KwikTag Overview

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KwikTag is a document imaging system that gives the ability to scan and electronically store various Agvance transactions and documents.

Logging In

To access KwikTag, in a web browser, enter the URL provided by KwikTag. This IP address allows access to the KwikTag server using a Chrome browser by adding */ktx* after the IP address of the server.



Once logged into KwikTag, select the option to view drawers.

The icon on the left shows all available drawers and the Star icon shows favorite drawers.

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Blend	Tickets	•		
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Lost a	Lost and Found 🔶 🕂			
My Filing 🔶 🕂				
Purchase Receipts 🔶 🛉				
Vendor Invoices 🔶 🛉				

Accessing Drawers

The App Menu in the upper right-hand corner provides quick access to the drawer list.



Selecting the drawer in the left-side menu displays available documents in the right-side viewing pane.

A scanned image of the document can be viewed by selecting the **PDF** icon. When selected, the document opens in the right-hand viewing pane and can be downloaded or opened in a new tab.

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Selecting the vertical **Ellipsis** icon displays actions for the selected document. Options include the ability to edit meta data, move the document to a different drawer, and email or delete the document from the server.

Blend Tickets



Searching and Filtering

There are two ways to perform a search in KwikTag:

• **By Drawer** – Find or filter documents in the selected drawer. Entering information into the Search or Filter field and selecting the **Magnifying Glass/Funnel** will search/filter the selected drawer.

Search	Filter	v
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• Global Search – Toggle between the options to match the search criteria exactly or to search for items which contain the specified search criteria. The Advanced Search options give the ability to search filing information as well as document content.



Add New File

A new document can be added to KwikTag by selecting the App Menu and choosing Add New File.



Select the Target Site and Drawer for the document and choose Submit.



If the files are electronic, they may be added at this point. Physical documents must have the appropriate barcode sticker adhered before scanning.

Enter the required meta data for this drawer and select **Submit** to complete the reservation.

kwiktag Add New Document

\odot Tag New Contracts

EXAMPLE 1 ADD FILES Simply Drag and Drop Or Click to Select Files	Expected Page Count						
Customer Name	Contract Number	Amount	WF_Status				
			Select an item 🔹				
Submit Cancel Add Another Retain Entries							