

Modify Index Values

Sometimes users may need to modify index field values, either due to mistyped indexes or additions/changes. The following steps outline

Modify Indexes on the Home screen

Users with proper permissions can make modifications to document index field values directly on the home screen.

Simply select a document by single clicking on an item in the search results screen, then scroll down.

Below the search results there are check boxes for “Indexes Information” and “Document Preview” with these check boxes enabled users can not only preview the document on the home screen but they can make changes to the indexes and Save.

The screenshot shows a table of search results with columns for document type, value, and document ID. Below the table, there are two checked checkboxes: "Indexes Information" and "Docu...". The "Indexes Information" section is expanded, showing fields for Vendor Name (PITNEY BOWES), Invoice Amount (219.81), Document Type (INVOICE), Urgency, Invoice No (8000-9090-0956-6006), PO No, Invoice Date (03/20/2019), and Import Date (03/28/2019). A red arrow points to the "Save" button at the bottom right of the form.

<input type="checkbox"/>	TECH DAT...	130.86	INVOICE	8029727635	FL206287
<input type="checkbox"/>	TECH DAT...	540.60	INVOICE	8029727634	FL206331
<input type="checkbox"/>	TECH DAT...	183.35	INVOICE	8029740807	FL206058
<input type="checkbox"/>	TECH DAT...	38.58	INVOICE	8029740809	FL204876
<input type="checkbox"/>	OFFICELINX	26.36	INVOICE	679058	
<input type="checkbox"/>	DEX IMAG...	06.54	INVOICE	AR4101893	PC286918
<input type="checkbox"/>	WHOLESA...	1230.50	INVOICE	36910	
<input type="checkbox"/>	HGI TECH...	25.55	INVOICE	869694	

Modify Indexes in the image viewer

Once a document is open within the image viewer, simply select the arrow above “Page Information” in the upper right corner to expand the “Page Information” window.

The screenshot shows a document page with the text "-6006" and "Page 1 of 2". In the upper right corner, there is a vertical bar with a blue circle icon and the text "Page Information". A red arrow points to this icon, indicating that clicking it will expand the "Page Information" window.

Modify Index Values

The first (default) tab is the Indexes tab. Here users can make changes to the indexes and Save.

The screenshot shows a web application interface with a sidebar on the left and a main content area on the right. The main content area is titled "Page Information" and has three tabs: "Indexes" (selected), "Info", and "Notes". Below the tabs, the title "Cabinet : AP Invoice" is displayed. The form contains the following fields:

- Vendor Name: PITNEY BOWES
- Invoice Amount: 219.81
- Document Type: INVOICE (dropdown menu)
- Urgency: (empty field)
- Invoice No: 8000-9090-0956-6006
- PO No: (empty field)
- Invoice Date: 03/20/2019 (calendar icon)
- Import Date: 03/28/2019 (calendar icon)

At the bottom of the form, there are two buttons: "Save" and "Reset". A red arrow points to the "Save" button.

Contact Information

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