

QUALCO

4 Ways

AI Automates Document Management

use cases



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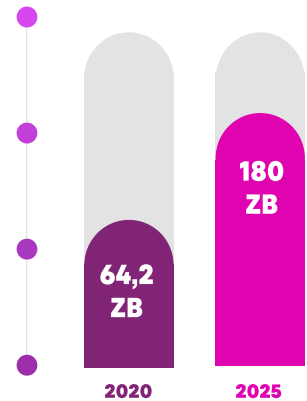
Introduction

Nowadays, businesses face the challenge of processing vast amounts of data, much of it locked within documents such as invoices, contracts, and forms. [Global data generation](#) is surging, with the total amount of data produced worldwide reaching 64.2 zettabytes in 2020 and projected to surpass 180 zettabytes by 2025. Manually extracting this information is time-consuming and subject to errors, leading to inefficiencies and high operational costs.

Artificial Intelligence (AI) revolutionises how organisations handle these tasks, offering advanced solutions for document data processing and eliminating manual data entry. By leveraging machine learning and Optical Character Recognition (OCR), AI extracts and categorises data precisely, transforming workflows into more streamlined, faster, more accurate, and far less error-prone digital processes.

Recognising these industry shifts, QUALCO has integrated advanced AI Document Processing features into [QUALCO Process Automation \(QPA\)](#), including automated document classification and data extraction. This enables businesses to enhance workflow automation when a document or image is uploaded. The system categorises the document, extracts relevant data, and inserts it into automated processes seamlessly, significantly improving speed, accuracy, and operational efficiency.

This report showcases four real-world use cases demonstrating how QUALCO Process Automation's AI Document Processing capabilities transform document-heavy workflows. Dive into how adopting AI improves operational efficiency and future-proofs your businesses in an increasingly data-driven world.



Total amount of data produced globally in zettabytes

Why AI in Document Management?

QUALCO Process Automation (QPA) is designed to help enterprises streamline their operations by automating workflows and integrating various systems. The solution supports the entire lifecycle of business process automation, from planning and execution to monitoring and optimisation. Managing unstructured data manually is inefficient and introduces a higher risk of costly errors, with data quality issues alone costing US businesses over [\\$600 billion annually](#).



Annual costs for US businesses due to data quality issues

AI Document Processing features transforms these workflows by identifying and extracting key information such as names, dates, amounts, and more, converting them into structured data that can be seamlessly integrated into business processes. With QPA's Automated Document Management capabilities, businesses can efficiently manage document-heavy workflows, saving time and reducing the risk of errors.

The tool uses machine learning to extract structured data from documents such as invoices, receipts, forms and more, enabling businesses to digitise and streamline their workflows. Enhanced with the AI Document Processing features, QPA automates data-heavy processes, reduces human intervention, and ensures greater accuracy in business operations. These enhancements improve operational efficiency, increase response times, and reduce costs.

Core Capabilities

Automated Data Extraction

Extracts text from scanned documents and images accurately. The solution goes beyond basic document management by identifying and extracting critical information (e.g., names, dates, invoice amounts) from structured documents such as name forms, invoices, and contracts.

Document Generation

Uses predefined templates that automatically insert relevant data to create documents such as contracts, invoices or letters, ensuring consistency and accuracy while saving time.



Document Classification

Automatically classifies documents based on content into predefined categories (e.g., invoice, contract, or tax form), helping businesses organise documents effectively.

Digital Signatures

Enables the secure and legal signing of generated documents using platforms like DocuSign.

Searchability

Empowers users to easily store, search, and retrieve data extracted from documents, enhancing efficiency in document handling.

Entity Extraction and Analysis

Identifies and extracts key entities such as names, addresses, dates, and tables from unstructured text, even in complex formats.

Multi-language Support

Processes documents in multiple languages, including English, Spanish, French, German, and more, making it suitable for global use cases.

Custom Document Processing

Allows businesses to train custom models tailored to specific document types if pre-trained models do not meet their needs.

Post-processing and Human Review

Integrates with human workflows, enabling human validation and post-processing when needed, such as for financial or legal documents.


Multi-format Document Support

Processes multiple file formats, including scanned images (JPG, PNG) and PDFs, whether scanned or in native digital form.





Operational Gains


QUALCO Process Automation's AI Document Processing feature empowers businesses to:


