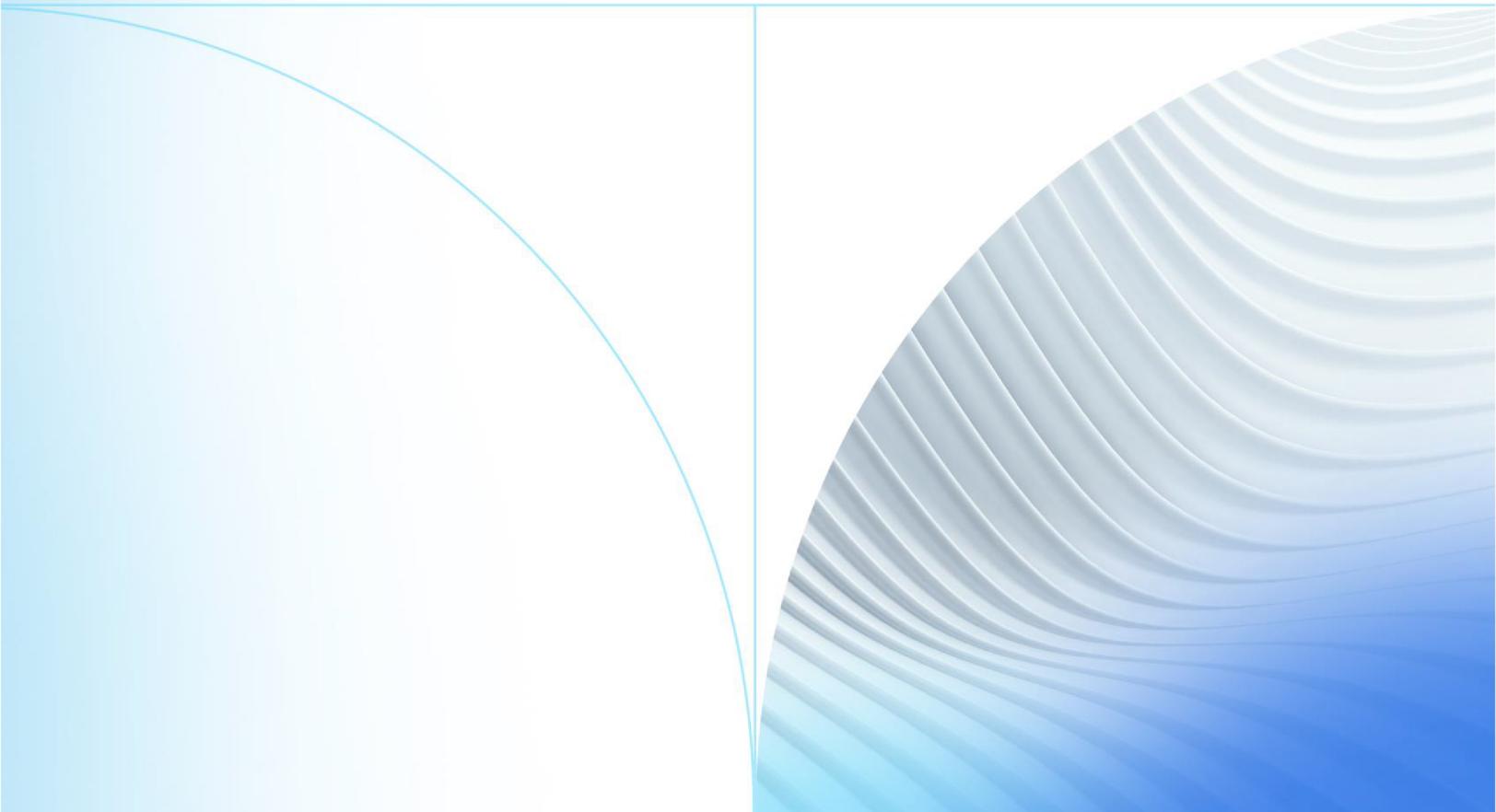




FactorSoft™

• Release v4.7

RemoteScan User Guide



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Limitations on Maintenance Services

The FactorSoft™ application is intended for use in accordance with the standards and processes described within this documentation. Efforts to investigate and/or repair FactorSoft™ application or data integrity issues caused by activities or integrations outside of the intended use of the FactorSoft™ platform will be subject to the then-current Jack Henry Professional Services billable hourly rate.

Standard Maintenance Services (Technical Support) does not include the following:

Investigation and Remediation of errors and data integrity issues caused, contributed to, or by any of the following:

- a software program that was not originally provided by Jack Henry
 - third-party automation, BOT/Screen Scraping technology, custom importers, or any other integration with FactorSoft™ that was not created by or in conjunction with Jack Henry.
- any modification not provided by Jack Henry to the software or standard database schema
 - the addition of custom database elements including triggers, stored procedures, tables, and columns
 - the alteration of standard FactorSoft™ triggers, tables, columns, stored procedures and indexes
 - the execution of T-SQL scripts resulting in changes to the data stored within the FactorSoft™ database
- equipment, software, networks or any other infrastructure in the customer's environment that does not meet the minimum requirements described within the then-current FactorSoft™ product documentation

Please note that if you are exploring possibilities with third-party software providers or considering altering the FactorSoft database in any way, it is strongly recommended that you discuss your plans with the FactorSoft™ support team before making any commitments or changes. As your software partner, we may be able to help solve your business problem in a way that does not introduce risk, data corruption, or system instability.

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RemoteScan

RemoteScan provides Live users (or lenders who are running a licensed copy of FactorSoft and are internally hosting through Citrix or Microsoft Terminal Services) with the capability of scanning document image files from their desktop computers for use in FactorSoft. You can scan images from a scanner attached to the local computer to a folder on the local computer, and then upload the images to FactorSoft using RemoteScan. RemoteScan supports black and white images in .TIF or .PDF file formats.

