



Document AI Platform

Intelligent data capture, workflow automation,  
and analytics from unstructured documents.



Data Capture



Workflow Automation



Analytics

# Our clients trust us to process 5M+ documents per year.

## Financial Services



Category - Financial Services  
Geography - USA  
Employee - 1000+  
nationaldebtrelief.com



Category - Lending  
Geography - India  
Employee - 100 - 200  
gopaysense.com



Category - Financial Services  
Geography - India  
Employee - 1K-5K  
hitachi.com



Category - CRE Lending  
Geography - USA  
Employee - 100+  
westlandrealestategroup.com



Category - CRE Lending  
Geography - USA  
Employee - 500 - 1000  
arbor.com

## Technology



Category - Software  
Geography - USA  
Employee - 50 - 100  
getjones.com



Category - Consulting  
Geography - Australia  
Employee - 10 - 50  
valtatech.com



Category - Software  
Geography - USA  
Employee - 50 - 100  
zuumapp.com

# Increase your workflow efficiency by 10x with Docsumo's business applications



## Invoice AI

Smart data processing from invoices for end-to-end automated accounts payable



## FinSpread

Granular level data analysis from P&L statements, Balance sheets, and other financial documents



## Utility Analytics

Different utility bills, different vendors, different styles - analyze data despite all variations.



## CRE Underwriter

Rent rolls, operating statements, T12 statements - one solution for all CRE underwriting needs



## Insurance Compliance

Intelligent Acord form processing for hassle-free insurance compliance



## TaxSpread

Process data from IRS tax forms irrespective of type and versions



## Identity & KYC

Get data from driver's license, passports, and other doctypes for smooth identity verification.



## Custom Model

Train on your dataset. Auto classify, categorize, and split documents for smooth processing

# Invoice AI: Valtatech, a Managed Services co-automates 50k invoices a month with 4 people

## Problem Statement

20,000 invoices with different formats to be processed per month that takes a dedicated team of 20+ data entry operators.

Despite multiple rounds of human-in-the-loop verification, the process is highly error-prone.

## Customer profile

**Valtatech**

**Managed Service Provider, Australia**

**100+ Employees**

## Requirements

Extract line-items such as description, unit price, quantity, sub total, and key-value pairs on different **invoice** types.

## Result

**< 30**

**sec  
processing time**

**99%+**

**touchless  
processing**

# Invoice AI : Livelife captures data from invoices from 150+ different vendors

## Problem Statement

Processing 1,000+ invoices in varying nature from received from 150+ vendors on a monthly basis.

Manual invoice scanning and data extraction for a single vendor takes up to 15 minutes.

## Customer profile

**Livelife Pharmacy**

**Network of Community Pharmacies, Australia**

**100+ Employees**

## Requirements

- End-to-end automated data extraction from **Invoices**
- A solution that doesn't require training whenever a new vendor is onboarded

## Result

**500+**

**Hours saved per month**

**99%+**

**touchless processing**

# Insurance Compliance: Arbor automates analysis from Acord forms and flood certificates

## Problem Statement

Scanning and extracting data from semi-structured forms and unstructured flood certificates for a single applicant takes up to 30 minutes with a possible error rate of 20%.

## Customer profile

**Arbor Realty Trust**

**Real estate investment trust, USA**

**500+ Employees**

## Requirements

End-to-end data extraction from:-

- **Acord 25**
- **Acord 28**
- **Flood Certificates**

## Result

**99%+**

**Data Capture  
Accuracy**

**10X**

**Faster Document  
Processing**

# Insurance Compliance : Jones reads insurance documents end-to-end with no human intervention

## Problem Statement

Manual examination of ACORD forms for limits on general, automobile, garage, and umbrella liability along with Lease Contracts. Each application takes 30+ minutes to process.

## Customer profile

**Jones**

**Real Estate Liability Solution, USA**

**500+ Employees**

## Requirements

Detection, classification, and data extraction from **Acord forms**

## Result

**<8 sec**

**Processing Time  
for Lease Contract**

**95%+**

**Touchless  
Processing**

# Debt Settlement : National Debt Relief captures data 350K+ unstructured letters using Docsumo

## Problem Statement

Processing 350,000+ highly unstructured settlement letters per month with a manpower of 50+ FTEs. The structure of these letters vary for different collectors, and the payment schedule is often written as running text.

