

Automation that reads invoices/receipts (PDF/JPG/PNG), extracts data with AI, and stores it

Tech Stack:

- Self hosted server (Digital Ocean)
- Storage Client
- AI workflow Node
- Json Text extraction
- AI model for OCR



Use Case

- Finance teams receive many invoices from different vendors every month.
- These invoices arrive in different formats and layouts, making manual data entry slow and error-prone.
- Staff currently open each invoice, read the details, and manually type them into an accounting sheet or database.
- The goal is to automatically read incoming invoices and extract the important accounting fields without human intervention.
- The system should work even when invoice layouts differ between vendors.

Solution Design

- Monitor a central intake channel (file storage) where vendors send invoices.
- Automatically collect each new invoice document as soon as it arrives.
- Convert the invoice into machine-readable text using document recognition.
- Use an AI model to understand the document context and identify key financial fields regardless of layout differences.
- Transform the extracted information into a standardized structured format required by the accounting system.
- Store the structured invoice data in a central sheet or database for reporting and bookkeeping.
- Archive the processed invoice to ensure it is not processed twice.

Hosting

- Self Hosted via Server Node
- Using AI workflow tool

Ai model

- Azure Open Ai chat model
- Or
- Open Ai Chat Model

Workflow