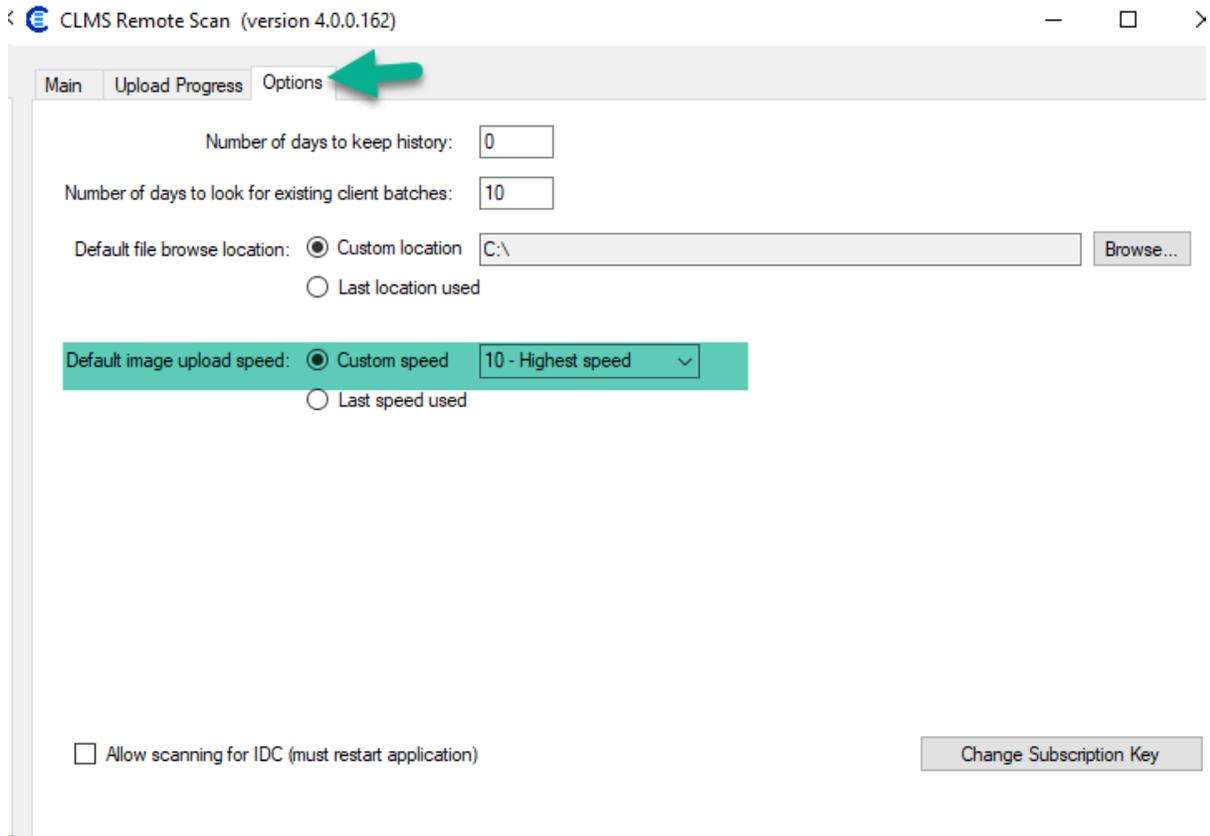
CAUTION

If you are running a licensed copy of FactorSoft (i.e., not a hosted account), your version of FactorSoft must be version 2.14.9 or higher. Additionally, RemoteScan must be run on IBM-compatible computers. It will not function on computers running iOS operating systems.

Setting Up RemoteScan

There are only a handful of options that must be configured before using RemoteScan. To set up the options, start the RemoteScan Application from the RemoteScan folder in **Start, All Applications** on your computer, or a desktop icon if one has been set up. RemoteScan starts and appears on the computer:

1. Select the Options tab.



2. Set the RemoteScan options as required:

Option	Description
Number of days to keep history	Set the number of days after which images are purged from the folder. For instance, if this value is set to 3, image files with dates older than three days from the current computer date are automatically deleted from the folder. The default value is "0", which indicates that the files are never automatically deleted from the image folder.
Number of days to look for existing client batches	Enter the number of days in the past to display open batches for the selected client when you click the Begin Batch button on the Main tab. After files are uploaded, the batch that was used to upload the images is empty and can be reused by adding new images and uploading.
Default file browse location	Set the folder location where RemoteScan will look for images to upload.

Option	Description
ation	<ul style="list-style-type: none"> • Custom location: Select this option and enter the folder location to specify the default file location. • Last location used: Select this option to use the folder location from the most recent upload as the default file location.
Default image upload speed	<p>Select the default upload speed. This speed indicates the length of a pause after each packet is sent (each image upload consists of multiple packets that are sent across the internet and reassembled at the Live host computer). "1 - Lowest speed" is the longest pause and each successive option is a shorter pause time. By setting this option, you can throttle network traffic from RemoteScan and lessen the performance effect from the upload on the network.</p>

Using RemoteScan

RemoteScan is simple to use. First, using your desktop scanner and its associated software, scan the documents to the upload folder in black and white (Bitonal) TIF format. Next, open the RemoteScan program, select the image type to be uploaded, select the files to be uploaded, and then execute the request. The program's user interface also provides an Upload Progress tab, on which you can monitor all upload jobs requested in the current session.

You can use RemoteScan to capture either invoice images to be used in purchase processing, or check images to be used in the collections processing. Each option is described in the following sub-sections:

Uploading Invoice Images

Follow these procedures to upload invoice images to the Live host:

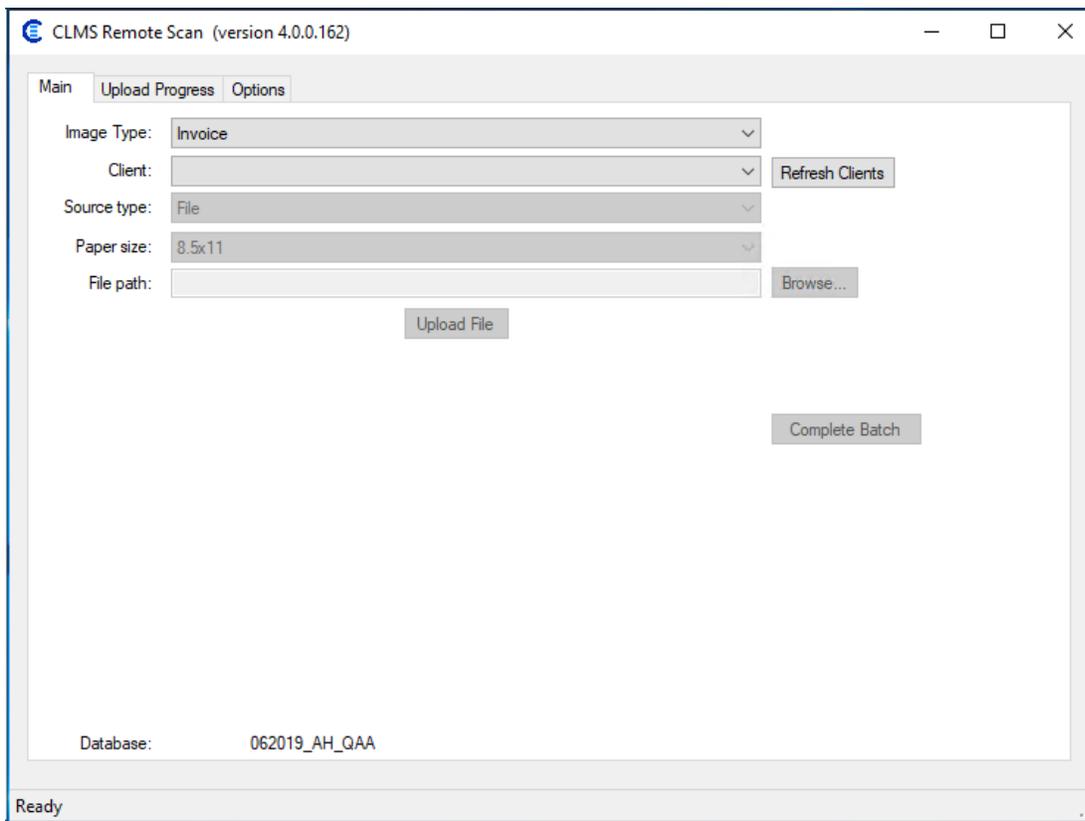
1. Open the RemoteScan application.

You can open the application from a desktop icon if one has been set up on your computer. If there is no desktop icon, double-click the **Remote Scan Application** entry in the **Start, All Programs, FactorSoft Remote Scan** folder.

TIP

If an older version of FactorSoft is being used, the path may be displayed as C:\FactorSoft or C:\CADENCE.

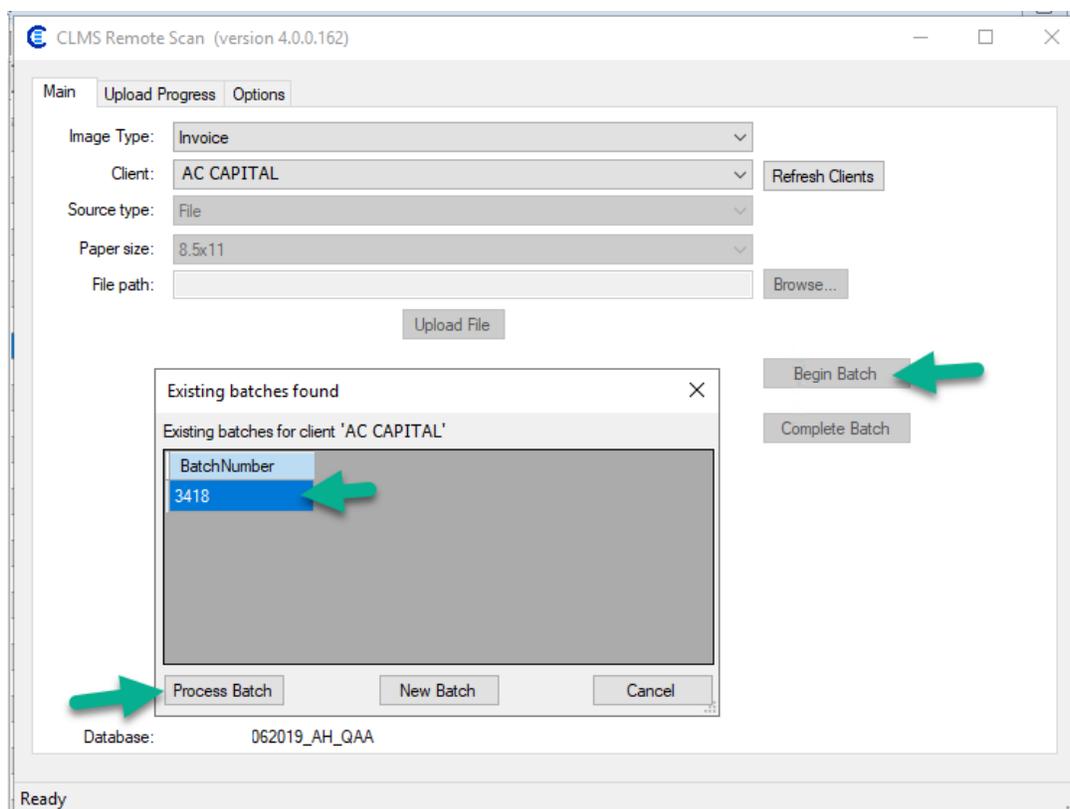
The RemoteScan application opens on your desktop.



2. Select Invoice in the **Image Type** option.
3. Select the client to which to upload the images from the **Client** list.
4. Click the **Begin Batch** button.

This opens a new batch that will be used to upload the invoice image(s) to the client in FactorSoft.

If there are batches for the client within the Number of days to look for existing client batches set on the Options tab, the Existing Batches Found screen is displayed.



To select an existing batch:

- Highlight the batch in the BatchNumber list.
- Click **Process Batch**.

To create a new, empty batch, click the **New Batch** button.

