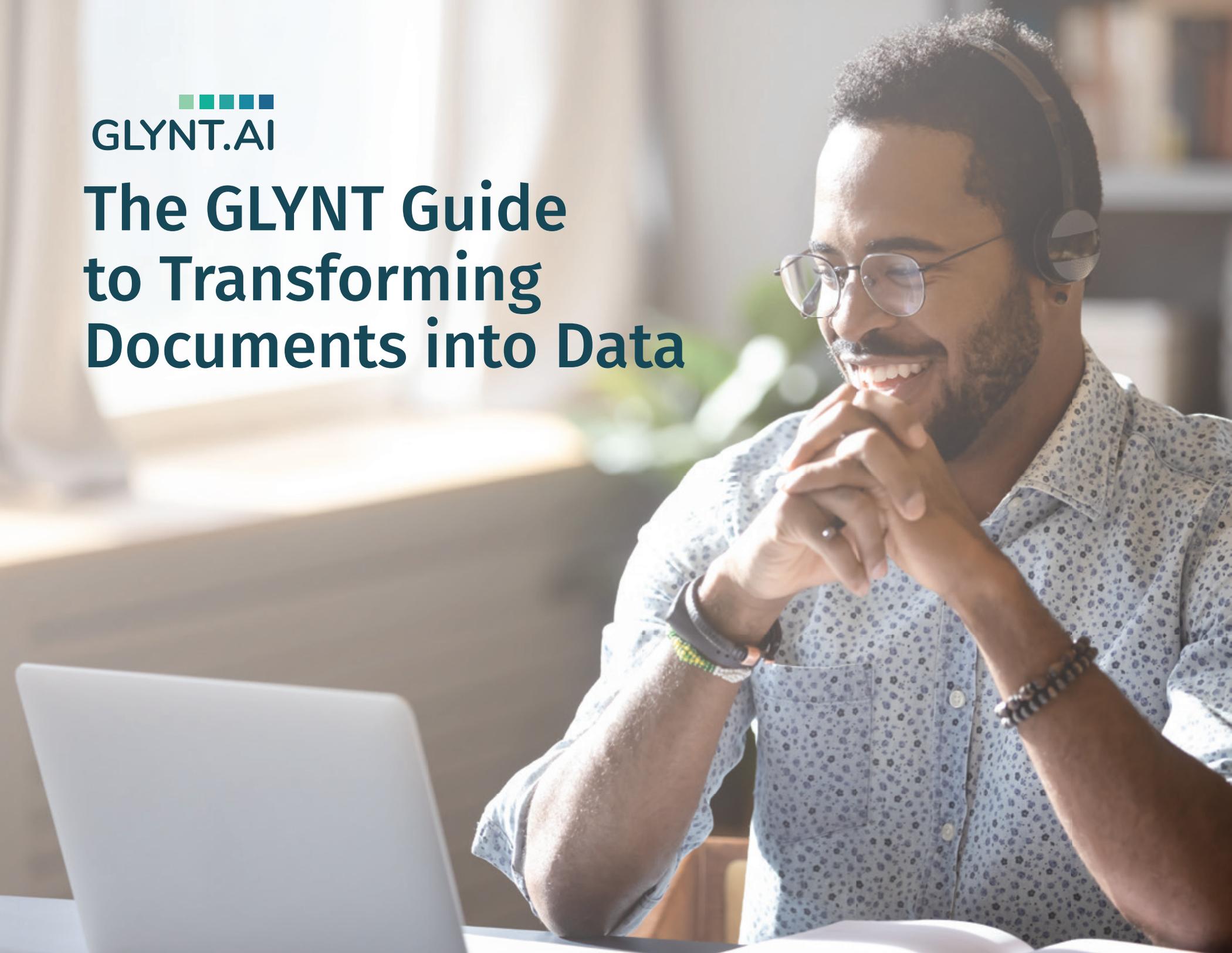




GLYNT.AI

# The GLYNT Guide to Transforming Documents into Data



Your monthly account summary

Previous balance	152.42
Payment - Thank You Mar 16, 2018	-152.42 cr
<b>New charges</b>	
Comcast Business services	144.85
Other charges and credits	5.17
Taxes and fees	2.57

**Amount due** **\$152.59**  
Payment due Apr 15, 2018



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Account number **8155 10 015 1352766**

Payment due **Apr 15, 2018**

**Please pay** **\$152.59**

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# Introduction

Documents are miniature data silos, with valuable data trapped in pdfs, scans and paper formats. And this problem is not going away: 75% of invoices are still issued on paper and over 2.5 trillion pdfs are created each year.<sup>1,2</sup> If data is the new gold, then every company is sitting on a gold mine. Time to get the data out.

