



DocuSort Pro

User Guide

Version 3.2

*Batch rename, OCR extract, and automatically
file your documents in seconds*

 Smart Renaming Batch rename with powerful, stackable rules	 OCR Extraction Read text from inside your documents	 Auto Filing Sort files into folders automatically
 Watch Folders Automate with monitored directories	 Team Sharing Share subscriptions with your team	 Undo History Reverse any rename with one click

[docusortpro.co.uk](https://www.docusortpro.co.uk)

© 2025 DocuSort Pro

Contents

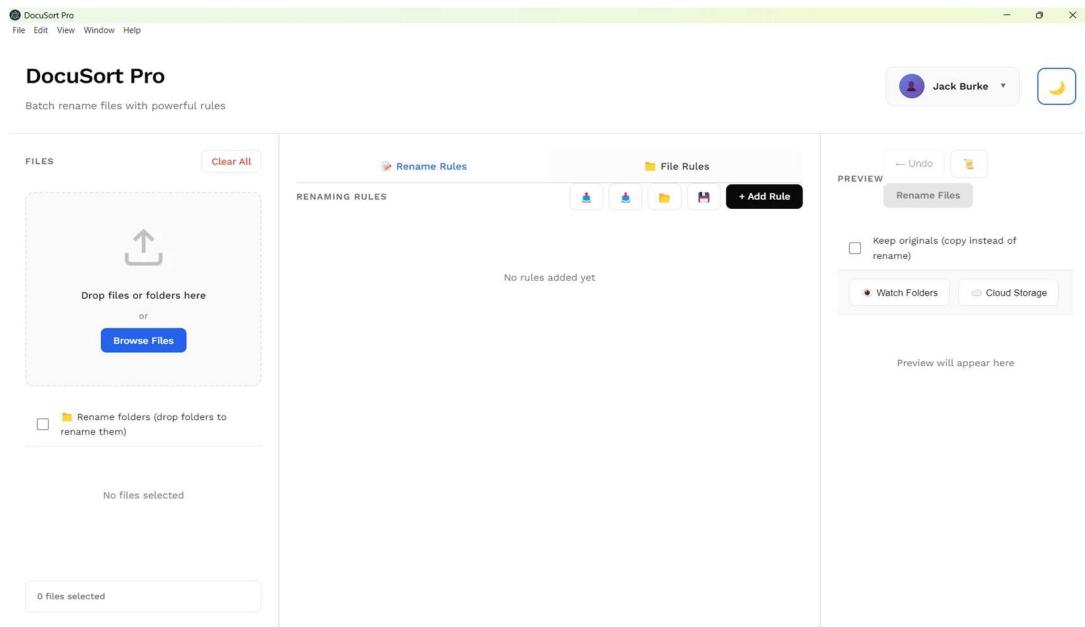
1. Getting Started	3
2. Smart Renaming	5
3. OCR Text Extraction	8
4. Zone OCR	10
5. File Router	12
6. Watch Folders	14
7. Team Management	16
8. Use Cases by Industry	18
9. Tips & Best Practices	22

1. Getting Started

DocuSort Pro helps you rename and organize documents automatically. Whether you're processing invoices, payslips, contracts, or any other documents, you'll save hours of manual work every week.

The Interface

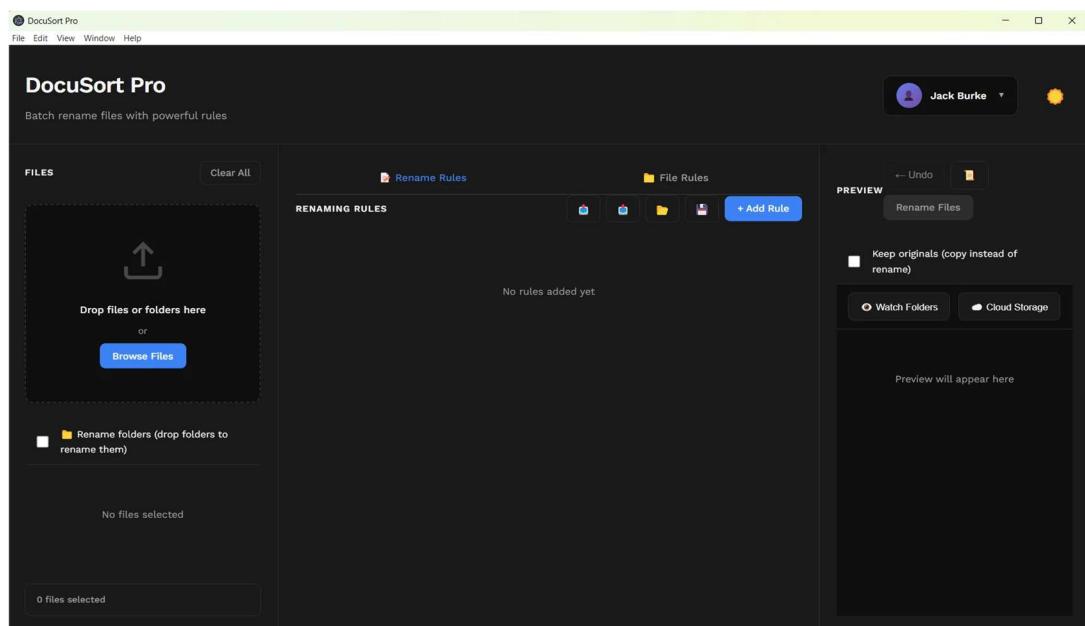
The app has a clean, three-panel layout:



- **Files Panel (left)** — Drop files here or click Browse to add documents
- **Rules Panel (center)** — Create and stack renaming rules
- **Preview Panel (right)** — See exactly what files will become before applying

Dark Mode

Prefer a darker interface? Toggle dark mode for comfortable viewing:



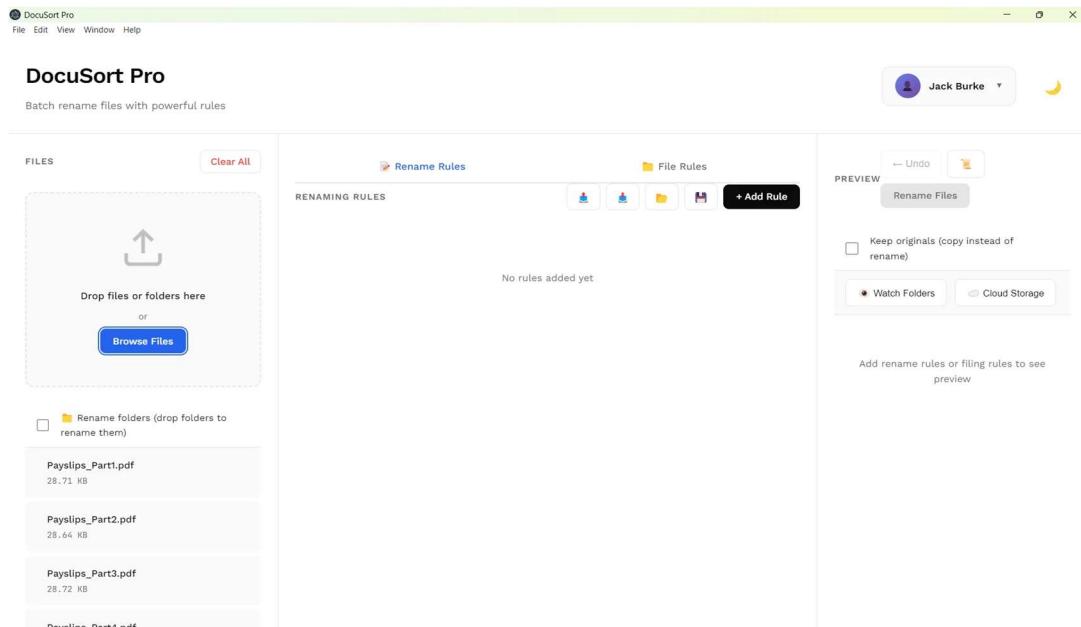
 **Tip**

Drag entire folders onto the Files panel to add all documents at once.

2. Smart Renaming

Transform messy filenames into clean, consistent names. Add files, create rules, preview the results, then apply.

Adding Files



1. **Drag and drop** files or folders onto the app
2. **Or click Browse** to select files manually
3. **Check "Rename folders"** if you want to rename folder names too

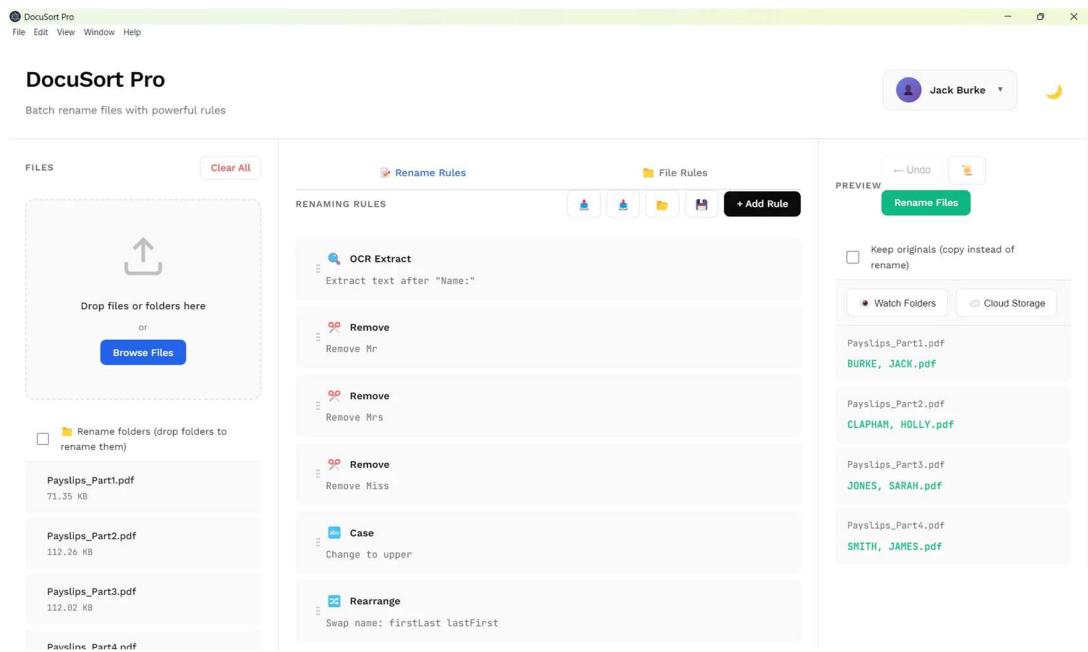
Rule Types

Click + Add Rule to see all available options:

Rule	What It Does
Find & Replace	Replace specific text with new text
Add Prefix/Suffix	Add text to start or end of filename
Change Case	Convert to UPPER, lower, or Title Case
Add Numbers	Add sequential numbers (001, 002, 003)
Remove	Remove specific text or characters
Rearrange	Swap name order (First Last → LAST, First)
OCR Extract	Read text from inside documents
Zone OCR	Extract text from specific document areas

Stacking Rules

The real power is combining multiple rules. Each rule transforms the result of the previous one.



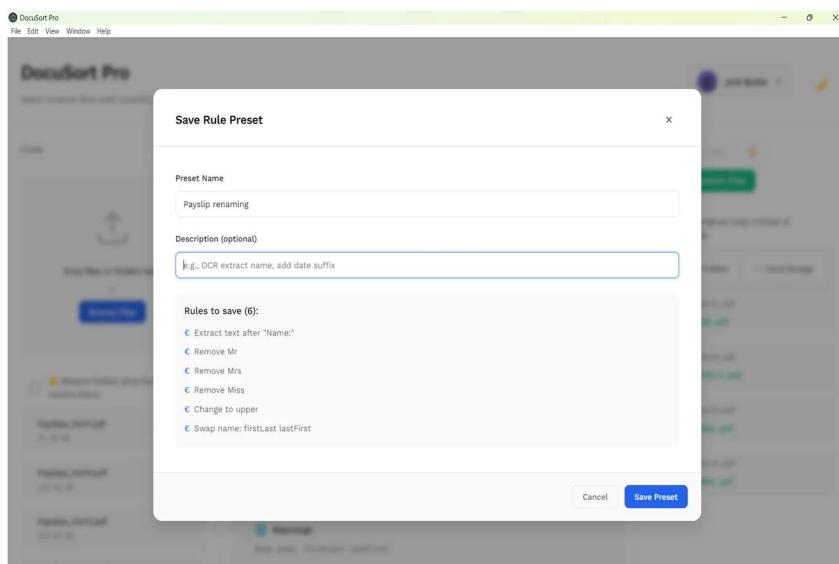
In this example, six rules work together:

1. OCR extracts the name from inside the document
2. Remove rules strip out "Mr", "Mrs", and "Miss"
3. Case changes to UPPERCASE
4. Rearrange swaps to SURNAME, First format

Result: "Payslips_Part1.pdf" becomes "BURKE, JACK.pdf"

Saving Presets

Save your rule combinations to reuse them:



Tip

Create presets for each document type you process regularly — "Invoices", "Payslips", "Contracts" — then switch between them instantly.

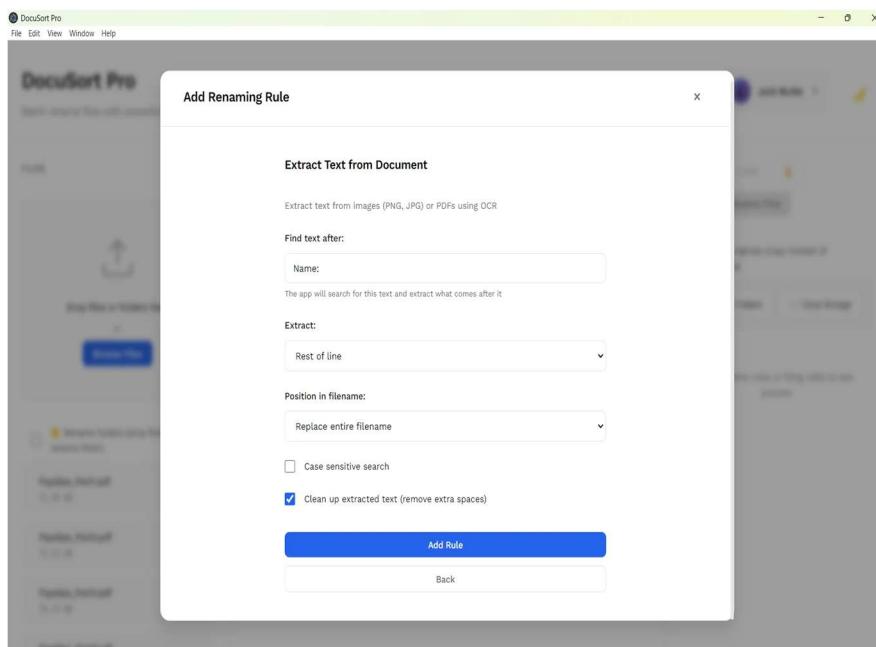
3. OCR Text Extraction

Available in Pro, Small Team & Enterprise plans

OCR reads text directly from your PDFs and images, then uses it to rename files automatically. Perfect for documents where the information you need is inside the file, not in the filename.

