

A background image showing a manufacturing worker wearing a white hard hat and safety glasses, sitting at a desk with multiple computer monitors. The worker's hand is visible on a mouse. The scene is dimly lit with blue tones, and the background shows industrial equipment and lights.

The Manufacturing Leader's Guide to Document Management

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

GUIDE | MANUFACTURING DOCUMENT MANAGEMENT

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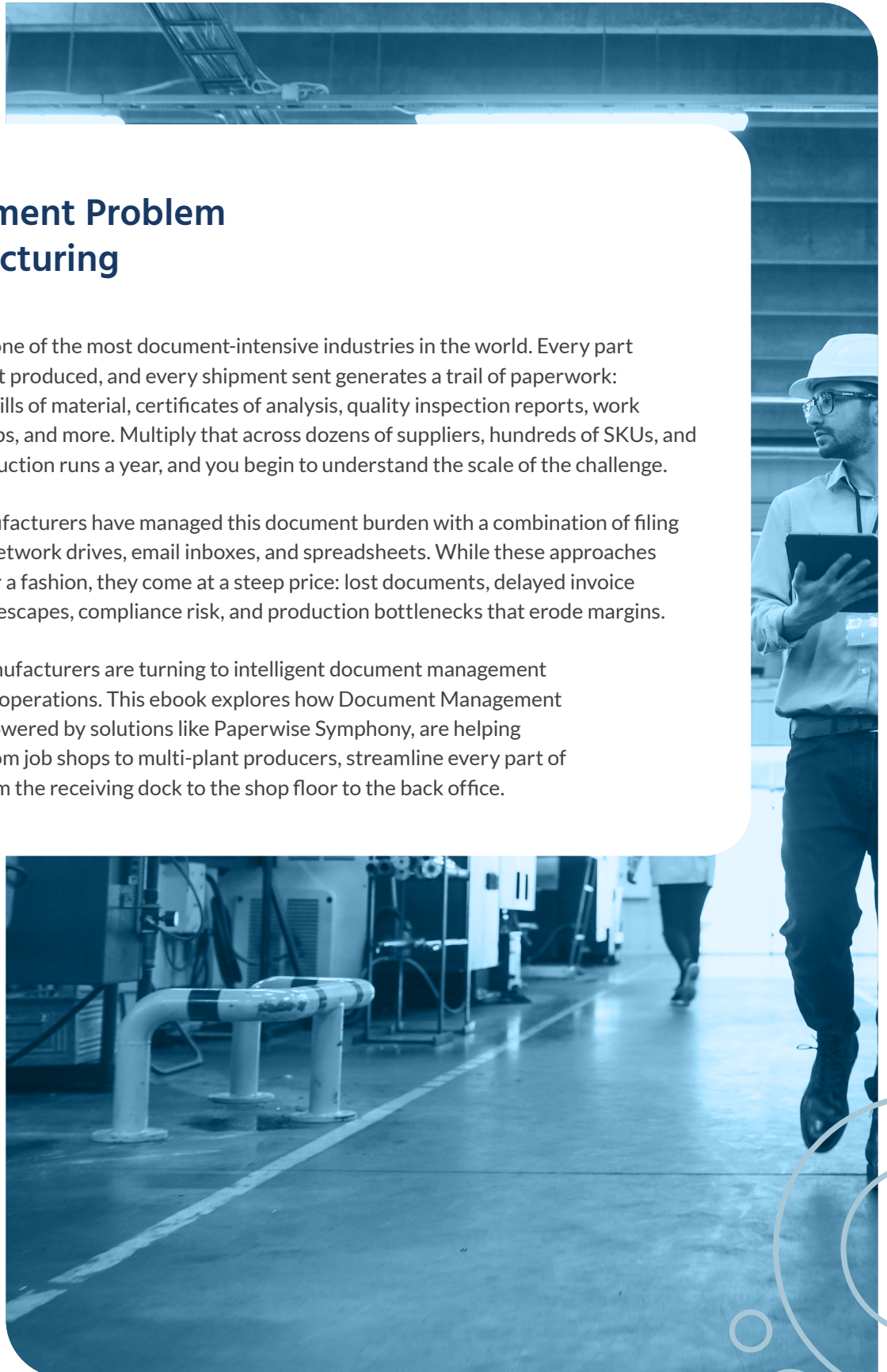
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The Document Problem in Manufacturing

Manufacturing is one of the most document-intensive industries in the world. Every part ordered, every unit produced, and every shipment sent generates a trail of paperwork: purchase orders, bills of material, certificates of analysis, quality inspection reports, work orders, packing slips, and more. Multiply that across dozens of suppliers, hundreds of SKUs, and thousands of production runs a year, and you begin to understand the scale of the challenge.