## Customer profile

**National Debt Relief**

**Debt Settlement Solution, USA**

**1,000+ Employees**

## Requirements

Categorically identify and extract predefined set of key-values from unstructured **debt settlement letters** despite their differences.

## Result

**99%+**

**Data Capture  
Accuracy**

**95%+**

**Touchless  
Processing**



# Debt Settlement : ClearOne Advantage automates data capture from unstructured debt settlement letters

## Problem Statement

Processing 10,000+ highly unstructured debt settlement letters to enable debt relief for applicants. Automating context-based data capture from these documents is challenging for a template-based OCR solution.

## Customer profile

**ClearOne Advantage**

**Debt Relief Solution, USA**

**300+ Employees**

## Requirements

End-to-end automated data extraction from **debt settlement letters**

## Result

**500+**

**Hours saved per month**

**99%+**

**touchless processing**

# FinSpread: A \$30BN Commercial lender automates underwriting from income statement & balance sheets

## Problem Statement

Classifying and capturing data from 5 different document types, and pushing data into excel models for analysis. The semi-automated data extraction solution delivers an accuracy of less than 80%.

## Customer profile

**Commercial Lender (term loans)**  
**200+ Employees**

## Requirements

End-to-end data extraction from:-

- **Profit & Loss Statements**
- **Rent Rolls**
- **Invoices**
- **IRS Tax Forms**

## Result

**99%+**

**Data Capture  
Accuracy**

**95%+**

**Straight-through  
processing**

# KYC Automation : Byju's automates KYC processing for 15K applications per month

## Problem Statement

Manual Detection and classification of Indian KYC documents takes up to 10 minutes with a possible error rate of 20%

## Customer profile

**Byju's**

**Ed-Tech, India**

**200,000+ Employees**

## Requirements

Scanning and extracting data from:-

- **PAN**
- **Aadhaar Card**
- **Voter ID**

## Result

**10X**

**Faster  
Processing**

**95%+**

**Touchless  
Processing**

# KYC Automation : PaySense automated customer onboarding end-to-end using Docsumo

## Problem Statement

Manual Detection and classification of Indian KYC documents. Processing and verifying a single application takes upto 48 hours to process.

## Customer profile

**Paysense**

**Retail Lending, India**

**1,500+ Employees**

## Requirements

Scanning and extracting data from:-

- **Bank Statement**
- **Check**
- **Passport**
- **Driving License**
- **Voter ID**

## Result

**<30 sec**

**Processing time for  
Unstructured Documents**

**95%+**

**Touchless  
Processing**

# Bank Statement AI : Hitachi classifies bank statements transaction 10x Faster

## Problem Statement

Processing 3,000+ digital and scanned copies of bank statements per month to reconcile payouts to ATM operators. Manual categorization of bank-statements based on transaction types takes up to 2 to 3 hours.

## Customer profile

**Hitachi Payment Services**

**Payment Service Provider, India**

**2,000+ Employees**

## Requirements

Capture key-value pairs along with line-items from **bank statements** accurately, and classify them based on the transaction types recorded in real-time.

## Result

**99%+**

**Data Capture  
Accuracy**

**95%+**

**Touchless  
Processing**

# Logistics Automation: Biagi Bros automates advanced shipment notification with Docsumo

## Problem Statement

Managing over 50 inbounds/day for customers where drivers deliver goods into client's warehouses.

Scanning documents manually, data extraction, and barcode generation for each customer takes up to 20 minutes.

## Customer profile

**BiagiBros**

**3PL Warehouse Company, USA**

**700+ Employees**

## Requirements

- End-to-end automated data extraction from **Bill of Lading**
- Push data into **HighJump Warehouse Management Software** for barcode generation

## Result

**500+**

**Hours saved per month**

**99%+**

**touchless processing**

# Utility Analytics : Westland automated utility bill processing for portfolio management

## Problem Statement

Processing 2,000+ utility bills per month from 6 different vendors in 6 different formats. Fields to be extracted from different utility bills also vary for each vendors.

## Customer profile

**Westland Real Estate Group**

**Commercial Real Estate, USA**

**150+ Employees**

## Requirements

End-to-end automated solution to capture dissimilar data points from different **utility bills**, and arrange them in a uniform format.

