

eBook

Upland Intelligent Capture

AI-driven document
management



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01

Maximize Efficiency: Embrace AI-driven document capture and management

Many people feel uncertain about the possibility of AI replacing jobs, but most of today's emerging technology makes our jobs easier by automating tasks so we can focus on the more important things.

At Upland, we have leveraged our understanding of cutting-edge cloud fax technology and emerging AI technology to uncover powerful new ways to securely share, access, and utilize confidential information and simplify complex workflows. Upland Intelligent Capture results in fewer human errors, decreasing the burden felt by individuals and teams within your organization.

In 2023, the cloud fax market size was valued at \$10 billion, and predictions show an estimate of \$19.44 billion by the end of 2030. With Intelligent Capture, teams can automate the extraction of key data points and access secure client information quickly and easily from a shared workflow. This means less time wasted on tedious tasks, fewer human errors, and a more cohesive digital experience AI supports organizations by automating tasks that frustrate overburdened teams.

Predictions show
the global cloud fax
market value will reach

\$19 billion
by the end of 2030.

What is Upland Intelligent Capture?

According to Business.com, 80% of employees report wanting their employers to make documents available via cloud services, and 83% of employees will recreate documents if they can't find them on the company network. 97% of organizations reported minimal or no digital document processes. In 2021, nearly 17 billion faxes were sent.

This solution intercepts and identifies the document type including any relevant sections to be labeled and categorized, ensuring that data is routed accurately. Meanwhile, advanced data extraction converts unstructured data into a structured format by automatically pulling labeled fields, such as client details (name, date of birth, social security, etc.), and integrating this information into your existing applications.



By consolidating this data into a centralized hub, our intuitive platform automates the review and approval processes, significantly reducing time spent on manual data entry, error correction, and information retrieval.

Because of advancing AI capabilities, this solution can discern and comprehend various elements such as barcodes, forms, handwritten notes, and more. It scans through fax transmissions, extracting pertinent information from documents, and then integrates it back into your system via the API. If the automated process cannot identify a dataset accurately, it is promptly flagged and routed to a review queue for manual inspection by your team.

Upland Intelligent Capture harnesses the power of AI for automated content detection and extraction. Faxes, forms, and other documents are transformed from static image files into text-searchable formats, enabling efficient document management and automatic association of metadata.

02

Manage documents and supercharge digital workflows

Upland Intelligent Capture empowers users to deliver crucial information from their mobile devices worldwide safely, and securely capture and share content from web-enabled devices.

The data can be converted into text-searchable formats, unlocking static documents for editing and enabling data manipulation. This includes automated form processing, line-item extractions, one-click conversions, and image enhancement. Image quality controls and format conversion options ensure clarity and compatibility, and method-agnostic capture supports barcodes and QR codes. Permissioned users can view a detailed analysis of fax traffic, seamless API integration, and access workflows, all from a convenient home screen.



Additionally, the platform offers a range of essential features:

Document separation

- Barcode
- Blank page

Data field validation

- Regex
- Length

AI-powered indexing

- AI-powered data extraction
- Unstructured, semi-structured & structured documents
- Document classification
- Data extraction

Workflow automation

- No code workflow designer
- Customizable decision making for routing
- Automated processing steps leveraging AI
- Queues, inbox & receiving areas
- Rapid onboarding

- Confidence valuation
- Document conversions
- TIFF
- PDF and PDF + Text
- .DOC/X
- JPG
- .XLS/X and more!

Securely export to a chosen destination

- CRMs & DMSs
- EMRs & EHRs
- Fax
- Email
- API
- Cloud File Sharing
- SFTP/FTP
- AWS S3

Security & compliance

- Live dashboards & analytics
- End-to-end encryption
- Cloud-native SaaS
- Automated retention & audit trails

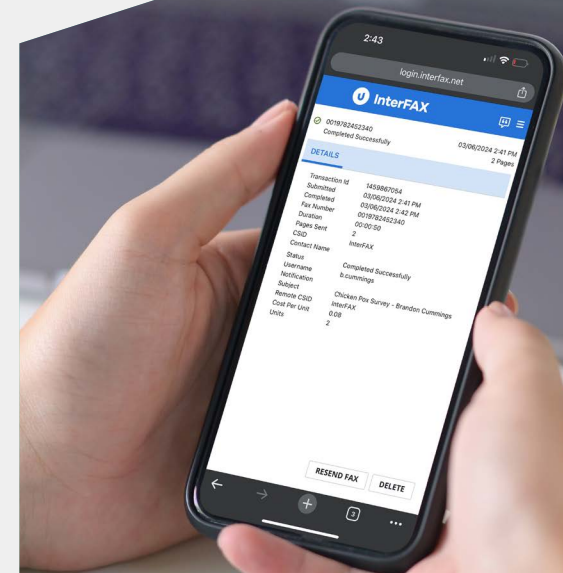
03

Revolutionize fax interception and workflow automation with Upland Intelligent Capture

Our interactive portal automates fax interception and routing while extracting vital information and streamlining digital workflows.