How It Works

1. **Click + Add Rule** and select "Extract Text from Document"
2. **Enter a keyword** to search for (like "Name:" or "Invoice:")
3. **Choose what to extract** — rest of line, specific characters, etc.



Real-Time Preview

See extracted names instantly in the Preview panel:

Original File	Proposed Rename
Payslips_Part1.pdf	Mr. Jack Burke.pdf
Payslips_Part2.pdf	Miss Holly Clapham.pdf
Payslips_Part3.pdf	Mrs Sarah Jones.pdf
Payslips_Part4.pdf	Mr. James Smith.pdf

The **green text** shows the new filename — each payslip is renamed with the employee name extracted from inside.

 **Note**

OCR works best with clear, high-quality scans. For documents with inconsistent layouts, use Zone OCR instead.

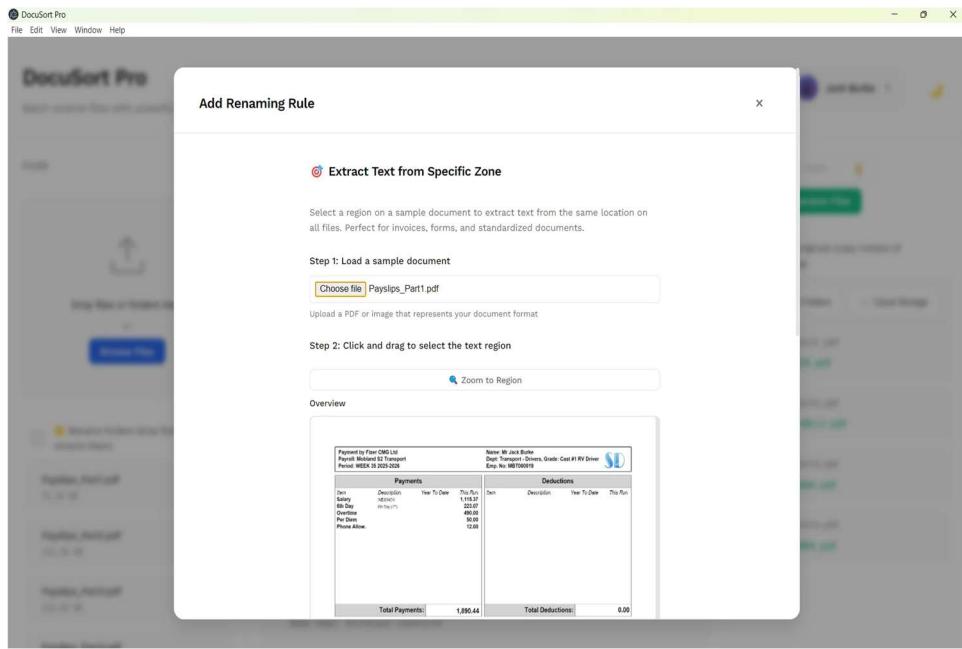
4. Zone OCR

Available in Pro, Small Team & Enterprise plans

Zone OCR extracts text from specific areas of your documents. Draw a box around exactly what you want to capture — perfect for standardized forms and invoices where information appears in the same position.

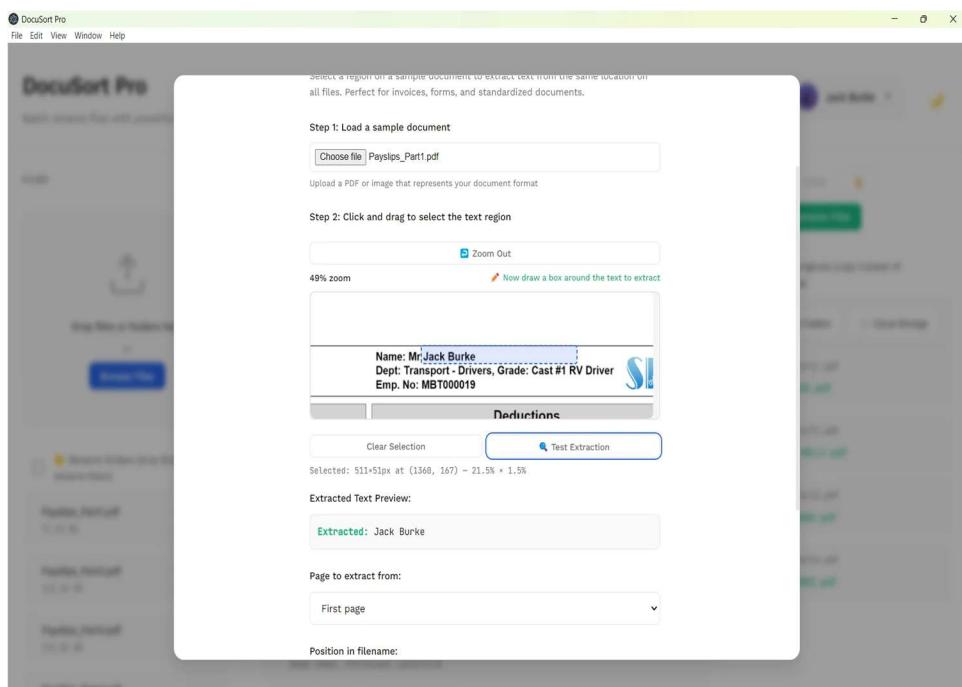
Setting Up a Zone

1. Load a sample document that represents your format



2. Draw a box around the text you want to extract

3. Click "Test Extraction" to verify the result



The extracted text appears in the green preview box. This zone will be applied to all documents in your batch.

