

Transforming paper-based workflows into efficient digital solutions

We worked with a leading IT Consulting Company to help their business clients get actionable information from physical documents using Outsystems. **This is their story with us.**

Overview

The fast-paced technological evolution around the world has increased the need for digitalization. But paper is still a reality in many companies, be it for legally binding documents, insurance details, complaints or invoices.

Near Partner worked with a leading IT consulting house that processes and scans physical documents for business clients. With facilities around the world, this customer required a robust solution that could store, organize and present millions of documents efficiently.

Why Near Partner

As an IT Consulting company, our customer was naturally well aware of the need to digitize and automate repetitive, time-consuming tasks. Yet, their digitalization and processing process was lagging their business customer expectations. Together, we identified the need to improve the way customers stored, processed and organized documents. To make this process more stable, they relied on us.



Now, our customers can see the most relevant data and use that information to their benefit in an intuitive yet powerful way.

CEO

Analyzing our problem

When the project started, the IT Consulting firm already had an innovative AI system in place that allowed customers to scan their paper documents, such as invoices, letters, or complaints. This system could read the different fields of information effectively, but not store it in an organized way for future use. With no established workflow and no supporting software, customers lacked access to the digital version of data and a reporting tool. We set out to develop an interface that could receive the data from the AI system and store it. Our solution also had to be intuitive enough so that thousands of users from different countries could analyze and act on the data.

Creating a Solution

Responding to such a large-scale challenge required a cross-functional team comprising members of both the Customer and Near Partner. Our first goal was overcoming the unstructured nature of the scanned documents. Each had its own format, fields, heading and content, which had to be categorized and processed before the “real” automation work could begin. We also developed a new workflow that enabled the consultant’s customers to get the best of their database.

Upon delivering the physical documents, customers would then have access to them digitally, through the interface, being able to observe them in a more interactive way. Customers gained the option of using certain filters, specifying what information was relevant at each time. They can also make a more individualized treatment of the data. In this way, users can identify and use data in a more structured way. To achieve this, [we used Outsystems](#), a low-code application building platform. Why did we choose OutSystems? Because it enables us to develop apps such as this in an intuitive and visual environment. It saves time and ensures quality from the onset. Outsystems allowed us to deliver quick and tested results in a matter of days, not weeks.

OUR RESULTS

key-points



The end user get access to a digital version of any physical information in an easy, interactive, fast and cost-effective way.



Both the end-user and the company itself have access to a dashboard where they can see the main process metrics.



A faster and less bureaucratic way of working that can store data from thousands of customers and millions of documents.

Need help with a similar project for your business?

GET IN TOUCH



www.nearpartner.com