Upland Intelligent Capture provides a convenient, centralized dashboard so users can capture and share content to structure and organize the review and approval processes.

Upland Intelligent Capture changes the way teams do business by integrating with the systems and applications they're already familiar with to automate some of the most common tasks professionals face every day. This results in fewer clerical errors and a more favorable experience.



Top 10 components of Intelligent Capture:

- 1 AI-powered OCR & hand capture** extract data from any document. Advanced AI handles multi-language, poor quality scans, context extraction, clean forms, messy files, unstructured layouts, even handwriting.
- 2 Dynamic classification for intelligent routing** routes documents automatically by document type, content, priority, or any custom business rule—easily adjusted by business users, not developers.
- 3 Automated extraction & indexing** Auto-tags, organizes, and extracts fields from any doc type—forms, emails, PDFs, images—so nothing gets lost and retrieval is instant.
- 4 No-code, visual workflow designer** allows you to build and adapt document workflows in minutes with intuitive drag-and-drop tools—no IT or coding needed.
- 5 AI-driven summarization & action insights** instantly summarizes documents, pulling out key action items, and surfacing risks or compliance gaps—so teams focus only on what matters.
- 6 Live analytics & real-time dashboards** track processing speed, error rates, bottlenecks, and compliance at a glance—providing actionable insights, not just raw data.
- 7 End-to-end security & compliance** with all major standards, so there's no extra work. Encryption, audit trails, granular access, and automated retention are built-in.
- 8 Omni-channel & mobile capture** let's you snap, scan, or upload from anywhere—email, web, mobile device, or scanner—nothing falls through the cracks.
- 9 Plug & play integrations** instantly connect with DMS, ERP, CRM, cloud drives, business apps, out-of-the-box connectors, APIs, SSO, and webhooks.
- 10 Rapid onboarding & self-service** allows your team to get up and running in hours, not weeks. Self-guided setup, clear help resources, and an interface users can quickly master.

04

Ask the experts: How is Upland Software leading the data revolution?

When you need to understand the details, you go to the experts. We talked with two of Upland Software's cloud fax and intelligent capture enthusiasts, Brandon Cummings and David Cox, who collectively have nearly 30 years of experience in the industry.

Read on as they discuss the advancements and capabilities of Intelligent Capture, exploring its growth through AI technology, automation of review and approval processes, integration with existing applications, adaptability to diverse document layouts, and customization options available to users.

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Upland is leading the cloud capture market with AI-powered workflows that reduce errors and increase efficiency.

Shawn Freligh
SVP and GM
Upland Content Lifecycle Automation

Could you elaborate on how Upland Intelligent Capture automates the review and approval processes and how it integrates with existing applications to streamline workflows and reduce data entry and errors?

