clients, data entry can be time-consuming. But ScanWriter from Personable eliminates the need for data entry, automating the process entirely.

Mary Girsch-Bock • Dec. 18, 2017

Personable ScanWriter

Xero, and Excel users. Accounting firms can purchase ScanWriter as a stand-alone application, or used in conjunction with other Personable applications such as SourceLink, which provides document management capability for QuickBooks users, or Workflow DMS, which offers users the ability to quickly and accurately route files to the appropriate parties. Both WorkFlow DMS and SourceLink can also be purchased as a separate application.

ScanWriter boasts 100 percent data accuracy in QuickBooks, with users able to manage a significant number of transactions in a fraction of the time it takes to enter data manually. The automated processing also helps to significantly reduce data entry errors, as users can easily review all data prior to completing the importing process. ScanWriter also offers batch processing as well.

ScanWriter works with both QuickBooks Desktop and QuickBooks Online, and now offers the same benefits in its Xero version; both offering the ability to scan an unlimited number of documents such as bank statements, invoices, receipts, bill, and credit card statements directly into QuickBooks or Xero, allowing users to bypass traditional data entry all together. The product also works with a TWAIN compliant scanner, or users can choose to purchase a scanner directly from ScanWriter if desired.

ScanWriter includes custom readers that serve as templates in order to ensure that data is imported correctly. Users must create a master reader for each type of document that will be scanned, which include invoices, bills, statements, and deposits. In addition to scanning data directly from banking institutions and credit card companies, users can quickly scan data from PDF's as well. Each document can be accessed and reviewed individually, or entire folder of documents can be processed if necessary. Once documents are scanned, users can easily review the data on display to ensure accuracy prior to the import process. Once approved, users only

need to click on the Import button to import the data directly into the corresponding

users incurring a monthly fee of $49.00 per active company per month for both Xero and QuickBooks companies. Monthly fees for Standard licensing for QuickBooks and Xero users runs $245.00 per month and includes up to 10 company files and up to 10 customized readers.

Firm Management • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.