In the past 20 years, technology has tackled parts of this challenge. Optical character recognition (OCR) reads the words on the page, and tooling has been added to pull out specific fields. But until AI came along, the error rates remained high and the variation in document layouts thwarted scalability.

Today is different. AI has changed the business of transforming documents into data. Now a rich set of tools can precisely extract all the data from each document. But the bigger news is that powerful AI is now ready to be put at the fingertips of everyday non-coder users. What took a team of developers and months of work is now placed in a no-code UI. Highly accurate data flows from documents in minutes.

This GLYNT Guide explores the possibilities and massive potential of no-code AI-powered solutions for transforming documents to data. Step by step, we'll walk through what's needed for a great solution and what this transformational approach can do for your business.

<sup>1</sup> Ardent Partners, [Accounts Payable Metrics that Matter in 2020](#).

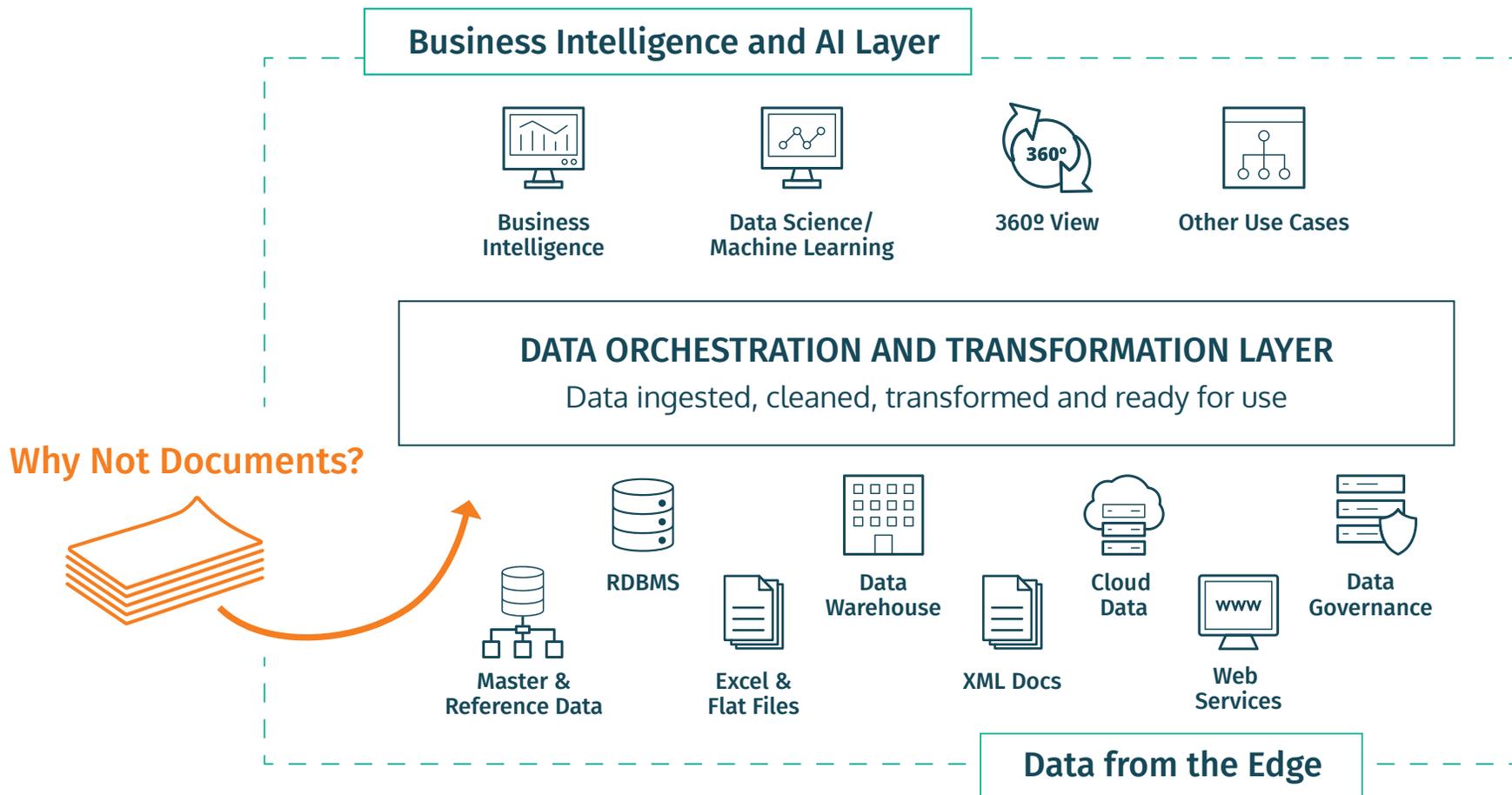
<sup>2</sup> The PDF Association, [The PDF in 2016](#).

