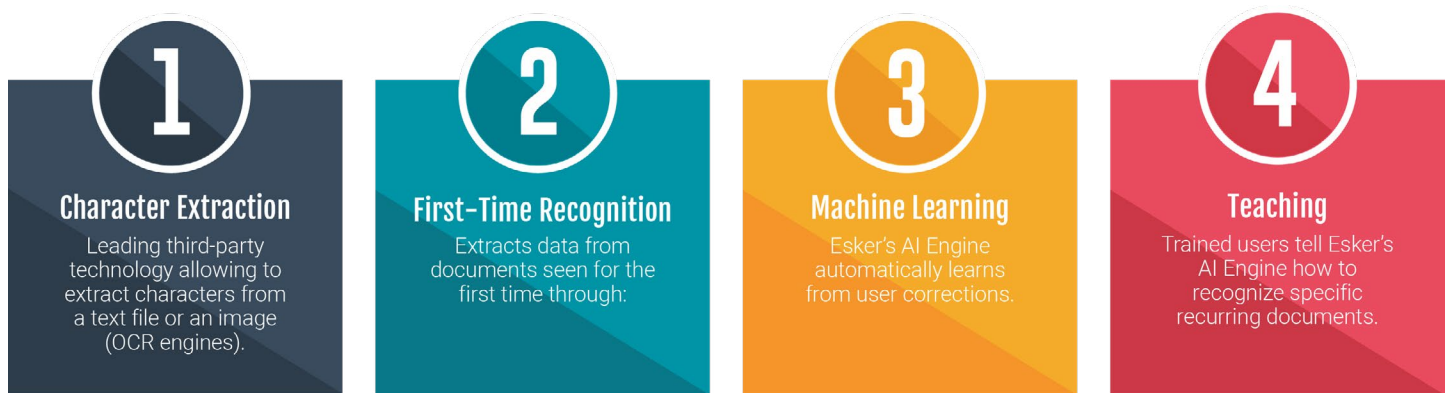


ESKER SYNERGY: AI-DRIVEN DATA EXTRACTION

INTELLENT CAPTURE FOR REACHING MAXIMUM DOCUMENT RECOGNITION

Esker Synergy is an AI-based data recognition technology designed to improve first-time data capture on business documents and help users reach the highest recognition rate possible, as fast as possible. In a nutshell, its role is to identify and extract data, not to interpret and analyze it. Powered by Esker's AI Engine, Synergy uses four core technologies for extracting data from documents.



4 LAYERS OF TECHNOLOGY POWERING INTELLIGENT DATA CAPTURE

Character Extraction

Esker's AI platform automatically extracts relevant information utilizing intelligent data capture technology including Optical Character Recognition (OCR) engines and deep learning capabilities. Leveraging this technology allows for immediate data recognition and automation from day one.

First-Time Recognition

Esker Synergy technology allows for automated document data extraction through deep learning neural networks, applying technologies used for facial recognition (Synergy Shared Network based on the recognition of invoice layout and structure) or natural language processing (Synergy Neural Network based on the recognition of words) to ALL business documents. Esker Synergy identifies predefined fields on a document and, if configured, compares that data against historical documents and ERP master data.

Machine Learning

Machine learning refers to the automatic feature silently working in the background of Esker's AI Engine to improve data extraction from documents during the form-validation processes. Based on the structure of the document, auto-learning fills in data fields based off of fields previously set by validating users.

Teaching

Teaching requires explicit action from users and allows them to define extraction criteria for specific recurring document templates based on layout, not sender. The user first makes a teaching request while verifying a document. The power user can then open the teaching request form and define the new teaching rule. Lastly, supplementary rules defined in the teaching interface can be applied to new, lookalike documents.



AI-Driven Data Extraction & Document Routing

Document recognition & routing

- OCR in 130+ languages for fax and image-based documents
- Perfect data extraction from EDI and text-based documents
- Different layers of AI technology to recognize document data
- Transparent AI: allow the users to understand which recognition technology was used to extract or compute a value
- Define business rules to route documents to the appropriate internal contact(s).