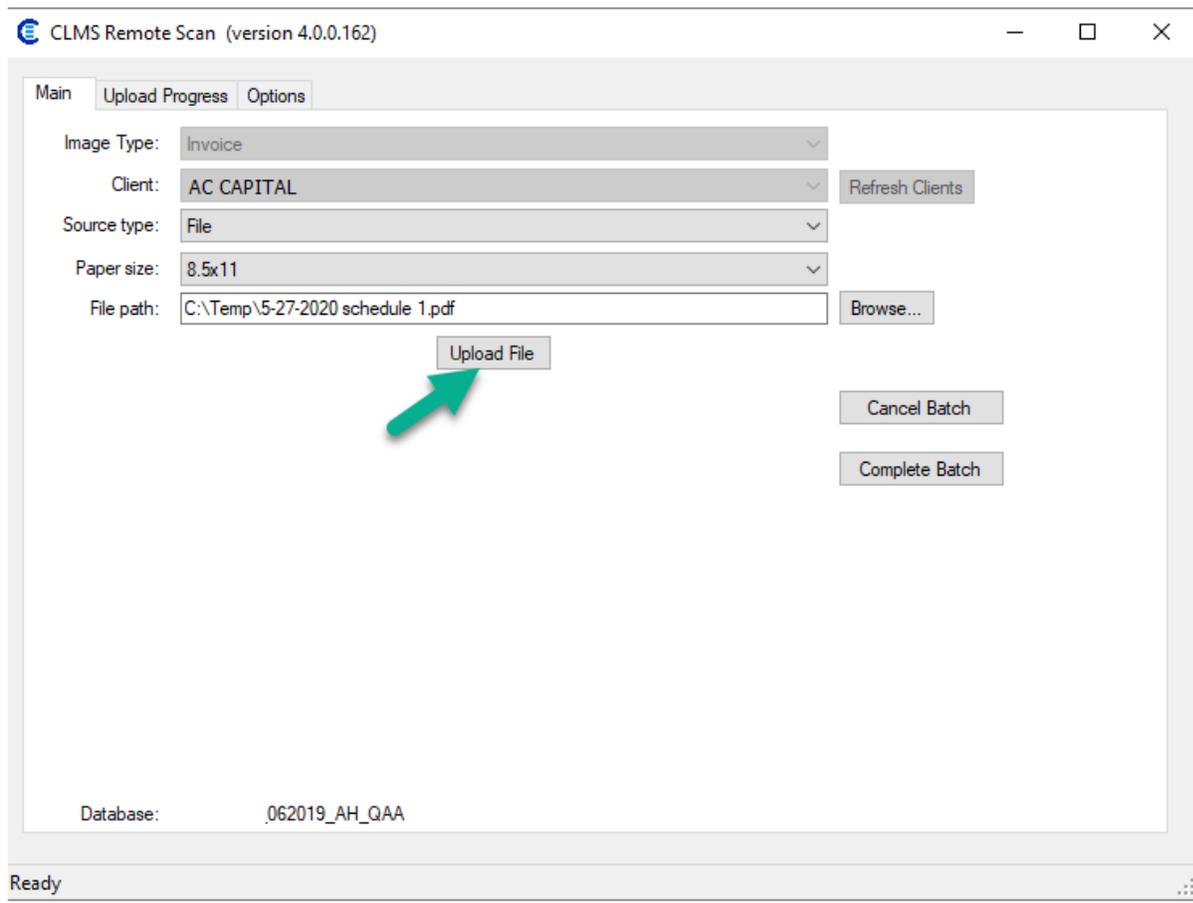
5. Complete the fields on the Main tab:

Field	Description
Source Type	Currently, File is the only Source Type available.
Paper Size	Select the paper size of the document image.

Field	Description
	<ul style="list-style-type: none"> • 8.5x11 • A4 • 11.5x12.25 • Checks • Custom
File path	Enter complete drive and folder location where the document image file is located. You can click the Browse button to display a browser screen, which you can use to navigate to the folder location.

6. Click **Upload File**.

RemoteScan uploads the image file to the batch. A progress bar is displayed as the file uploads.



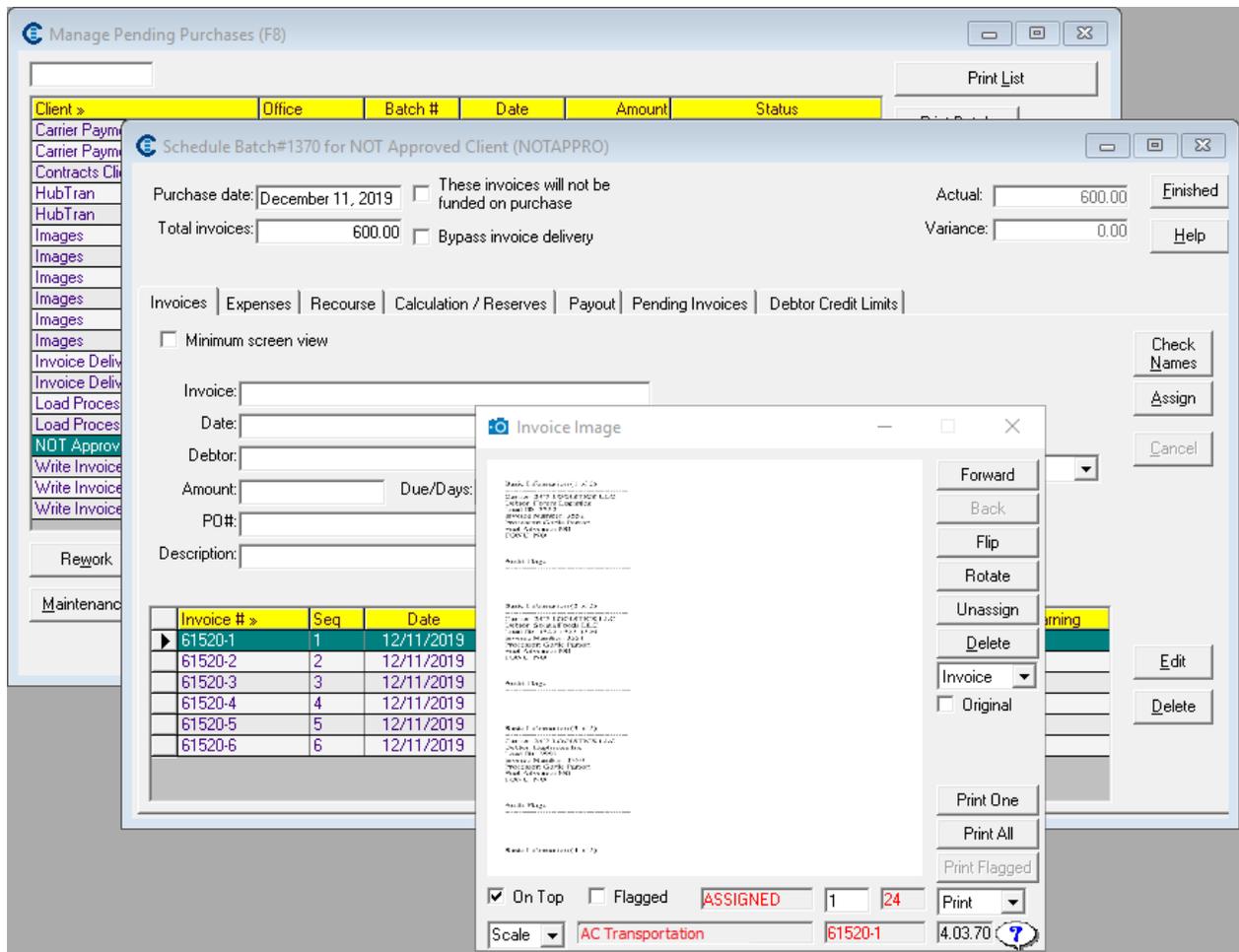
TIP

While the upload is in progress, you can click Cancel Batch to stop the upload.

