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# Document Integrator Feature

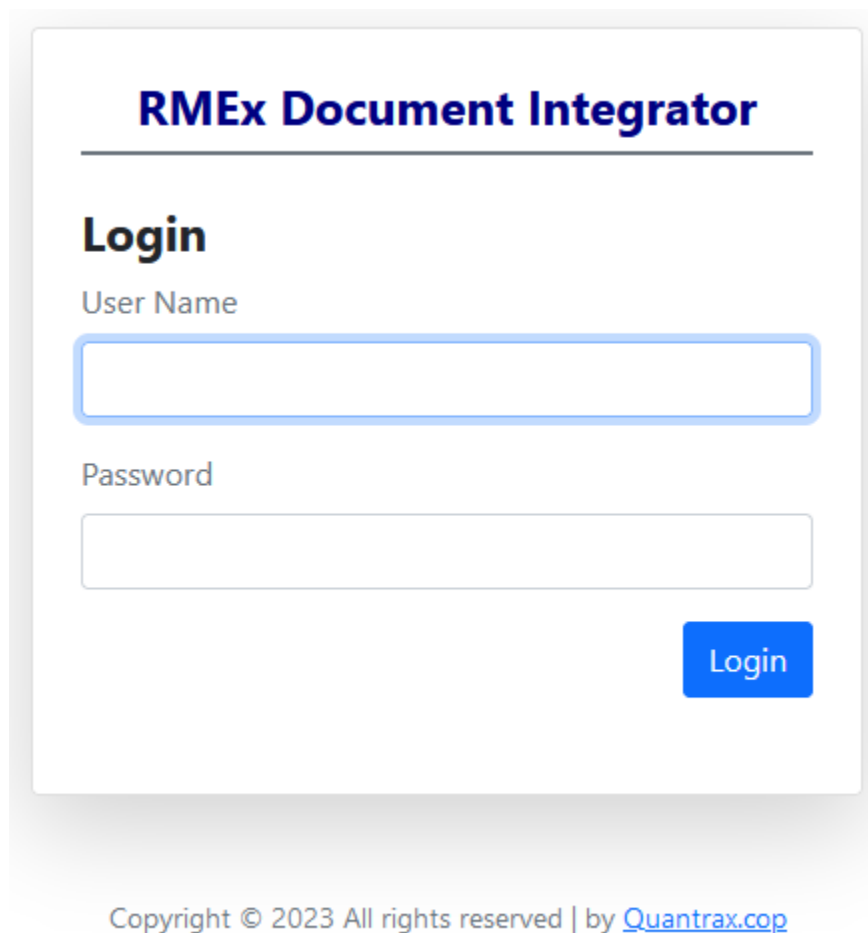
## Document Integrator

Document integrator is a feature that can be used to attach any documents for clients and/or consumers.

This option gives the user the ability to upload and integrate multiple documents on the account and client level.

This option supports the **.txt, .bmp, .gif, .png, .jpg, .pdf(recommended)** document format.

To access this feature, you must use the link that Quantrax will be providing you.



The screenshot shows a login interface for the RME.x Document Integrator. At the top, the title "RME.x Document Integrator" is displayed in a bold, blue font, underlined. Below the title, the word "Login" is written in a bold, black font. There are two input fields: "User Name" and "Password". The "User Name" field is highlighted with a blue border. A blue "Login" button is located at the bottom right of the form. At the bottom of the page, there is a copyright notice: "Copyright © 2023 All rights reserved | by [Quantrax.cop](http://Quantrax.cop)".

Version - 1.1.3


Once you access the link, you will be presented with a login screen where you can enter the same user ID and password that you use to access RME.x GUI.

## Setting up login credentials

Users will be required to use their RME.x User ID and password and setup an email address as well.

The login credentials need to be set up upon implementation of the Document Integrator. All user/s that will need access have to be sent to Quantrax for setup. All changes or additions to users have to be communicated with Quantrax.

