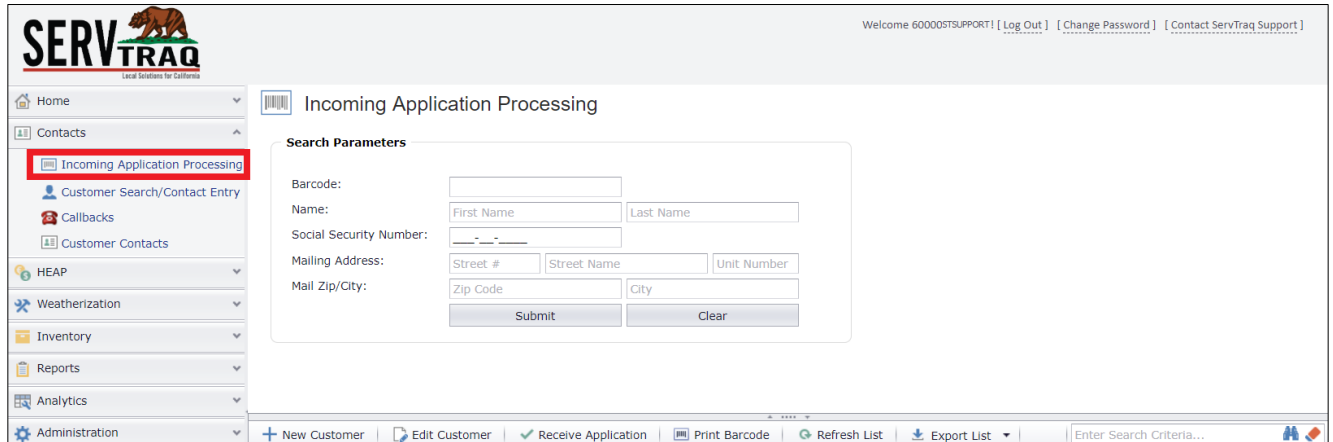


2

Incoming Application Processing

The Incoming Application Processing feature is designed to mark an application as “received” in order to track the receipt of an application



To fully utilize this feature’s capabilities, we recommend processing applications with a **barcode scanner** and a **label machine**.



❶ **Barcode Scanner** ⇒ *Honeywell MS7120 Orbit Barcode Scanner*

❷ **Label Machine** ⇒ *DYMO LabelWriter 400*

❸ **Label Type** ⇒ *DYMO white address labels (Size: 1 1/8" X 3 1/2")*


NOTE



Select the printer option **DYMO LabelWriter 400** with the orientation set

Receiving Barcoded Applications

If the application has a barcode and the name on the barcode matches the name of the applicant, it can be scanned.

 Incoming Application Processing

Search Parameters

Barcode:

Name:

First Name

Last Name

Social Security Number:

Mailing Address:

Street #

Street Name

Unit Number

Mail Zip/City:

Zip Code

City

Submit

Clear


QUICK TIP
Broken/Non-Functioning Scanner?
⇒ Type the barcode number instead.

NOTE



The cursor must be placed on the **Barcode** entry box before scanning an application. (You will see a blinking line!)

After scanning the application, the barcode number will appear in the Barcode field and the Customer Record will appear in the search results.

 Incoming Application Processing

Search Parameters

Barcode:

407585

Name:

First Name

Last Name

Social Security Number:

__-__-__

Mailing Address:

Street #

Street Name

Unit Number

Mail Zip/City:

Zip Code


City


Submit


Clear

+ New Customer

Edit Customer


 Receive Application

 Print Barcode


 Refresh List



...

Search Results

	Name	SSN	Date of Birth	Mailing Address
	DOENA T HOLSCHEIN	765-43-2108	12/31/1950	1 THIS WAY APT A

If the name on the barcode and the customer record matches, click **Receive Application**.