- 7. To add more document images to the batch, repeat steps 5 and 6 until all images to upload for the client are included in the batch.
- 8. When all image files have been uploaded to the batch, click the **Complete Batch** button on the Main tab.

The program creates the batch and writes the images to the database. When completed, the invoice batch is available in the Manage Pending Purchases (F8) screen.

To create a purchase batch from the images, select the batch and click the **Rework** button. The Schedule Batch screen appears and the images are displayed in the Invoice Image screen.



Uploading Check Images

Follow these procedures to upload check images to the Live host:



1. Open the Remote Scan application.

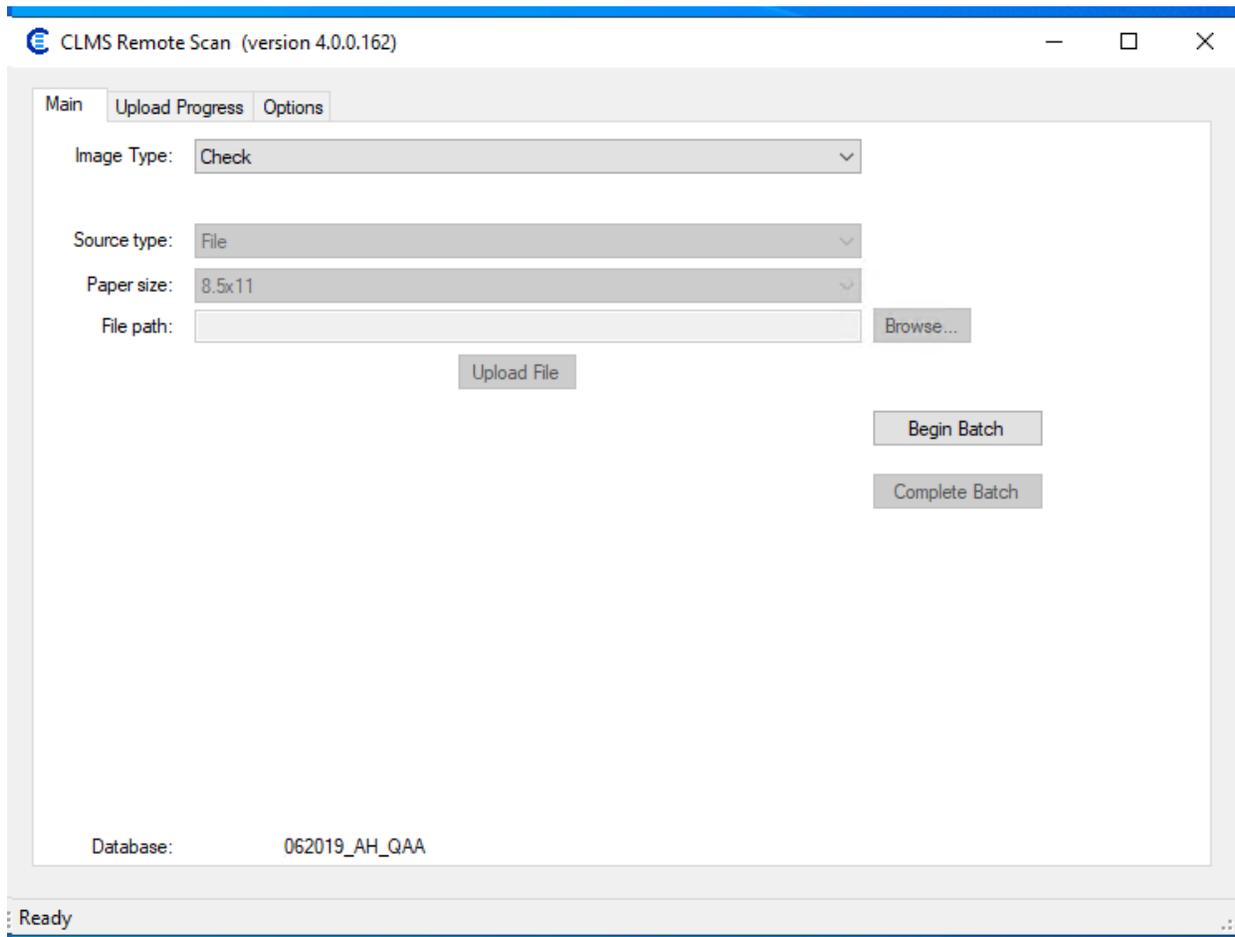
You can open the application from a desktop icon if one has been set up on your computer. If there is no desktop icon, double-click the **Remote Scan Application** entry in the **Start, All Programs, FactorSoft Remote Scan** folder.

TIP

If an older version of FactorSoft is being used, the path may be displayed as C:\FactorSoft or C:\CADENCE.

The Remote Scan application opens on your desktop.