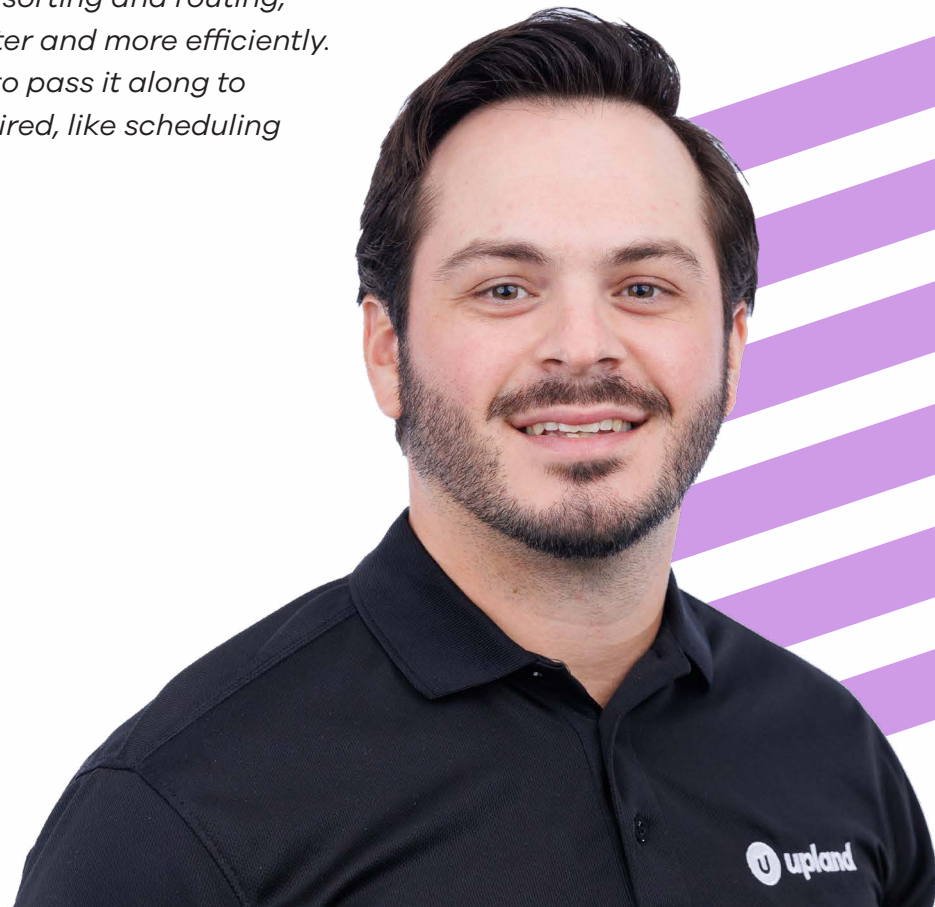
"These platforms utilize AI-driven capture technology to extract and classify data from incoming faxes automatically. Once that data has been pulled, it can route documents to the appropriate personnel based on predefined workflows. For instance, an invoice received via fax can be automatically sent to the finance department for review, while patient records can be directed to the appropriate healthcare providers, all with no human intervention required.

This automation reduces the time spent on manual sorting and routing, ensuring that documents reach the right hands faster and more efficiently. It doesn't have to wait for someone to be available to pass it along to where it needs to go until human interaction is required, like scheduling a patient for a procedure."



Ensure that documents reach the right hands faster and more efficiently.

Brandon Cummings
Director of Product Marketing
Upland Software



How has Upland Intelligent Capture grown in recent years with the use of AI technology to accurately intercept and identify documents?

"In recent years, capture technology for data extraction and document classification has seen significant improvements due to the incorporation of advanced AI. Modern AI algorithms, including machine learning and deep learning, have dramatically increased the accuracy and efficiency of processes.

These technologies can now more precisely identify and extract relevant data from diverse document formats, classify documents more accurately, and adapt to new types of documents through continuous learning. As a result, organizations can automate more of their document processing workflows, reduce manual data entry errors, and achieve greater operational efficiency."

How does Upland Intelligent Capture adapt to diverse layouts and handle handwritten notes or forms? What measures are in place to ensure accurate data extraction considering their potential variability and complexity?

"There are various methods for dealing with different layouts. Some AI models focus on training. You submit ten examples of a specific form highlighting where you want to extract the data, and the AI model builds a pattern of recognition based on the data.

My favorite model is the Key Pair extraction. In this model, the AI looks for two critical bits of data—the keyword 'invoice #' and the actual invoice number. The AI model knows there are multiple potential names for the keyword: Invoice ID, Invoice Number, Invoice No, Invoice number, etc., and will map them all to the correct internal data value—meaning it requires no training to extract data from any invoices, no matter the layout. Using various metrics, you can gauge the confidence of the extracted data and visually show fields that may be correct, suspect, or wrong."



It requires no training to extract data from any invoices, no matter the layout.

David Cox
Product Manager
Upland Software



Upland Intelligent Capture offers a range of essential features; what customization options are available, and what should potential customers consider?

With our innovative features, potential new customers can breathe a sigh of relief as they evaluate their current document workflow. Are users manually routing documents, keying data into the system, or sorting files? By harnessing the power of new AI features, these tasks can be automated, requiring only minimal user input and freeing up valuable time and resources. **Each feature offers a plethora of customization options, putting you in the driver's seat.**

Take barcodes for example:

- How many different barcodes would you like to extract?
- What's the pattern?
- Would you prefer to split the data in the barcode into multiple data values?
- Do you want to take the last value found or the first?
- Would you like the document to auto separate when a barcode is found?