To view the options, an email account must be associated with the user account. If an email is not set up, you will get the following screen.

 You have not set up an email address. Please go to settings and set up your email.

# Welcome to RME.x Document Integrator

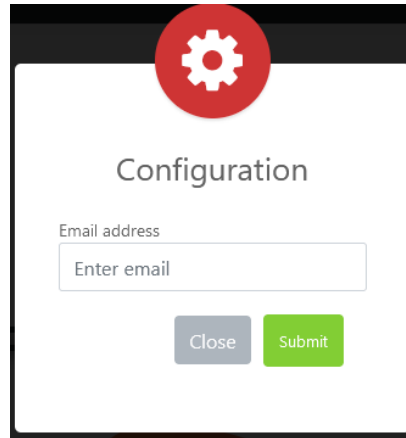


The Integrator Options are not enabled, please set up your configuration and try again. Thank you!

To add an e-mail address, click on the SETTINGS button.



The email address can be entered and submitted here.

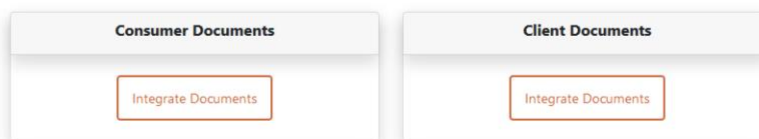


Once the email address is successfully added, the document integrator is ready to be used.

Settings

10:14:07 PM  
Monday, February 6, 2023  
poornaw@quantrax.com

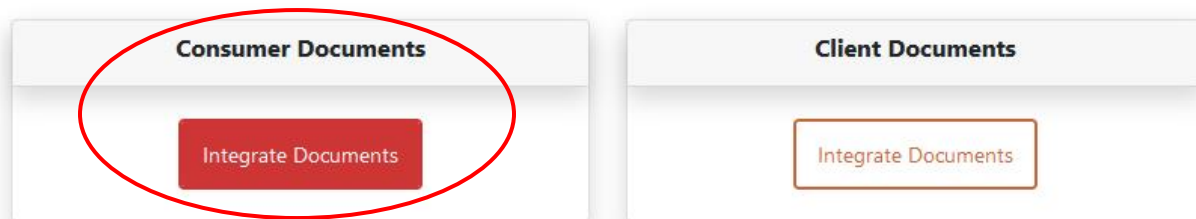
## Welcome to RME.x Document Integrator



## Using the Document Integrator

### Consumer Documents

# Welcome to RME.x Document Integrator



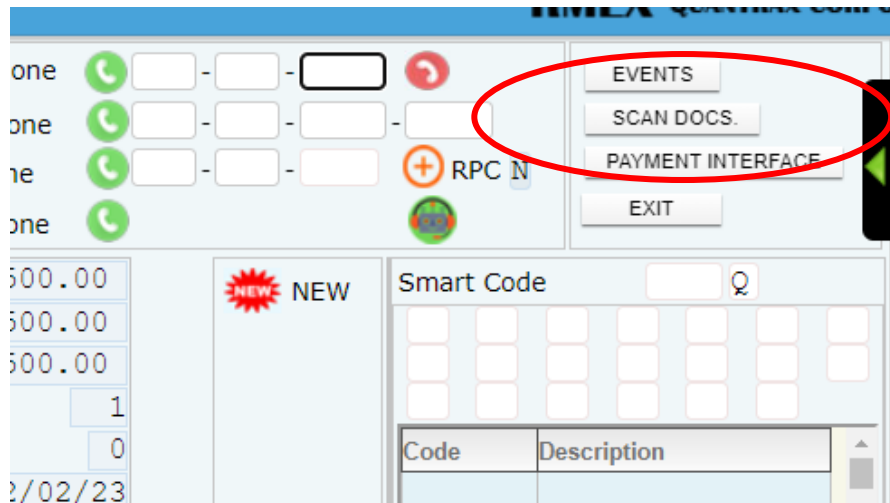
The consumer document feature allows for documents to be added per consumer as batches.

