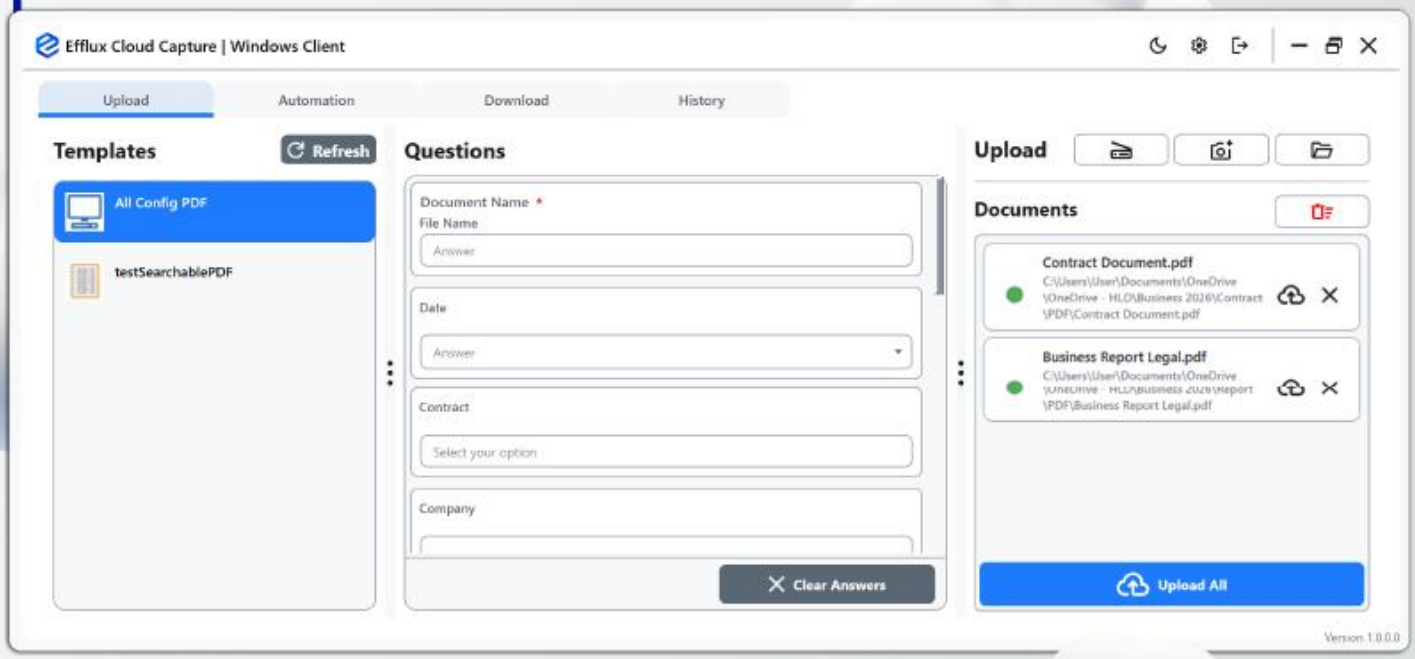
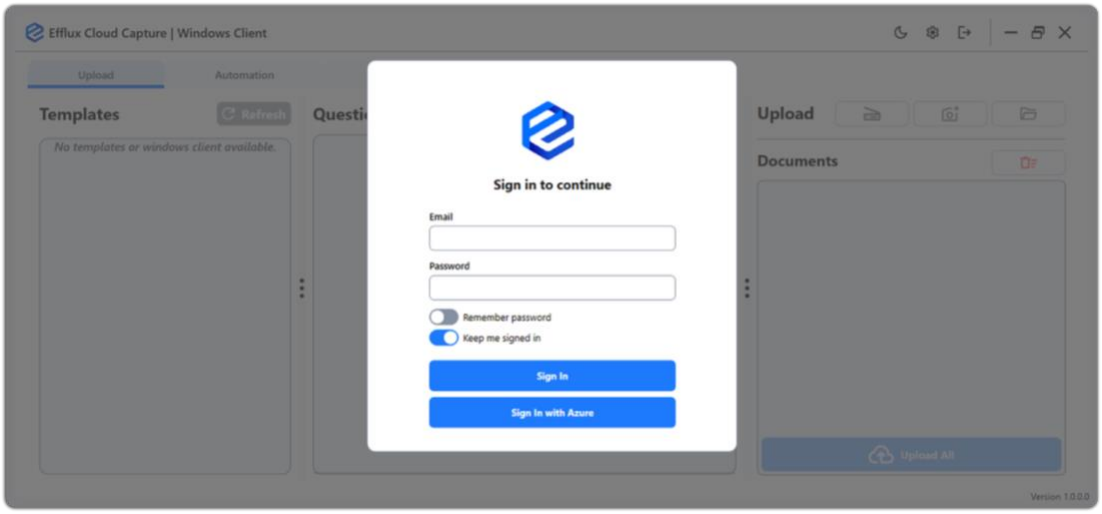
User Manual