As we move forward, we're excited to introduce some new, game-changing features:

- Document summarizations let you summarize the content of the whole document. This summarization can be added as a new page to the document or can be passed through as metadata.
- Document classification allows you to classify and route documents based on keywords or values detected in them.
- Signature detection will detect a signature and flag documents suspected to have signatures and documents missing signatures.
- Translation allows you to translate documents from one language into another. The system will leave the structure, images, and logos intact.
- Keyword detection analyzes the document and outputs all the keywords associated with it, allowing better indexing of the document in backend systems.

05

Leverage emerging AI technologies and gain a competitive edge

Leveraging emerging technologies has become fundamental to getting an edge over the competition. Intelligent Capture utilizes AI and machine learning (ML) for document interpretation, OCR for precise content extraction, and secure data transmission through APIs, ensuring compliance with HIPAA, PIPEDA, and PHIPA regulations.

By integrating these advanced capabilities, organizations can streamline digital processes, reduce administrative burdens, and enhance productivity. This technology consolidates data into a single hub for automated routing and approvals, making critical information accessible across devices. Customizable workflows and the ability to flag and queue unidentified data for manual examination further enhance operational efficiency, allowing teams to focus on more strategic tasks.

- Integration of AI for document interpretation
- Utilization of OCR for content extraction and precision
- Compliance with data regulations (HIPAA, PIPEDA, PHIPA)
- Data transmission through API back to the application
- Extracts data and flags unidentified data for manual examination
- Secure capture and forwarding of content
- Global accessibility and usability across devices
- Customizable workflow configurations
- Automated document reception, processing, and redistribution

06

Benefits of AI-Powered Intelligent Capture in various industries

Integrating cloud fax and capture technologies has become a cornerstone of operational efficiency across many industries, transcending company size or structure. The versatility of these solutions extends far beyond traditional boundaries, offering indispensable benefits to varying sectors.

For educational institutions, Upland Intelligent Capture streamlines admissions processes and ensures secure student records. In the engineering sector, it enhances project management with real-time data sharing and reduces administrative burdens. In the manufacturing market, it optimizes supply chain management and minimizes production documentation errors.

Non-profits benefit by safely handling sensitive donor information and improving the efficiency of grant application processes.

Regardless of your business's market, seamlessly transmitting and managing critical documents is crucial to success. Moreover, the flexibility of volume and pricing models inherent in cloud-based fax and capture services ensures that organizations can optimize their operations without excessive costs.

From streamlining digital workflow processes to maintaining data security, the adaptability and cost-effectiveness of these technologies underscore their indispensability in today's competitive landscape.

- Enhanced team efficiency
- Real-time digital information sharing
- Reduction of administrative tasks and human error
- Improved access to time-sensitive documents
- Identification and handling of handwritten notes or forms
- Handling of high volumes of sensitive data safely from any location
- Automation of approval processes and reviews to support fast, accurate, informed decision-making



Benefits of Intelligent Capture for healthcare providers

Approximately 75% of medical communications are still handled via fax. Efficient workflows expedite the process of caring for patients and allow staff to spend more time practicing medicine and less time bouncing around different systems to access necessary medical information. Reducing the time patients spend waiting to get in with a new doctor or schedule a much-needed procedure enhances the overall patient experience.

Upland Intelligent Capture's advanced cloud capture functionalities facilitate seamless integration into existing EMRs/EHRs, providing a comprehensive view of a patient's PHI through a unified and intuitive dashboard. That means more time spent healing patients and less time sorting through dozens of files and documents to find that one specific lab report. This streamlines workflows, reducing wait times and human-related errors significantly. **In an industry where every second counts, such accessibility holds the potential to save lives.**





Approximately
75%
of medical
communications
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Tackle processes such as:

- Appointment setting
- Billing and invoicing
- Medical records
- Legal documents
- Maintenance and repairs
- Image processing
- Insurance claims
- Inventory and supply orders
- Donor communications
- Lab requests
- Pharmacy scanning
- Surgery scheduling
- User actions
- Telemedicine
- Compliance and audits
- Referrals
- Administrative communications
- Patient communications
- Contracts
- Tax documents
- Bid proposals
- Grants and funding
- Feedback and surveys
- Quality control
- Material procurement
- Shipment processing
- Supply chain management



Managing new patients

Accelerated intake procedures, improved referral management processes, and new patient documentation organizes the method of accepting and seeing new patients. By consolidating referrals from various sources onto a single-view user-friendly dashboard for centralized data, we've eliminated unnecessary confusion and decreased the time wasted searching for information.