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Reduce Human Effort: Automates data entry, saving time and reducing workload by transforming scanned documents into searchable text.
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Minimise Costs: Processes large volumes of documents quickly, reducing manual labour and the costs associated with physical document storage.
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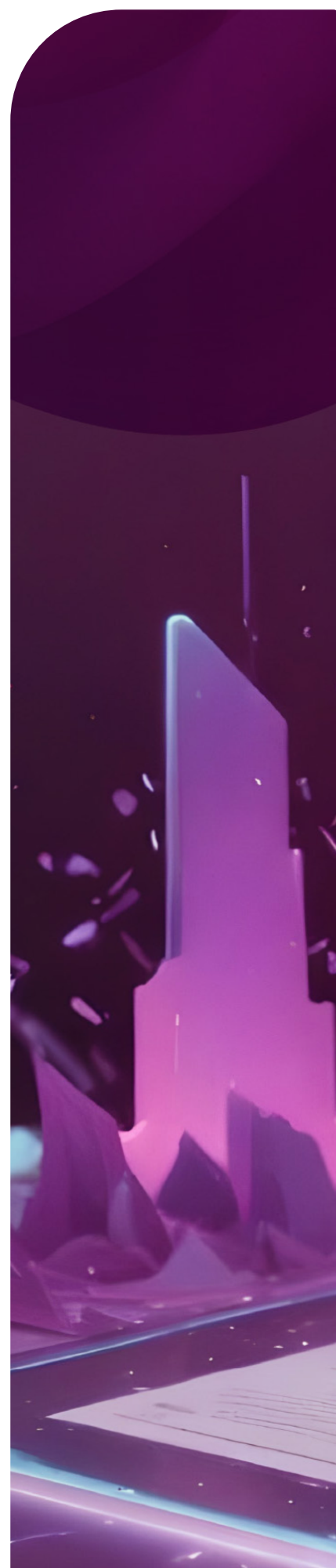
Improve Accuracy: Reduces human error in data entry, leading to more accurate documentation and compliance.
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Get Multilingual Support: Handles documents in multiple languages, allowing businesses to operate globally without manual translation.
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Enhance Customer Experience: Speeds up customer-facing processes such as account openings and document verification, improving customer service.
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Integrate Effortlessly: Integrates easily with existing systems and cloud-based services, modernising workflows without significant infrastructural changes.
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Leverage Self-Service Capabilities: Supports real-time document upload and processing, enabling faster pre-approval or qualification checks for customers.



USE CASE 01

Document Classification and Retrieval

Financial institutions handle extensive volumes of documents that must be classified and easily retrievable. Manually processing and tagging these documents can slow down operations. QUALCO Process Automation, powered by document classification and automated data extraction, automates the document classification and retrieval process within a Document Management System (DMS).

HOW IT WORKS

Document Submission

Users upload documents such as contracts and customer correspondence into the system.

Document Classification

QPA automatically categorises the documents based on their content, such as contracts or compliance reports.

Data Extraction

The solution extracts metadata and critical information, tagging and indexing the documents for quick retrieval.

Searchability

The system enhances search functionality, allowing users to locate documents using the extracted metadata.

WHAT TO EXPECT

- **Speed up document retrieval** through text-based tagging and indexing.
- **Automatically classify and organise** documents, reducing filing needs.
- **Ensure correct categorisation** and tagging for regulatory compliance and audits.
- **Minimise handling time** and quickly access critical information.

USE CASE 02

Inbound Email Handling

Processing incoming emails manually can be inefficient, especially when handling attachments like documents that need processing and filing. QUALCO Process Automation integrates with inbound email accounts, automating the handling and processing of incoming emails and reducing human effort.

HOW IT WORKS

Email Parsing

QPA connects to the inbound email account to retrieve incoming emails and attachments.

Document Classification

Automatically classifies the extracted documents based on predefined categories (e.g., loan applications, customer queries, invoices).

Document Extraction

Emails and attachments are processed to extract relevant documents and their contents.

Data Extraction

Extracts essential data from documents and emails, such as application details, request types, and customer information.

System Integration

The extracted data can be fed into relevant systems such as a CRM, ERP or Document Management System for further processing or action.

WHAT TO EXPECT

- **Reduce human effort** in sorting and processing incoming emails and attachments.
- **Speed up response times** by automating document handling from emails.
- **Minimise errors** associated with manual email data extraction.
- **Integrate seamlessly** and ensure smooth data flow into existing IT systems.



USE CASE 03

Customer Onboarding Automation

Customer onboarding often involves submitting multiple documents for verification, such as identity proofs and Know Your Customer (KYC) forms. Manually verifying these documents can delay the onboarding process. QUALCO Process Automation streamlines customer onboarding by automating document verification and integrating external verification services.

HOW IT WORKS

Document Submission

Customers submit their documents online, such as identity proofs and KYC forms, into the system.



Document Verification

QPA verifies the documents by extracting critical data and cross-referencing with government or external services.



Approval

The system automatically approves the documents and feeds the extracted data into the relevant onboarding systems once the documents are verified.

WHAT TO EXPECT

- **Check documents automatically** by integrating with government or external services.
- **Speed up the onboarding process** by verifying documents in real-time.
- **Reduce errors** by automating document verification and data extraction.

USE CASE 04

Loan Application Processing

During the loan application process, applicants submit various documents such as income statements and identification cards. Traditionally, a loan officer would manually classify and verify these documents before entering the details into the Loan Origination System (LOS). This process is time-consuming and prone to errors. With AI document classification, data extraction, and generation, QUALCO Process Automation automates these steps, streamlining the loan approval process.

HOW IT WORKS

Document Submission

Users upload documents such as contracts and customer correspondence into the system.

Data Extraction

The system extracts key data points such as income figures, identification numbers, and dates. Critical information like salary and tax records is then populated into the loan application form.

Document Classification

QPA automatically classifies documents (e.g., income proof, identification, and bank statements) using advanced deep learning algorithms.

Seamless Integration

The extracted data is seamlessly fed into the Loan Origination process, facilitating automatic data entry and reducing review time and potential errors.

WHAT TO EXPECT

- **Reduce human input** by automatically extracting key document information.
- **Achieve faster approvals** through automated data checks and verification.
- **Minimise errors** associated with manual document handling.



About QUALCO Process Automation

[QUALCO Process Automation](#) offers a comprehensive suite of tools that allows enterprises to efficiently manage their workflows from planning to implementation with intelligent forms, streamlined processes and operations, and seamless integration with existing IT systems. Our platform enables enterprises to transform while boosting process effectiveness via improved user experiences, making it effortlessly easier for them to navigate change successfully.

Take the first step towards automation.

CONTACT US