



GRM Windows Gains Clearer View of Accounts Paperwork with PSI:Capture

Company Background

GRM windows has grown to become one of South Wales most established suppliers of PVCu windows, doors, panels and conservatories and has been supplying directly to trade and public for more than 35 years. The company takes a pride in providing a quality service, a wide range of products and competitive prices.

The Problem

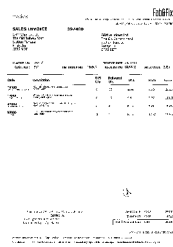
The company was having difficulty storing and accessing accounts paperwork such as sales orders, purchase invoices and delivery notes. In addition, manual keying of data from these documents into the accounts system, Sage Line 50, was becoming more and more time consuming.

The Requirements

GRM Windows needed a system to automatically extract data from these documents, upload it to their accounts system and create an electronic copy that could be stored safely on their server for quick access and for backup in case of the need for disaster recovery.



Richard Gambling
Managing Director



Document Index Fields		Record 1 of 1
Invoice Number	357400	
Date	29/10/2013	
Char Performance	530	
Net Total	235.16	
VAT	47.03	
VAT number	709695631	
Vendor Name	Fab&Fa	
Tax Code	T2	
Account Code	F370	
Nominal Code	500005	
Date Scanned	28/05/2014	



Incoming supplier invoices and sales orders are scanned on a Canon MFP and imported in PSI:Capture for processing

PSI:Capture identifies each item and extracts required data from each document type. Lookups to a database retrieve supplier details, tax rates and nominal codes

Data is exported into Excel (CSV) format and imported into Sage. Scanned documents are converted to PDF for storage and retrieval by PSI:Search

The Solution

The company chose PSI:Capture, a solution recommended by their office equipment supplier, Blue Sky Digital. PSI:Capture provided all the capability the company needed, including intelligent data extraction from a variety of supplier invoices and other accounting documents, integration with Sage Line 50, conversion of scanned images into legally admissible text-searchable PDF format and storage and retrieval of documents using the PSI:Search application.

“Adopting PSI:Capture for scanning and data capture has not only reduced the time taken to get supplier invoice data into Sage but it has also allowed us to store all our accounting documentation safely offsite on a remote server, eliminating the risk of losing critical company information in the event of a fire or flood.” Said Richard Gambling, Managing Director, GRM Windows.

Solution Components in Summary

Capture Software:	PSI:Capture with advanced data extraction and Sage integration
Output Formats	Text-searchable PDF and CSV data file
Document Management:	PSI:Search viewing software
Accounting Systems:	Sage Line 50
Scanner:	Canon Multi-function Printer

About Datafinity Ltd

Datafinity delivers cost-effective, leading-edge document management and data capture solutions for companies that need to improve the efficiency of business and document processes within their organisation. By providing a combination of innovative market leading technologies and years of experience in document management solutions, Datafinity can help improve efficiency, save cost and enhance customer service whilst achieving a fast return on investment.

About PSIGEN Software, Inc.

PSIGEN is the innovative leader in advanced capture applications, and helps organisations convert content into managed digital assets. Their largest customers include service providers, business process outsourcers, and major corporations with significant customer concentrations in financial services, healthcare, manufacturing and retail.