Triaging document storage

Automated classification and routing of documents to relevant teams expedite the initiation of work, ultimately reducing patient wait times for quicker treatment.

Identification of barriers

Real-time tracking of document statuses enables early detection of obstacles, thereby alleviating workflow congestion and ensuring seamless document progression. Furthermore, expedited review and delivery of lab results and prescription fulfillment enhance accuracy and improve patient care.

Aiding critical healthcare decisions

Highlighting and extracting applicable fields facilitates quicker and more efficient decision-making. AI cannot safely diagnose, treat, or write prescriptions, however, it can capture and classify documents as well as read them to extract information that has real-world implications in how medicine evolves as an industry, as well as individual healthcare decisions, allowing teams to take prompt action.

Enhancing visibility

A shared workspace enables teams to monitor document progress, actions taken, and team involvement, fostering collaboration and efficiency. Automating workflows further enhances inter-team efficiency, particularly in triaging and routing documents.

Analyzing data

Structured data empowers administrative leaders with the tools and insights to manage, monitor, and optimize patient treatment options and care plans effectively.

Benefits of Intelligent Capture for financial markets

Systematized processes are vital to the success of financial professionals.

They need procedures in place that allow them to focus on delivering top-notch financial services to their clients. Reducing the time spent searching for account information, loan approvals, portfolio reports, etc., enhances the overall client experience and can significantly boost satisfaction and loyalty.

Upland Intelligent Capture provides advanced cloud capture capabilities that seamlessly integrate into existing platforms. **This means more time spent managing investments and less time sorting through numerous files and documents to find specific financial data.** Streamlining protocols eliminates many errors that can lead to hefty fines. In an industry where accuracy is critical, such accessibility promotes trust and encourages continued business for generations.

- Financial data
- Medical records
- Compliance and audits
- Billing and invoicing
- Contracts
- Credit information
- Tax documents
- Legal documents
- Loan processing
- Account management
- Insurance claims
- Investment portfolios
- Client information
- Portfolio reports
- Bid proposals
- Credit card data



A photograph of a hotel employee, a woman with dark hair wearing a white shirt, black bow tie, and black vest, smiling and holding a tablet. She is showing the tablet to a guest, a woman with red dreadlocks wearing an orange long-sleeved shirt. The background is slightly blurred, showing an indoor setting. The image is framed by a teal shape on the left and two orange diagonal stripes on the right.

Benefits of Intelligent Capture for the **hospitality sector**

Efficient workflows are crucial in the hospitality industry, allowing staff to focus more on delivering exceptional guest experiences and less on navigating various systems to access necessary information. Reducing the time guests spend waiting to check in or receive services enhances the overall guest experience and can significantly boost satisfaction and loyalty.

Upland Intelligent Capture delivers advanced cloud capture functionalities that work well with existing systems, providing a comprehensive view of guest information through a unified and intuitive dashboard. That way, your staff can spend more time attending to guests and less time sorting through numerous files and documents to find specific details. When satisfaction is paramount, such accessibility can transform the guest experience, fostering repeat visits and positive reviews.

- Bookings and reservations
- Credit card data
- Contracts
- Billing and invoicing
- Client information
- Guest communications
- Legal documents
- Compliance and audits
- Maintenance and repairs
- Account management
- Insurance claims
- Inventory and supply orders
- Feedback and surveys
- Permits
- Tax documents
- Bid proposals
- Shipment processing

07

Upland Intelligent Capture transforms digital workflows. Book a demo today!

Looking for AI-powered technology to improve your digital workflows? **Book your personalized product demonstration to see how Upland Intelligent Capture can change the way your teams work.**

Our cloud capture and fax solution provides your team with a secure and user-friendly solution for capturing, faxing, and routing documents seamlessly integrating with your current systems.

Transmit digital data instantly to improve service delivery and prevent clerical errors. Enhance productivity by reducing time spent on administrative tasks, minimizing costly mistakes, and facilitating quick access to time-sensitive documents from anywhere worldwide. With features such as automated decisions on document classifications, data, and user assignments, Upland Intelligent Capture is equipped to handle even the most unique business processes efficiently.

**Want to learn more about how
Upland Intelligent Capture can
change the way your teams work?**

Connect with us.



uplandsoftware.com/intelligentCapture