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Personable Inc. — ScanWriter 2012

800-688-4281

www.personable.com

Best Firm Fit

It is always pretty easy to identify the best firm fit for ScanWriter QuickBooks Edition (ScanWriter). It is designed at the core for serving as a document storage solution to support your QuickBooks transactions. If your firm provides outsourced bookkeeping and accounting services based on QuickBooks then ScanWriter is designed to fill that niche. The value of ScanWriter diminishes if you are not servicing QuickBooks based clients and/or using QuickBooks internally. However, the Workflow DMS product can be used to help manage the storage and routing of documents outside of QuickBooks.

Strengths

- Available as a desktop application or hosted by Personable
- Direct integration with 26 different transaction and record types in QB
- Workflow DMS application can be used to manage the processing of documents outside of QuickBooks
- ScanWriter utility will convert credit card and bank statements into a format for direct import into QB transactions
- Integration with Outlook inbound and outbound e-mails

Potential Limitations

- Limited functionality beyond QuickBooks integration

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QuickBooks.

- Any QuickBooks transaction can be linked to an Outlook e-mail message, a web address, or a ScanWriter file.
- The TurboFolder feature is used to create a standard folder / sub-folder template that can be customized on a per client basis as appropriate.
- Documents can be scanned directly into ScanWriter and the built-in OCR tool will convert the scanned images to searchable text.
- You can annotate the ScanWriter image files with a series of electronic stamp images that are provided.
- Outlook emails can be stored directly into ScanWriter and files can be emailed.
- ScanWriter ME (Management Edition) includes the capability to route files based on pre-defined rules, i.e., invoice amount.
- QuickBooks documents can be searched by transaction date, amount, vendor, customer, reference number and more.
- The ScanWriter module is a powerful new application that will scan credit card, bank statements and many other documents and pick data off the documents using OCR. You can establish your own library of recognizable documents that you can use to transfer data directly from the form into QuickBooks or Excel.

Summary & Pricing

Personable continues to work on improving the depth and scope of their product functionality. The ScanWriter module, which is only about a year old, has been enhanced to let you setup your own document recognition library. The bottom line with ScanWriter is that its value is based in the integration with QuickBooks. You can use your level of QuickBooks utilization to measure the potential value of ScanWriter and the companion ScanWriter application for your organization. Pricing for ScanWriter is \$995 and includes the ScanWriter module. A three user

package is priced at \$2,595. The hosted version of ScanWriter is priced at \$125 per

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