Efflux Cloud Capture

Windows Client



1. Login



Use your **Efflux Cloud Capture** credentials to sign in to the Windows Client.

If your account has access to Cloud Capture, you can log in without any additional setup.

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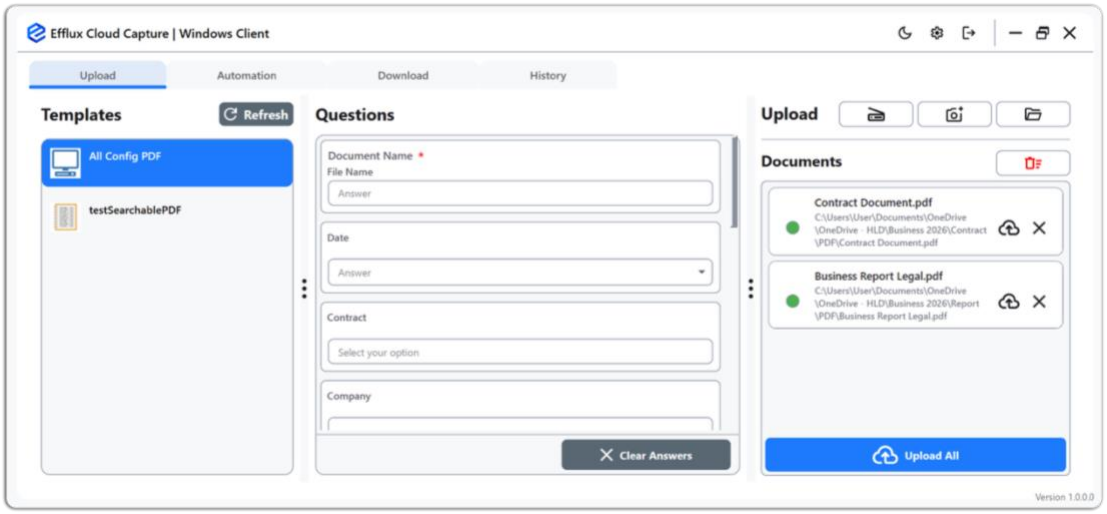
2. Upload



2.1 Templates

The first tab displays your available templates.

To see templates here, make sure you have:

1. Created a **Windows Client** entry in Cloud Capture.
2. Assigned one or more templates to that Windows Client.

2.2 Answering Template Questions

If the selected template contains questions, they appear in the middle panel.
Fill them in before adding documents to upload.

2.3 Adding Documents

You can add documents in three ways:

Browse
Click **Browse** to select one or more files from your computer.

Capture
Click **Capture** to open a camera window.
Choose your camera source, take a picture, and add it to the upload list.

Scan (TWAIN)

Click **Scan (TWAIN)** to open the scanning window.

Steps:

1. Click **Start Scan**.
2. Choose your scanner source.
3. The scanned pages will appear in a preview.
4. Add the pages to your upload list when ready.

