



SHORT GUIDE · INDUSTRY · LOGISTICS AND TRANSPORT

Crumpled waybills on the clipboard? Photographed at the dock, already read in the office.

Waybills, delivery notes, packing lists and customs papers are created at the dock and on the road, often with a signature and handwritten remark. This short guide shows how PaperOffice captures them by smartphone, files them per site and reads shipment data. For warehouses, forwarders and dispatch.

OVERVIEW

Photos from the mobile app, even without a connection in the cold store, one workspace per site or client, shipment data from the CMR waybill as fields with their source, and a search by shipment number.

01 · THE PROBLEM

The goods are delivered. The paperwork is still on the road.

At the dock and at the consignee, waybills, delivery notes and packing lists are created on paper, often as a carbon copy with a signature and a remark. It takes days for the documents to reach the office. Billing waits until the signed waybill is there, and it has to stay findable for later questions.

WHY IT HAPPENS

Paper travels along

Waybills ride with the driver through the route, carbon copies sit on the clipboard at the dock. Whatever is missing at the end of the route is missing from billing too.

Signatures and remarks by hand

Consignees sign and note reservations by hand, often on damp or crumpled paper. In the office, someone types it up and calls back about what is hard to read.

Many partners, many forms

Every forwarder, client and subcontractor uses its own forms. Documents from several sites and customers have to stay separate and still be quick to find.

HOW YOU NOTICE IT

- Waybills reach the office as a pile at the end of the route.
- Billing for a route waits for one single signed document.
- For a complaint, the consignee's remark is searched for in binders.
- Shipment numbers, weights and packages are typed into the TMS by hand.
- Carbon copies at the dock are damp, faded or hard to read.

02 · THE WAY WITH PAPEROFFICE

Photographed at the dock, already read in the office.

The path is the same for waybill, delivery note and packing list: photograph, file in the site's workspace, read and find. The mobile app takes the paper from the dock straight there, even from areas without a connection.

1

Photograph at the dock

Warehouse staff and your own drivers photograph documents with the mobile app, which detects edges and straightens the image. Without a connection, as in the cold store, it uploads later.

[MODULE: MOBILE APP](#)

2

One workspace per site

Every site or client gets a workspace with its own rights. Partners upload into a Business workspace through an external share with upload rights.

[MODULE: WORKSPACES](#)

3

Recognize freight papers

AI-DMS detects waybill, delivery note, packing list, customs declaration, export declaration, bill of lading and invoice. With Ultra, AI-OCR also reads handwritten remarks.

[MODULE: CLASSIFICATION](#)

4

Shipment data as fields

The **CMR / Waybill** template reads waybill number, sender, recipient, carrier, weight, dimensions, description of goods and instructions. Every value comes with its source.

[MODULE: IDP AGENT](#)

5

Find the shipment

Search finds a shipment number in the recognized text of every document, photos included. Document Chat answers questions such as "Which documents exist for shipment 7731?"

[MODULE: SMART SEARCH](#)

03 · IN THE APP

From the dock into the workspace.

Here is how to set up the route from the dock to the office. You need an account, one workspace per site or client, and the smartphones of your warehouse staff and drivers.

1

Create the sites

Under **Document AI** > **Workspaces**, set up one workspace per site or client. Choose AI-DMS Ultra for photos with handwriting and signatures.

2

Pair a smartphone

On the computer, use **Add mobile device** in the **Security Center** to create a QR code and scan it with the smartphone at the dock. The pairing can be permanent if you like.

3

Send documents

In the app, tap **Add**, open the camera, tap **Send**, pick the site's workspace and tap **Upload**. **Batch** mode captures multi-page papers.

4

Create the waybill agent

Select a waybill, open **Actions** > **Agents & workflows** > **IDP** and create an agent with **CMR / Waybill**. Under **Document AI** > **Document Types**, use **Bind IDP Agent** on the waybill type to set it.

5

Ask about a shipment

Click **Ask Agent**, choose the workspaces and ask, for example "Which documents exist for shipment 7731?" The documents found are listed below the answer.

