

# The Transportation Leader's Guide to Document Management

How Transportation Companies Are Eliminating Paperwork, Automating Workflows, and Gaining Competitive Advantage with Symphony

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## Introduction: The Document Problem in Transportation

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Transportation and logistics is one of the most document-intensive industries in the world. Every load that moves from origin to destination generates a trail of paperwork, bills of lading, proof of delivery, driver qualification files, rate confirmations, fuel receipts, safety inspection reports, and more. Multiply that by hundreds or thousands of loads per week, and you begin to understand the scale of the challenge.

For decades, transportation companies have managed this document burden with a combination of fax machines, filing cabinets, email inboxes, and spreadsheets. While these approaches have worked, after a fashion, they come at a steep price: lost documents, delayed billing, compliance risk, frustrated drivers, and operational bottlenecks that erode margins.

Today, leading transportation companies are turning to intelligent document management to transform their operations. This ebook explores how Document Management Systems (DMS), powered by solutions like Paperwise Symphony, are helping trucking carriers, freight brokers, and logistics companies streamline every part of their business, from the cab of the truck to the back office.



# The Unique Document Challenges Transportation Companies Face

Transportation operations generate an extraordinary volume of documents across multiple teams, locations, and systems. Understanding these challenges is the first step toward solving them.



## OVERWHELMING PAPERWORK VOLUME

A mid-size carrier handling 500 loads per week may process 5,000 or more individual documents, bills of lading, delivery receipts, fuel tickets, lumper receipts, and more, every single week. That's over a quarter-million documents per year. Managing this at scale with manual processes is simply not sustainable.



## DOCUMENTS CAPTURED ACROSS MULTIPLE TOUCHPOINTS

Unlike office-based businesses, transportation documents are generated everywhere: at shipper docks, receiver warehouses, truck stops, and weigh stations. Drivers are on the road, not in an office, which means getting documents back to dispatch or billing has historically required faxing from truck stops or waiting until drivers return to the terminal, creating days-long delays in the billing cycle.



## MANUAL ERRORS AND MISPLACED DOCUMENTS

When documents are handled manually, errors multiply. Data gets keyed incorrectly from bills of lading. Proof of delivery signatures go missing. Rate confirmations get buried in email. Each error or missing document can delay a customer invoice by days, directly impacting cash flow.



## COMPLIANCE AND REGULATORY REQUIREMENTS

Transportation companies operate under strict federal and state regulations. FMCSA requires carriers to maintain driver qualification files, hours of service logs, drug and alcohol testing records, and vehicle inspection reports, and to produce them on demand during audits. The consequences of poor document management aren't just operational; they can include fines, out-of-service orders, and even loss of operating authority.

Key regulatory document requirements include:

- Driver Qualification Files (maintained throughout employment plus 3 years)
- Drug & Alcohol Testing Records (5 years for positive tests)
- Hours of Service logs and supporting documents (6 months)
- Accident reports and supporting documentation (3 years)
- Vehicle inspection reports (12 months)



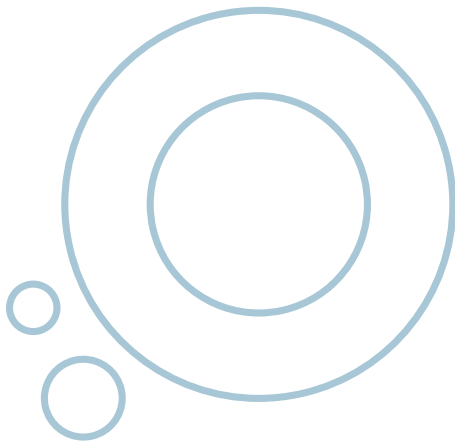
### INEFFICIENT BILLING AND CASH FLOW DELAYS

Billing accuracy and speed directly affect a carrier's cash flow. When documents such as signed bills of lading and proof of delivery are slow to arrive or difficult to locate, invoicing gets delayed, and with it, payment. Many carriers operate on thin margins where a few extra days in the billing cycle translates into real financial strain.



