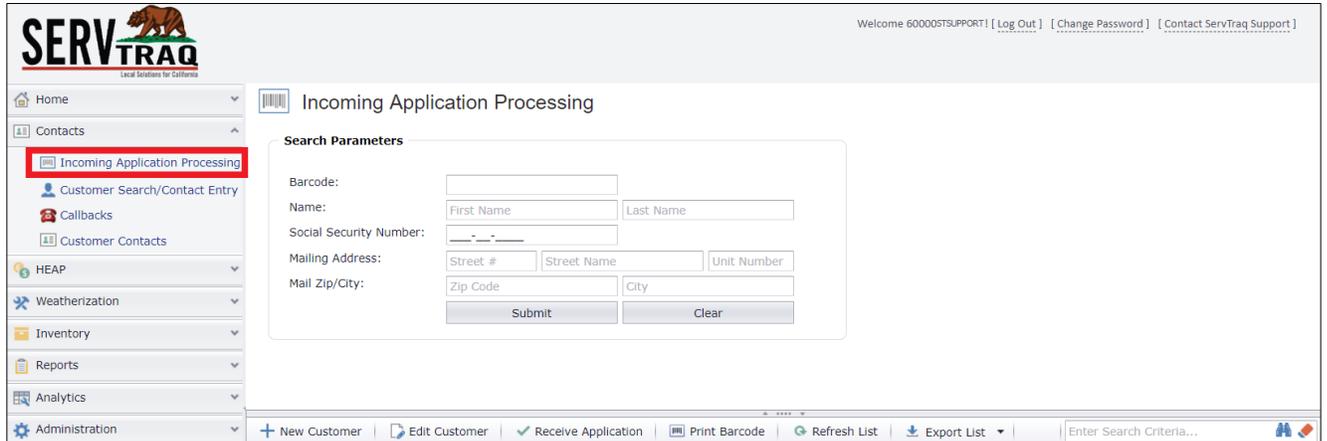


**2**

# 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**.

**WE RECOMMEND**

- ➊ **Barcode Scanner** ⇒ *Honeywell MS7120 Orbit Barcode Scanner*
- ➋ **Label Machine** ⇒ *DYMO LabelWriter 400*
- ➌ **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:	<input type="text"/>		
Name:	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	
Social Security Number:	<input type="text" value="___-__-____"/>		
Mailing Address:	<input type="text" value="Street #"/>	<input type="text" value="Street Name"/>	<input type="text" value="Unit Number"/>
Mail Zip/City:	<input type="text" value="Zip Code"/>	<input type="text" value="City"/>	
	<input type="button" value="Submit"/>	<input type="button" value="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:

Name:

Social Security Number:

Mailing Address:

Mail Zip/City:

+ 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

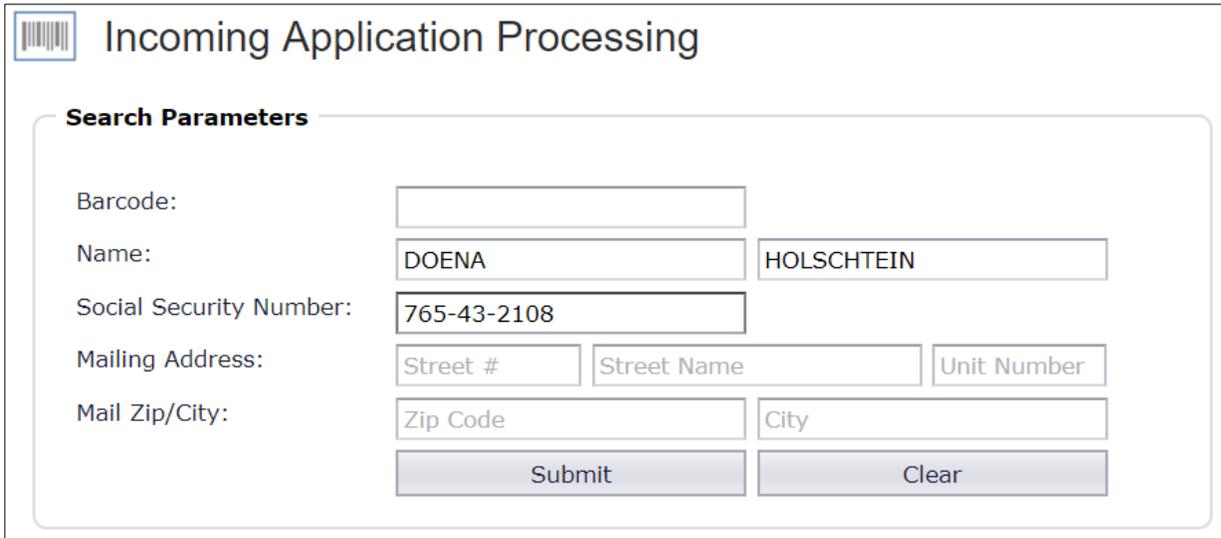
✓
Application Received Successfully
x

**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 search form. The form includes the following fields and buttons:

- Barcode:** An empty text input field.
- Name:** Two text input fields containing "DOENA" and "HOLSCHTEIN".
- Social Security Number:** A text input field containing "765-43-2108".
- Mailing Address:** Three text input fields labeled "Street #", "Street Name", and "Unit Number".
- Mail Zip/City:** Two text input fields labeled "Zip Code" and "City".
- Submit:** A button located below the "Social Security Number" and "Mailing Address" fields.
- Clear:** A button located below the "Mail Zip/City" fields.

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**.

<a href="#">+ New Customer</a>	<a href="#">Edit Customer</a>	<a href="#">✓ Receive Application</a>	<b>Print Barcode</b>	<a href="#">Refresh List</a>	<a href="#">Export List</a>
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