

Did You Know - New ImageSilo Interface Tips



Paperless that WORKS!

800-457-3733

MuniMetriX News & Technical Tips

... there are many new options available with the latest release of ImageSilo?

1. Column Layout and View

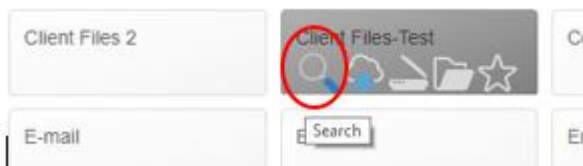
Not only does ImageSilo have a completely new look that is much more mobile friendly, you can also manipulate the view to suit your needs no matter what device you're on. For example, you can **MOVE** columns around, or just **HIDE** them completely! Simply click on the three dots in any column to display the view options, or just drag/drop columns in whatever order you'd like them.

The screenshot shows the ImageSilo interface with a table of documents. A context menu is open over the 'Policy-Account No' column, showing options to drag/drop columns and to uncheck boxes to hide columns. The table has columns for Document ID, Client Name, Policy-Account No, REP ID, Document Type, and Plan Type. The context menu lists various columns that can be hidden, such as @Document ID, @Document Creation Date, @Status, Client Name, Policy-Account No, File Type, REP ID, Document Type, Plan Type, Company, Description, Audit, Document Date, By Whom Scanned, Scanned Date, and Submitted.

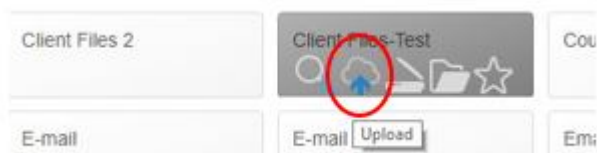
Document ID	Client Name	Policy-Account No	REP ID	Document Type	Plan Type
123456	Adams, Jon	735642	333444	Legal Document	
123456	Adams, Jon	735642	123456	Application	15 Year
123456	Adams, Jon	735642	987654	Illustration	15 Year
123456	Adams, Jon	735642	987654	Policy Delivery Receipt	20 Year
123456	Adams, Jon	735642	123456	Application	15 Year
123456	Adams, Jon	735642	987654	Application	
123456	Adams, Jonathan	123456	987654	Fact Finding Material	20 Year
123456	Adams, Jonathan	123456	123456	Application	
123456	Adams, Jonathan	999	123456	Client Profile	
123456	Adams, Jonathan	999	326598	Application	
123456	Adams, Jonathan	999	326598	Application	

2. When hovering over any project, hidden icons will appear (like magic) that enable you to Search, Upload, or Scan.

The **SEARCH** feature (a magnifying glass) gives multiple criteria options to help you narrow down your search results within that project.



The **UPLOAD** feature (previously called ADD) is for files already on your computer, such as emails, Microsoft office documents, and PDFs.

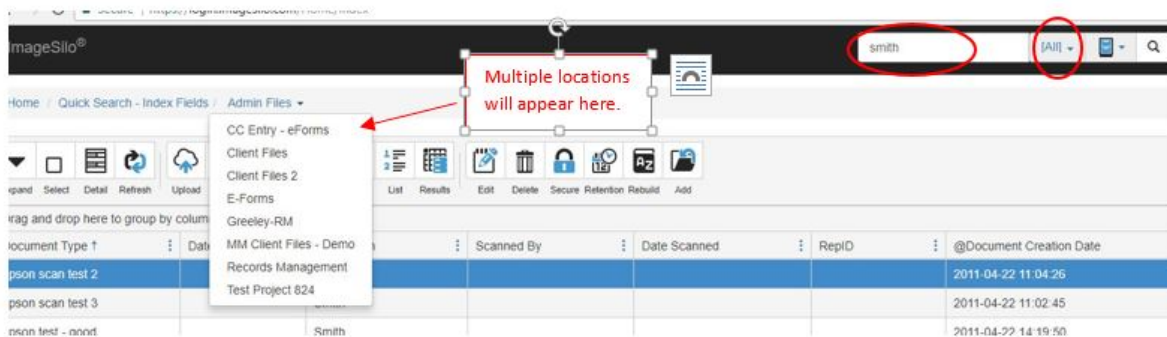


The **SCAN** feature is for dedicated scanners connected to your computer that can scan paper documents directly in to ImageSilo.



3. Quick Search

This is a feature that enables you to do a search through **ALL PROJECTS** at a time by entering a single criteria in the box at the upper right corner of the screen (next to your username). This "quick" search does not allow for filtering through multiple fields (unlike the 'magnifying glass' search mentioned above). **Note:** When using this feature to search all projects, you have to view the drop-down list (as indicated below) to see the various other projects the files may be found, as the search results will only show one project at a time.



As always, you may call our support team at 800-457-3733 for assistance. We'll be happy to help!

We want to encourage you, as a valued customer, to reach out to us should you have any suggestions or ideas you feel would be a benefit in your use of ImageSilo. Call us at 800-457-3733 or e-mail us at support@munimetrix.com any time! We appreciate your loyalty!