2.4 Uploading Documents

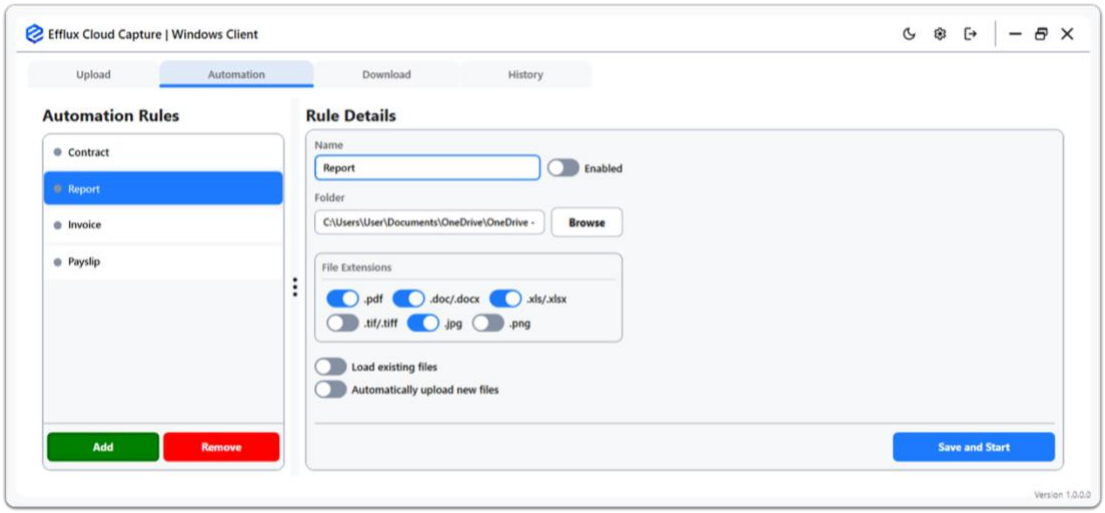
You can upload documents in two ways:

- **Upload individually** using the upload button next to each file.
- **Upload all** using the button below the document list.

By default, files are removed from the list after a successful upload.
You can change this behavior in **Settings**.

3. Automation

This tab lets you create automation rules. Each rule monitors a folder and captures newly added documents.



3.1 Rule Configuration

For each rule, you must define:

- **Name** of the rule
- **Enable / Disable** state
- **Folder to track** (use **Browse** to select it)
- **File extensions** to capture (e.g., pdf, jpg)

3.2 Load Existing Documents

Enable this if you want the rule to capture documents already in the folder.

⚠ **Note:** If the rule restarts for any reason, existing files may upload again.

3.3 Automatic Uploading

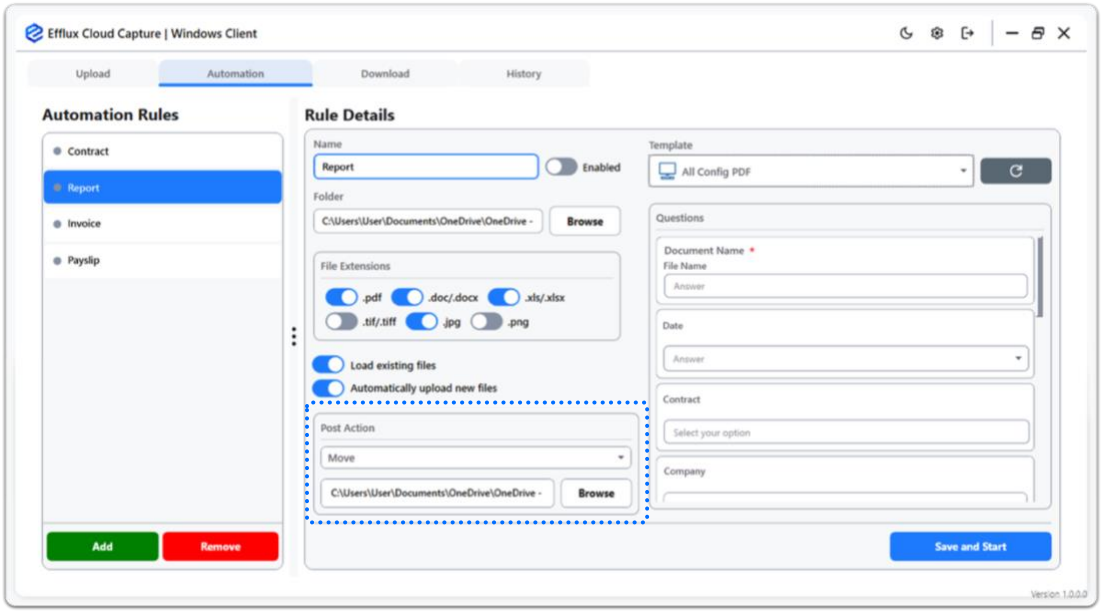
If **Automatically upload new files** is disabled:

- Captured files appear in the **Upload** tab and must be uploaded manually

If it is enabled:

- A template dropdown appears.
- Choose a template and answer its questions.
- Every captured file will upload automatically in the background using your selected template and answers.

3.4 Post-Action



Choose what happens to a file after upload:

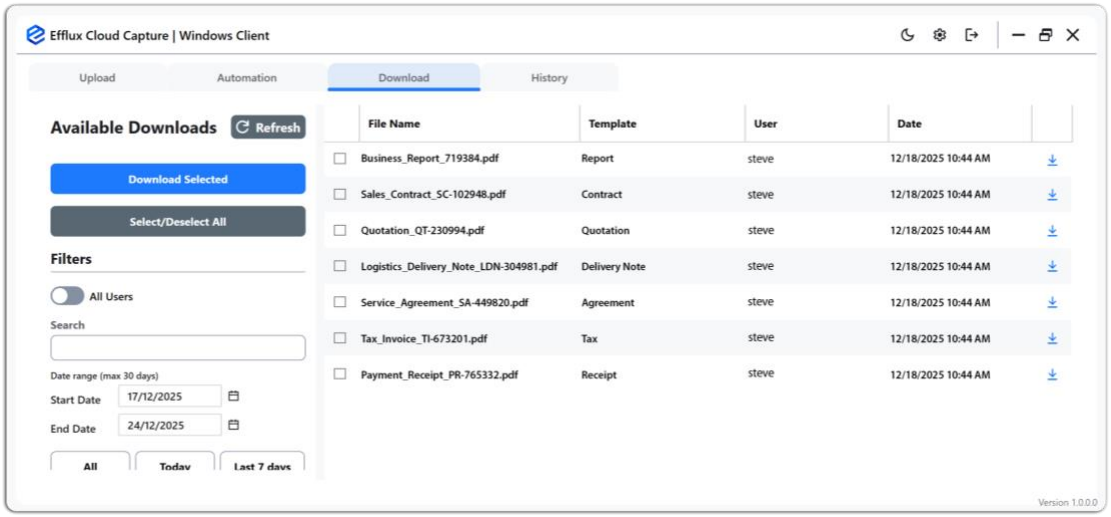
- **None**
  No action is taken.
- **Move**
  Select a folder. The file is moved there after successful upload.
- **Delete**
  The file is deleted from your computer after successful upload.

⚠
Recommendation: Enable a post-action if “Load existing documents” is turned on to avoid duplicate uploads.

3.4 Saving Rules

After making any changes to a rule, click **Save and Start**.
This restarts the rule and applies all new settings.