 Incoming Application Processing

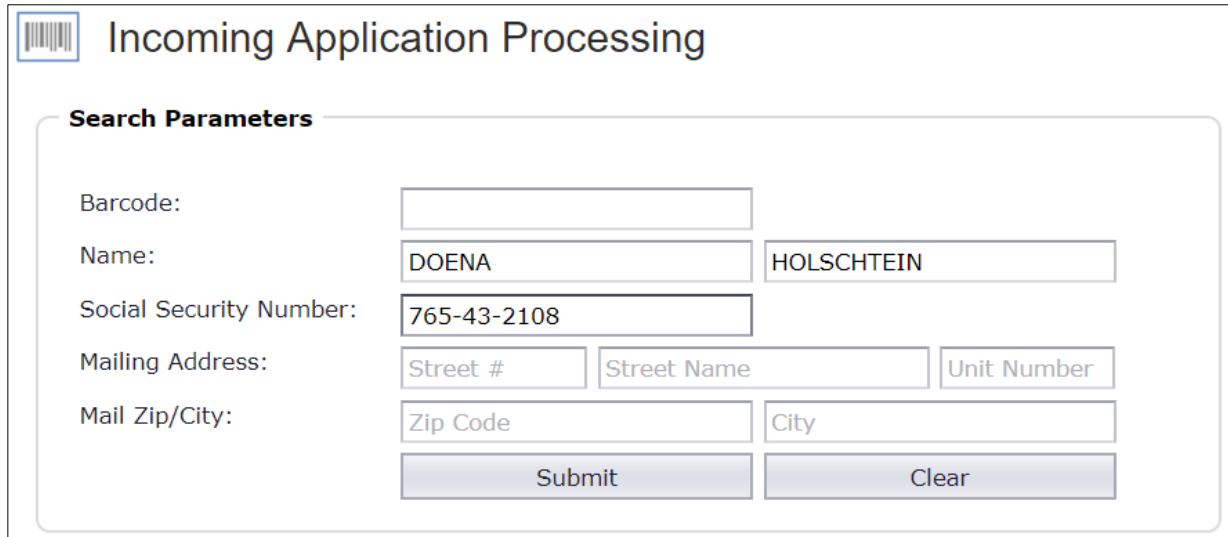
 Application Received Successfully 

Above: An application that is successfully received will generate this notification.

After the customer's application has been marked as received, a *Customer Contact Entry Note* will be created for the customer record to track the receipt of the application.

Receiving Non-Barcoded Applications

Search for an application using any or all of the fields listed in the table below.



The screenshot shows a web interface titled "Incoming Application Processing" with a barcode icon. Below the title is a "Search Parameters" section containing several input fields. The "Barcode:" field is empty. The "Name:" field is split into two parts: "DOENA" and "HOLSCHEIN". The "Social Security Number:" field contains "765-43-2108". The "Mailing Address:" field is split into three parts: "Street #", "Street Name", and "Unit Number". The "Mail Zip/City:" field is split into two parts: "Zip Code" and "City". At the bottom of the form are two buttons: "Submit" and "Clear".

Click **Submit** to run the search. Click **Clear** to erase the fields.

Customer record exists? → Click on the customer record and click **Receive Application**. Follow the steps below in Generate a Barcode section to print the application barcode.

Customer record not found? → Click **New Customer** to create a new customer record and add the application. The application should now appear in the search results. Select it and click **Receive Application**.

Generate an Application Barcode

Generate a barcode if the customer's application does not already have one OR if the name on the barcode does not match the name of the applicant.



NOTE

A customer's application must be in ServTraq and have their application marked as "received" **BEFORE** a barcode can be generated.

After searching for the customer, select the correct customer record and click **Print Barcode**.

	New Customer		Edit Customer		Receive Application		Print Barcode		Refresh List		Export List ▾
Search Results											
	Name	SSN	Date of Birth	Mailing Address							
	DOENA T HOLSCHEIN	765-43-2108	12/31/1950	1 THIS WAY APT A							

A specific barcode label for the customer selected will be generated. Click to print.

**NOTE**

A barcode is just a contact number and **NOT** an application identification number.

ICON KEY

	View multiple barcodes on one page
	Zoom out
	Zoom in
	Print all pages
	Print current page in view
	Export barcode to different format
	Search document
	See all export options