

BOOKKEEPING BUSINESS SIMPLIFIES UPLOADING AND STORING FINANCIAL DOCUMENTS WITH GLOBALSEARCH® AND GLOBALCAPTURE®

Case Study:
Books N Billing
with Sheila Burak-Farquharson, Office Manager

Industry:
Accounting

Departments Impacted:
Front Office, Accounting

Featured Products:
GlobalSearch® and GlobalCapture®

Objectives:
Find and implement a solution that would be compatible with their upgraded software



Meet Books N Billing

Based in Melbourne, Florida, Books N Billing, a woman- and USAF Veteran owned business, works as a back-office specialist for a businesses' bookkeeping needs. Focusing on small businesses, entrepreneurs, and salespersons regularly on the go, Books N Billing helps companies streamline their accounting processes and organize their financial documents to help them increase productivity and have a clearer picture of their business finances.

Challenge

Books N Billing was looking to replace the solution they used to store both customers and their own business files. Their old solution was no longer compatible with the software they were upgrading to. Office Manager, Sheila Burak-Farquharson, works daily scanning client files including receipts, financial paperwork, and invoices. She is also responsible for scanning in the mail, ordering office supplies, and assisting clients by answering general questions.



“We were upgrading our solution, trying to tweak some things, and the solution that we had was no longer compatible with what we were doing and the software we were upgrading to.”

Sheila Burak-Farquharson

Solution: GlobalSearch® and GlobalCapture®

Konica Minolta, a partner of Books N Billing, who helps with their printing services, highly recommended Square 9's GlobalSearch and GlobalCapture solutions. The implementation process was slower than they expected to get all their documents moved over correctly, but now that they are up and running with GlobalSearch, the Books N Billing staff likes the ease of use for themselves and their clients.



“GlobalSearch is very user friendly; we can add index fields to the documents in GlobalSearch no matter our location.”



Sheila Burak-Farquharson

Benefit

“The coolest thing about GlobalSearch is when I can scan in everything at once; all of the documents from different clients and the QR Coversheets separate each document,” said Burak-Farquharson.

Once the documents are in GlobalSearch, Sheila can log in and index the documents, either in the office or at home. “That was one of the benefits, especially with Covid shutdowns, being able to access this information if I was working from home, I was still able to index these documents from my house and work efficiently,” said Burak-Farquharson.

Result

“

“We would definitely recommend GlobalSearch to our peers. It’s a very cool process to scan and store documents, especially for small businesses. It’s very fast to scan the documents in, and there is little to no delay time for when it gets into GlobalSearch.”

_____ *Sheila Burak-Farquharson*

“It’s very convenient. I can scan anywhere from 100 to 600 documents in the office and then go home and index the documents if I needed to”, said Burak-Farquharson.



See how Square 9 Softworks can transform your organization. Visit www.square-9.com or call us at 203.706.4808.