CLIENT: RETAIL & FASHION SERVICES

Optimizing Document Lifecycle Management

Objective: Transition from legacy-only physical archiving to a sophisticated hybrid digital-physical storage and retrieval system that ensures 100% document availability and ease of access.

The Challenge

Client needed a scalable way to manage high volumes of financial and operational documents while keeping every asset searchable through the Kleeto portal.

Data silos: Supporting documents were often separated from their main SAP counterparts.

Searchability: Manual filing made voucher retrieval slow and audit heavy.

Hybrid inflow: Physical paper and digital SFTP streams required different processing logic.

Executive Summary

The workflow evolved through four practical phases: foundation scanning, digital streamlining, integrated split-source processing, and archival placeholders.

The result is a dynamic document management workflow where SAP documents, supporting documents, and physical-only records stay linked, searchable, and accessible.

Kleeto's iterative approach helped move the program beyond storage into structured lifecycle management.

Evolution of the Solution

01

Foundation

Physical documents received, key meta data captured, page counts verified, and digital files uploaded into standard folder paths as per agreed SOPs.

02

Digital Streamlining

100% SFTP enabled, Digital acknowledgment of document Main and supporting PDFs merged into a unified file for one-click viewing.

03

Integrated Model

SAP documents arrive via SFTP while supporting Physical documents are digitized by Kleeto and are stored as per defined Tags for instant search.

04

Archival Track

Physical-only records are tagged and connected with the digital documents to create a single place holder.

Current Focus: Integrated Model

SAP documents flow through SFTP, while physical supporting documents are indexed into dedicated sub-folders named after the specific document. This keeps SAP Doc and Supporting Doc separate yet linked within the same folder structure.



Key Improvements & Results

Faster
audit-ready retrieval

Search by date, document number, and type reduces time spent locating vouchers.

Accurate
multi-stage QC

Page counts and metadata checks protect alignment with physical originals.

Flexible
mixed-media inflow

Digital and physical documents are handled together without creating backlogs.

How the Hybrid Workflow Functions: -

Input Stream	Processing Logic	Portal Outcome
SAP documents via SFTP	Digital receipt and controlled indexing	Searchable SAP document record
Supporting documents physically received	Digitized and stored in dedicated document-specific sub-folders	Granular access without breaking the SAP link
Physical-only archival assets	Digital placeholder created	Complete digital record of all stored assets

Conclusion

By iterating the process at regular intervals, the workflow moved beyond simple storage to become a dynamic document management system. The current folder-per-document structure provides high-precision organization, ensures no document is missed, and creates a seamless retrieval experience through the Kleeto portal.

Result: A hybrid lifecycle model where Digital & physical documents, and archival placeholders remain connected, searchable, and accessible. Kleeto Helps in saving time, energy and resources of the user team.