PS Financials
Powering Better Business Decisions
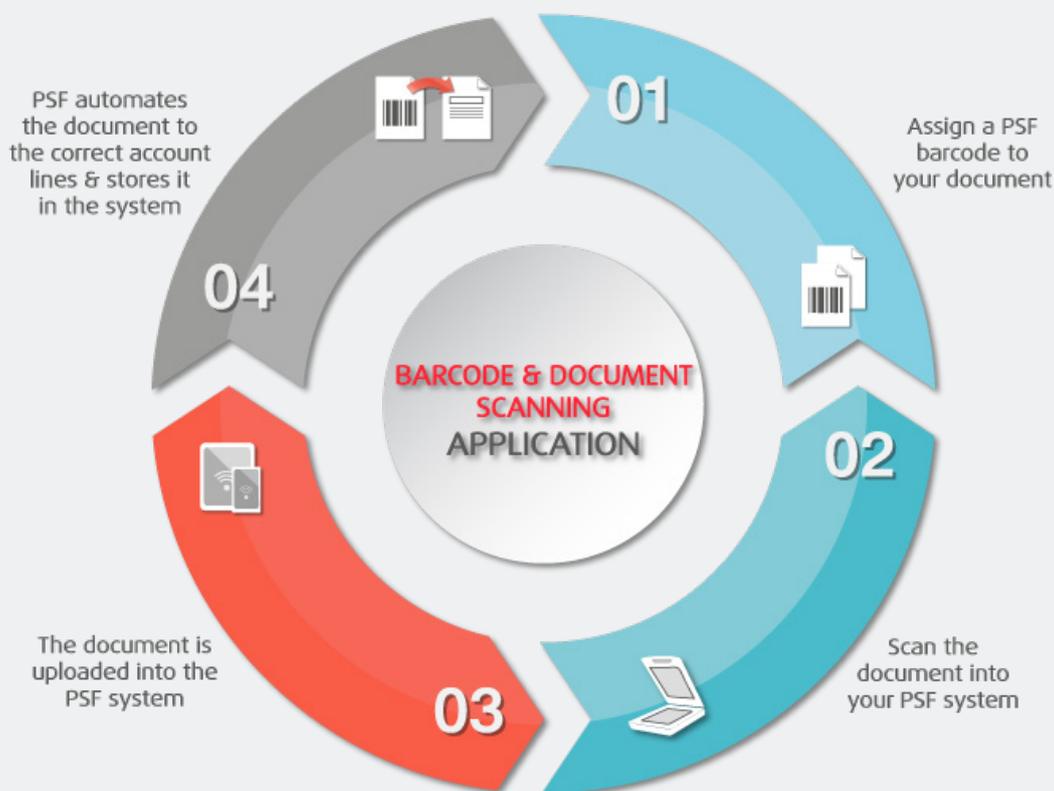
Document Barcode, Scanning & Attachments

Streamline your document input procedure with PS Financials

The PSF Barcode & Document Scanning application provides electronic copies of external documents like purchase invoices etc. The Emailing suite attaches internally produced documents. The application allows you to assign barcodes and scan documents effortlessly into the system.

Documents created with a PS Financials barcode specifies the details of the document within the barcode itself. For data input, you scan the documents into PSF, the module then automatically assigns the data to the correct account lines and stores it in the system.

01 Assign a PSF barcode to your document

02 Scan the document into your PSF system

03 The document is uploaded into the PSF system

04 PSF automates the document to the correct account lines & stores it in the system

BARCODE & DOCUMENT SCANNING APPLICATION

Numerous documents can be created and uploaded; this does not have to be an ad hoc procedure and can facilitate the input of multiple documents into PS Financials.

The scanning application is able to read the barcode set on the first page of every document and understand that the next barcode will recognise the beginning of the next document. This means that multiple documents can be input in batches.

Scanned Documents stored against:

► Accounts   ► Transactions   ► Documents created in PSF are automatically attached

Drive efficiency, reduce cost and improve processes

The Barcode and Scanning application provides beneficial features:

Automatically produces barcode from posting within PSF

Eliminates the need for keeping hard copies of paperwork

Upon scanning, PSF organises documents to the corresponding account or transaction automatically, eradicating any user errors
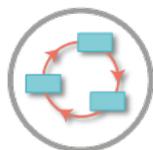
Scanned documents can be sent electronically for approval using PSF Workflow

Profiles can be set up determining the document types scanned into the system i.e. set to a certain format and style for each profile

Reduction in the cost of stationery as fewer documents are photocopied

Workflow enabled

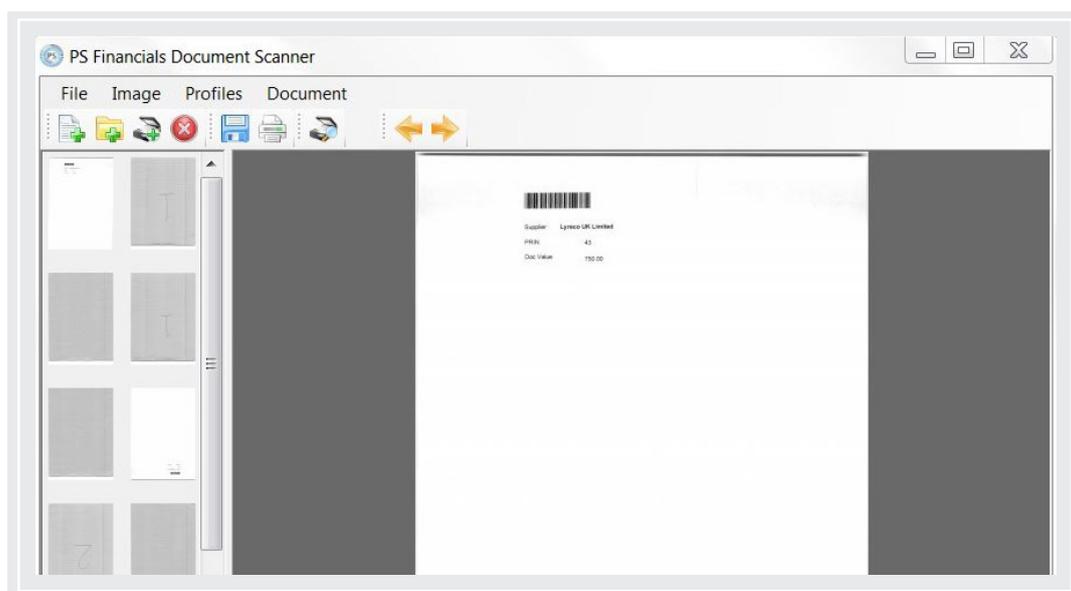Reduced postage costs as documents can be viewed and sent online rather than posted

Single or multi-page document

Time spent filing, distributing and photocopying is drastically reduced

The PSF Document Scanner opening screen enables configuration of document file paths and the setup of various profiles:

"We have automated the authorisation of invoices in a similar way to what is currently done with the payments system. This means that the invoices received at Head Office will be scanned in and approved electronically, therefore we don't have to chase bits of paper around."

Acorns Children's Hospice

For an in-depth look into PS Financials' solutions, visit our website:
www.psfinancials.com/our-solutions

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