



Use Cases for Document Management



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Overview

In our fast-paced world, organizations of all sizes are grappling with the overwhelming influx of documents. It's not just the sheer volume that poses a challenge; the complexity of managing and using this information effectively is a challenge as well. From onboarding paperwork to financial statements, compliance reports, and other business-critical documents, all must be stored, accessed, and shared securely. Without an effective strategy in place, companies risk operational inefficiencies, costly errors, and compliance violations. That's where proper document management systems (DMS) come in.

Document management solutions streamline and optimize day-to-day tasks, simplifying processes and improving document management.



Document Management Explained

Document management refers to the systematic oversight of documents throughout their lifecycle. This includes capturing, storing, organizing, and disseminating documents effectively. By utilizing specialized systems, organizations can enhance their operations, boost efficiency, and uphold compliance standards. This process centralizes both electronic and physical documents, such as contracts, invoices, and reports, improving accessibility and management.

A document management system (DMS) is a structured digital solution designed to store, track, manage, and secure digital documents. Unlike traditional filing systems that rely on physical storage or scattered digital folders, a document management system centralizes content, making it easier than ever to search, retrieve, and act on information.

Businesses across industries are increasingly relying on document management systems to enhance their document organization. These systems not only provide enhanced security and scalability but also facilitate improved collaboration among teams, resulting in increased efficiency and productivity.

In this eBook, we will explore how organizations across departments and industries utilize document management systems, and how Paperwise's comprehensive solution helps companies of all kinds achieve operational excellence.



Paperwise's Document Management Solutions

At Paperwise, we understand that managing documents effectively isn't just about staying organized—it's essential to maintaining productivity, security, and compliance. Our platform has been purpose-built to address the most common document challenges businesses face today: manual processing bottlenecks, disjointed systems, compliance headaches, and security vulnerabilities.

Paperwise's document management solutions transform how companies streamline workflows and organize information. By digitizing physical documents and centralizing digital files, our system automates routine document-related tasks, such as scanning, indexing, routing, and archiving. With intelligent extraction and easy integration with existing systems, Paperwise ensures your team has secure access to the latest versions of the documents they need.

Our intelligent approach brings clarity and control to complex document ecosystems. Whether you are optimizing workflow efficiency or preparing for an audit, Paperwise provides the tools you need to manage your business documents confidently.

Industry Use Cases for Document Management

While many industries have moved toward digital transformation, the need for document management varies by industry, driven by unique regulatory and operational demands. A document management system must be flexible enough to accommodate these differences and provide the necessary tools to handle vast amounts of sensitive information.



Healthcare

Healthcare organizations handle a massive volume of sensitive patient data daily, making secure document management essential. Documents such as medical records, lab results, treatment plans, and insurance claims must not only be stored securely but also be readily accessible to authorized personnel. A DMS ensures quick access to patient files, reducing delays in care and improving efficiency and patient outcomes.

With Paperwise's document management solutions, healthcare personnel can streamline document processes, reduce inefficiencies, and comply with industry regulations. Our solution aims to ease typical document workflows in the healthcare sector, thereby providing a smooth experience for managing medical records.



Financial Services & Insurance

Financial and insurance organizations are subject to stringent government regulations that require transparent data management. For banks, investment firms, credit unions, and insurance agencies, every transaction, policy, and claim must be carefully documented and easily accessible for auditing purposes. This level of documentation can quickly become overwhelming without a proper document management system in place.

By implementing a centralized document management solution such as Paperwise, finance and insurance companies are significantly more prepared to navigate the complexities of regulatory compliance. This system not only streamlines manual, disjointed processes but also enhances cybersecurity measures and addresses data silos, ultimately improving operational efficiency and risk management.



Transportation & Logistics

In the transportation and logistics industry, timing is everything. Cargo deliveries, shipping manifests, delivery receipts, customs forms, and inventory reports are critical to ensuring on-time deliveries and accurate inventory tracking. However, manual document handling can introduce delays and errors that compromise efficiency and place unnecessary strain on supply chain operators.

With Paperwise, logistics and transportation teams can consolidate documentation from carriers, vendors, drivers, and customers into one central platform. Automation capabilities enable real-time document routing, access from anywhere, and direct integration with supply chain systems, resulting in smoother workflows, faster response times, and improved logistics performance.



Manufacturing

Manufacturers must manage vast amounts of technical documentation, ranging from specifications, equipment manuals, parts lists, safety protocols, compliance reports, and more. Manual document systems make it difficult for employees across departments and facilities to find and work with the latest information.

With Paperwise, manufacturing organizations can digitize and organize production documentation, create automated maintenance records, and ensure safety processes remain up to date. Teams are empowered to collaborate with confidence, knowing that everyone has secure access to the same verified versions of each document—resulting in fewer errors, improved production quality, and safer workplaces.



