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product can be used with any TWAIN compatible scanner, or customers can purchase a compatible scanner directly from Personable if desired.

Mary Girsch-Bock • Aug. 18, 2016



From the **2016 reviews of Document Management and Document Storage systems.**

For accounting firms currently using QuickBooks that offer accounting services for multiple clients, data entry can be time-consuming and cumbersome. Enter ScanWriter, from Personable, a handy application designed for QuickBooks users that automates the data entry process.

ScanWriter can be purchased alone, or teamed up with other Personable applications which include SourceLink, which provides document management capability, along with WorkFlow DMS, which offers easy document routing

capability. Used together, they offer complete document management capability for

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bypassing the traditional data entry route.

Personable Scan Writer

www.personable.com/ScanWriter_Overview.htm

ScanWriter works with both QuickBooks Desktop and QuickBooks Online, the product can be used with any TWAIN compatible scanner, or customers can purchase a compatible scanner directly from Personable if desired.

To scan in documents, both ScanWriter and QuickBooks applications need to be open. The product uses a variety of templates, called Readers, which help to identify the data that needs to be read from each document that will be scanned in. To begin, a Master Reader is created for each type of document, such as invoices, bills, bank statements, and deposits. Users simply choose the appropriate reader and click on the data import button on the user navigation screen. The system can access files directly from a scanner or by accessing PDF files that are stored in the computer. Documents can be accessed individually, or an entire folder can be automatically scanned if desired. Once documents have been scanned, users can quickly review the documents for accuracy, validating any data that has not been correctly assigned. Once the file is approved, users simply click on the Import in QB button to import the data. If an error is found once a file has been imported, users can easily reverse the import by using the Undo the Last Import button.

For firms that handle a large number of transactions and use QuickBooks, ScanWriter can save an inordinate amount of time.

ScanWriter is available in Basic and Standard versions, with the Basic Edition with one workstation for a one-time fee of \$995. A monthly plan is also available, which includes SourceLink, at a cost of \$49.95 for 24 months. A \$49 monthly maintenance fee is required of both Basic versions. The Standard edition, including SourceLink

and 100 customized readers, has a one-time cost of \$3,995, and a maintenance fee of

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