# The Gap

Here's the problem we set out to solve. As the figure shows, data from the edge feeds AI. Modern software systems and tools are tackling data ingestion from spreadsheets, databases and even iot sensors. Everything flows into powerful systems that mash up data and produce insights, analytics, back office efficiencies and revenue growth. But documents are not in the picture.

Why not? In the past there were two key frictions: Deployment and integration was complex and expensive, creating a huge barrier to adoption. And, the accuracy rates were fairly low, which kept review and cleanup teams in place. Documents stayed siloed.

Now, with powerful AI built-in to no-code software, the frictions are gone. So what should one expect from a modern solution? What are the best practices in transforming documents to data? What future-forward aspects should be considered? That is what this guide is all about.



# The Vision

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We're in the midst of a tsunami of digital transformation: Moving to the cloud, streaming more and more data through its systems, offering no-code and low-code solutions that enable a broader range of employees to manage workflows and build capabilities.

A great documents to data solution fits right in. Digital transformations are expansive, reaching into all corners of the enterprise, and putting world-class technologies into easy-to-use packages. Here's our list of the product features you'll need.

## A Great Outcome:

The output of the document transformation tool is data that is just as easy to use as other data. Once the data is in your system, it looks and acts like data from any other source.

## Simple to Use:

Whether you use a DIY solution or a managed service, the experience should feel simple and straightforward. No coding required. No guesswork either.

## Easily Connected:

Documents in, data out. There should be a number of easy ways to make these connections.

## Trusted:

Documents can be messy and complex, yet your product or service needs a simple stream of clean data. A great solution provides validated performance metrics.

## Go Where the Documents Are:

Most documents flow into departments, not a central back office. A great documents to data solution fits right in, no matter what the department's size.

## Scalable:

Transforming documents into data is a part of an operational workflow. Scalable solutions use humans up-front for configuration tasks at the start, and avoid having large teams of people review and correct data as it is produced.

## Honor the Roles:

Documents have layouts and data schemas. It's too expensive to have software developers study the visuals. Good solutions enable data specialists to use no-code tools to structure and manage the data flows.

# The Key Requirements: Simple to Use. Stay in Control. Trust the Data. Scalable.

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The pandemic has accelerated the digital transformation across the globe, with almost every department and business unit looking at their processes with fresh eyes. The winning documents to data solution has four key solution requirements. Whether the challenge is to capture a few must-have fields or dense line-item detail, the same key requirements are needed by Citizen Users everywhere.

**Simple to Use.** The Citizen User can set up an automated workflow, manage a library of flows, and review the results. No coding needed. Just a few tasks, completed in a few minutes.

**Stay in Control.** The Citizen User has the tools at his or her fingertips to do a great job. If a data error is found, correct it instantly and adjust the automation to prevent a repeat.

**Trust the Data.** Data documents are used in healthcare, payments, financing and reports to investors. Accuracy matters, and the right solution has the reporting that visibly demonstrates verified results.

**A Scalable Solution.** Frankly, if a solution can't scale, the status quo of no document data or manual data entry remains the best option. For documents, scalability is both the technical capabilities of handling volume and the additional capabilities needed to handle the variety of document layouts and data schemas.

## **The Citizen User:**

*An employee with knowledge of your use case, data needs and current document flows. Not a coder, but willing and able to use structured software tools to deliver accurate and timely results.*



## Map GLYNT Output to Your Database

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If you are using data from documents, then any new solution must be mapped to your current database schema. Or if you're new to documents, you'll know exactly where the data can add the most value. A good solution has connectors built to frequently used systems such as Salesforce, Coupa or Oracle, and the ability to automate the customized data mapping to your database. Regardless of your schema, document data should fit right in.

## Built-In Document Expertise

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Consider the simple pay stub document, issued in pdf or paper form. Each employer or payroll service has its own document layout and data schema. But your team wants a single stream of structured data, ready to use without reference to which employer it came from. Using a combination of document and software expertise, the best solutions build a semantic data model for documents that is complete, meaningful and scalable. Without this product feature, detailed data from documents can be hopelessly confusing.

