BILL'S HOME TECH

Home & Small Business Tech Solutions

AN EXTENDED GUIDE · NO. 2484

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Document Scanner Setup — ScanSnap, Brother & Epson, Searchable PDFs, and Shredding Safely

Choose and set up a sheet-fed scanner, make every scan searchable, name and back it up, then shred with confidence

Plain-English tech help from:

Bill's Home Tech

Portage County, Ohio

Tech Made Simple. Service Made Personal.

Bill Davis — Bill's Home Tech

(330) 200-8042 · bill@billshometech.com · Atwater, Ohio

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SUMMARY

The 60-Second Version

For stacks of paper, a sheet-fed document scanner from ScanSnap, Brother, or Epson is far faster than a printer lid or a phone. Before you scan, pick a save folder that's backed up, a handful of folders, and one naming pattern with the date first. In the scanner software, turn on searchable PDF so you can search inside every scan.

Back up your scans in two places, keep originals you're required to keep, and shred the rest with a cross-cut or micro-cut shredder. For a page or two, your phone's Notes, Files, or Google Drive app does the job for free.

1 The Short Version

A good document scanner can turn a filing cabinet of bills, statements, and records into a tidy set of files you can search in seconds. The scanners that do this best are small desktop machines that pull a stack of pages through by themselves, both sides at once. The three names you'll see most are Ricoh's ScanSnap (formerly sold under the Fujitsu name), Brother, and Epson.

This guide walks you through choosing one, setting it up, and turning on the one setting that matters most: searchable PDF. Then it covers naming and organizing your files so you can find them again, backing them up, and getting rid of the paper safely. If you only have a few pages now and then, your phone can do the job for free, and that's covered too.

- A sheet-fed document scanner handles stacks of paper; a flatbed is for photos and fragile pages.
- Turn on searchable PDF (also called OCR) so you can search inside your scans.
- Pick a simple naming pattern and a few folders before you scan the first page.
- Back up your scans in two places before you shred anything.
- Shred originals with a cross-cut or micro-cut shredder, and keep the papers you're required to keep.

WATCH OUT

Don't start with the hardest pile. Scan this month's mail first. You'll learn the scanner on easy pages, and you'll stop the pile from growing while you work through the old boxes.

2 Do You Need a Document Scanner?

Many printers have a scanner lid on top, and every smartphone can scan. So why buy a separate machine? Speed and stacks. A dedicated document scanner pulls 20 to 50 pages through on its own, both sides at once, and makes them into one file. A flatbed lid makes you lift, place, and press for every single page.

You have...	Best tool
A few pages a month	Your phone (Notes, Files, or Google Drive)
A drawer of bills and statements	A sheet-fed document scanner
Boxes of old paperwork to go paperless	A sheet-fed document scanner
Photos, fragile or bound pages	A flatbed scanner or photo scanner
Receipts for taxes or a small business	A document scanner with a receipt mode

GOOD TO KNOW

If your main goal is old family photos, a document scanner is the wrong tool. Feeding precious photos through rollers can scratch or bend them. My guide "Scanning Boxes of Old Photos" covers the right way: billshometech.com/guides/scanning-old-photos.

3 The Three Big Names, Plainly Compared

All three makers sell solid desktop scanners that scan both sides, connect by Wi-Fi or USB, and make searchable PDFs. The differences are mostly in the software and how simple the buttons are.

Brand	Popular models	Software	Known for
ScanSnap (Ricoh, formerly Fujitsu)	iX2500, iX1600	ScanSnap Home	One-button simplicity and good file naming
Brother	ADS-1800W, ADS-4700W	Brother iPrint&Scan	Value, and scanning straight to a folder or email
Epson	WorkForce ES-580W, RapidReceipt RR-600W	Epson ScanSmart	Receipt tools and a friendly touchscreen

Any of these will serve a household well. If you want the simplest one-button experience, people often like ScanSnap. If you want a lower price or already own a Brother printer, Brother's software will feel familiar. If you scan lots of receipts, Epson's RapidReceipt models are built for that.

WATCH OUT

Model numbers and prices change often, and the stores are full of look-alike scanners with unknown software. Stick with an established brand, and check that the maker's current software supports your computer before you buy.

4 Before You Plug It In

Ten minutes of planning saves hours later. Decide where your scans will live and how you'll name them before the first page goes through.

1. Pick one home for your scans: a Documents folder on your computer that's backed up, or a cloud folder such as iCloud Drive, Google Drive, OneDrive, or Dropbox.
2. Create a handful of top-level folders, such as Taxes, Medical, Home, Insurance, Bank, Car, and Personal.
3. Decide on a naming pattern (there's a chapter on this) and write it on a sticky note on the scanner.
4. Clear a space with an In tray for unscanned paper and an Out tray for scanned paper waiting to be filed or shredded.
5. Have a pen handy to put a small check mark on each page once it's scanned.