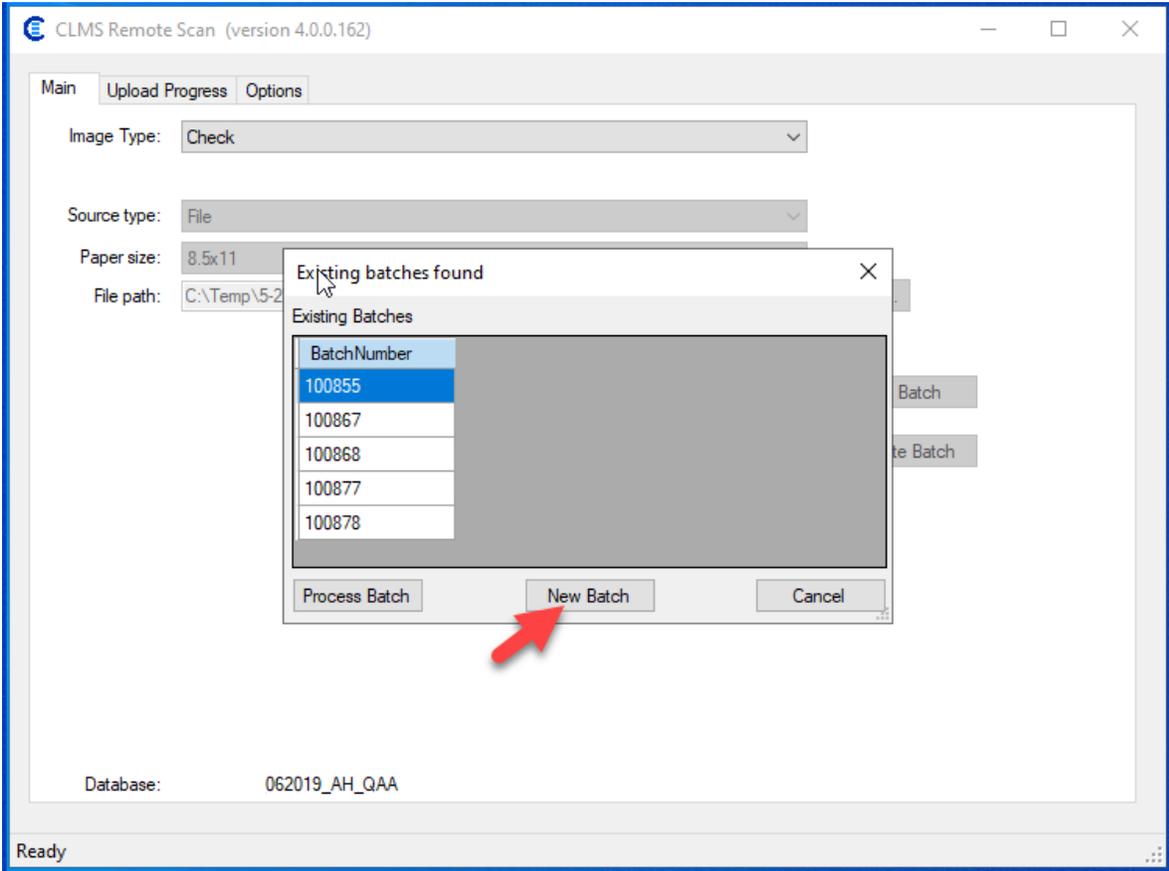
2. Select **Check** in the **Image Type** option.



3. Click the **Begin Batch** button.

This opens a new batch that will be used to upload the check image(s) to FactorSoft.

If there are open check batches, the Existing Batches Found screen is displays.



4. Complete the fields on the Main tab:

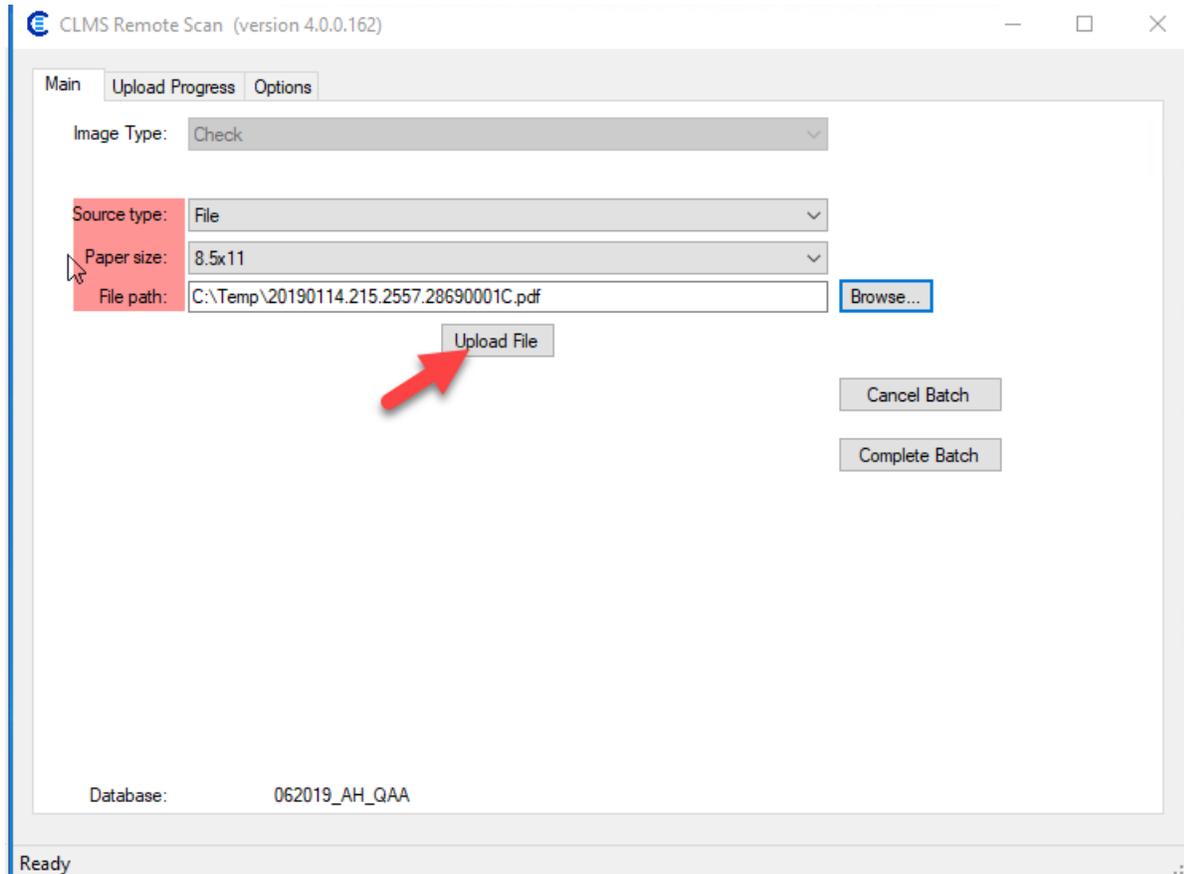
Field	Description
Source Type	Currently, File is the only Source Type available.
Paper Size	Select the paper size of the document image. <ul style="list-style-type: none"> • 8.5x11 • A4 • 11.5x12.25 • Checks • Custom
File path	Enter complete drive and folder location where the document image file is located. You can click the Browse button to display a browser screen,