First-time recognition

- Esker Synergy: automated document data extraction through deep learning neural networks, applying technologies used for facial recognition (Synergy shared network) or natural language processing (Synergy neural network) to business documents
- Esker Synergy identifies the required fields at both the header and line-item level
- Defined data fields are compared to ERP master data

Auto-learning (machine learning)

- Machine learning technology to transparently improve the header and line-item data recognition based on previous user corrections

Teaching

- If necessary, explicitly train the system on top documents to ensure perfect data extraction
- If utilizing standardized document templates, teach the solution how to perfectly recognize the templates



Analytics & Dashboards

Visibility and traceability

- Track key metrics via new automation dashboard, including: touchless rate trend, submission and recognition methods, number of changes by vendor, automation rate by month, etc.
- Follow documents throughout every phase of processing with dynamic dashboards
- Default analytics provided with the solution
- Customize actions, metrics and charts displayed on the dashboards according to your needs
- Monitor automation rates and evolution of recognition methods via the automation trends dashboard Create personalized dashboards and reports, schedule them and share results
- Access to standard financial metrics and KPIs, such as aging reports, payment forecast reports, days payable outstanding, on-time payment rates, etc.
- Global platform with eight languages

Audit trail

- Identify who did what on each invoice with a history of modifications
- Ability to download your vendor invoices, credit notes and an audit trail file as a compressed ZIP file



Security

Compliance

- Quality and integrity of internal control and processes: SSAE 18 & ISAE 3402 compliance
- Protection of sensitive health information: HIPAA & HITECH compliance
- Continuous improvement and close monitoring of security levels: ISO 27001 certification

Support

- Worldwide coverage in five languages (English, French, Italian, Spanish, German) with teams of expert engineers
- Over 95% customer satisfaction rate
- Follow-the-sun and 24/7 premium support options available

Physical security

- Physical access: 24/7 monitoring, access restriction control, onsite staffing, locked racks
- Environmental security: air cooling, fire detection and suppression systems, temperature monitoring
- Electrical security: redundant power supplies, uninterruptible power supplies, backup generators

Architecture security

- Three layers of security: redundancy, clustering, disaster recovery
- Network load balancing: improves processing efficiency by distributing workload among servers
- 24/7 automated system monitoring: ensures that servers stay up and running

Logical security

- Firewalls: servers are protected by redundant firewalls
- Proven reliability: penetration tests and vulnerability assessments are issued on a regular basis
- Secure protocols: HTTPS with TLS 1.2, AS2

Data security

- Confidentiality: data segregation and unique document identifiers
- Data storage: documents are automatically deleted after two months
- Archiving: documents can be archived for longer durations in a geographically redundant site
- IP filtering and email gateways: restrict access to only certain IP addresses or domain names
- Alerting: detection of threats (e.g., virus, Trojan, worm, etc.) on all incoming documents
- Data encryption: all documents are encrypted at rest

User security

- Password and session policies: Set up policies according to business needs
- Traceability: security event log to monitor any action (e.g., account login, creation, deletion, password change, etc.)
- SSO: centralize user security and facilitate authentication
- Multi-factor authentication: require an OTP code (email or mobile app) to login and manage trusted devices



Data Verification

Duplicate document check

- Avoid entering the same document in ERP system twice
- Configurable duplicate check by same document number, date, or other defined field(s)

Workflow technology

- Routing prioritization data capture (e.g., paper document, fax, e-invoice, EDI, XML, etc.)
- Multi-level approval
- Exception handling
- Three-way matching
- Define business workflow rules to automatically route documents with exceptions to the appropriate approver
- Reroute/modify predetermined workflow route based on user profile and authorization
- Easily create or maintain workflow rules using the graphical rule designer
- Track and make changes to date, time and ID of user access
- Full document processing audit trail log

Validation interface

- Display original document
- Validate extracted document information and edit if necessary
- Annotate document image (e.g., highlight or mask areas, add a note, etc.)
- Configure interface in specific language: seven languages supported

Touchless validation

- Automatically process documents that are 100% recognized and data-consistent in ERP system

Enhanced EDI document processing

- Display EDI documents in a human-readable PDF format



Document Reception

Email

- Native email support
- Create inbound email channels to receive documents in minutes
- Process email attachments (e.g., PDF, TIFF, Word, Excel, JPEG) or email body content
- Define customer-specific rules to specify which attachments should be considered as documents

EDI

- Support of all standard EDI formats: UBL, EDIFACT, X12, IDoc, cXML
- Support of SFTP and AS2 communication channels for EDI files
- Display of all EDI documents in a human-readable PDF format

Scan

- Upload scanned documents via SFTP, web services, the Esker Loader tool or directly from the web interface
- Handle batches based on document detection and separator pages or manually through a web interface

Channel consolidation

- One single interface to process and track all documents, regardless of their reception channel
- Preview all documents from within the Esker Document Manager, regardless of their source or format

Fax

- Native support of all fax standards and formats
- Port existing fax numbers to Esker's cloud platform (where available)

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