Franchises

Fast food franchises depend on seamless operations across multiple locations to ensure consistent customer experiences. Managing maintenance requests from equipment repairs to building upkeep is critical to keeping these operations running smoothly. Without an efficient, centralized document management system, maintenance needs can fall through the cracks, leading to delays, unnecessary costs, and disruptions in service.

Document management systems provide franchises with a unified platform for storing, organizing, and accessing essential documentation with ease. Franchise owners and corporate teams can digitize maintenance logs, track equipment warranties, and manage contractor agreements all in one place. Every document is securely indexed and easily retrievable, ensuring that nothing is misplaced and every franchise location remains audit-ready.

In addition to Paperwise’s document management solution, we offer a Maintenance Request Workflow Solution designed explicitly for franchise operations. This automated system streamlines maintenance processes by routing requests, tracking resolution timelines, and storing related documentation all within a single platform. This solution yields faster response times, reduced downtime, and fewer cost escalations, enabling franchises to maintain smooth operations and serve customers without disruptions.



Utilities

Utility companies operate in a high-stakes environment where rapid responsiveness, regulatory compliance, and efficient data management are crucial to success. From managing engineering documents to tracking regulatory updates, the volume and sensitivity of their information make document control a top operational priority. Without a proper DMS, utilities often face significant hurdles, including lost files, outdated versions, and poor collaboration across departments.

Our document management solution addresses these challenges by centralizing critical project documents, engineering drawings, compliance records, and work orders into a single, secure platform. This robust system not only automates workflows, reducing time lost to manual handling, but also creates clear audit trails to support industry regulations and internal monitoring. Role-based access controls ensure that sensitive information is accessible only to authorized staff, strengthening cybersecurity while boosting operational transparency.

With Paperwise, logistics and transportation teams can consolidate documentation from carriers, vendors, drivers, and customers into one central platform. Automation capabilities enable real-time document routing, access from anywhere, and direct integration with supply chain systems, resulting in smoother workflows, faster response times, and improved logistics performance.



Education

Educational institutions manage vast amounts of information every day, ranging from student academic records to administrative files and accreditation documentation. With many factors, traditional paper-based or fragmented digital storage systems can quickly lead to inefficiencies, lost documents, and compliance risks. Schools, colleges, and universities need reliable systems that protect sensitive data while supporting smooth operations across departments.

Document management plays a vital role by centralizing student records, including academic papers, administrative documents, and accreditation files in one secure platform. With Paperwise, institutions can streamline document capture, storage, and access, making it easier for staff to manage enrollment, track student progress, and maintain regulatory standards. Automated workflows reduce the administrative burden on faculty and staff, ensuring that tasks such as approvals, reporting, and record updates are completed efficiently and accurately.

By adopting Paperwise's document management solution, educational institutions enhance organizational efficiency, safeguard sensitive student data, and create a more seamless experience for students, educators, and administrative teams alike.



Department Use Cases for Document Management

While the value of DMS is clear across industries, its true power lies in its department-level capabilities. Here's how various departments use document management to propel their operations forward:



HUMAN RESOURCES

HR departments handle significant amounts of sensitive employee documents, such as onboarding forms, performance reviews, and compliance records, making secure document management essential. With a DMS, HR teams can organize, access, and update documents efficiently while ensuring sensitive personnel data remains protected and compliant.



FINANCE & ACCOUNTING

Finance teams rely on accurate and timely access to documents such as invoices, purchase orders, and tax records. A document management solution ensures proper version control, faster approvals, and accurate auditing, helping minimize errors and streamline financial operations.



RESEARCH & DEVELOPMENT

R&D teams manage critical intellectual property, including project plans, research reports, and design specifications. Document management enables secure storage, controlled sharing, and better collaboration across departments, safeguarding valuable data and accelerating innovation cycles.



COMPLIANCE & RISK MANAGEMENT

Compliance teams oversee regulatory documents, audit trails, and incident reports that need to be securely maintained and readily accessible. With automated workflows and detailed visibility, document management simplifies compliance tracking and minimizes the risk of costly oversights.



LEGAL

Legal departments handle case files, contracts, legal agreements, campaign materials, and compliance documents that require secure access and precise version control. A robust DMS improves collaboration across legal teams, reduces risk, and ensures critical documents are quickly accessible and fully protected



PUBLIC SERVICE

Government offices manage vast amounts of public records, policy documents, and regulatory filings, all of which must be preserved and accessible for transparency and compliance. Document management centralizes these records, supports secure access by authorized personnel, and accelerates response times for public inquiries.



CUSTOMER SERVICE

Customer service teams require quick access to service agreements, support records, and customer feedback forms to resolve issues efficiently. Document management ensures staff can retrieve and update records in real time, enhancing responsiveness and the customer experience.



Functional Use Cases for Document Management

Document management is only the beginning. To support end-to-end digital transformation, Paperwise delivers a powerful suite of advanced features purpose-built to simplify your most document-intensive workflows. From handling invoices to managing legally binding contracts, Paperwise equips teams with the tools they need to eliminate manual work, boost accuracy, and accelerate business processes across departments.