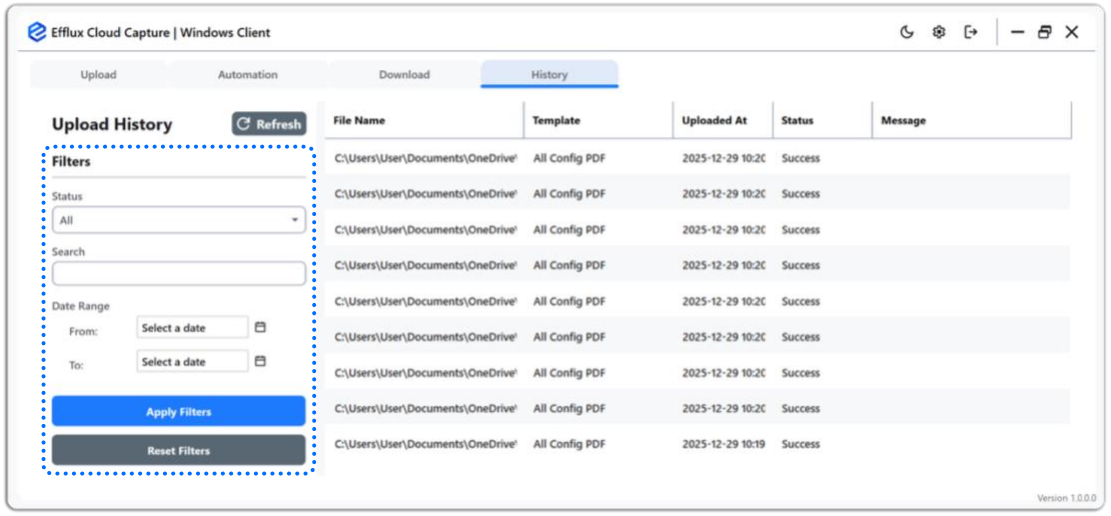
4. Download



This tab lets you download processed documents directly from Cloud Capture.

- Use the left-hand filters to find documents quickly.
- Select multiple documents and download them as a **ZIP** file using **Download Selected**.

