

# Steps for Document Management



Whether your data is structured or unstructured, it is critical to organize it all. We take data from disconnected systems, paper-based workflows, emails, voicemails, spreadsheets, and more and combine it into one streamlined location. Our Paperwise Document Management solution allows you to put your content to work for you by automatically acquiring, digitizing, indexing, sorting, and matching your content with your existing business system data.

## STEPS TO USE DOCUMENT MANAGEMENT

- 1 Design filing system, appropriate security/segmentation and classification process
- 2 Upload and capture your documents
- 3 Retrieve and process documents by deciding on the processes, access and outcome of each document
- 4 Determine document output of each document and invoice
- 5 Establish archive parameters of how long you need to keep documentation and what to do at the end of each lifecycle

Contact our team today to get started with our document management software.