INVOICE PROCESSING

Accounts payable teams often struggle with slow, manual invoice handling that creates backlogs, delays, and costly errors. Paperwise transforms AP operations with automated invoice processing designed to simplify every step of the workflow.

By automating invoice intake and approvals, Paperwise helps finance teams reduce manual data entry, speed up payment cycles, and strengthen financial accuracy—unlocking a more efficient and compliant AP process.

With Paperwise, organizations can:

- Capture invoices digitally from email, scan, or upload
- Use intelligent data extraction to pull key fields automatically
- Route invoices for approval through customizable workflows
- Validate vendor information and GL coding
- Track invoice status in real time to prevent delays
- Maintain a secure, searchable archive for audits and financial reporting

CONTRACT MANAGEMENT

Contracts are among the most critical and risk-sensitive documents organizations manage. Paperwise Symphony for contract management delivers a centralized, secure, and fully automated solution for managing the entire contract lifecycle.

Paperwise transforms contract processes from scattered and reactive to streamlined, proactive, and strategic—reducing risk, improving visibility, and strengthening compliance across the organization.

With Symphony, teams can:

- Centralize all contracts and supporting documents in a secure repository
- Track renewals, obligations, and key dates with automated reminders
- Use version control to monitor revisions and maintain audit-ready history
- Implement automated routing and approvals for contract creation, review, and renewal
- Utilize built-in eSignature (powered by SignNow) for fast, legally binding execution
- Enforce security and compliance with access controls and permanent audit trails

INTELLIGENT CAPTURE

Gone are the days of manual data entry and time-consuming indexing. Paperwise's intelligent capture technology uses advanced extraction and classification tools to automatically recognize, organize, and digitize documents of all types.

Intelligent capture accelerates document intake, improves data accuracy, and removes bottlenecks that slow down departments like finance, HR, customer service, and operations.

Key capabilities include:

- AI-powered classification of documents (invoices, forms, contracts, receipts, etc.)
- Automatic extraction of key data fields
- Barcode and metadata recognition
- Template-free identification to handle structured or unstructured documents
- Seamless routing of captured documents into the appropriate workflows

FORMS

Many organizations still rely on cumbersome paper forms or static PDFs that create delays and manual administrative work. Paperwise modernizes form-driven processes with dynamic, digital forms that simplify data collection and eliminate manual handling.

Digital forms accelerate request management, reduce administrative workload, and support a more efficient, paperless workflow across the organization.

With Paperwise digital forms, organizations can:

- Create customized electronic forms tailored to any process
- Capture data digitally without re-keying or manual entry
- Auto-route submitted forms into workflows for approvals or processing
- Store all completed forms securely with searchable indexing
- Ensure consistency by standardizing formatting and required fields

E-SIGNATURE

Finalizing approvals and legally binding documents no longer requires printing, scanning, or shipping. Paperwise's integrated e-signature capabilities—powered by SignNow—bring secure, compliant, and fast signing directly into your workflow.

By embedding e-signature capabilities into everyday workflows, Paperwise empowers organizations to shorten cycle times, enhance user experience, and finalize documents with confidence.

With Paperwise e-Signature, teams can:

- Send documents for signature directly within the platform
- Enable legally binding signatures that meet industry standards
- Capture signature history and maintain a permanent audit trail
- Speed up contract execution, onboarding, approvals, and more
- Allow internal and external users to sign from anywhere, on any device

Why Paperwise?

Paperwise empowers businesses to simplify processes, enhance security, and maximize efficiency through a centralized, user-friendly platform for managing documents and data. By transforming complex, fragmented systems into streamlined, unified workflows, Paperwise reduces redundancy, minimizes errors, and allows teams to focus on strategic priorities.

Our solutions enable companies to safeguard sensitive information, maintain compliance, and leverage their data to drive more intelligent business decisions, delivering measurable improvements in productivity and operational excellence.

Beyond software, Paperwise offers a complete support ecosystem. With a team of workflow specialists, integration experts, network engineers, and business process professionals, we provide tailored solutions that fit each organization's unique needs.

Trusted by over 20,000 users, Paperwise helps businesses of all sizes streamline their operations, enhance collaboration, give you complete control over your important information, and fully realize the potential of their document management strategy.



40

HOURS OF LABOR
SAVED EACH WEEK

30

MINUTES SAVED
PER DOCUMENT

40%

IMPROVEMENT
IN ACCURACY
AND EFFICIENCY

Transform Your Document Management with Paperwise

Discover how document management solutions with Paperwise can revolutionize your business operations with smarter workflows, seamless document control, and unparalleled efficiency. Our tailored solutions help you simplify compliance, enhance collaboration, and eliminate the chaos of managing critical documents across teams.

Contact us today to learn more about how we can support your organizational needs and schedule a demo to see our solutions in action—experience firsthand the power of intuitive, secure document management with Paperwise.





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