

# Scanning Documents into Synergy Enterprise



***SYNERGYEXPERT.COM***

# Partnership for North America

- ✓ ScanSys partners with Exact Software globally (since 2006) to bring a scanning solution to Synergy Enterprise customers. Over 1,000 installations have been completed.
- ✓ ScanSys is working with SynergyExpert.com as their North American partner for sales, implementation and support for this tool.

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# Scanning Into Synergy Enterprise

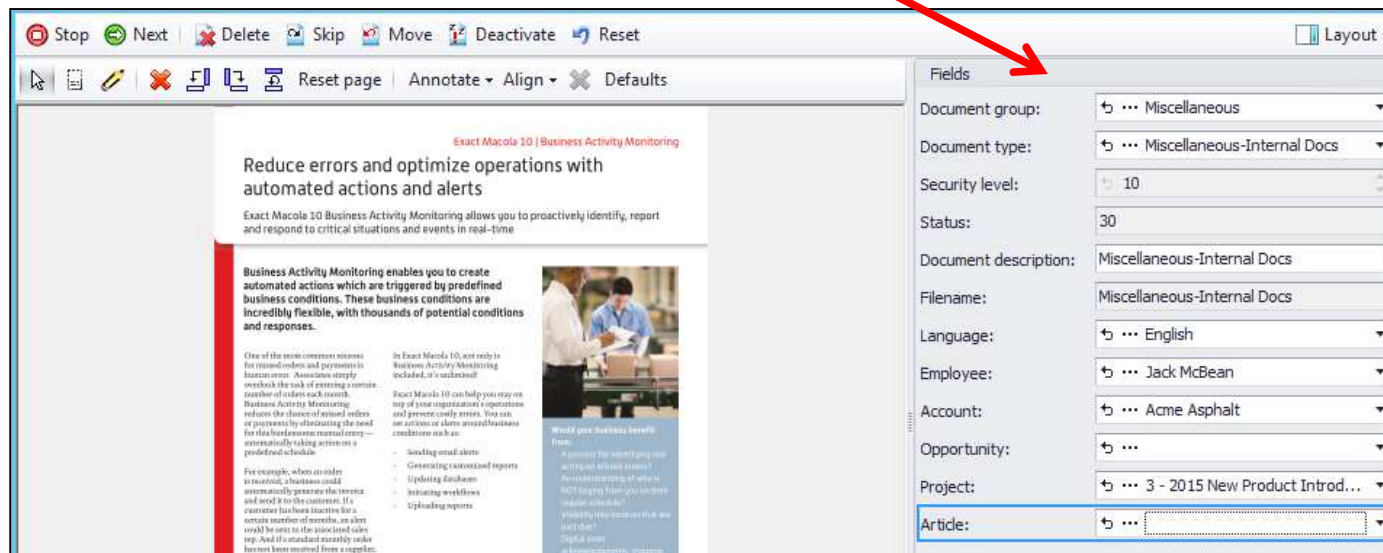
- ImageCapture is scanning software used in different modes for sending documents to Synergy Enterprise:
  - Manual Uploading
  - Automatic Uploading
  - Bar Code Recognition
  - OCR Recognition

# Scanning Into Synergy Enterprise

- Scanned documents are sent from a scanner to file directories.
- The uploading of the documents from these files is based upon the method used in attaching them to Synergy Enterprise (Manual or Automated).

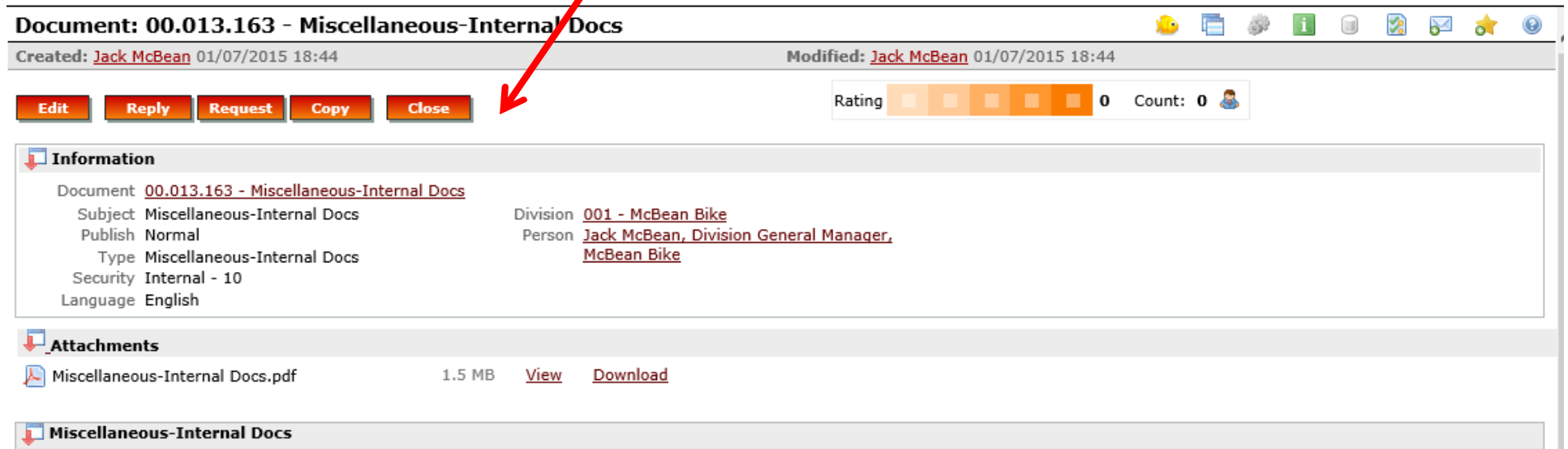
# Manual Uploading

- Allows a Resource to manually select the “Type” and other criteria for each saved Synergy document.