For decades, manufacturers have managed this document burden with a combination of filing cabinets, shared network drives, email inboxes, and spreadsheets. While these approaches have worked, after a fashion, they come at a steep price: lost documents, delayed invoice approvals, quality escapes, compliance risk, and production bottlenecks that erode margins.

Today, leading manufacturers 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 manufacturers, from job shops to multi-plant producers, streamline every part of their business, from the receiving dock to the shop floor to the back office.



The Unique Document Challenges Manufacturers Face

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

Documents Captured Across Multiple Touchpoints

Unlike office-based businesses, manufacturing documents are generated everywhere: at the receiving dock, on the shop floor, in the quality lab, and at the shipping dock. Purchase orders arrive by email, packing slips ride in with the truck, certificates of analysis come from suppliers in a dozen different formats, and inspection results get recorded on paper travelers that follow the work order from station to station. Getting all of that into a usable, searchable record has historically meant manual filing, re-keying, and a lot of hunting.

Manual Errors and Misplaced Documents

When documents are handled manually, errors multiply. Data gets keyed incorrectly from packing slips. Certificates of analysis go missing at receiving. Purchase order numbers get transposed on vendor invoices. Each error or missing document can delay a supplier payment, hold a production run, or, worse, let a nonconforming part reach the next station undetected.

Overwhelming Paperwork Volume

A mid-size manufacturer processing 200 purchase orders and 300 work orders per week may generate thousands of individual documents, receiving reports, certificates of analysis, inspection results, travelers, and vendor invoices, every single week. Managing this at scale with manual processes is simply not sustainable.

Fragmented Systems and Lack of Visibility

Most manufacturers rely on an ERP system for production planning, inventory, and accounting, but their documents live somewhere else entirely: in email attachments, shared network drives, physical filing cabinets, or a supplier portal. This disconnect means that when a quality manager needs to pull a certificate of analysis for a specific lot, they often have to leave the ERP, search through multiple systems, and still may not find what they need quickly.

Compliance and Regulatory Requirements

Manufacturers operate under a dense layer of quality and regulatory obligations. ISO 9001 and IATF 16949 require documented quality records and traceability. Aerospace suppliers must meet AS9100. Food, beverage, and pharmaceutical manufacturers must maintain records under FDA Good Manufacturing Practice regulations, and medical device makers must maintain device history records under 21 CFR Part 820. OSHA requires certain safety and exposure records to be kept for the duration of employment plus 30 years. The consequences of poor document management aren't just operational, they can include failed audits, lost certifications, product recalls, and regulatory fines.

Key regulatory and quality document requirements include:

- Device History Records and Device Master Records (retained for the expected life of the device, per 21 CFR Part 820)
- Certificates of Analysis and Conformance (retained per customer contract, often for the product's shelf life plus additional years)
- Non-Conformance and Corrective Action (CAPA) Records (retained per ISO 9001 / IATF 16949 documented procedures)
- Calibration and Equipment Maintenance Records (typically 3 to 7 years, depending on customer and industry requirements)
- Safety Data Sheets and OSHA Exposure Records (duration of employment plus 30 years)
- Lot and Batch Traceability Records (retained to support recalls throughout the product's distribution life)

Inefficient Invoice Matching and Cash Flow Delays

Accounts payable accuracy and speed directly affect a manufacturer's working capital and supplier relationships. When purchase orders, receiving reports, and vendor invoices live in three different systems, three-way matching becomes a manual chase, and early-payment discounts get missed while overdue invoices pile up.

The Documents Manufacturers Manage

PROCUREMENT & SUPPLY CHAIN DOCUMENTS

- **Purchase Order (PO):** The foundational procurement document, an agreement between the manufacturer and supplier that specifies materials, quantities, pricing, and delivery terms.
- **Packing Slip / Receiving Report:** Documentation accompanying incoming shipments, used to confirm materials received match the purchase order.
- **Supplier / Vendor Invoice:** The billing document from suppliers, matched against the PO and receiving report before payment.
- **Certificate of Analysis (COA):** Supplier-provided documentation confirming that a specific lot of material meets required specifications.
- **Certificate of Conformance (COC):** Supplier attestation that delivered goods conform to purchase order requirements and applicable standards.
- **Material Safety Data Sheet (SDS):** Documentation of chemical and material safety information, required to be accessible wherever the material is used.
- **Supplier Quality Agreements:** Contracts defining quality expectations, inspection requirements, and corrective action responsibilities with suppliers.