> **WATCH OUT**
>
> Keep it simple. Six or eight folders you'll actually use beat thirty folders you'll never remember. You can always search inside searchable PDFs, so the folders only need to be roughly right.

5 Setting Up a ScanSnap

ScanSnap scanners are made by PFU, a Ricoh company, and older models carried the Fujitsu name. They're known for a single big scan button and software called ScanSnap Home that does most of the thinking for you.

1. Unbox the scanner, remove all the shipping tape, and plug in the power.
2. On your computer, download ScanSnap Home from the official ScanSnap website. Don't use a disc or a random download site.
3. Open ScanSnap Home and follow its setup steps to connect the scanner by Wi-Fi or USB.
4. Create a scan profile for documents: choose PDF as the file type and turn on the option to make text searchable.

5. Choose where scans are saved, using the folder you picked earlier.
6. Put a short test document in the feeder, press Scan, and open the result to check it.

GOOD TO KNOW

Reviewers have noted that the searchable-text option in ScanSnap Home has to be switched on in the profile settings and is easy to overlook. Check it on your first test: open the PDF and try to search for a word that's on the page.

TIP

ScanSnap Home can suggest a file name from the document's contents and date. Try it for a week. If the names it picks make sense to you, keep it on and save yourself some typing.

Rather not do this yourself? I'll come to your home and set it up for you — a flat $99 first visit across Portage County, Ohio and nearby communities. Outside the area? I also help remotely by phone or screen-share. Book at billshometech.com/book or call (330) 200-8042.

6 Setting Up a Brother Document Scanner

Brother's ADS series scanners connect by Wi-Fi or USB and use the Brother iPrint&Scan app on computers and phones. Many models can also scan straight to a folder, a USB stick, or an email without a computer at all.

1. Unpack the scanner, remove the tape, and plug it in.
2. Follow the setup on the scanner's touchscreen to join your Wi-Fi, or connect it to your computer by USB.
3. On your computer, install Brother iPrint&Scan from Brother's official support site for your exact model.
4. Open iPrint&Scan, choose your scanner, and open the scan settings.
5. Pick a document setting, set the file type to searchable PDF, and choose your save folder.
6. Scan a test page and search inside it to make sure the text was recognized.

TIP

Brother's support site lists software by exact model number. The model is on a label on the scanner, often on the back or underneath. Type it in exactly, ADS-1800W rather than just ADS, so you get the right download.

WATCH OUT

Some reviewers found the searchable-PDF conversion takes a little while after the scan finishes, especially on big stacks. Wait for it to finish before you move or rename the file.

7 Setting Up an Epson Document Scanner

Epson's WorkForce ES models and RapidReceipt RR models use Epson ScanSmart software, which can make searchable PDFs and, on the receipt models, pull out totals and dates for budgeting or taxes.

1. Unpack the scanner, remove the tape, and plug it in.
2. Use the scanner's touchscreen setup to join your Wi-Fi, or connect by USB.
3. Download Epson ScanSmart from Epson's official support page for your model.
4. Open ScanSmart, select your scanner, and scan a test page.
5. When saving, choose searchable PDF as the file type and pick your save folder.
6. If words aren't recognized, check that the correct language is selected in the save settings.

GOOD TO KNOW

Epson's own help pages point out that searchable PDFs depend on the text-recognition language being set correctly. If your scans aren't searchable, that's the first setting to check.

8 Searchable PDF: The Setting That Matters Most

A plain scan is just a picture of a page. Your computer can't read the words in it, so searching for "water bill" finds nothing. A searchable PDF has an invisible layer of text added by a process called OCR, optical character recognition. The page looks the same, but now you can search for any word on it, and copy text out of it.

- On your computer: search for a word and the right statement pops up, even if the file name is vague.
- In the PDF: press Ctrl+F (Windows) or Command+F (Mac) to jump to a word on the page.
- For the future: an executor or family member can find things without knowing your filing system.

1. In your scanner software, find the file type or save settings.
2. Choose searchable PDF, or plain PDF with an OCR or text recognition box checked.
3. Scan a test page that has clear printed text.
4. Open the file and search for a word you can see on the page.
5. If the search finds it, you're set. If not, recheck the setting and the language.

> **WATCH OUT**
> OCR is very good on printed text and poor on handwriting. Faded receipts and tiny print can come out with a few wrong letters. Name important files clearly rather than relying on search alone.

9 Naming Files So You Can Find Them

A good name tells you what a file is without opening it. The trick is to pick one pattern and use it every time. Putting the date first, written year-month-day, makes your files sort themselves in order.

