# Turning Conversations into Business Transactions

Whether you are trying to handle a request, improve the contract process in sales or purchasing or you are onboarding a new client or employee, the activities are inherently collaborative. Creating, revising, reviewing, approving and signing contracts are tasks that often involve two or more people. Such process-driven collaboration is typically linked to fillable business forms and interactive business documents. Content is drafted, saved and organized with metadata and often requires multiple revision cycles before it is considered complete. The automated and ad-hoc tasks and activities that users need to perform to achieve a common goal are managed by Papyrus.

Use Cases: Self-Service | On-boarding | Request Handling | Claims | Contracts | Registrations
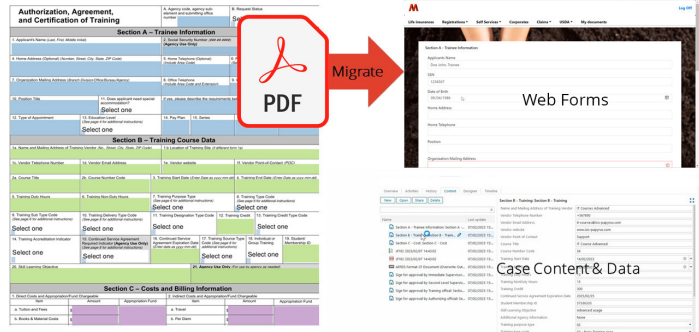
Organizations Call for Digital Transformation of Forms

1. Locating and manually filling out a paper or PDF form is time-consuming and error-prone for the requester
2. Incorrectly entered information causes inefficiencies in the process
3. Re-entering data into other systems costs time, resources and money, and new errors are likely to happen
4. Sending emails with PDF forms containing Person Identifiable Information and other sensitive data increases the risk of fraud and privacy violations as process status and insight gets lost
5. Emailing forms means duplicates and different versions that take up disk space, making it hard to find the current version and adding to the complexity of information governance

The Papyrus DocuFlow solution seamlessly migrates paper and PDF Forms into web forms and replaces emails with workflow and case management.

1. Provide self-service online for customers and employees
2. Migrate paper and PDF forms to HTML
3. Improve user experience and data quality
4. Increase process efficiency and process transparency
5. Sign electronically and digital notarize
6. Automate data exchange through services
7. Govern information and content

Migrating the PDF Interactive Form
Create an envelope template in the Papyrus Business Designer and upload the Interactive PDF Form for analysis and migration. The migration uses a wizard to turn the PDF into web forms for the requester and recipients to get assigned the task of editing, approving, signing, and viewing the form or getting a carbon copy of the optional resulting filled and signed PDF form.

Capturing the PDF or Paper Form
Form classification and extraction definitions are during the migration generated. Automatic handling of remaining incoming PDFs via email or upload is guaranteed.

For PDF Forms that are not interactive or paper-only, the Business Designer Capture is used to define the classification and extract definitions to automate those scanned Forms.

Workflow and Case Management
The Papyrus workflow engine replaces the emails being sent to route the form. Tasks are planned and assigned for persons, roles, or departments, and service tasks automate the execution of integration. Notifications alert participants in the process if steps become due.

Seamless integration with Papyrus Customer Communication simplifies creating and sending documents as a request for additional information or status. The whole process from request-to-closure is taken place in the comfort of Papyrus Adaptive Case Management, making collaboration simple and easing the management of additional content such as emails and other documents.

Utmost Life and Pension opted for a customer Self-Service Portal that connects the front-end with back-office teams, providing access to relevant information and top-notch customer service. The MyUtmost project implemented by the Papyrus team was "our crowning glory and a great success in 2022," said the CEO of Utmost Life and Pension in his year-end speech.

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