SureClose-Barcoding

About Barcoding

Barcodes can be used to simplify the process of filing documents to placeholders in SureClose. Once set up, a barcode cover sheet can be generated, printed, and distributed to parties on a file.

Before barcodes can be generated for a document placeholder on a file, at least one barcode cover sheet template must be created and/or uploaded to SureClose.

Enable Barcoding

You must enable barcoding in SureClose before barcoded attachments can be filed directly to placeholder in a file.

Steps

1. On the navigation pane, click **Home**.
2. Select **Profile**.
3. Under Preferences, select **Auto-file Barcoded Documents** to set this feature to Yes.

> **Note:** If the Auto-file Barcoded Documents is not selected, documents will not automatically file into your placeholders, and will go to the user's inbox.

4. When finished, click **Save**. You will now be able to scan barcodes for automatic filing to placeholders.
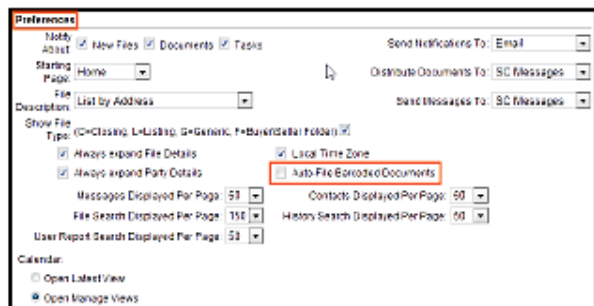
Create a Barcode Cover Sheet from an Existing Template

Barcode cover sheets can be generated and printed two different ways using the Barcodes button in the top menu of the Documents page.

If the placeholder has the **Use for Barcoding** check box selected, then you can select the **Barcodes** button to automatically generate a barcode cover sheet for all placeholders on the file with this setting, *without having to select each individual placeholder.*

> **Note:** Double-click each placeholder on the file you want to use for barcoding. On the General Information tab select **Use For Barcoding** then click **Save**.

If the placeholder does not have the **Use for Barcoding** check box selected, then you must select the placeholder or placeholders you want to generate a barcode cover sheet for, and then click the **Barcodes** button.

> **Note:** If no placeholders exist on a selected file, then the Barcodes button displays but is disabled and cannot be used.

Steps

1. On the navigation pane, click **Files**. Recent Files open at the top of the navigation pane.
2. From Recent Files, locate the file you want to work with. If needed, search for the file.
3. With the file selected, click **Documents**. The Documents page displays.
4. Select the placeholder or placeholders you want to work with.
5. Click the **Barcodes** button. The Barcode Cover Sheet Template drop-down list displays.
6. Select the template you would like to use.
7. Click **OK**. Your cover sheets will take a moment to generate.
8. Your coversheets will display. Select **Print** to use this cover sheet. Select the **Distribute** button if you would like to email this cover sheet to another user. You may also save this cover sheet to your computer by selecting **Save**.
9. When finished, click **Close**.