Click the **Integrate Documents** button under the Consumer Documents option.

*Consumer Documents (Contd.)*

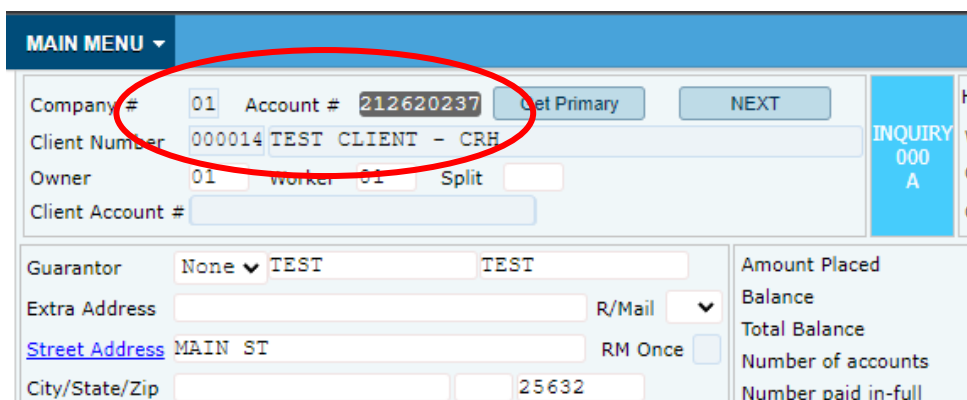
Two main selection options are provided but **ONLY** one option can be selected at a time – either via RME.x account# (9-digit) or client account# (1-25 alphanumeric characters)

The uploaded files for consumers can be viewed through the **scan docs** button on an account.



**Scanned with RME.x account number**

This option allows for the documents to be scanned with a format that includes the RME.x account number.



### Consumer Documents (Contd.)

When using this option, the given naming format for the documents must be followed. The uploaded documents will then be uploaded to the account by the RME.x account number.

We recommend that you follow the same format throughout all your future batches for consistency of data.

Scanned with RME.x account number

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By 11 digit account #(Format 01) (E.g. 01000781002\_docname.pdf)

By 11 digit account #(Format 02) (E.g. 01\_000781002\_docname.pdf)

By RME.x case#(9 digits)  
 Company code  (02 Digits. E.g. 99)

**By 11 digit account #(Format 01):** In this format for the document file name, the file name is in the 11-digit account number format in which the first two digits is the company code for the account number.

**By 11 digit account #(Format 02):** In this format the company code and account number are separated by an underscore.

**By RME.x case#(9 digits)  
 Company code:** This option can be used if the documents that are to be integrated do not have the company code as part of its file name. RME.x account number and the company will need to be entered separately.