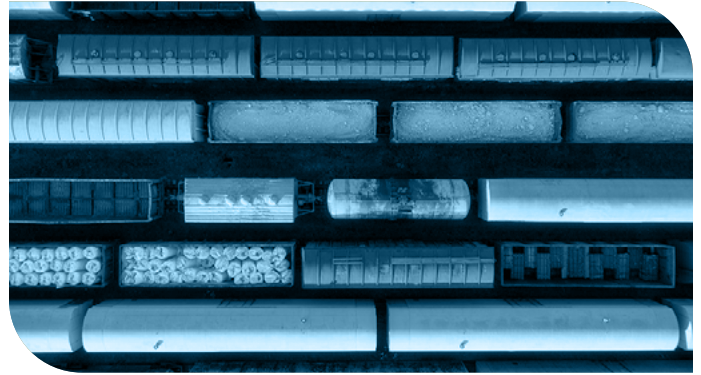
### FRAGMENTED SYSTEMS AND LACK OF VISIBILITY

Most transportation companies rely on a Transportation Management System (TMS) for dispatch, load management, and accounting, but their documents live somewhere else entirely: in email attachments, shared network drives, physical filing cabinets, or third-party document storage. This disconnect means that when an operations manager needs to pull a proof of delivery, they often have to leave their TMS, search through multiple systems, and still may not find what they need quickly.



# The Documents Transportation Companies Manage

Transportation operations generate an extraordinary volume of documents across multiple teams, locations, and systems. Understanding these challenges is the first step toward solving them.



## Freight & Operations Documents

DOCUMENT	DESCRIPTION
BILL OF LADING (BOL)	The foundational shipping document, a contract between shipper and carrier that includes load details, terms, and serves as receipt of freight.
PROOF OF DELIVERY (POD)	Signed confirmation that freight was delivered to the correct location and recipient. Essential for invoicing and dispute resolution.
RATE CONFIRMATION / LOAD TENDER	Agreement between broker and carrier confirming load details, rate, and terms of service.
FREIGHT INVOICE	The billing document is sent to shippers or brokers requesting payment for completed loads.
LUMPER RECEIPTS	Documentation of third-party unloading services, required for reimbursement from shippers.
FUEL RECEIPTS / IFTA RECORDS	Fuel purchase documentation required for International Fuel Tax Agreement (IFTA) reporting and reimbursement.
SCALE TICKETS / WEIGHT RECEIPTS	Documentation of load weights at certified scales, required for weight compliance.



## Driver & Safety Documents

DOCUMENT	DESCRIPTION
DRIVER QUALIFICATION FILE (DQ FILE)	A comprehensive file per driver including CDL, medical certificate, employment application, MVR, and background check records.
HOURS OF SERVICE (HOS) LOGS	Electronic or paper logs documenting driver on-duty, off-duty, and driving time in compliance with FMCSA regulations.
DRUG & ALCOHOL TESTING RECORDS	Pre-employment, random, post-accident, and reasonable suspicion test documentation.
PRE/POST TRIP INSPECTION REPORTS (DVIR)	Driver Vehicle Inspection Reports documenting vehicle condition at start and end of each trip.
ACCIDENT REPORTS	Documentation of any incident involving a company vehicle, including police reports, photos, and witness statements.
TRAINING & CERTIFICATION RECORDS	Documents related to safety training, endorsements, and ongoing certification requirements.





## Maintenance & Fleet Documents

DOCUMENT	DESCRIPTION
PREVENTIVE MAINTENANCE RECORDS	Scheduled service documentation for each vehicle in the fleet.
REPAIR ORDERS	Records of all repairs performed, including vendor invoices and parts documentation.
ANNUAL VEHICLE INSPECTIONS	Mandatory annual inspection reports required to keep commercial vehicles in service.
TIRE RECORDS	Documentation of tire purchases, rotations, and replacements per vehicle.
EQUIPMENT LEASE AGREEMENTS	Contracts for leased trailers, equipment, or owner-operator agreements.





