Digital Forward

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Overview | OnBase

Purpose

OnBase is a document hosting platform that is closely integrated with **Lightico**. As an agent, it is of critical importance to be aware of OnBase's capabilities and the way in which you interact with the platform when processing service requests.

Why we made it?

OnBase works in conjunction with the functionality of **Lightico** to further streamline and improve the connect service process for both customers and agents.

How will this benefit you?

You will know how to access and navigate OnBase, shortening the time it takes to process a service request and, in turn, driving increased customer satisfaction.

![Digital Forward]
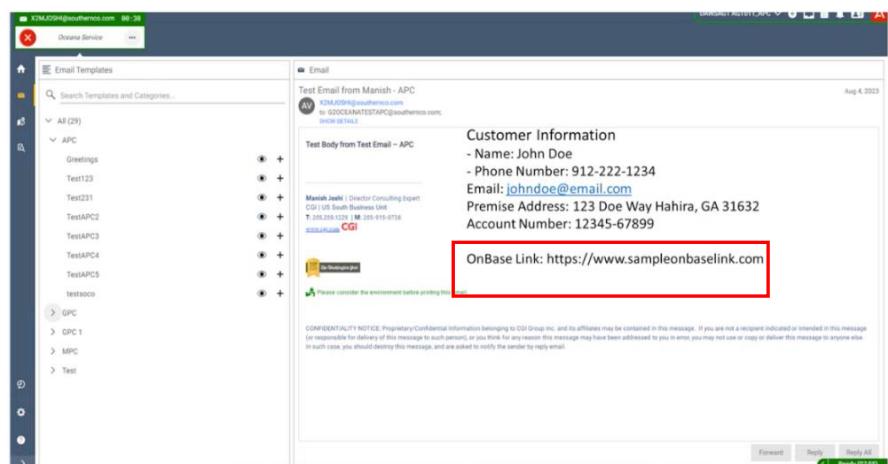
Lesson A | Access OnBase

Purpose

To learn how to access **OnBase**.

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1. Once a customer submits their documents through **Lightico**, you will receive a notification in **Workspaces**.

2. The notification will include the customer's information and a link to view the customer's documents in **OnBase**.

3. Click the **OnBase** link to open **OnBase**.

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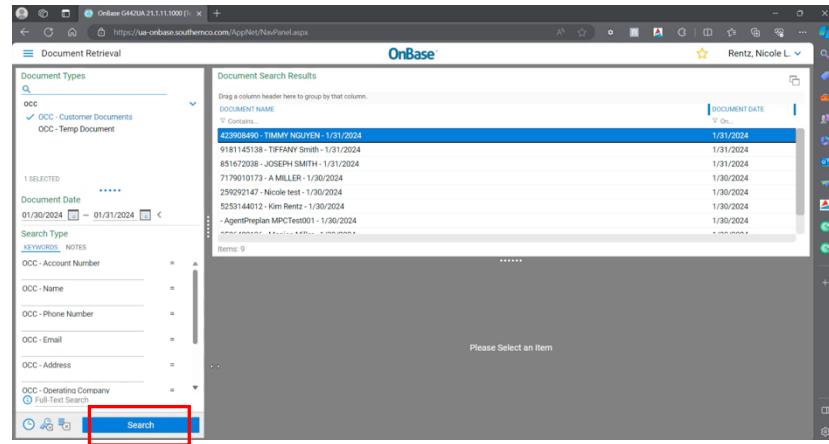
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Lesson B | Customer Search

Purpose
To learn how to search for a specific customer's documents within **OnBase**.

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1. In **OnBase**, you can use the left-side panel to search for a specific customer. Search parameters can include Account Number, Customer Name, Customer Phone Number, Physical Address, and more.

2. Enter your desired search parameters and click the "Search" button.

3. **Lightico** customer sessions matching your search parameters will appear in the "Document Search Results" panel in the center of the screen.

4. Select the appropriate customer session, and their documents will appear in the lower panel of the screen.

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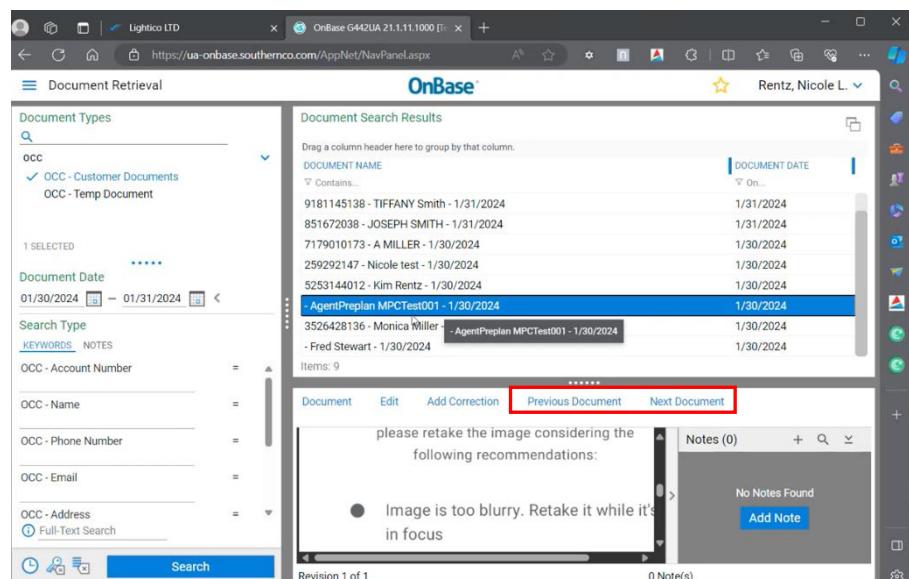
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Lesson C | View Documents

Purpose
To learn how to view documents within **OnBase**.

1. You can view the documents the customer has uploaded in the bottom panel of **OnBase**.

2. Click "Document" to view the first document.

   a. You can cycle through documents by clicking the "Previous Document" and "Next Document" buttons.