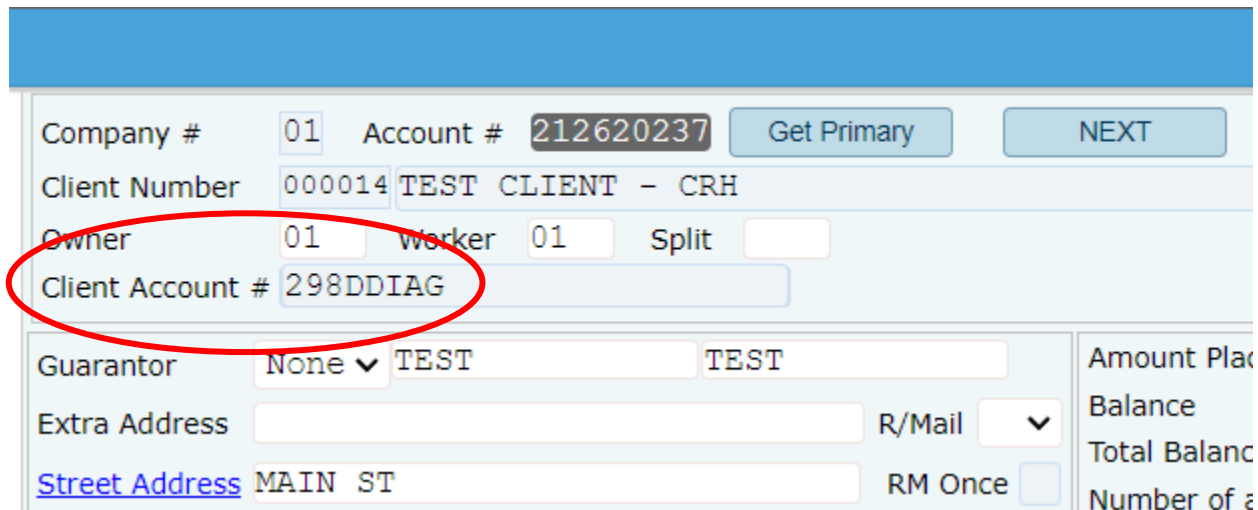
The '*docname*' for these files can be additional information or short description for the files and is recommended.

*Consumer Documents (Contd.)*

**Scanned with Client account number**

With this option, the document integration can be done using the client account number.

The client account number is unique to the client under which the consumer account is present. However, different clients can have the same client number.



Company # 01 Account # 212620237 Get Primary NEXT

Client Number 000014 TEST CLIENT - CRH

Owner 01 Worker 01 Split

**Client Account # 298DDIAG**

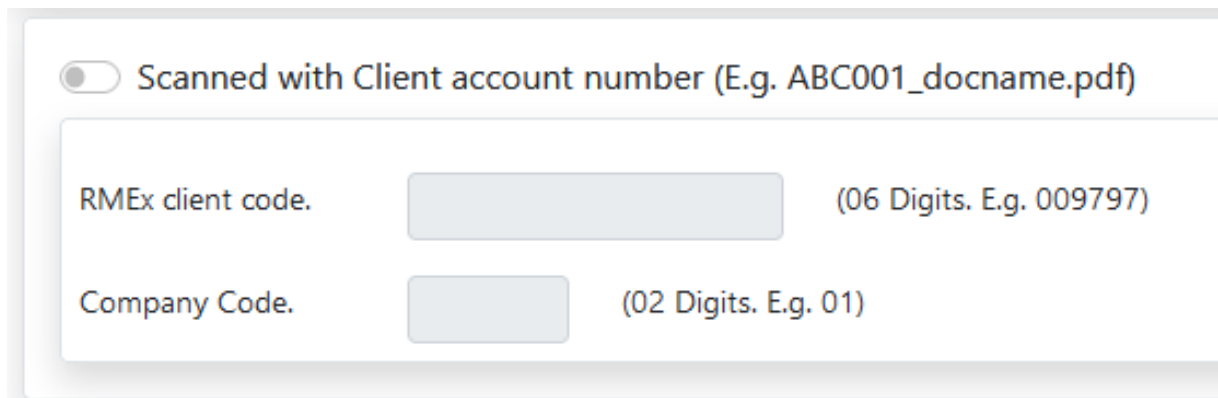
Guarantor None TEST TEST Amount Plac

Extra Address R/Mail Balance

Street Address MAIN ST RM Once Total Balanc

Number of a

The client numbers can be alphanumeric and has a max limit of 25 characters.