## Accounting & Finance Documents

DOCUMENT	DESCRIPTION
VENDOR INVOICES (AP)	Invoices from fuel vendors, repair shops, and other service providers.
SETTLEMENT STATEMENTS	Weekly or bi-weekly driver pay settlements.
OWNER-OPERATOR AGREEMENTS	Contracts governing the relationship with owner-operators leased to the carrier.
CUSTOMER CONTRACTS	Master carrier agreements and freight contracts with shippers.
INSURANCE CERTIFICATES	Proof of liability, cargo, and physical damage insurance coverage.



# The Benefits of Document Management for Transportation



**Real-World Impact:** Transportation companies using Paperwise Symphony have reported saving significant hours of labor each week and achieving a 40% or greater improvement in accuracy and efficiency. Faster document processing directly accelerates invoice creation and reduces days sales outstanding (DSO).

1

## Faster Billing and Improved Cash Flow

One of the most immediate and measurable benefits of document management is the acceleration of the billing cycle. When drivers can submit proof of delivery and bills of lading via mobile capture the moment they complete a delivery, rather than mailing or faxing documents days later, billing can begin the same day.

2

## Seamless FMCSA Compliance and Audit Readiness

With a DMS, all required compliance documents are stored in organized, searchable digital repositories. When an FMCSA auditor arrives or sends a request, your team can pull any required document in seconds rather than spending hours searching through physical files. Automated retention policies ensure records are kept for the appropriate period and purged when no longer required.

3

## Driver-Friendly Mobile Workflows

Symphony's mobile capture capabilities allow drivers to photograph and submit documents directly from their iOS or Android devices. This means a driver finishing a delivery can snap a photo of the signed BOL immediately, sending it straight into the system for processing, no fax machine, no waiting until they return to the terminal. Easier document submission means fewer lost documents and happier drivers.

4

## Reduced Operational Costs

Manual document handling carries hidden costs that add up quickly: paper and printing, physical storage space, staff time spent filing and searching, and the cost of errors and disputes. A DMS eliminates most of these costs while also reducing the risk of costly compliance violations.



5

### Stronger Customer, Carrier, and Driver Relationships

When a shipper or broker calls asking for a POD, being able to produce it in seconds rather than promising to call back is a powerful differentiator. Symphony's customer portal allows you to securely share documents with shippers, brokers, and other stakeholders at any point in the transit process, building trust and improving communication.

6

### Real-Time Visibility and Analytics

A DMS connected to your TMS gives operations and management teams real-time visibility into document status across all loads. Are all BOLs accounted for? Which loads are missing signed PODs? What's the average time from delivery to invoice? These insights help managers identify bottlenecks and continuously improve operations.

7

### Scalable Operations

As your fleet and load volume grows, manual document processes don't scale, they break. A DMS grows with your operation, handling increasing document volumes without requiring proportional increases in administrative staff. Automation takes over the repetitive tasks, allowing your team to focus on higher-value work.



# How Intelligent Capture Works in Transportation

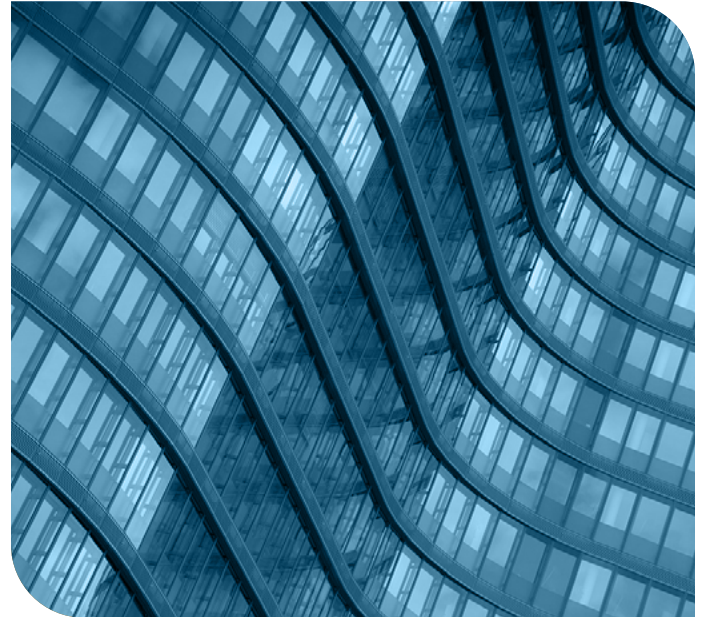
## What Is Intelligent Capture?