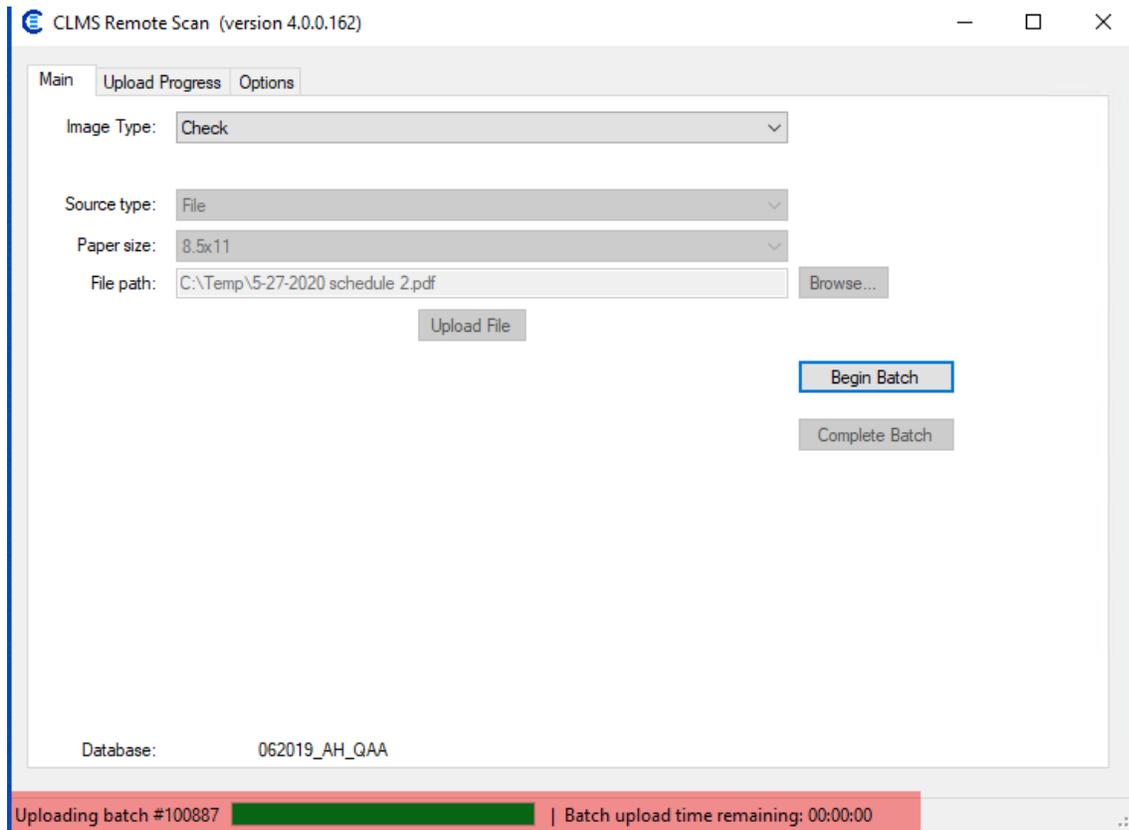
Field	Description
	which you can use to navigate to the folder location.

5. Click **Upload File**.

Remote Scan uploads the image file to the batch. A progress bar is displayed as the program uploads.



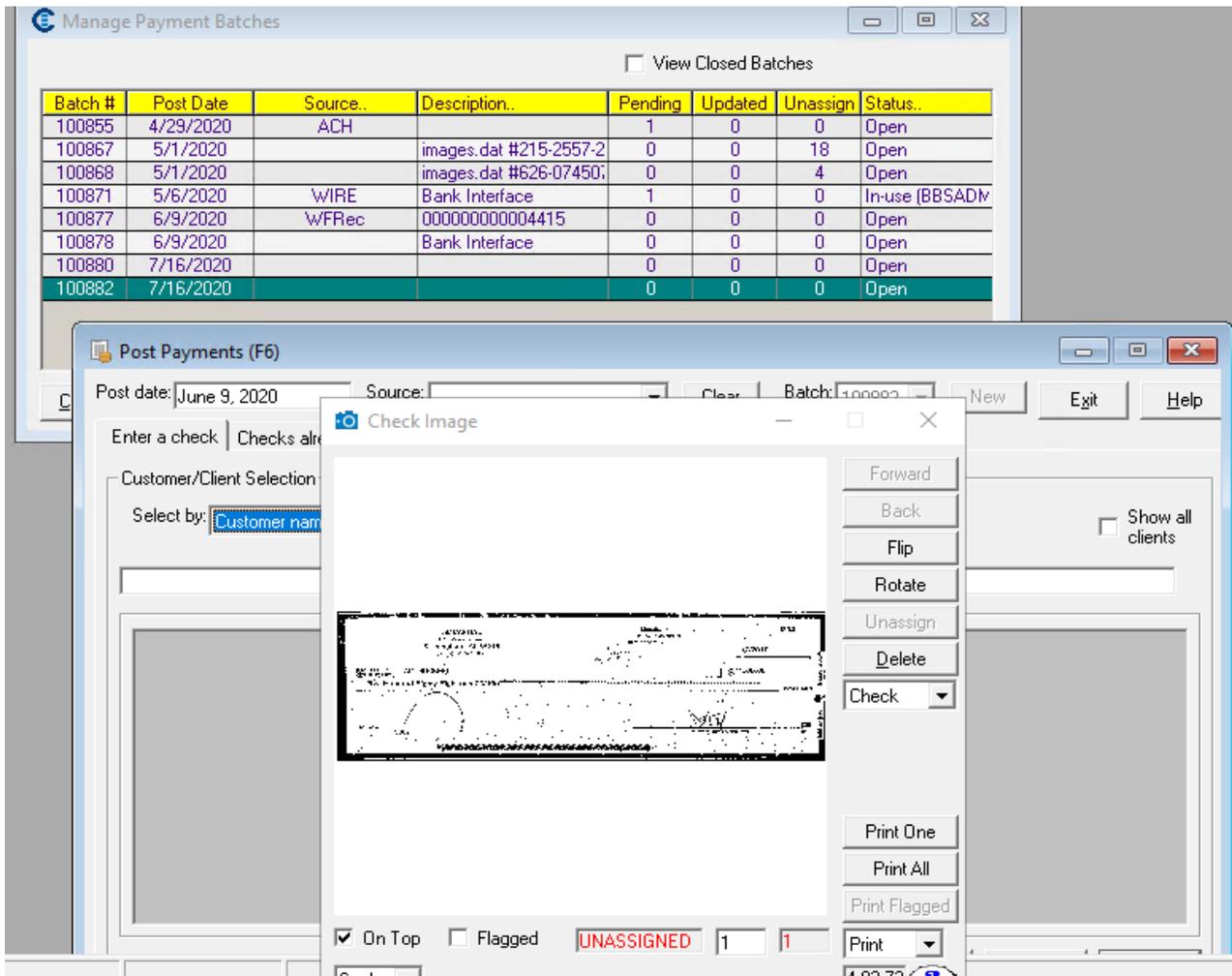
6. To add more check images to the batch, repeat steps 4 and 5 until all images to upload are included in the batch.