ACCOUNTING & FINANCE DOCUMENTS

- **Vendor Invoices (AP):** Invoices from raw material suppliers, contract manufacturers, and service providers.
- **Customer Invoices (AR):** Billing documents sent to customers for shipped goods.
- **Customer Contracts:** Master supply agreements and purchase contracts with customers.
- **Insurance Certificates:** Proof of liability, product, and property insurance coverage.
- **Warranty Claims:** Documentation of product warranty issues, including root cause analysis and resolution.



PRODUCTION, QUALITY & ENGINEERING DOCUMENTS

- **Bill of Materials (BOM):** The structured list of raw materials, components, and sub-assemblies required to build a finished product.
- **Work Order / Router / Traveler:** The document that follows a job through production, recording operations completed, inspection results, and sign-offs at each station.
- **Engineering Change Notice (ECN):** Formal documentation of a change to a part, drawing, or process, including approval history.
- **Quality Inspection Reports:** Records of in-process and final inspection results measured against specification.
- **Non-Conformance Report (NCR) / CAPA:** Documentation of a quality deviation and the corrective and preventive action taken to resolve it.
- **Device History Record (DHR) / Device Master Record (DMR):** Comprehensive production and design records required for regulated medical device manufacturers.

MAINTENANCE & FACILITIES DOCUMENTS

- **Preventive Maintenance Records:** Scheduled service documentation for production equipment and machinery.
- **Equipment Calibration Records:** Documentation confirming measurement and test equipment is within tolerance, required for quality certifications.
- **Repair Orders:** Records of unscheduled repairs, including vendor invoices and parts documentation.
- **Facility Inspection Reports:** Safety and regulatory inspection records for plant facilities and equipment.
- **Equipment Lease Agreements:** Contracts for leased machinery, vehicles, or facility equipment.

The Benefits of Document Management for Manufacturing

Real-World Impact: Manufacturers 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 approvals, shortens days payable outstanding, and keeps quality records audit-ready.



Faster Invoice Processing and Improved Cash Flow

One of the most immediate and measurable benefits of document management is the acceleration of three-way matching. When purchase orders, receiving reports, and vendor invoices are automatically captured and matched, accounts payable can approve and pay invoices in days rather than weeks, capturing early-payment discounts and strengthening supplier relationships.



Seamless Quality and Regulatory Compliance

With a DMS, all quality and compliance documents are stored in organized, searchable digital repositories. When an ISO, IATF, or FDA auditor arrives or sends a request, your team can pull any required certificate, inspection report, or calibration record in seconds rather than spending hours searching through binders. Automated retention policies ensure records are kept for the appropriate period and purged when no longer required.



Shop-Floor-Friendly Mobile and Scanning Workflows

Symphony's mobile capture capabilities allow operators, quality technicians, and receiving clerks to photograph and submit documents directly from a phone, tablet, or shop-floor scanner. A receiving clerk can capture a packing slip and certificate of analysis the moment a shipment arrives, sending it straight into the system for matching, no manual filing, no waiting for paperwork to reach the office.





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.



Stronger Supplier and Customer Relationships

When a customer calls asking for a certificate of analysis or a supplier needs proof of payment, being able to produce it in seconds rather than promising to call back is a powerful differentiator. Symphony's portal allows you to securely share documents with suppliers, customers, and auditors at any point in the process, building trust and improving communication.



Real-Time Visibility and Analytics

A DMS connected to your ERP gives operations and quality teams real-time visibility into document status across every purchase order and work order. Are all certificates of analysis accounted for? Which invoices are stuck in exception review? What's the average time from receipt to invoice approval? These insights help managers identify bottlenecks and continuously improve operations.



Scalable Operations

As your plant, product line, and supplier base grow, 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 Manufacturing

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 Manufacturing

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 (purchase order, packing slip, certificate of analysis, invoice, inspection report, etc.) without manual intervention.
- **Data Extraction:** Key fields are automatically extracted: PO number, part number, lot number, quantity, price, supplier name, and more.
- **ERP Matching:** Extracted data is automatically matched against records in your ERP system, linking documents to the correct purchase order, work order, or vendor record.
- **Exception Flagging:** Documents that don't match or have missing information are flagged for review, ensuring problems are caught before they become payment disputes or quality escapes.
- **Automated Routing:** Documents are automatically routed to the correct workflow based on their type and content, a certificate of analysis goes to quality, a safety data sheet goes to EHS, an invoice triggers the accounts payable workflow.