Scanned with Client account number (E.g. ABC001\_docname.pdf)

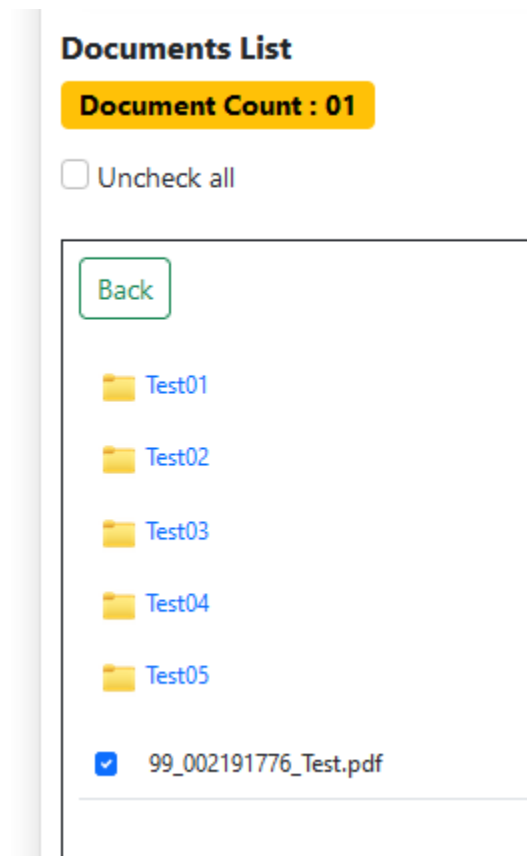
RME.x client code. (06 Digits. E.g. 009797)

Company Code. (02 Digits. E.g. 01)

If the file names of the documents to be uploaded has the client account number, The **client code** of the client and the **company code** are required to be entered in the fields so system will look for both codes to locate the specific account to integrate the documents to.



## Consumer Documents (Contd.)



The files under the selected folder path are shown in this section. Document files are shown to be selected under the directory. These files can be selected to be integrated.

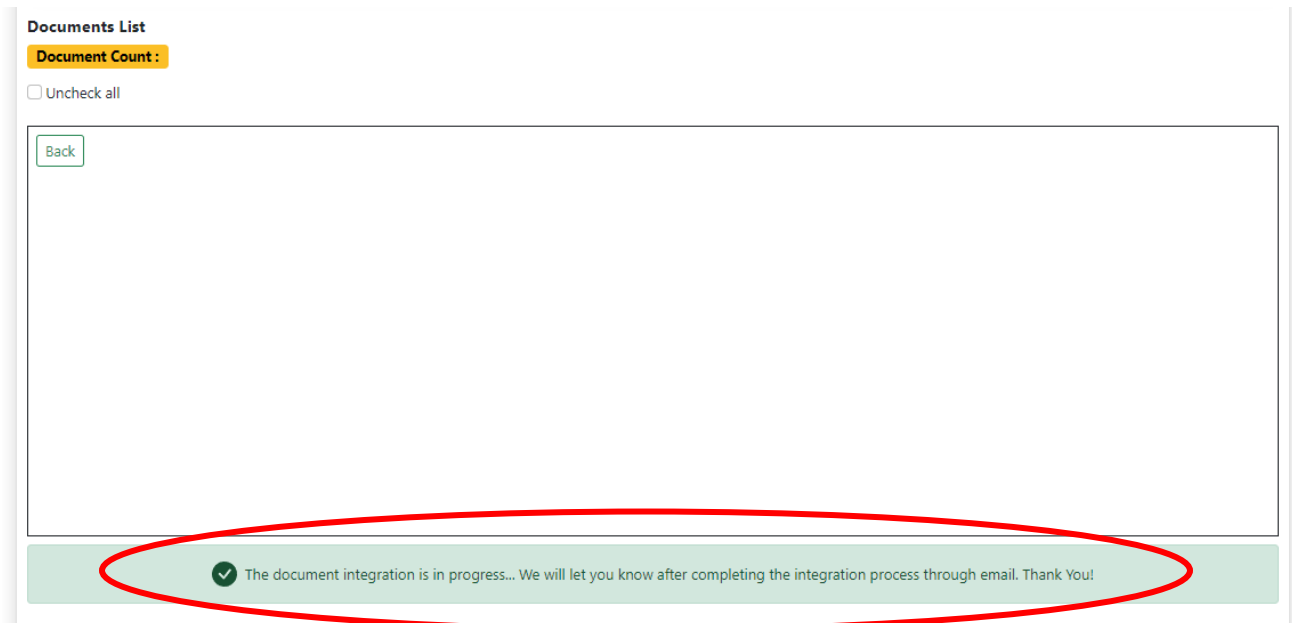
The specific root path or folder in your document server must be provided to Quantrax (where the files to be integrated need to be dropped and pulled by the integrator), if not provided, Quantrax will create a folder path to store the documents in. Sub-folders within this primary folder can be accessed within the integrator.

