Goodbye Paper Hello Freedom

IntelliChief Capture Enterprise™

IntelliChief Capture Enterprise automates the extraction, validation, and processing of data from documents that originate in paper and electronic format. It extracts and classifies key information for business processes, facilitating entry into the IntelliChief Archive, IntelliChief Workflow, and your own Enterprise Resource Planning (ERP)/Line of Business (LOB) applications. IntelliChief Capture Enterprise is designed for ease of use with minimal instruction needed, reducing costs and accelerating document processing efficiencies. Significantly reducing labor-intensive document handling and manual data entry, IntelliChief Capture Enterprise will streamline business processes and drive automation in areas like Accounts Payable and Sales Order Entry.

There are five stages used by IntelliChief Capture Enterprise to automatically process documents, all designed to drive automation and ensure data integrity and rules compliance:

1.   **Import** – The Import stage is the entry point for documents in to IntelliChief Capture Enterprise. Paper documents can be imported via scanning, using desktop scanners or network scanners as well as multi-function peripherals (MFPs). Electronic documents, such as those sent in via email or those that come in through a fax server, can be automatically imported without creating/touching paper. Whether your operations include multiple locations in a decentralized environment, or a single location shared services center, the Import stage allows for the capture of documents at the beginning of your business process, which will drive both automation and visibility.

2.   **Optimize** – With one of the primary goals of IntelliChief Capture Enterprise being to deliver accurate and validated data to your ERP/LOB applications, the Optimize stage is critical. During this stage, document images are cleaned up and enhanced to ensure image quality for the remaining stages of processing. The Optimize stage will deskew the images, remove lines, provide image orientation, etc., and offers both manual and automated image Quality Assurance (QA). The end result is a clean image that allows for the accurate reading of its contents. After image optimization is complete, documents will be automatically classified and identified so that the next stage can occur.

3.   **Read** – During the Read stage, Fingerprint and Optical Character Recognition (OCR) technologies are used to identify the entity the document came from (vendor, customer, etc.) and extract the required data from the unique locations on the document. Fingerprints are used to identify the business entity the document came from, as well as ensure that the unique layout of that entity's form will not prevent fields and data from being identified and extracted. Unlike many template based OCR engines, the creation of new Fingerprints is quick, easy, and controlled at the end user level as needed without reliance on any IT/technical resources. And once a document is imported, optimized, and has a Fingerprint match, OCR technology will extract all of the values from the header, body, and footer. These values are converted to text and labeled as to their meaning, such as a dollar amount, quantity, date, or company name…all without any user intervention.

4.   **Validate & Verify** – Once data has been extracted and labeled during the Read stage, it must then go through the Validate & Verify stage to ensure accuracy. IntelliChief Capture Enterprise will ensure accuracy through its Fingerprint technology as well as user defined confidence thresholds, database look ups, calculations, and business based rules validations. These validation and verification methods run automatically and without user intervention. Documents that pass confidence, validation, and verification can move automatically straight through the process without being touched, while documents that fail will be presented to an end user for review, correction, and/or routing for exception handling.

5.   **Deliver** – Once the documents and data are processed and the accuracy of data is ensured, this information can be delivered to IntelliChief Workflow for further processing and to the IntelliChief Archive for filing. And the data can be delivered to your ERP/LOB applications in order to complete required transactions without manual data entry. The delivery of these documents and their related data can be automated based on business rules, again to ensure that the proper compliance and controls are followed.

Benefits:
•   **Increased productivity and reduced costs:** By significantly reducing manual data entry, IntelliChief Capture Enterprise allows for quick processing and easy accessibility to documents for accounts payable, sales order processing, customer service, case management, and other business transactions.
•   **Streamlined process:** IntelliChief Capture Enterprise can help eliminate a demanding paper/ manual process by automating labor-intensive tasks, such as invoice matching or sales order validation.
•   **Increased accuracy:** By eliminating data entry errors, IntelliChief Capture Enterprise can save time tracking down and fixing faulty data or misplaced document images.
•   **Focus:** By eliminating manual data entry and the manual review of information, knowledge workers can now spend their time focused on exception handling, as well as the value added tasks of analytical analysis, vendor and partner relations, customer service, and more.

Departmental Application Highlight: Accounts Payable

The IntelliChief Capture Enterprise for AP Invoices solution is architected for organizations looking to automate their Accounts Payable process, with the goals of eliminating the very manual functions of invoice matching and voucher creation. Invoices received as paper documents, email attachments, or other means are scanned or imported in to Capture Enterprise. Here, information from the header, body, and footer of the invoices is extracted. This information is then verified and validated, leveraging database look ups, defined business rules, calculations, and defined confidence thresholds. The vendor associated with each invoice layout is automatically identified, and other critical pieces of information including line items on single and multiple-page invoices are processed.

The solution offers Accounts Payable validations, such as math calculations and automated two-way and three-way matching. Invoices that fail validations, fall below confidence thresholds, or fail the invoice match process can be reviewed and resolved immediately, or routed through IntelliChief Workflow for exception handling. Non-PO based invoices can be routed for GL coding and approval. After all invoice types have been fully matched, approved, coded, or otherwise resolved the data extracted and validated via Capture Enterprise for AP Invoices will be delivered for voucher creation within your ERP/financial application without manual data entry.

New invoice layouts are set up in minutes by AP professionals as they process invoices, without reliance on IT staff, thus resulting in reduced invoice processing costs and cycle time. ***Some clients have reported more than a 50 percent reduction in invoice processing costs and over 75 percent straight through processing on Purchase Order based invoices.*** By drastically reducing invoice cycle times organizations are well positioned to take advantage early pay vendor discounts, or even negotiate more favorable terms with their suppliers.

IntelliChief
Paperless Process Management

Departmental Application Highlight: Sales Orders

The IntelliChief Capture Enterprise for Sales Orders solution can be implemented for automatic processing of inbound customer purchase orders. Customer POs received via email and fax, or even as hard copy documents, are imported in to Capture Enterprise for processing. Information from the header, body, and footer of the POs is extracted. This information is then verified and validated, leveraging database look ups, defined business rules, calculations, and defined confidence thresholds. Extracted information is used to index these orders in the IntelliChief Archive AND create the sales order in the ERP/order entry system without manual data entry.

But before indexing and order creation happens, validations can be performed to ensure PO line items match the item master and pricing is accurate, or that the product is in stock or able to be delivered on the requested date. Orders that cannot be processed due to inaccuracies on the PO, delivery challenges, or issues with the customer's status (such as being on credit hold), can be routed via IntelliChief Workflow for exception handling.

New customer PO layouts are set up in minutes by those professionals in Customer Care or Order Entry as they process orders, without reliance on IT staff. Capture Enterprise for Sales Orders greatly reduces the costs associated with processing orders, speeds up order fulfillment, and reduces Days Sales Outstanding (DSO). And it will drive accuracy through the elimination of data entry and provide immediate visibility for orders that are backlogged or those that risk creating a customer satisfaction issue.

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