 **When to Use Zone OCR**

Use it when documents have consistent layouts — invoices from the same supplier, payslips from the same system, or standardized forms.

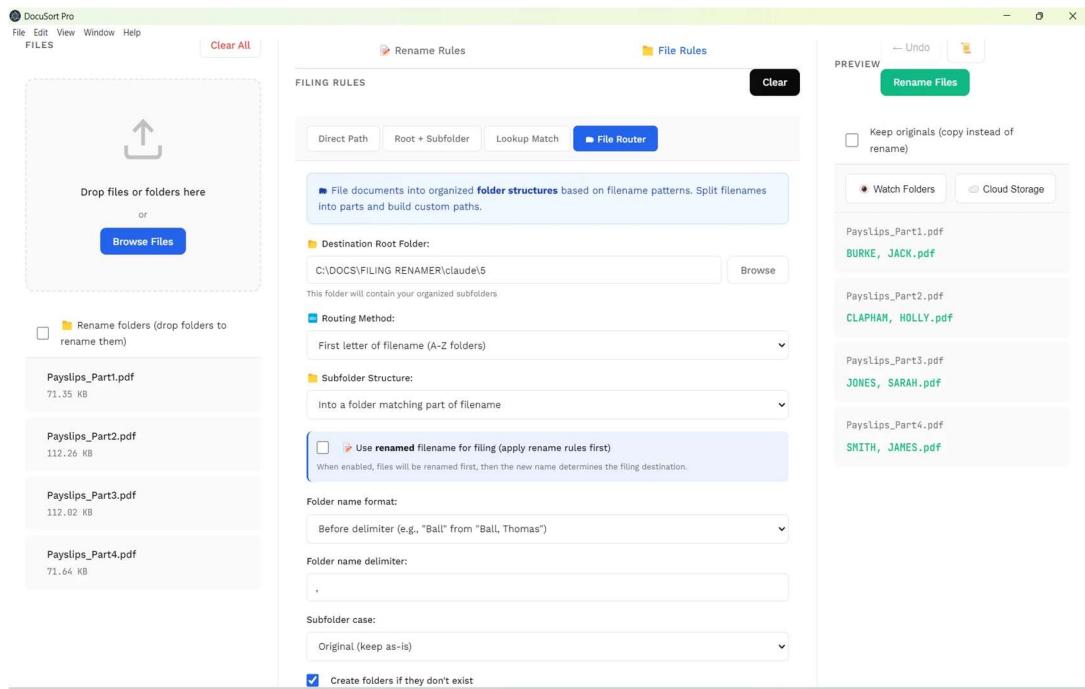
5. File Router

Available in Pro, Small Team & Enterprise plans

The File Router automatically sorts documents into folders based on their names. Set up rules once, then let DocuSort Pro do the filing for you.

Routing Options

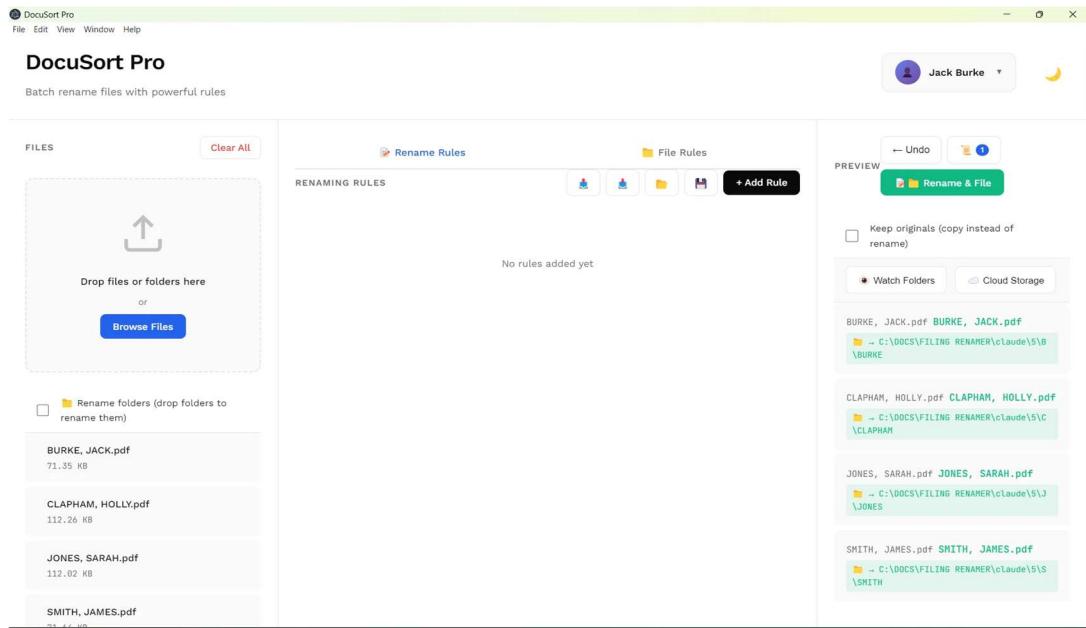
Click the File Rules tab to access routing:



- **Direct Path** — Send all files to one folder
- **Root + Subfolder** — Organize into subfolders by pattern
- **Lookup Match** — Use an Excel file to define routing
- **File Router** — A-Z alphabetical filing

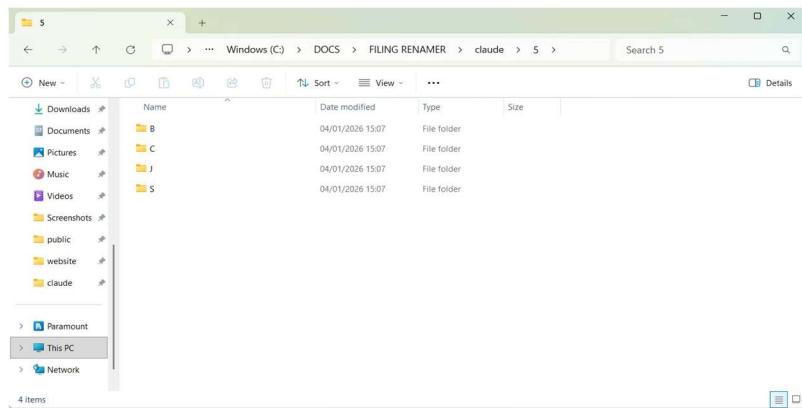
Preview Before Filing

The preview shows exactly where each file will go:



The Result

Clean, organized folder structure created automatically:



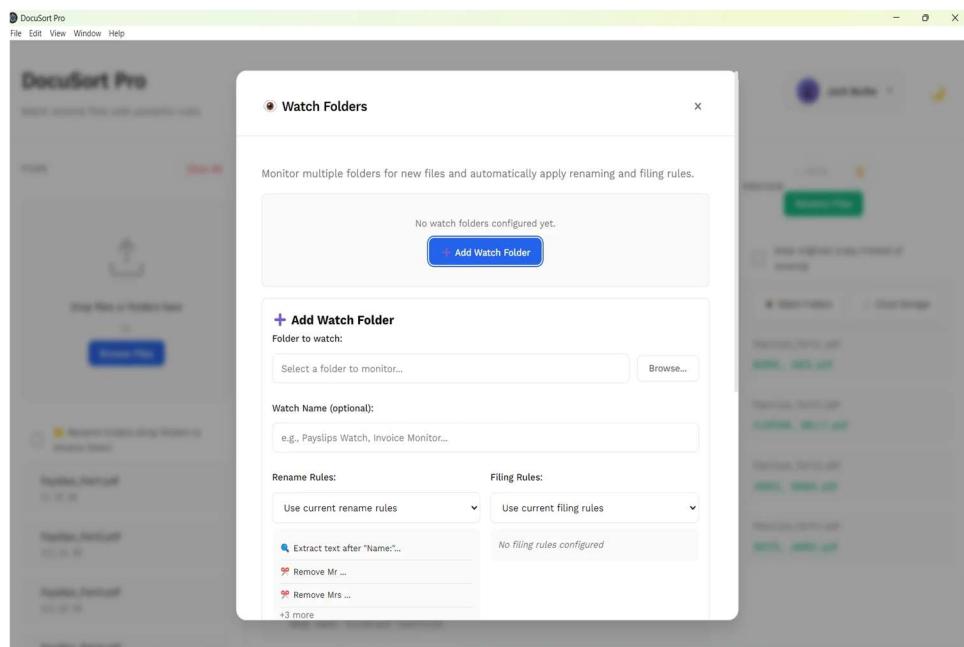
6. Watch Folders

Available in Pro, Small Team & Enterprise plans

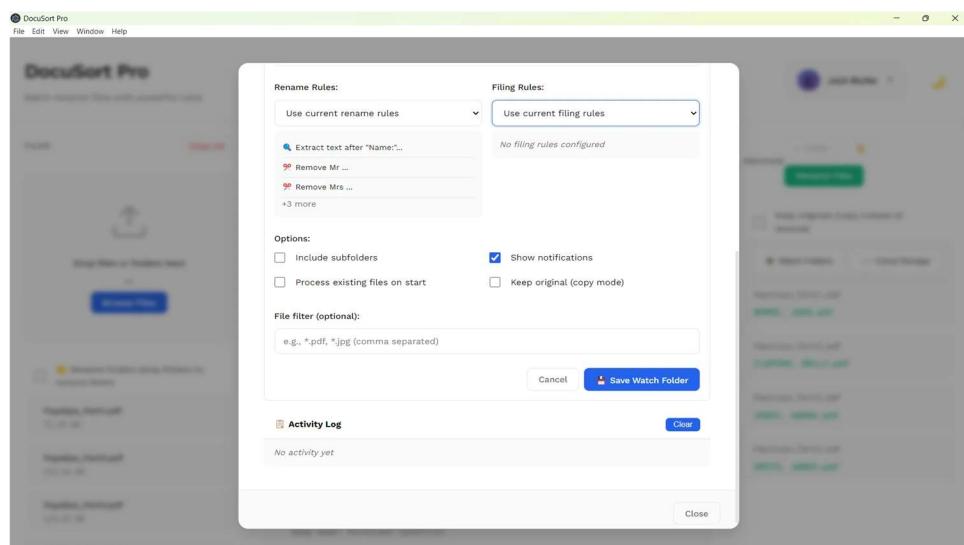
Watch Folders provide true automation. Monitor a folder, and DocuSort Pro will automatically process any files that appear — perfect for scanner output directories.

Creating a Watch Folder

1. **Click Watch Folders** in the toolbar
2. **Select a folder** to monitor
3. **Choose rules** to apply automatically



Options



- **Include subfolders** — Monitor nested folders
- **Show notifications** — Desktop alerts when files are processed
- **Process existing** — Handle files already in the folder

- **File filter** — Only process certain file types (*.pdf, *.jpg)

Power User Tip

Point a Watch Folder at your scanner's output directory. Every scan gets automatically renamed and filed.

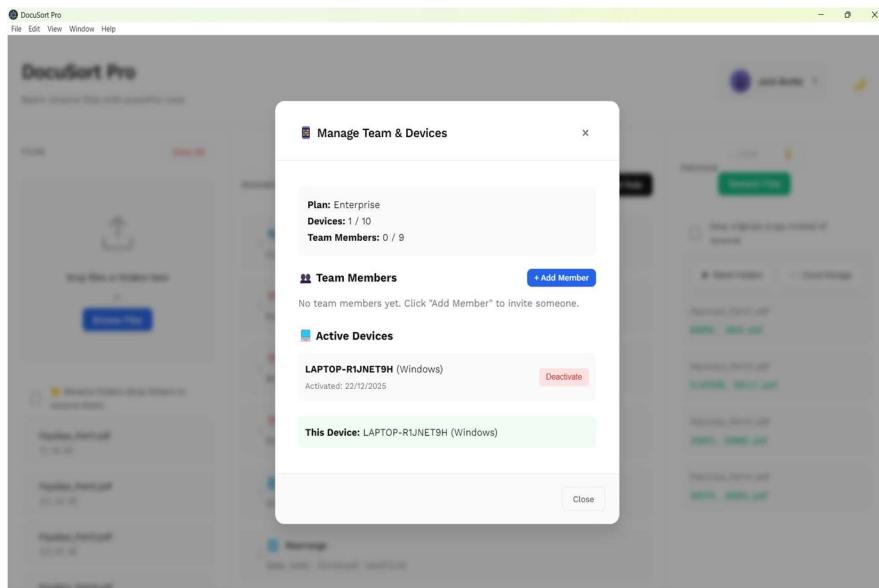
7. Team Management

Available in Small Team & Enterprise plans

Share your subscription with colleagues. Team plans include shared device pools and centralized member management.

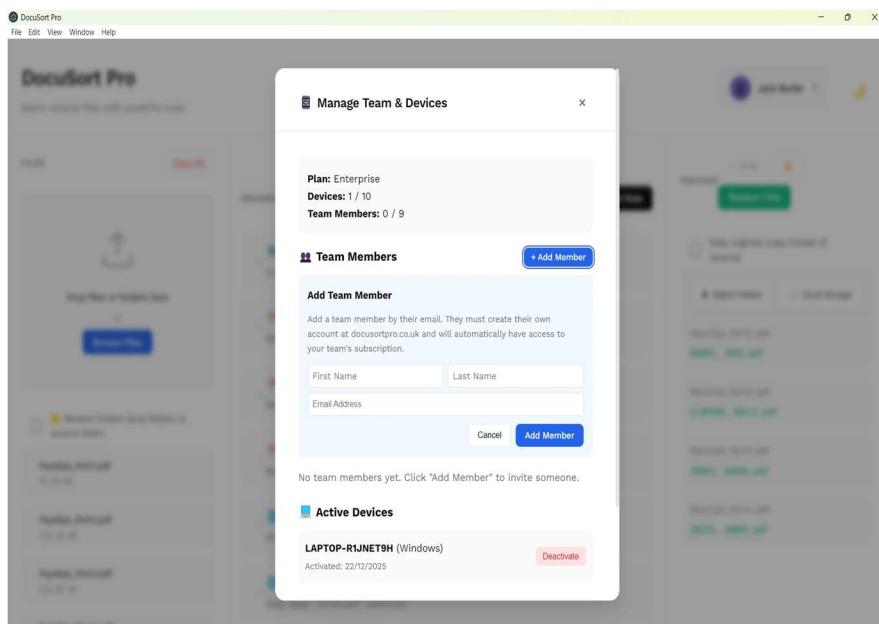
The Dashboard

Click your account name → "Manage Team & Devices":



- **Plan** — Your subscription level
- **Devices** — How many slots are used
- **Team Members** — Who has access

Adding Team Members



1. Click + Add Member

2. Enter their name and email
3. They create an account at docusortpro.co.uk
4. They automatically get your team's features

8. Use Cases by Industry

Here's how different industries use DocuSort Pro to save time:

Accounting & Finance

Invoice Processing

Challenge: Hundreds of supplier invoices arrive with generic names like "scan001.pdf"

Solution: Zone OCR extracts Supplier, Invoice Number, and Date. File Router sorts by supplier.