By default, all files in the folder are selected, click the **Integrate** button to start the process.

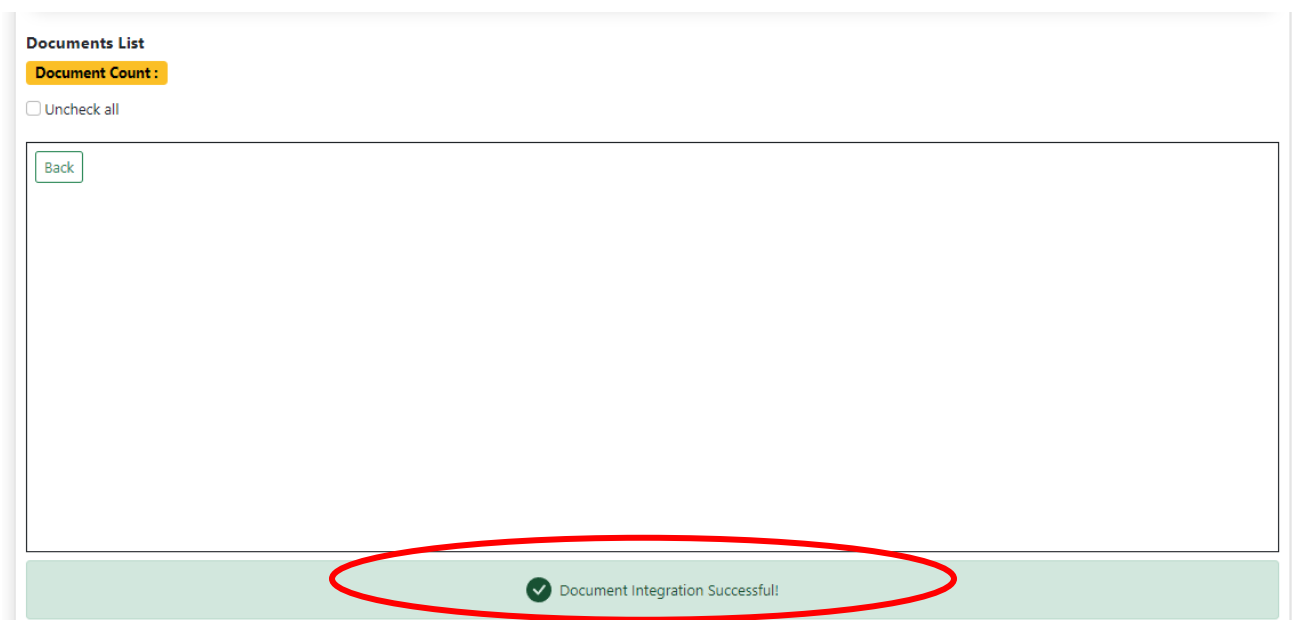
If the number of documents being uploaded is over 100, the process will run as a background process and after completion, an email notification will be sent.

If the client account number option is used, the process will run in the background regardless of the number of files.

When the background process is running, the following message will be shown on screen.