7. When all image files have been uploaded to the batch, click the **Complete Batch** button on the Main tab.

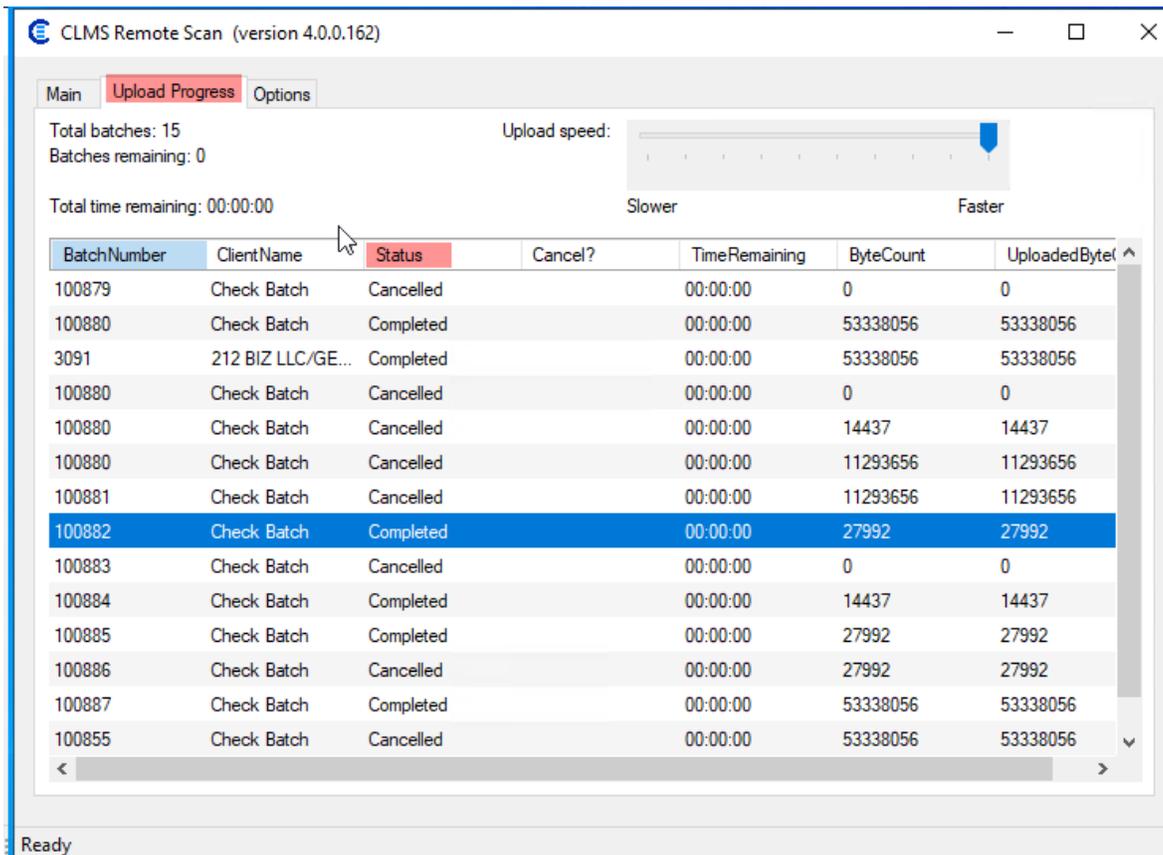
The program creates the batch and writes the images to the database. When completed, the invoice batch is available in the Post Payments (F6) screen.

To post payments from the images, select Manage Payment Batches from the Office menu, select the batch in the Manage Payment Batches grid, and click the **Post** button. The Post Payments (F6) screen appears and the images are displayed in the Check Image screen.



Monitor Upload Progress

After the Upload File button has been pressed on the Main Tab to upload a batch of invoice or check images, the batch can be viewed on the Upload Progress tab.



Field	Description
Total Batches	The number of batches that have been created in the current session.
Batches Remaining	The number of batches not in completed status for the current session.
Upload speed	Select the upload speed for the current batch being uploaded. This speed indicates the length of a pause after each packet is sent (each image upload consists of multiple packets that are sent across the internet and reassembled at the Live host computer). "Slower" is the longest pause and each successive space on the slider is a shorter pause time. By setting this option, you can throttle network traffic from RemoteScan and lessen the performance effect from the upload on the network.
Total time remaining	An approximate time remaining for the currently uploading batch. Otherwise, this column displays all zeroes.
Grid	Lists all open and completed batches for the current session:

Field	Description
	<ul style="list-style-type: none"> • BatchNumber: The image batch number for the open or completed batch. • ClientName: The client name. • Status: The status of the upload. Editing = open batch. Completed = closed batch. • Cancel?: Yes = cancelled batch. • TimeRemaining: Displays the time remaining for an active upload job in hh:mm:ss format. • ByteCount: Displays the cumulative number of bytes of the image files selected for the batch. • UploadedByteCount: Displays the cumulative number of bytes of the image files uploaded to the batch.

When all image files have been uploaded to the batch, click the **Complete Batch** button on the Main tab.

When the **Complete Batch** button on the Main tab is pressed for an invoice or check batch, the status of the batch changes to **Completed** in the Upload Progress grid. This indicates that the batch is ready to be accessed in FactorSoft to assign images to a purchase or payment batch.