Pattern	Example
Date - Who - What	2026-11-03 - Dominion Energy - Bill

Date - Who - What	2026-04-12 - IRS - 2025 Tax Return
Date - Who - What	2026-09-30 - Dr Patel - Visit Summary
Date - Who - What	2026-01-15 - State Farm - Auto Policy

- Write the date as year-month-day so files line up in order.
- Use the company or person's name the way you'd say it.
- Keep the description to two or three words.
- Skip special characters like slashes, colons, and question marks; some computers reject them.

> **TIP**
> Write your naming pattern on a card and tape it to the scanner. Consistency matters more than which pattern you pick.

10 A Simple Folder Plan

Pair your naming pattern with a small set of folders. Add a year folder inside the big ones if they fill up.

- Taxes: one folder per tax year, holding the return and the papers behind it.
- Bank & Investments: statements, account letters, and year-end summaries.
- Medical: visit summaries, bills, insurance explanations of benefits.
- Home: deed, mortgage, insurance, warranties, and repair receipts.
- Car: title, registration, insurance, and service records.
- Personal: birth and marriage certificates, military records, and other vital papers (scan them, but keep the originals).

> **GOOD TO KNOW**
> If you're planning for the future, a well-organized scan folder is a gift to whoever helps with your affairs someday. My guide "Digitizing a Lifetime of Paper Records" covers keepsake papers like letters and programs: billshometech.com/guides/digitizing-a-lifetime-of-paper-records-programs-letters-ephemera.

11 Back Up Before You Shred

Your scans are only as safe as the computer or account they live on. Before a single page goes into the shredder, make sure every scan exists in at least two places.

1. Keep the scans in a folder that syncs to a cloud service such as iCloud Drive, Google Drive, OneDrive, or Dropbox.
2. Also copy them to an external drive now and then, or let your computer's backup (Time Machine or File History) cover that folder.
3. Open a few random scans from the backup to make sure they open and are readable.
4. Only then move the matching paper to the shred pile.

WATCH OUT

Scanned tax, bank, and medical records are exactly what identity thieves want. Protect the computer and cloud account with a strong password and two-step sign-in, and don't save these files to a shared family computer that everyone uses.

TIP

My guide "The 3-2-1 Backup Plan" explains a simple, sturdy backup routine: billshometech.com/guides/3-2-1-backup-plan.

Rather not do this yourself? I'll come to your home and set it up for you — a flat $99 first visit across Portage County, Ohio and nearby communities. Outside the area? I also help remotely by phone or screen-share. Book at billshometech.com/book or call (330) 200-8042.

12 What to Keep, What to Shred

Going paperless doesn't mean shredding everything. Some papers should stay in their original form. For tax papers, the IRS says how long to keep records depends on what they record. Three years after filing is the general rule, with longer periods in some situations, such as seven years for certain loss claims.

Keep the original	Scan, then shred once backed up
Birth, marriage, and death certificates	Utility and phone bills
Social Security cards and passports	Bank and credit card statements past what you need
Car titles and property deeds	Routine medical bills and insurance explanations
Wills, trusts, and powers of attorney	Pay stubs once checked against your year-end form
Military discharge papers (DD-214)	Receipts you no longer need for returns or warranties

WATCH OUT

This is general guidance, not legal or tax advice. Bill isn't a lawyer or an accountant. For your own situation, especially taxes, an estate, or a business, check irs.gov or ask your tax preparer or attorney before you shred anything you're unsure about.

13 Shredding the Originals Safely

Once papers are scanned and backed up, shred anything with your name plus an account number, a Social Security number, a signature, or medical details. Tossing them whole in the recycling bin is an open invitation to identity thieves.

- Choose a cross-cut or micro-cut shredder, not a strip-cut one that slices pages into long, readable ribbons.
- Security ratings run from P-1 to P-7. A P-4 is the common choice for home papers, and P-5 adds extra margin for financial and medical records.
- Feed a few sheets at a time; overloading jams most home shredders.
- Remove large binder clips; most home shredders can handle staples, but check yours.
- Empty the bin before it's packed solid, and bag the shreds before recycling.

> **GOOD TO KNOW**
>
> Got a big backlog? Many communities and banks host free shred days, and office-supply stores often offer paid shredding by the pound. It's faster than feeding boxes through a home shredder, and you can watch your papers being destroyed.

14 The Phone-Scanner Alternative

If you scan only a few pages a month, your phone may be all the scanner you need. Both iPhone and Android can make clean, multi-page PDFs with apps that are already on the phone or free to download.