Intelligent Capture for Specific Manufacturing Use Cases

Three-Way Match and Accounts Payable Processing: Vendor invoices are captured, data is extracted and validated against the purchase order and receiving report in the ERP, and invoices within tolerance are routed for automatic approval. No manual data entry required, exceptions are flagged for human review.

Quality Documentation Management: Incoming certificates of analysis, certificates of conformance, and inspection reports are automatically classified and filed to the correct lot or work order record. Expiration and hold flags are extracted and tracked, with automated alerts when a certificate is missing or a lot is on quality hold.

Supplier Onboarding and Compliance Documents: Incoming supplier documents, W-9s, certificates of insurance, quality agreements, and safety data sheets, are automatically classified and filed to the correct supplier record, with automated alerts as documents approach expiration.



ERP Integrations: Connecting Symphony to Your Operations

The power of a document management system is multiplied when it connects directly to your Enterprise Resource Planning (ERP) system. Paperwise Symphony offers deep, purpose-built integrations with leading ERP and accounting platforms, ensuring that documents and data flow seamlessly between systems without manual re-entry.

Integration with Microsoft Dynamics Business Central and GP

Microsoft Dynamics is one of the most widely used ERP platforms among small to mid-size manufacturers, providing comprehensive production, inventory, and financial management capabilities. Paperwise Symphony's integration with Business Central and Dynamics GP creates a connection that eliminates the gap between your ERP data and your document management:

- **Automatic Record Linking:** Documents captured in Symphony are automatically matched and linked to the corresponding purchase order, vendor, or item record in Dynamics, providing a complete document package accessible directly from the ERP interface.
- **Streamlined Three-Way Matching:** When an invoice is received, Symphony automatically checks it against the purchase order and receiving report in Dynamics and routes it for approval once all three match.
- **Vendor Record Integration:** Supplier documents in Symphony are linked to the corresponding vendor records in Dynamics, giving purchasing and quality teams a complete view of each supplier's compliance status.
- **Real-Time Document Access:** Users working in Dynamics can access and retrieve documents stored in Symphony with a single click, without leaving the ERP environment.



Integration with SAP

For manufacturers running SAP, Paperwise Symphony supports data exchange between the document management system and SAP through scheduled file transfers, keeping vendor, purchase order, and invoice data synchronized so that documents remain linked to the correct SAP records without manual re-keying.

REST API and Custom Integration Capabilities

For manufacturers using other ERP platforms, including QuickBooks, Sage, or AS400-based systems, Symphony's ECM API enables secure, bidirectional data exchange with virtually any system. Through the API, technical teams can build custom integrations that connect Symphony to any business application, front-end data capture and validation, automated processing with one- or two-way syncing, and back-end updates, ensuring that document management enhances rather than disrupts existing workflows.

Real-World Scenarios: Document Management in Action

Scenario 1: The Three-Way Match Bottleneck

THE CHALLENGE

A mid-size manufacturer with a dozen key suppliers is struggling with a consistent 10 to 15 day gap between invoice receipt and payment approval. Invoices arrive by email and mail, and accounts payable staff manually track down the matching purchase order and receiving report before an invoice can be approved. Early-payment discounts are routinely missed, and the AP team spends hours each week chasing paperwork instead of processing payments.

WITH SYMPHONY

Vendor invoices are automatically captured from email and other sources. Intelligent Capture extracts invoice data and matches it against the purchase order and receiving report in the ERP. Invoices within tolerance 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, captures early-payment discounts, and strengthens supplier relationships.