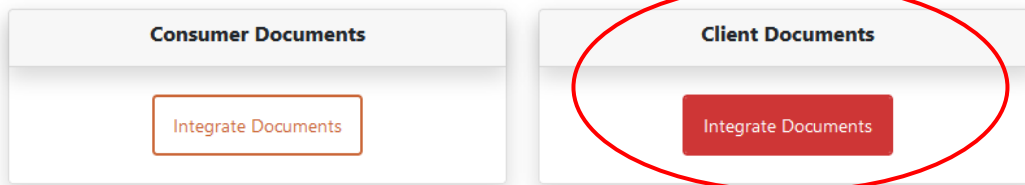
Once the document integration is completed, the following message will be displayed and an email will be sent to the email address that was set up.



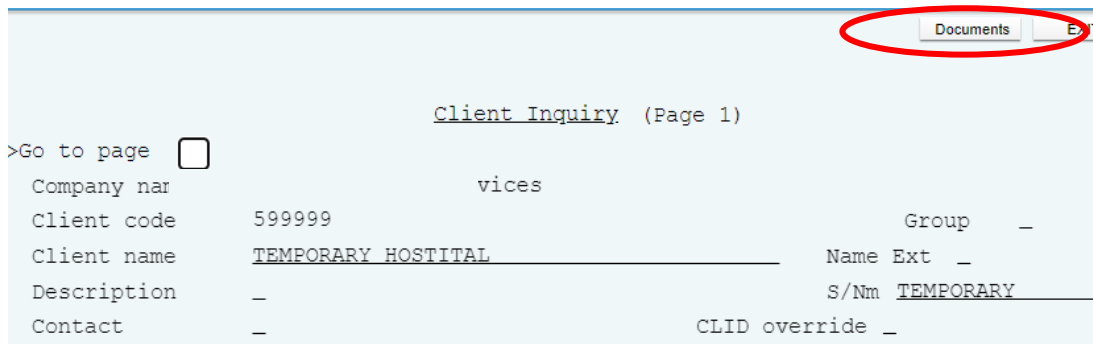
*Note: Documents that were not integrated will be left in the folder. This is*

## Client Documents

# Welcome to RME.x Document Integrator



The Client Document Integrator feature allows for documents for clients to be added to the system that can then be viewed by the client Inquiry option.



The Client documents can be viewed from the Client inquiry options for that client. (Management Menu > Client Inquiry)

## Client Documents (contd.)

**Client Document Integrator**

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Selection options

Scanned with RME.x company code (E.g. 01)

Scanned with RME.x company and client code (E.g. 01\_004506\_docname.pdf)

Before starting client document integration, the selection for how the document scan was done must be selected. Only one option can be selected.

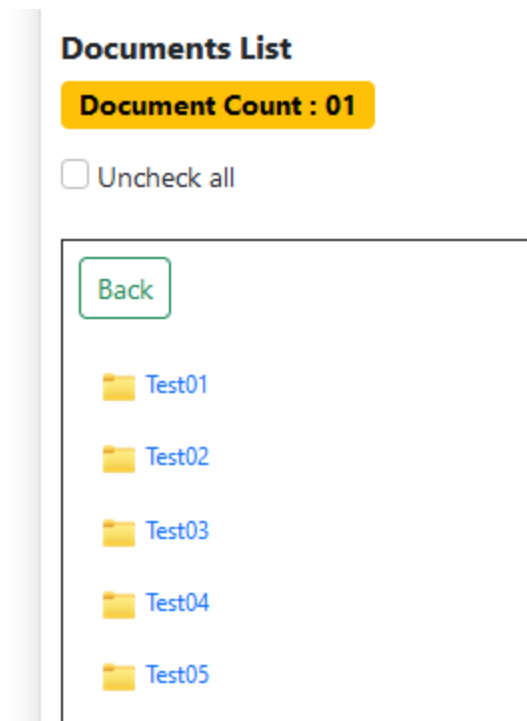
**Scanned with RME.x company code:**

Select this option if the documents that are to be integrated are under the same company code. With this option, the scanned documents are integrated to the client document for every client in that company code. **ONLY** select this if documents are needed to be attached to **ALL** clients under that company code.