On iPhone: Notes or Files

1. Open Notes and start a new note, or open an existing one.
2. Tap the paperclip (attachment) button and choose Scan Documents.
3. Hold the phone over the page. It will snap automatically when the page is lined up, or tap the shutter.
4. Add more pages if needed, then tap Save or Done. The scan stays in the note as a PDF you can share.
5. In the Files app, tap the three-dot More button and choose Scan Documents to save the PDF straight into a folder.

On Android or iPhone: Google Drive

1. Open the Google Drive app and tap the plus (+) button.
2. Choose Scan, or the camera icon on some versions.
3. Line up the page and take the picture; tap plus to add more pages.

4. Tap Save, give the file a name using your naming pattern, and pick a folder.

> **GOOD TO KNOW**
>
> Phone scans are great for occasional use, but a stack of 40 pages takes far longer by phone than by sheet-fed scanner. My guide "Scan a Document With Just Your Phone (No App)" has more phone tips: billshometech.com/guides/scan-a-document-just-phone-no-app.

15 Keeping Up: A Weekly Habit

The hardest part of going paperless isn't the setup. It's keeping up. A five-minute weekly routine keeps the In tray from becoming a new pile.

1. Once a week, scan everything in the In tray.
2. Name each file with your pattern and drop it in the right folder.
3. Check that the week's scans have synced to your backup.
4. Shred the scanned papers you don't need to keep, and file the originals you do.
5. Switch to paperless statements online where you're comfortable, so less paper arrives.

> **TIP**
>
> Wipe the scanner's rollers and glass every few months with the cleaning method in its manual. Dusty rollers cause jams and crooked scans, and a dirty glass strip puts lines down every page.

16 Quick Troubleshooting

What you see	Try this first
Pages jam or feed two at once	Fan the stack, remove staples and clips, clean the rollers
Search doesn't find words	Turn on searchable PDF/OCR and check the language setting
Scanner not found on Wi-Fi	Restart the scanner and router; reconnect it in the app
Lines down every page	Clean the scanner's glass strip
Huge file sizes	Use a document setting (not photo) and 300 dpi
Crooked pages	Line up the side guides snugly against the stack

GOOD TO KNOW

If you also want to combine, split, or shrink PDFs after scanning, my guide "Combine, Split & Shrink PDFs — Free Tools That Aren't Traps" covers safe tools: billshometech.com/guides/combine-split-and-shrink-pdfs-free-tools-that-arent-traps.

17 When to Call Bill

Setting up a scanner is easy to start and easy to get wrong in small ways that hurt later: scans that aren't searchable, files with no backup, or folders nobody else could make sense of. Bill can get it right the first time, with 30+ years of professional experience behind him.

- You want help choosing the right scanner for your paperwork and computer.
- The scanner won't connect to Wi-Fi or your computer can't find it.

- You want searchable PDF, file naming, and folders set up for you.
- You want a backup set up before you start shredding.
- You're helping a parent go paperless and want a plan they can keep up with.

Bill's help is $49 for a remote session or $99 for an in-home visit. Call (330) 200-8042. He'll set things up with you so you understand how it works, not just leave you with a machine you're afraid to touch.

CHEAT SHEET

Everyday Cheat Sheet

Keep this by the scanner. Searchable PDF on, one naming pattern, two backups, then shred.

I want to...	Do this...
Scan a stack of pages	Use a sheet-fed scanner; fan the stack and remove staples first
Search inside my scans	Turn on searchable PDF (OCR) in the scanner software
Name files so I can find them	Date - Who - What, e.g. 2026-11-03 - Dominion Energy - Bill
Protect my scans	Keep them in a synced cloud folder plus an external-drive backup
Get rid of the paper	Cross-cut or micro-cut shredder (P-4 or P-5), after backing up
Scan just a page or two	iPhone Notes or Files, or the Google Drive app's Scan button
Get help	Call Bill: (330) 200-8042

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.

HOW I CAN HELP

Your Visit — and My Promise

You don't have to remember all of it — just that a friendly, patient person is one call away, whenever you'd rather have a hand.

KEY SPECS

In your home — $99 flat for the first visit, no contracts and no surprises, with a 30-day come-back-free follow-up. In-home visits cover Portage County, Ohio and nearby communities.
Outside the area? Remotely — $49 for a screen-share session (free for Support Plan members, $39/mo), refundable if I can't fix it — and credited toward a visit if you'd rather have me in person. Book either at billshometech.com/book.

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full $99. No questions, no awkwardness. That's how I'd want to be treated.

Whenever you're ready, I'll come to your home anywhere in Portage County, Ohio and nearby communities, at your pace. Too far for a house call? I also help remotely. Book at billshometech.com/book or call (330) 200-8042. — Bill

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