Intelligent Capture combines Optical Character Recognition (OCR), machine learning, and rules-based automation to automatically identify, classify, and extract data from incoming documents, regardless of format or source. Using patented supervised learning technology, Symphony's Intelligent Capture gets smarter over time, improving accuracy with every document it processes.

## How Intelligent Capture Works in Transportation

When a document enters Symphony, whether via mobile capture, email, scanner, or direct integration, Intelligent Capture immediately goes to work:

- **Document Classification:** The system automatically identifies what type of document it is (BOL, POD, invoice, inspection report, etc.) without manual intervention.
- **Data Extraction:** Key fields are automatically extracted, load number, shipper/consignee information, delivery date, weight, invoice amount, and more.
- **TMS Matching:** Extracted data is automatically matched against records in your Transportation Management System, linking documents to the correct load, customer, or driver record.
- **Exception Flagging:** Documents that don't match or have missing information are flagged for review, ensuring problems are caught before they become billing disputes.
- **Automated Routing:** Documents are automatically routed to the correct workflow based on their type and content, a fuel receipt goes to accounting, a DVIR goes to maintenance, a POD triggers the invoicing workflow.



## Intelligent Capture for Specific Transportation Use Cases



### TRIP DOCUMENT PROCESSING

Drivers submit trip packets, BOL, POD, fuel receipts, lumber receipts, via mobile capture. Intelligent Capture automatically classifies each document, extracts load data, matches it to the load record in the TMS, and routes it to billing for invoice creation. What used to take days now happens in hours.



### DRIVER QUALIFICATION FILE MANAGEMENT

Incoming driver documents, applications, CDL copies, medical certificates, background checks, are automatically classified and filed to the correct driver record. Expiration dates are extracted and tracked, with automated alerts when documents approach expiration.



### ACCOUNTS PAYABLE PROCESSING

Vendor invoices are captured, data is extracted and validated against purchase orders, and invoices are routed through approval workflows automatically. No manual data entry required.



## TMS Integrations - Connecting Symphony to Your Operations

The power of a document management system is multiplied when it connects directly to your Transportation Management System. Paperwise Symphony offers deep, purpose-built integrations with leading TMS platforms, ensuring that documents and data flow seamlessly between systems without manual re-entry.

### Integration with Trimble TruckMate

Trimble TruckMate is one of the most widely used Transportation Management Systems among mid-size to large carriers, providing comprehensive dispatch, billing, payroll, safety, and maintenance management capabilities.



Paperwise Symphony's integration with Trimble TruckMate creates a bidirectional connection that eliminates the gap between your TMS data and your document management:

- **Automatic Load Linking:** Documents captured in Symphony are automatically matched and linked to the corresponding load record in TruckMate, providing a complete document package accessible directly from the TMS interface.
- **Streamlined Billing Workflows:** When a load is completed in TruckMate, Symphony automatically checks for all required documents (BOL, POD, etc.) and triggers the billing workflow when they are all present and matched.
- **Driver Record Integration:** Driver documents in Symphony are linked to the corresponding driver records in TruckMate, giving dispatch and safety teams a complete view of each driver's compliance status.
- **Invoice Processing:** Vendor invoices captured by Symphony are matched against purchase orders in TruckMate, streamlining the accounts payable process.
- **Real-Time Document Access:** Users working in TruckMate can access and retrieve documents stored in Symphony with a single click, without leaving the TMS environment.



## TruckMate Integration: Key Use Case

A mid-size carrier using TruckMate can configure Symphony to automatically alert their billing team the moment all required documents are received and matched for a given load. Instead of billing staff manually checking document completeness, Symphony handles this automatically, accelerating the billing cycle and eliminating the need for a dedicated document-chasing function.

