

Case study

Conveyancing firm

Transforming conveyancing document workflows with OfficeCo & PaperStream Capture Pro Premium.

"The workflow has transformed how we process incoming post. What previously occupied two members of staff for most of the day, with numerous mistakes along the way, is now completed quickly and accurately."

The customer

Conveyancing firm

The Products

PaperStream Capture Pro Premium partnered with OfficeCo

The challenge

Transforming a manual, error-prone process into a scalable, automated workflow, whilst handling approximately 1,000 incoming documents per day

The solution

Using a combination of PaperStream Capture Pro Premium and OfficeCo, the firm were able to enable automation directly at the point of scanning. The process

was optimised with a combination of scanners and MFDs, which complimented the solution thanks to PaperStream Capture Pro Premium's ability to be used with any TWAIN compatible device, regardless of brand

The benefit

The solution resulted in the firm transforming their high-volume document scanning requirement into a scalable process, crucial to the compliance-driven industry that they operate in. Achieving improved accuracy, efficiency and transparency, in a way that was cost-effective and user-friendly, the firm could successfully modernise its document capture workflows



The customer

A high-volume conveyancing law firm processing approximately 1,000 incoming documents per day needed to modernise its document capture workflow. Conveyancing workflows depend on accurate document handling, with each client assigned a unique Matter Reference, which must be consistently applied across all related documents.

However, they were working with manual processes which were creating inefficiencies, increasing compliance risk, and slowing down case progression, which in turn posed significant challenges.



The challenge

The key challenge that the conveyancing firm faced was how to transform a manual, error-prone process into a scalable, automated workflow. They also faced the following operational challenges:

1. **No Matter Reference at scan stage** meant that incoming post often lacked structured identifiers, making automated classification difficult
2. **Manual document naming and filing** dictated a requirement for staff to scan documents individually, manually name files, and upload them into a case management system
3. **A high risk of misfiling** occurred, with a single mistyped character potentially resulting in documents being assigned to the wrong Matter, creating compliance risk and rework
4. **Time-consuming document splitting** was commonplace, as each Matter typically contained multiple documents, which had to be manually separated and organised, while maintaining document order



The solution

Working with OfficeCo, the firm implemented an intelligent capture solution powered by PaperStream Capture Pro Premium, enabling automation directly at the point of scanning. This combination allowed the firm to address key challenges through the below workflow components:



1. **Matter-Based Batch Separation**
 - A laminated “Matter Reference Sheet” was deployed during post sorting
 - Staff could write Matter References (e.g. AAA1111) using a dry-wipe marker
 - This functioned as a trigger for document separation
2. **Handwriting Recognition + Validation**
 - Matter References are now captured using Zonal OCR with handwriting recognition
 - A regex validation rule ensured immediate error detection and correction at scan stage
3. **Automated Document Splitting**
 - Barcode separator sheets split documents within each Matter
 - This ensured correct document grouping and preservation of scan order
4. **Automated File Naming**
 - Documents are now automatically named using: Matter Reference, Sequential counter and Date/time fields
 - This produces consistent, structured output ready for downstream ingestion





The benefit

The conveyancing firm achieved significant results from the partnership of OfficeCo and PaperStream Capture Pro Premium, including:

Efficiency gains

- Eliminated manual file naming and document splitting
- Enabled high-volume batch processing instead of document-by-document scanning
- Reduced the inbound scanning process from two full-time staff working from 09:00 to around 13:30, to one person completing sorting and scanning in approximately two hours

Improved Accuracy

- Regex validation ensured correct Matter References
- Errors were caught at scan time, not downstream
- Dramatic reduction in misfiled documents

Scalable Workflow

- Document handling levels have increased drastically to approximately 1,000 per day and can be managed with ease
- Structured workload integrates seamlessly with existing case management systems to scale output

Cost-Effective Solution

- Provided a lightweight alternative to traditional IDP and DMS solutions while reducing labour requirements
- Enhanced existing infrastructure without requiring system replacement

User-Friendly Process

- Simple, intuitive process using familiar tools (laminated sheets and barcodes)
- Minimal training is now required, allowing for rapid adoption across operational teams



Conclusion

Ultimately, the optimisation of high-volume document processing that the firm achieved, epitomises how intelligent capture can transform manual, error-prone legal workflows into scalable processes. In compliance-driven environments, validation at the point of capture is critical, with the results for the firm proving that the combination of simple physical triggers with advanced software is crucial for delivering powerful, practical automation.

Utilising a combination of PaperStream Capture Pro Premium and TWAIN compatible image capture devices with the consultative approach from OfficeCo ensured that the solution delivered measurable operational improvements without adding complexity. OfficeCo played an essential role in identifying workflow efficiencies, designing a practical, user-centric solution and leveraging the advanced capabilities found within PaperStream Capture Pro.

Contact OfficeCo

Visit: www.officeco.tech

Call: **01420612646**

Email: samuel@officeco.tech