# Automatic Uploading

- Send all documents within a file directory to pre-defined “Criteria” within Synergy Enterprise.



Document: **00.013.163 - Miscellaneous-Internal Docs**


Created: [Jack McBean](#) 01/07/2015 18:44 Modified: [Jack McBean](#) 01/07/2015 18:44

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**Information**

Document	<a href="#">00.013.163 - Miscellaneous-Internal Docs</a>	Division	<a href="#">001 - McBean Bike</a>
Subject	Miscellaneous-Internal Docs	Person	<a href="#">Jack McBean, Division General Manager, McBean Bike</a>
Publish	Normal		
Type	Miscellaneous-Internal Docs		
Security	Internal - 10		
Language	English		

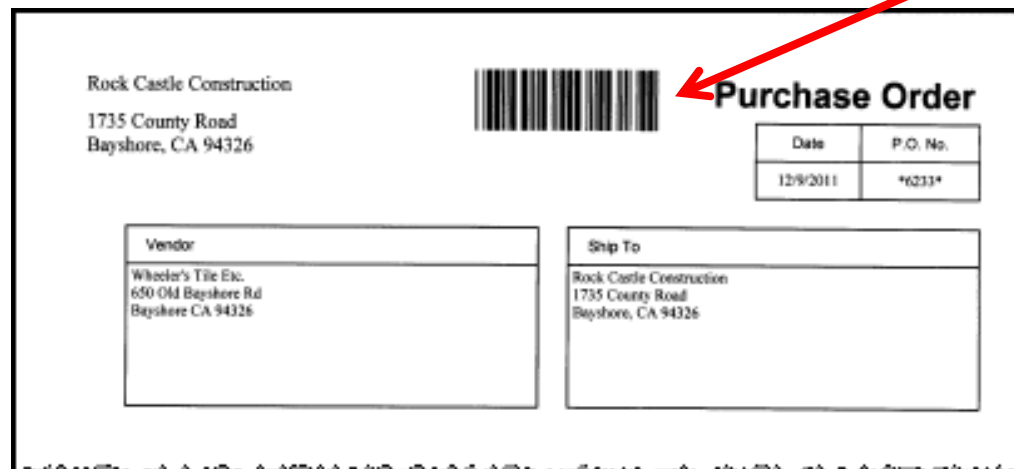
**Attachments**

 Miscellaneous-Internal Docs.pdf	1.5 MB	<a href="#">View</a>	<a href="#">Download</a>
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**Miscellaneous-Internal Docs**

# Bar Code Recognition

- Send all documents within a file directory and a certain bar code within a section of the form (or cover sheet) to a pre-defined “Criteria Type” within Synergy Enterprise.



Rock Castle Construction  
1735 County Road  
Bayshore, CA 94326

**Purchase Order**

Date	P.O. No.
12/9/2011	*6233*

Vendor	Ship To
Wheeler's Tile Etc. 650 Old Bayshore Rd Bayshore CA 94326	Rock Castle Construction 1735 County Road Bayshore, CA 94326

A red arrow points from the top right towards the barcode.

# OCR Recognition

- Send all documents within a file directory and certain OCR recognizable field(s) within a section in the form to pre-defined “Criteria Type” within Synergy Enterprise.

**ABC Corp** **PURCHASE ORDER**

123 Anywhere St.  
Some City, CA 91000  
Phone (555) 555-1212 Fax (555) 555-5555

P.O. NUMBER: 1234  
P.O. DATE: 4/15/13

**TO:**  
Jane Doe  
XYZ Corp  
123 Anywhere St.  
Some City, CA 91000  
Phone (555) 555-1212

**SHIP TO:**  
AAA Store  
Retail PO# 123  
123 Anywhere St.  
Some City, CA 91000  
Phone (555) 555-1212

**SHIP TO:**  
BBB Store  
Retail PO# 456  
123 Anywhere St.  
Some City, CA 91000  
Phone (555) 555-1212

START DATE	CANCEL DATE	ORDERED BY	SHIPPED VIA	F.O.B.	TERMS
4/19	4/26	Jane Doe	UPS 2-Day	MeImarc Inc.	NET 15

UNITS	DESCRIPTION	UNIT PRICE	TOTAL
	Design ABC - Style#123		



# Workflow Creation

- As Documents are uploaded into Synergy Enterprise, workflow requests can be created for further actions to be completed by your employees.

# More Information

For more information or a demo of this tool (or others) which we provide for Synergy Enterprise, contact our organization.

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