## Integration with Trimble (Enterprise TMS Solutions)

Beyond TruckMate, Paperwise Symphony integrates with the broader Trimble transportation ecosystem, enabling carriers using Trimble's suite of solutions to benefit from seamless document management across their entire operation. This includes integration capabilities that sync data between Symphony and Trimble's dispatch, compliance, and financial management modules.

## REST API and Custom Integration Capabilities

For transportation companies using other TMS platforms or requiring custom integrations, Symphony's robust REST API enables seamless bidirectional data exchange with virtually any system. Through the Symphony Software Development Toolkit, technical teams can build custom integrations that connect Symphony to any business application, ensuring that document management enhances rather than disrupts existing workflows.

# Real-World Scenarios - Document Management in Action

## Scenario 1: The Trip Document Bottleneck

**The Challenge:** A regional carrier with 150 drivers is struggling with a consistent 3–4 day gap between load completion and invoice generation. Drivers are submitting trip documents by fax or dropping off paper packets when they return to the terminal. By the time billing receives, sorts, and processes the documents, days have passed, and cash flow is suffering.

**With Symphony:** Drivers are equipped with the Symphony mobile app. Upon delivery, they photograph the signed BOL and POD from their phone. Symphony's Intelligent Capture automatically classifies the documents, extracts load data, and matches it to the load record in TruckMate. The billing team receives an automated notification that all documents are received and matched. Invoice creation begins the same day as delivery. The billing cycle shrinks from 3–4 days to same-day or next-day, accelerating cash flow significantly.

## Scenario 2: The FMCSA Audit Scramble

**The Challenge:** A carrier receives notice of an FMCSA compliance audit. The safety manager spends three days before the audit pulling together driver qualification files, drug and alcohol testing records, and accident documentation from filing cabinets, email archives, and a third-party testing service, an exhausting, stressful process with a real risk of missing documents.

**With Symphony:** All driver compliance documents are stored in Symphony, organized by driver and document type, with expiration dates tracked automatically. When the audit notice arrives, the safety manager uses Symphony's search function to pull a complete compliance package in minutes. Expiration alerts have already flagged any documents needing renewal weeks in advance. The audit is managed confidently rather than frantically.

### Scenario 3: The Owner-Operator Onboarding Delay

**The Challenge:** A carrier regularly adds new owner-operators to their fleet. The onboarding process requires collecting and verifying a substantial list of documents: CDL, medical certificate, MVR, background check, insurance certificate, lease agreement, and more. Currently managed by email and spreadsheet, the process takes 5-7 days and frequently stalls when documents are missing or incomplete.

**With Symphony:** Symphony includes a configurable onboarding workflow that defines all required documents for each owner-operator. An automated checklist tracks document receipt and flags missing items. New owner-operators can upload documents via a secure portal, and Symphony automatically classifies and routes them for review. The onboarding process is streamlined to 1-2 days, and carriers can put new drivers to work faster.

### Scenario 4: The Accounts Payable Backlog

**The Challenge:** A growing carrier's accounts payable team is overwhelmed with vendor invoice processing. Invoices arrive by email, fax, and mail from fuel vendors, repair shops, and service providers. Manual data entry is slow, errors are common, and some invoices are getting lost — leading to late payments and strained vendor relationships.

**With Symphony:** Vendor invoices are automatically captured from email and other sources. Intelligent Capture extracts invoice data and matches it against purchase orders in the TMS. Invoices within normal parameters are auto-approved and routed for payment. Exceptions are flagged for human review. The AP team processes the same invoice volume in a fraction of the time, with significantly fewer errors and no lost invoices.



