

efact

e-mail  fax  archive  at the closing table ™



User Manual

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I. Welcome

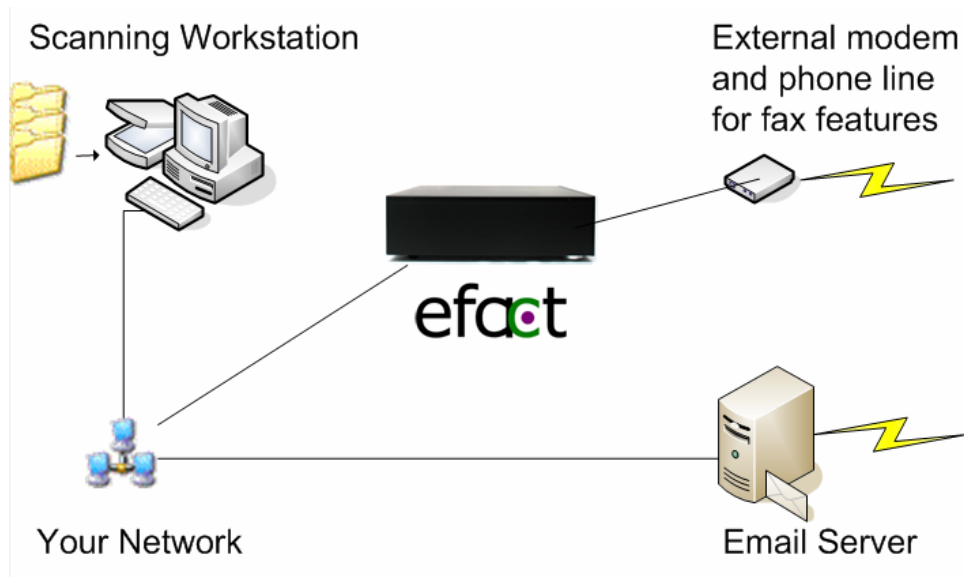
1. Project History

The efact project started when we heard from so many different real estate conveyancers that existing scanning solutions didn't work, were too complicated, too expensive, and weren't appropriate for what real estate conveyancers needed.

Direct IT decided that the only way to fill this need was to develop a product that was **easy to use** and that was designed for **the closing process**.

2. efact Overview

Below is a quick diagram of how an efact integrates with your network. The scanning workstations and clients access the efact over the network. For fax sending support, an external modem can be connected to the efact – this will also require a telephone line. In order to send mail, the efact also connects over the network to your mail server (or an external mail server run by your ISP, if an internal mail server is not available).



There are only two ways to access the efact. The first is with a web browser – the browser-based interface will allow you to access virtual all of the efact's functions. The other is with our custom scanning software, efactScan – efactScan is used only for scanning.

II. Scanning

Strategies for Success

The efact appliance was designed for the closing process, but there is more to a successful scanning strategy than just an appliance. The following is some information about how to scan effectively.

1. Having a good work area for your scanning workstation

It is vital when integrating scanning with your business that your scanning workstation is well thought out. Make sure there is plenty of room for sorting and stacking files. A nice tabletop surface for the scanner to also sit on is also vital, and of course a fast PC itself will allow you to process scanned files faster. Particularly with high-speed scanners, a high-end PC will allow the process to go much faster.

2. Integrating scanning in the closing process

The most successful efact implementations are ones where the efact becomes a part of your closing process. Often efact is integrated as the first post-closing step; this way, once the closing documents are scanned, they can easily be faxed and emailed to lenders or other parties, and the documents will also have been securely filed away in one step.

3. Scanner maintenance

It is important to keep your scanner as clean and dust-free as possible. Also, make sure not to run staples through a scanner, this is one of the easiest ways to damage the scanner and often manufacturers will not warranty against scratches from staples or paperclips.

4. Using efactScan

efactScan is the efact's custom scanning interface. To use it:

1. Double-click the efactScan icon on your desktop.
2. Go to "file", then "Select TWAIN source" and choose your scanner
3. click the "Scan" button
4. Choose your scanning settings (See section below)
5. When the file has finished scanning, fill out the indexing window with the borrower name, closing date, etc.
6. Click "save" and the file will be saved to the efact

Special Technical Note: The scanning workstation requires that the Z: network drive be connected successfully to a share on the efact. If you do not see two folders inside your Z: drive called "Settings" and "Extras", then contact technical support and we will help you fix the Z: drive mapping.

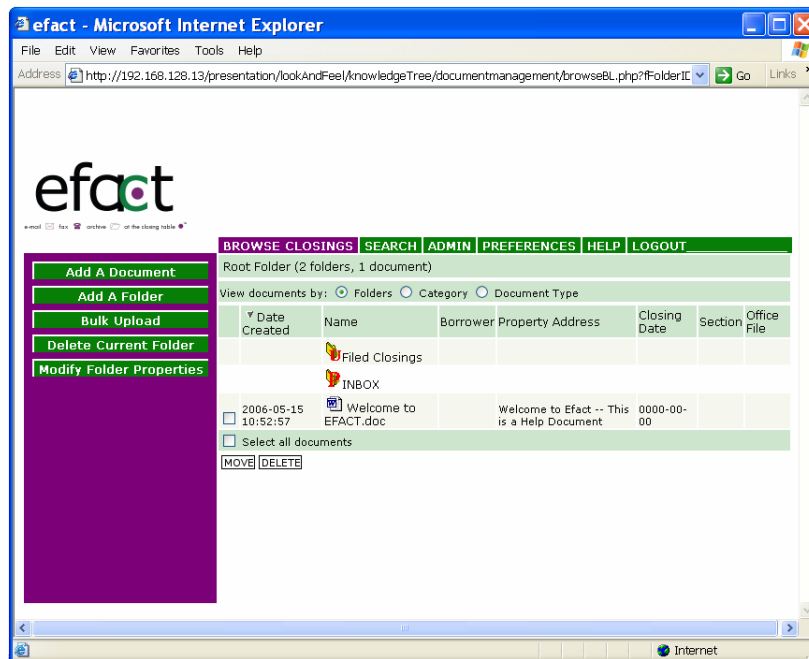
5. Scanning settings

For general-purpose scanning, we recommend 200dpi, with page size detection and deskew. Other types of smoothing, margin removal, and filtering can also help depending on paper type. Also, double feed detection can be very helpful in detecting and stopping the process if the scanner ever grabs two pieces of paper at once. Also, remember that the more processing that is done on each scanned document will require more processing power and memory on your scanning workstation. In the case of high-end scanners, this can slow down the scanning process significantly.

III. Retrieval

Finding and working with your stored documents

Most of efact's functionality is extremely simple to use – particularly searching for documents and working with those documents is very easy using our web interface (pictured below).



1. Using efact email

efact email is the efact system's integrated print-to-email extension. Print to email allows you to select a range of pages in a scanned .pdf document and email only those pages. efact email creates a new PDF with only the pages you selected, and emails that immediately through your usual mail client (Microsoft Outlook and Outlook Express are both supported).

2. Burning CDs

In order to burn a cd, you first need to insert a **blank** cd into the efact's dvd drive. Then, choose the document in the retrieval interface and click on the "cdburn" button, the document will be burned to the CD and will be automatically ejected when finished.

3. Searching

Searching for documents is pretty much self-explanatory. Simply click on the "search" tab and fill in as much as you want to match in any of the fields. Search is not case sensitive.

4. Deleting

The efact uses a 2-step deletion process. Any user who has access to a document can delete it, however in order to be completely gone the administrator must then purge the document from the "Deleted" queue. This allows the administrator to recover documents which are mistakenly deleted by users.