A packaged solution to quickly scan, store and reference supplier purchase invoices in the EFACS Document Management module.

Once a supplier invoice has been registered on the EFACS Purchase Ledger and approved, it is traditionally stored as a hard copy in a lever arch folder along with all the others.

Generally companies must keep records for 6 years - depending on the volume of supplier invoices processed, this can equate to a lot of stored paper and physical storage space. Equally the retrieval of a filed supplier invoice to answer a query can be time-consuming.

The Solution

Exel has created a packaged solution to vastly improve this process, making it more efficient and accurate.

The solution is comprised of a desktop WiFi scanner, a pre-defined workflow process and on-site consultancy for the implementation of the solution.

The Scanner

Exel has selected the ScanSnap iX1500 due to its compact footprint, desktop placement, fast scan speed of 30 pages per minute and wireless connectivity.

The Process

The operator in receipt of the invoice registers this via EFACS, which generates a Purchase Invoice (PI) number. A 3-way match is conducted as usual, comparing the invoice received against the Purchase Order and Goods Received Note.

The user then feeds the document through the scanner. As soon as this is complete a window appears on the PC screen, where the PI number is input as a filename.

Within the same screen, the resulting file is placed in a folder which is monitored by EFACS. When a document is detected the filename is read, this allows EFACS to save the document within the Document Management module, referenced against the relevant Purchase Invoice.

The document is now saved to the EFACS Document Management system and is referenced against the Purchase Invoice, Goods Received Note, Purchase Order and Supplier.

System Requirements

- 8.5.6 MR33, 8.6
- Workflow
- Document Management

Business Benefits

- Automated process.
- Document linked to multiple references.
- Complete accuracy.
- Document retrieval.
- Increased efficiency.
- Allows the possibility of destroying the hard copy.

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