## Customer Success Stories

### G&D Integrated: Real-Time Freight Document Management

G&D Integrated is a full-service transportation and logistics company that turned to Paperwise Symphony to modernize their document management processes. The results:

- **Real-Time Digitization:** G&D now digitizes freight documents in real time through Symphony's mobile capture app, the moment a delivery is completed, documents are in the system.
- **Driver Record Compliance:** Symphony streamlined G&D's management of driver qualification files and compliance documentation, reducing the manual burden on their safety team.
- **Labor Cost Reduction:** By automating document workflows that previously required significant manual effort, G&D has cut labor costs associated with document processing.
- **Accuracy Improvement:** Automated matching and exception handling has improved accuracy across the board, reducing billing disputes and compliance risks.

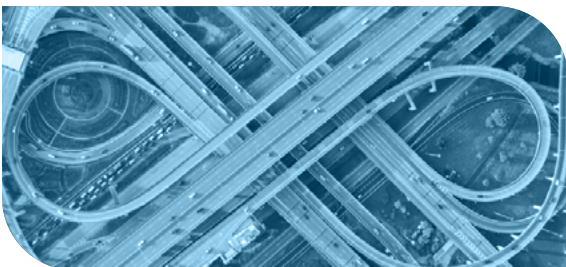


## K&B Transportation: Custom Billing and Payroll Workflows

K&B Transportation came to Paperwise after their previous imaging system was no longer meeting their needs. They needed an in-house platform that could handle complex billing and payroll workflows while integrating with their existing systems.

Paperwise delivered custom workflows tailored specifically to K&B's unique billing requirements:

- **Reduced Manual Processes:** Workflows that previously required significant staff time are now largely automated.
- **Time Savings:** K&B's team has reclaimed valuable time previously consumed by manual document handling.
- **Seamless Integration:** Symphony integrates cleanly with K&B's existing systems, ensuring data flows correctly without disruption.



# Getting Started with Document Management

## STEP 1: ASSESS YOUR CURRENT STATE

Before selecting a solution, take stock of your current document challenges. Ask your team:

- How long does it currently take from delivery completion to invoice creation?
- How many hours per week do staff spend on document handling tasks?
- How do you currently manage driver qualification files?
- What happens during an FMCSA audit? How quickly can you produce required documents?
- Where are documents currently stored, and how are they accessed?

## STEP 2: DEFINE YOUR PRIORITIES

Most carriers start with the highest-pain areas: trip document processing and billing acceleration, or compliance document management. Identifying your top priorities helps you focus the implementation and see value quickly.

## STEP 3: EVALUATE SOLUTIONS WITH YOUR TMS IN MIND

Your DMS needs to integrate with your TMS. Ensure any solution you evaluate has a proven, tested integration with your platform, whether that's Trimble TruckMate, McLeod, TMW, or another system. A DMS that doesn't connect to your TMS creates another data silo rather than solving the problem.

## STEP 4: PLAN YOUR DOCUMENT TYPES AND WORKFLOWS

Work with your DMS vendor to map out the document types you manage and the workflows you want to automate. For transportation, this typically includes trip document workflows, driver compliance workflows, and AP processing workflows.

## STEP 5: ROLL OUT IN PHASES

The most successful implementations start with a focused initial rollout, often trip documents and billing, before expanding to other document types and departments. This builds user familiarity and demonstrates value quickly, creating momentum for broader adoption.



## Getting Started with Paperwise Symphony

Paperwise Symphony is designed to deploy quickly and integrate seamlessly with your existing TMS. Our implementation team works closely with each carrier to configure Symphony for their specific workflows, document types, and integration requirements. Most carriers are up and running with their core workflows in weeks, not months.

The transportation industry is at an inflection point. Carriers that continue to manage documents manually are fighting an uphill battle, against thinning margins, increasing regulatory complexity, driver recruitment challenges, and shipper demands for faster, more transparent service.

Document management isn't just a back-office efficiency tool. It's a strategic advantage. Carriers using intelligent document management are billing faster, staying audit-ready, retaining drivers more effectively, and scaling their operations without proportional increases in administrative overhead.

Paperwise Symphony was built with transportation companies in mind, from its deep TMS integrations with Trimble TruckMate to its driver-friendly mobile capture capabilities to its Intelligent Capture technology that automatically processes the documents your business runs on.

The question isn't whether to modernize your document management, it's how soon you can get started.





## Contact Us

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