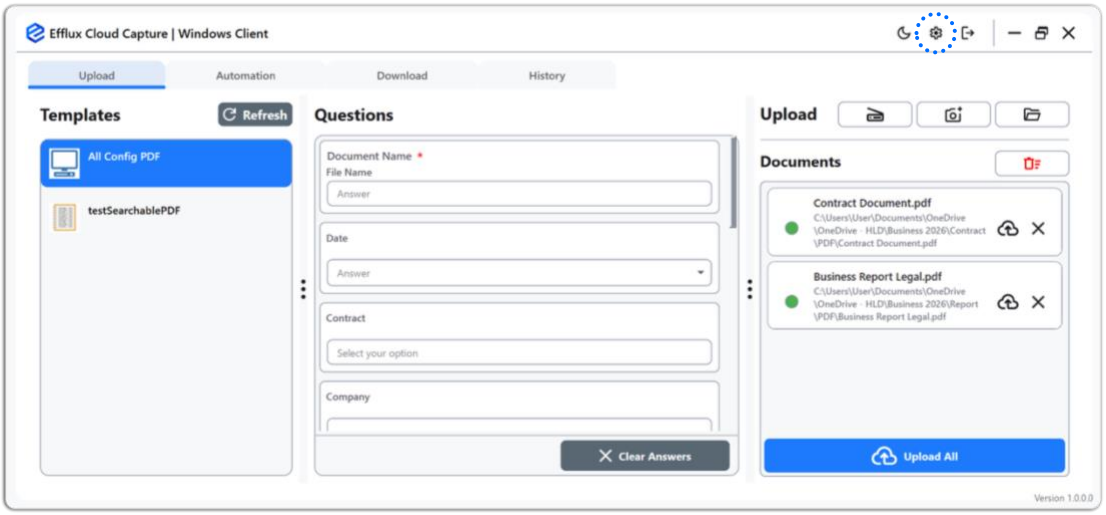
5. History

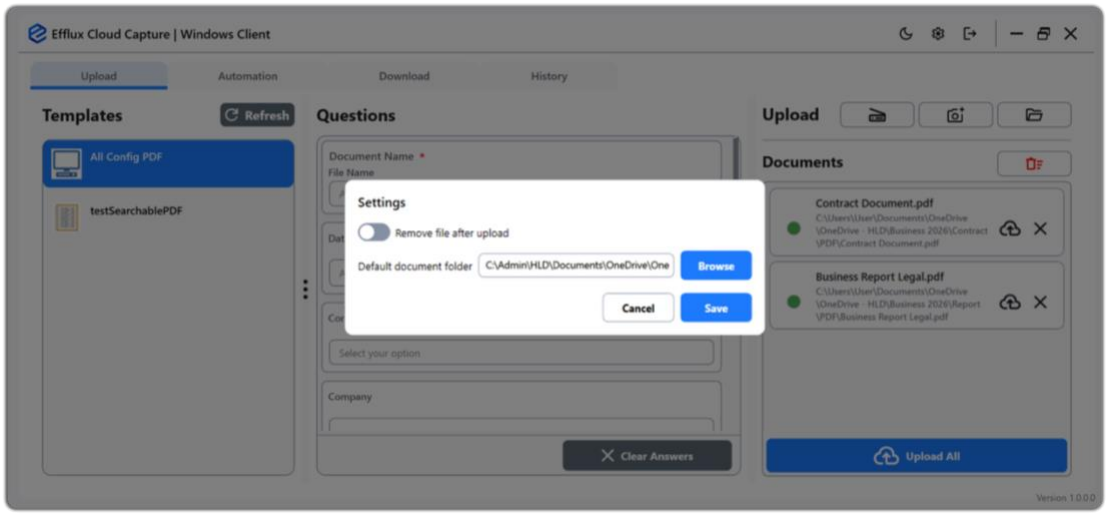


This tab shows the upload history from the Windows Client for the past **30 days**.

You can filter results using the left panel.

6. Settings



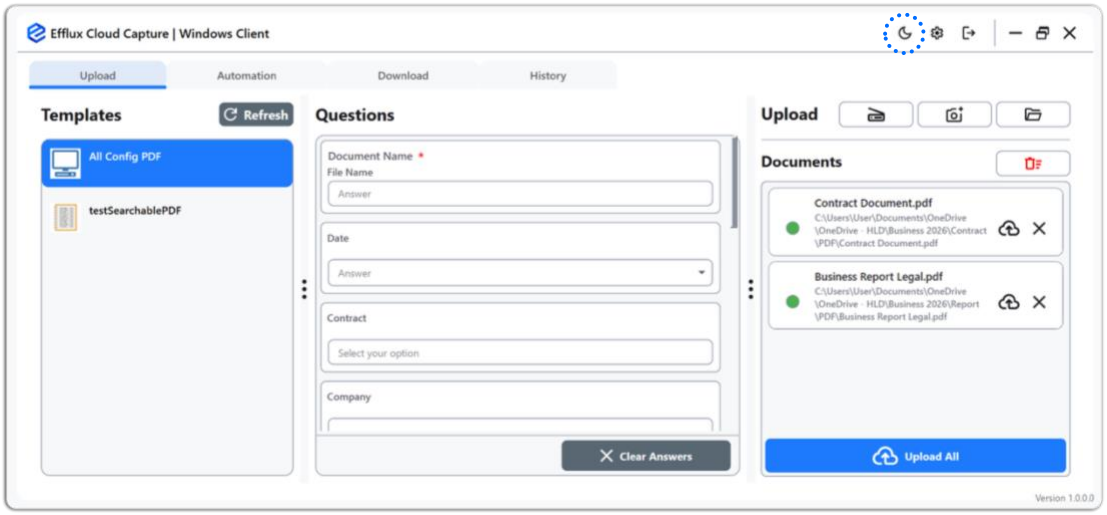


Open the Settings page using the gear icon in the top navigation bar.

Here you can configure:

- Whether documents should be removed from the upload list after upload.
- The default folder used when browsing for documents

7. Dark Mode



Switch between **Dark Mode** and **Light Mode** using the toggle in the top navigation bar.

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Color Palettes:

#1C2B41	#09326C	#0055CC	#0C66E4	#1D7AFC
#388BFF	#579DFF	#85B8FF	#CCE0FF	#E9F2FF
#1D2125	#22272B	#2C333A	#454F59	#596773
#8590A2	#B3B9C4	#DCDFE4	#F1F2F4	#F7F8F9

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