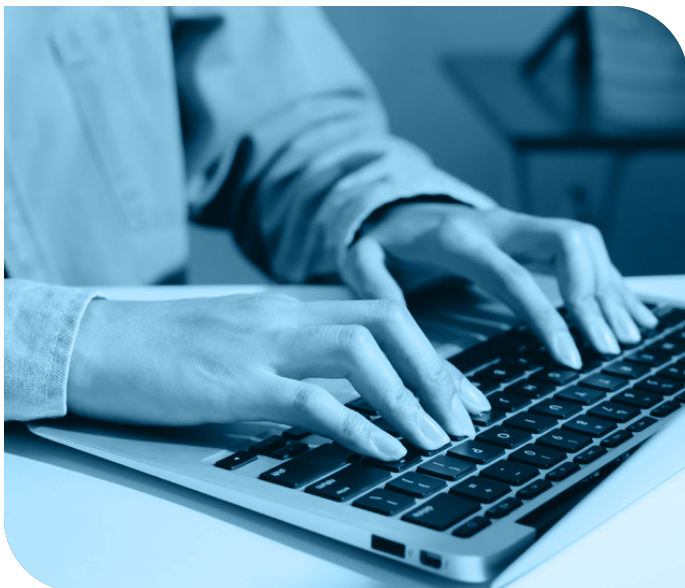
Scenario 2: The Quality Audit Scramble

THE CHALLENGE

A manufacturer receives notice of an upcoming ISO 9001 surveillance audit. The quality manager spends days before the audit pulling together certificates of analysis, calibration records, and non-conformance documentation from filing cabinets, email archives, and supplier portals, an exhausting, stressful process with a real risk of missing documents.

WITH SYMPHONY

All quality and compliance documents are stored in Symphony, organized by supplier, lot, and document type, with expiration and hold status tracked automatically. When the audit notice arrives, the quality 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 Supplier Onboarding Delay

THE CHALLENGE

A manufacturer regularly adds new suppliers to support new product lines. The onboarding process requires collecting and verifying a substantial list of documents: W-9, certificate of insurance, quality agreement, safety data sheets, and sample certificates of analysis. Currently managed by email and spreadsheet, the process takes a week or more and frequently stalls when documents are missing or incomplete.

WITH SYMPHONY

Symphony includes a configurable onboarding workflow that defines all required documents for each new supplier. An automated checklist tracks document receipt and flags missing items. New suppliers can upload documents via a secure portal, and Symphony automatically classifies and routes them for review. The onboarding process is streamlined to a day or two, and purchasing can activate new suppliers faster.

Scenario 4: The Engineering Change Backlog

THE CHALLENGE

A manufacturer's engineering change notices (ECNs) route through email for review and approval by engineering, quality, purchasing, and production. Approvals get buried in inboxes, and it is difficult to tell which revision of a drawing or specification is currently in effect on the shop floor, creating a real risk of building product to an outdated spec.

WITH SYMPHONY

ECNs are captured and routed through a defined approval workflow, with each approver notified automatically and status visible in real time. Once approved, the current revision is automatically linked to the affected part and work order records, so the shop floor and quality team are always working from the latest specification. What used to take weeks of email chasing now happens in days, with a complete, auditable approval trail attached to every change.





Getting Started with Document Management

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 invoice receipt to payment approval? How many hours per week do staff spend on document handling tasks? How do you currently manage certificates of analysis and quality records? What happens during an ISO, IATF, or FDA audit, and how quickly can you produce required documents? Where are documents currently stored, and how are they accessed?

2. Define Your Priorities

Most manufacturers start with the highest-pain areas: accounts payable and three-way match acceleration, or quality and compliance document management. Identifying your top priorities helps you focus the implementation and see value quickly.



3. Evaluate Solutions With Your ERP in Mind

Your DMS needs to integrate with your ERP. Ensure any solution you evaluate has a proven, tested integration with your platform, whether that's Microsoft Dynamics Business Central, Dynamics GP, SAP, QuickBooks, Sage, or an AS400-based system. A DMS that doesn't connect to your ERP creates another data silo rather than solving the problem.

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 manufacturing, this typically includes procurement and three-way match workflows, quality documentation workflows, and supplier onboarding workflows.

5. Roll Out in Phases

The most successful implementations start with a focused initial rollout, often accounts payable and procurement documents, before expanding to quality, engineering, and 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 ERP. Our implementation team works closely with each manufacturer to configure Symphony for their specific workflows, document types, and integration requirements. Most manufacturers are up and running with their core workflows in weeks, not months.

The manufacturing industry is at an inflection point. Manufacturers that continue to manage documents manually are fighting an uphill battle, against thinning margins, increasing regulatory complexity, supply chain volatility, and customer demands for faster, more transparent service.

Document management isn't just a back-office efficiency tool. It's a strategic advantage. Manufacturers using intelligent document management are paying suppliers faster, staying audit-ready, reducing quality escapes, and scaling their operations without proportional increases in administrative overhead.

Paperwise Symphony was built with manufacturers in mind, from its deep ERP integrations with Microsoft Dynamics and SAP to its shop-floor-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.

Ready to See Symphony in Action?
Schedule a personalized demo.



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