TIP FROM PRACTICE

Photograph before the carbon copy gets damp Agree that documents are photographed right at handover. Each page can be checked and retaken before sending, and the agent's test run shows for each field how confidently the value was read.

04 · AN EXAMPLE

A cold store operator, two sites, many routes.



A cold storage logistics company with 60 employees runs two sites and drives with its own trucks and subcontractors. Waybills, delivery notes and packing lists are created at the dock, and consignees sign and note reservations by hand. Billing starts once the documents are in.

BEFORE

- Drivers bring signed waybills to the office only at the end of the route.
- Carbon copies sit on the clipboard at the dock, some damp or crumpled.
- The office types shipment number, weight and packages into the TMS by hand.
- For a complaint, the consignee's remark is searched for in binders.

WITH PAPEROFFICE

- Warehouse staff and drivers photograph waybill and delivery note right at handover.
- In the cold store without a connection, the photo waits on the device and uploads later.
- Sender, recipient, weight and instructions are fields with their source on the document.
- A search for the shipment number finds waybill, delivery note and packing list.

An invented business for illustration; all people are made up. Check with real waybills from your routes whether shipment data and handwritten remarks are read correctly.

05 · CHECKLIST

Before the first waybill is photographed.

Go through the points with the warehouse, dispatch and billing. Each of them can be settled in your own business before you start.

- ☐ Every site or client has a workspace with a clear name.
- ☐ Workspaces with handwritten remarks process with AI-DMS Ultra.
- ☐ The waybill agent has been tested on CMR waybills from several forwarders.
- ☐ It is settled who in the office decides on remarks and damage notes.
- ☐ It is clear how the fields get into the TMS: by export or REST API.
- ☐ Every smartphone at the dock and in the truck is paired with a fixed user.
- ☐ Documents are photographed right at handover, on the same day.
- ☐ The field list is agreed, such as shipment number, weight, packages and signature.
- ☐ Partners with upload rights have a share with an expiry date.
- ☐ For a lost smartphone, it is clear who removes it in the Security Center .

06 · FREQUENTLY ASKED QUESTIONS

What the warehouse, dispatch and billing want to know.

Are photos from drivers processed?

Yes, if the driver's smartphone is paired with your account. The mobile app detects the edges and straightens the image, and AI-OCR reads the document. With AI-DMS Ultra, handwriting is added.

How do we find all documents of a shipment?

Search for the shipment number. Search finds it in the recognized text of every document, photos included, and highlights the spot in the document. You can also search all workspaces you have rights to.

How does the data get into our TMS?

Transport and dispatch stay in your TMS. PaperOffice delivers the fields as XLSX, CSV or JSON, or your TMS pulls them through the REST API, for example with POST /documents/idp-agent-run.

What happens without a connection, as in the cold store?

The app keeps the scan in a queue on the device. As soon as there is a connection again, it uploads it to the selected workspace on its own.

Does PaperOffice recognize signatures and remarks?

With AI-DMS Ultra, recognized signatures, stamps and handwriting appear as separate details on the document. For a clear yes or no, add a yes/no field to the agent. Whether a remark is a reservation is decided by a person.

Can partners and subcontractors upload documents?

Yes. You share a Business workspace by email invitation with upload rights and an expiry date. The partner uses a PaperOffice account of their own, and revoking takes effect immediately.

07 · HOW TO START

Photograph your next waybill at the dock.

Sign in to your PaperOffice account, pair a smartphone and send the first waybill into the workspace of a site. Costs follow usage, and the pricing page spells them out.

Pick one dock

Start with one site and a team that likes working with a smartphone.

Test for a week

Photograph one week of waybills and compare the fields with the data in your TMS.

Extend to all sites

Once the route works, pair the remaining smartphones and create the workspaces for the other sites.

DATASHEETS ON THIS TOPIC

Mobile App

paperoffice.ai/downloads/paperoffice-ai-datasheet-mobile-app.pdf

Workspaces

paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

Classification

paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf

IDP Agent

paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf

AI-OCR

paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf

Smart Search

paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf

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