## Removing Frictions

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Anyone who has worked with documents knows there are some annoying and continual sources of friction, such as adding new document sources, constant document layout changes that break automation or lead to missing data. In theory these are occasional events, but in practice they are amazingly frequent. An automated solution is not really automated unless it has a specific automated workflow for each of these events.

### Leveraging Your Document Data

Adding document data to other incoming data streams? A great solution brings it all together with easy-to-use tools built right into the UI for configuration and customization of your data output. No need for exhausting integrations or support tickets, just get the data you want in the format you want.



## Five Key Questions to Ask About the “AI”

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It may seem like a technical detail, but how the AI solution was built can be a key factor in your overall costs and will determine how well the solution adapts to your future needs. Here are five key questions to ask about the AI, each aimed at uncovering hidden costs or benefits to you.

### ***What is the Accuracy Rate?***

The accuracy rate is a key driver of cost because it is so expensive to fix data errors now or later. Measure the accuracy rate based on straight-through processing (STP) results, before a human has corrected anything. If you have a typical use case, such as header fields on invoices, benchmark competing solutions on accuracy and time to correct errors.

For a wider set of applications – such as non-standard documents, highly varied documents or capture of full-line item detail – you’ll be evaluating AI solutions that can be customized to your documents. To verify the accuracy rate, you’ll need to do an initial configuration and measure the results. You’ll also learn something else: Systems that are easy to customize are cheaper to maintain.

### ***How can new document types be added?***

Your document needs will change over time, and documents themselves have constantly changing layouts and data. Ask how new document types are added to the AI system, and uncover all sorts of built-in resilience to all sorts of document changes.

Also check the automation coverage of your documents: Can the AI system handle new variants of the standard documents? There is always that odd bank statement or payroll stub. When the AI system is built on a huge training library of 1000s of documents, there may be no immediate fix for these “outliers,” leaving a good portion of your documents out of automation.

### ***How quickly does the AI system learn?***

Suppose an AI system must be trained on 20,000 invoices before producing results. Yet it is not capturing the data from 5 of your vendors. How can adding 5 more documents to the large training set possibly improve the results? On the flip side, AI systems that quickly customize can quickly learn. This rapid learning means errors are not repeated and the AI solution has the resiliency needed to keep costs low in the future.

### ***Who does what?***

A key set of questions addresses the roles and skills for using and managing the documents to data solution. And the answers are driven by the facts that even fairly standard documents are hugely varied in layout and data schema, and that a significant portion of documents change layouts each year.

Suppose a documents to data solution offers access only through a developer API. Then your developer is in the hot seat, constantly chasing down data issues. The same problem arises when the documents to data solution is inaccessible, deep in a larger end-to-end platform.

So it is the nature of documents themselves that leads to an odd but true statement: A great AI-powered solution for transforming documents into data also has a great user interface, ready for non-coders to take action when needed. It is this careful specification of roles within the product that will save you time and money over the long run.

### ***What's the product roadmap?***

The challenge of transforming documents into data is not going away, so check to see if your growing needs align with the solution's product roadmap. How does the AI get better over time? How does the user experience improve? What are the strategic goals of the provider, will they be focused on solving the problems you care about?

The pandemic has accelerated the need for digital transformation. Companies are eager to gain efficiencies and support top line growth. Technology providers are seeing enormous demands, and some are extending their focus to broad swaths of enterprise workflows. Check on product focus and planned iterations to keep your data flowing smoothly.

# UTILITY BILL

Billing Inquiries: (650) 903-6317  
 (M-F, 8AM-5PM)  
 Water/Wastewater Emergency: (650) 903-6329  
 (M-F, 7AM-4PM)  
 Call Police Dept: (650) 903-6344  
 (After 5PM, holidays, and weekends)

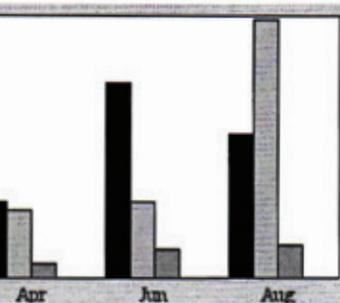
## Account Information

Account Number: 6050-026000.01  
 Customer Name: BUTTNER PROPERTIES  
 Service Address: 705 N SHORELINE BL 709  
 Bill Date: 08/21/2017  
 Service Period: 06/01/2017 - 07/31/2017  
 Days In Billing Period: 61  
 Payment Due By: 09/20/2017  
 Total Amount Due: \$737.29

## Bill Details

Water 197.14  
 Meter 90.15  
 5/8"-3/4" BACKFLOW METER  
 Sewer 30 SEWER-COMMERCIAL 141.56  
 Trash  
 1 TRASH 32 GALLON 61.60  
 1 1YD TRASH P/U 1X 205.58  
 1 1YD BIN-RENTAL 41.26  
 Subtotal 737.29  
 Prior Balance 837.30  
 Payments Received -837.30  
 Total Amount Due: 737.29

Unit	Units Used	Cost
	30.0000	197.14



Days	Gallons/Day
61	367
63	486
62	651
62	84

ter = 748.052 Gallons

CEIVED AFTER 09/20/17.  
 T 07/01/17.