**Scanned with RME.x company and client code:**

The given format for the file name **MUST** always be followed:  
*(company code\_client code\_docname.pdf)*  
 Files scanned with this option selected are only added to the client code that is specified in the file name. The 'docname' for the files can be additional information or short description for the files and is recommended.

## Client Documents (contd.)



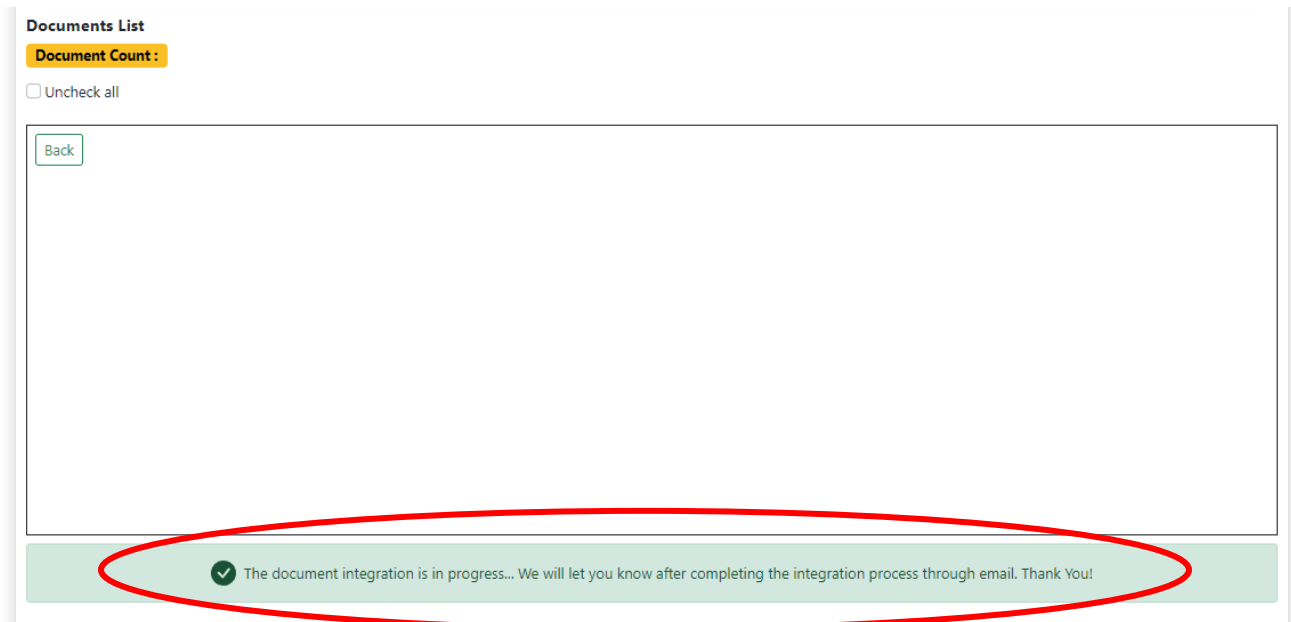
The files under the selected folder path are shown in this section. Document files are shown to be selected under the directory. These files can be selected to be integrated.

The specific root path or folder in your document server must be provided to Quantrax (where the files to be integrated need to be dropped and pulled by the integrator), if not provided, Quantrax will create a folder path to store the documents in. Sub-folders within this primary folder can be accessed within the integrator.

By default, all files in the folder are selected, click the **Integrate** button to start the process.

If the number of documents being uploaded is over 100, the process will run as a background process and after completion, an email notification will be sent.

When the background process is running, the following message will be shown on screen.



Once the document integration is completed, the following message will be displayed and an email will be sent to the email address that was set up.