Result: "scan001.pdf" → "ACME_INV-2024-0847_2024-01-15.pdf" filed to /Suppliers/A/

Bank Statements

Challenge: Monthly statements from multiple accounts need organizing

Solution: OCR extracts account number and date. Add bank name prefix.

Result: "statement.pdf" → "Barclays_1234_2024-01.pdf" filed to /Bank/2024/

Human Resources

Payslip Distribution

Challenge: Batch payslips need renaming with employee names before distribution

Solution: OCR finds "Name:", removes titles, rearranges to SURNAME, First format.

Result: "Payslip_001.pdf" → "SMITH, John - WE 2024-01-15.pdf"

Employee Records

Challenge: Contracts, certifications, and reviews need filing by employee

Solution: Excel lookup matches employee names to IDs. File Router creates structure.

Result: Documents filed to /Employees/EMP001_Smith_John/

Legal & Professional Services

Contract Management

Challenge: Client contracts need organizing by client and matter

Solution: Zone OCR extracts client name and date. A-Z filing by surname.

Result: "contract.pdf" → "Davies_Contract_2024-01-15.pdf" filed to /Clients/D/

Healthcare

Patient Records

Challenge: Scanned medical forms need filing by patient ID

Solution: Zone OCR extracts patient ID from consistent form location. Add document type prefix.

Result: "scan.pdf" → "PT12345_LabResults_2024-01-15.pdf"

Real Estate

Property Documents

Challenge: Contracts, surveys, and reports need organizing by property

Solution: Excel lookup matches addresses to property references.

Result: "survey.pdf" → "PROP001_Survey_2024-01.pdf" filed to /Properties/123_High_Street/

Film & Media Production

Production Paperwork

Challenge: Call sheets, contracts, and releases need organizing by shoot day

Solution: Add project prefix. OCR extracts shoot day. File by production.

Result: "callsheet.pdf" → "PROJ01_Day15_CallSheet.pdf" filed to /Productions/PROJ01/

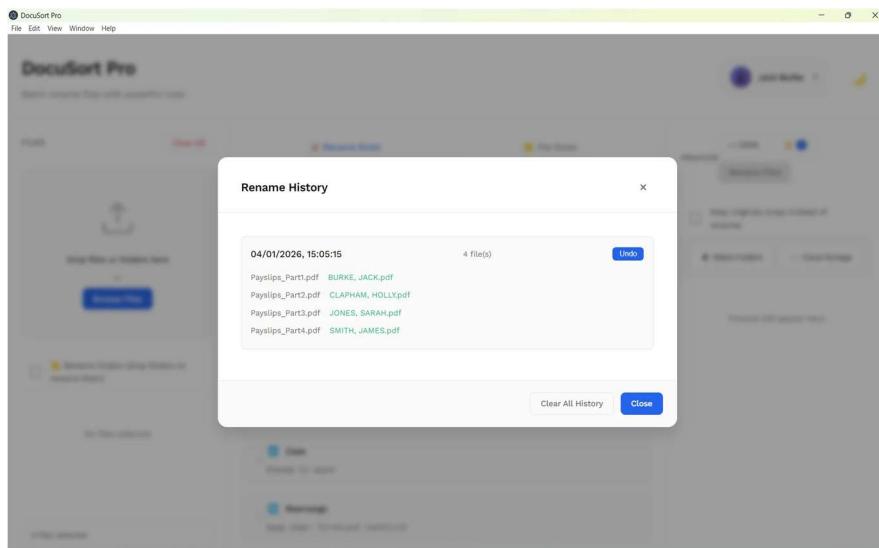
9. Tips & Best Practices

Always Preview First

Never apply changes without checking the Preview panel. You'll see exactly what will happen before committing.

Use the Undo Feature

Made a mistake? Click Undo to see your history and reverse any changes:



Save Rule Presets

If you process similar documents regularly, save your rule combinations. Switch between workflows instantly.

Test on Samples First

Before processing hundreds of files, test on 3-5 samples. Catches issues early.

Keep Originals Initially

When setting up new workflows, check "Keep originals" to copy instead of move. Switch to move mode once confident.

Use Descriptive Names

Include enough information to identify documents without opening them: Client, Type, Date, Version.

✉ Need Help?

Email contact@docusortpro.co.uk or visit docusortpro.co.uk

Thank you for using DocuSort Pro

© 2025 DocuSort Pro. All rights reserved.