## Result

**<8 sec**

**Processing  
Time**

**95%+**

**Touchless  
Processing**

# Accounts Receivables : Crowncare Healthcare automates invoice and checks reconciliation

## Problem Statement

Crowncare runs healthcare facilities for which they send invoices to customers, and customers make payments via checks. In this process, they were manually reconciling invoices against checks.

## Customer profile

**Crowncare Healthcare**

**Healthcare, USA**

**100+ Employees**

## Requirements

Scanning and extracting data from 1500+

- **Check**
- **Accounts Receivable**

## Result

**<20 sec** **Processing Time**

**90%+** **Touchless Processing**



# Check Processing : CFS automates data capture from checks for donation management

## Problem Statement

Manually processing 3,000+ handwritten donation checks every month. While automating this process, most OCR solutions falls short as they cannot identify handwritten characters

## Customer profile

**Campaign Financial Services**

**Campaign Finance & Consulting Firm , USA**

**200+ Employees**

## Requirements

End-to-end automated solution to capture dissimilar data points like name and total donation amount from different **checks** and arrange them in an uniform CSV format

## Result

**<60 sec**

**Processing time  
for handwritten cheques**

**95%+**

**Touchless  
Processing**

# Customers really love us.

**With Docsumo we are now able to process thousands of ACORD Forms in a day.**

"We were looking for a tech partner to automate analysis of certificates of insurance for our real estate liability management software. We are really happy with Docsumo's APIs and their team's dedication to solving our problem. We are now able to process thousands of ACORD forms a day automatically while being able to get accurate analytics from over 100 data points"

**Michael Rudman**

Co-founder & CTO

**JONES**



**Docsumo is your go-to solution if you need a flexible solution to capture data from unstructured documents.**

"Docsumo does a very good job when it comes to our specific use-case. Debt settlement letters vary a lot from each other, but Docsumo manages to capture data accurately almost every single time at the processing speed which is unprecedented. We're witnessing the STP rate of over 95% with Docsumo."

**Daniel Tilipman**

President & Co-Founder



**Best in class for capturing data from financial documents.**

"We are using Docsumo's APIs for automating data capture from bank statements and identity cards while onboarding customers. It has reduced the time our operations team spends on data entry by manifolds while providing a much better customer experience."

**Prashanth Ranganathan**

Co-founder & CEO

**PayU**



# Go beyond traditional OCR, get intelligent at doc processing



## No Template Setup

Works out of the box without the need to maintain template directory.



## Custom AI Models

Learns from customer data to create custom deep learning models.



## Confidence Scores

Provide field-level confidence score to decide transfer to QA & mark fields for audit.



## 99% + Precision

No need for in-house verification team.



## Validation Layer

Enhance data with our configurable rules & settings.



## Review Tool

Highly Intuitive review tool which highlights low conf. fields for human review



## Really Fast Processing

Get data back in less than 1 min for straight through processing & 30 mins for human verification.



## Analytics

Categorize table data and get summary analytics for automated decisions.

# Data Security: We are SOC2 Type 2 audited

1	All Requests transferred over HTTPS only.
2	Data transfer encrypted with AES 256.
3	Kubernetes clusters accessible via only 4 protected endpoints.
4	JWT tokens refreshed daily.
5	Data stored on S3 & Mongo dB is encrypted.
6	Data access is monitored for each user.



# Agile & Fast Developer Support

1	Customer Development as well as general architectural guidance as you build and test.
2	Direct chat channel with support staff & developers for troubleshooting, analysis and deployment.
3	Agile Work Culture & fast response times makes it easier to work with us.

**Developer First**

**API Access**

**Slack Support**

# Infrastructure: Process millions of documents at high speed on scalable cloud infrastructure

## Production



Complete production environment is on Amazon Web Series (AWS) & Google Cloud

**99.9% UPTIME ACROSS THE GLOBE**

## Hosting



Applications and databases are hosted across multiple data-centers in multiple countries

**HIGH AVAILABILITY & DISASTER MANAGEMENT**

## Monitoring



We use Stackdriver in addition to AWS metrics to monitor our production applications and services

**24×7 MONITORING**

USA/ Europe/India customers are served from data centres in their location.

# Contact Us

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