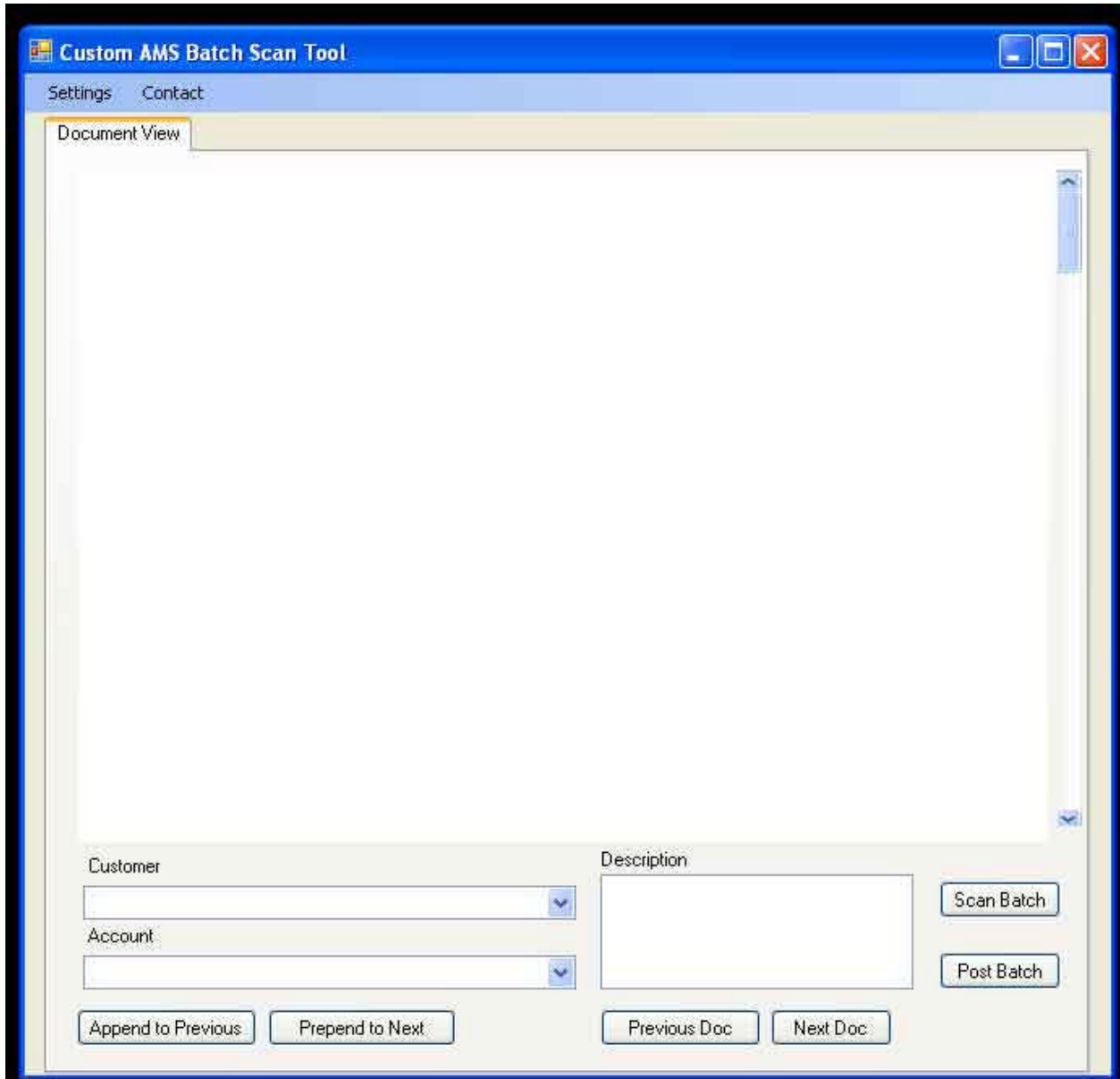
If this needs to hit a web page on the server that is fine, just need a secure way to do this, querystring is not acceptable as it is too easy to manipulate.

Step 5:



Upload finished, user exits window and document set in the background is cleared.

Step 6:



UI set back to everything disabled except Scan Batch button and menu. Process can repeat from Step 2 if client chooses.