PAY BILL BY TEXT  
 ilityBill to sign up.  
 r online 24/7, no fees  
 tPaymentPlan.com

## DIY or Managed Services?

Recently GLYNT has seen customers going in both directions. Some customers want a DIY SaaS software solution because they have the in-house team in place. Other customers want a Managed Service that transforms documents into data so they can reduce in-house back-office headcount, or bring workflow back from offshore. A world-class solution gives you the option. And a dose of assurance. Because if an AI-powered software product is offered as a DIY solution, it has to work: Everything is exposed.

## De-Risking a Change

We get it. Your years of experience with manual data entry and semi-automated workflows have built up the policies and protocols that produce data week after week. But it is really hard work to keep pushing this ball up the hill, and the lack of scalability makes growth doubly hard. A good automated system is not a black box, but produces data you can rely on from the start. Imagine adding new document flows each week, gently accumulating digital automation.

# The Recap: It Just Works

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We'll leave you with the 4 biggest areas in which an AI-powered solution for transforming documents into data can change your ways of doing business for the better.

## 1) Stop the Slow

Documents are part of the everyday business experience, yet solutions have remained in a backwater of semi-automated and slow services. Meanwhile, employees have formed expectations about how things should work from other digital experiences. An Uber or Lyft can show up in minutes, a bank can wire funds instantly. It makes no sense to wait on data from documents.

## 2) Avoid Expensive Rework

Inaccurate document data is painful every step of the way. First there is a last round of data checks and validation before the data is uploaded to the system of record. But data errors slip through. As the data is called up for use in visualizations and analytics, errors are revealed. Annoying. And another round of correction is required. Data for payments has extra layers of scrutiny. A highly accurate AI-powered system saves money throughout your workflow.

## 3) Grow Revenues without Fear

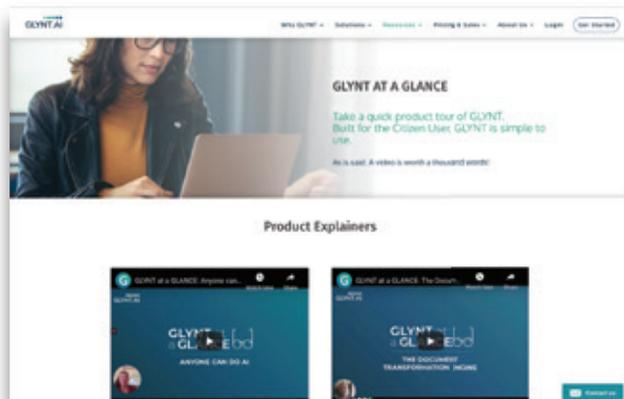
More than one customer has told us they had to turn away business because they could not scale their system for transforming documents to data. This is about handling the enormous variety of incoming documents, adapting the system for changing document layouts and handling high volumes. Only a modern, AI-powered system can flexibly scale to these current needs.

## 4) Empower your Citizen Users

Employees who have been the backbone of your semi-automated document system know your use case, data needs and workflows. Give them the modern tools to manage the documents to data transformation and to produce high-quality data, saving developer time and effort. With a modern software system, a no-code DIY product, your Citizen Users will thrive.

# About GLYNT

GLYNT transforms documents into data, with a simple no-code DIY solution. Based on advanced 'Few Shot' machine learning, GLYNT delivers accurate and validated data, averaging 98% accuracy after training on just a handful (2- 5) documents. GLYNT is quickly customized to your incoming document flow, transforming document variety into normalized and structured data flow. Get your first production-ready results in under an hour. Customers in energy, supply chain, healthcare and other markets use GLYNT to process documents across the globe. For more information visit us at [www.glynt.ai](http://www.glynt.ai)



Want to find out more about GLYNT's no-code AI-powered solution for automated data from documents? Discover our feature videos and product tour right here.

[REQUEST A DEMO](#)

