

Document Insight —

AI-powered document parsing and automation inside Salesforce

Document Insight is an AI-powered document intelligence platform built inside Salesforce. It reads financial, identity, income, tax, and custom business documents, extracts structured data, validates the results using confidence and fraud scoring, and maps the information directly to Salesforce records.

AI-Powered Extraction

Extract structured data from any document type

Minimal Manual Data Entry

Reduce repetitive typing with automated extraction

Data Ready in Seconds

Move reviews forward without delays

Built-In Fraud Detection

Flag suspicious documents before review

Why Businesses choose Document Insight —

- **No manual data entry.** Simplify intelligent document processing Salesforce with AI-powered extraction that maps document data to existing or new records.
- **Turn statements into actionable data.** Extracts actionable insights from bank statements such as revenue, cash flow, balances, overdrafts, and NSF activity.
- **Reads all document types.** Accurately reads structured forms, semi-structured documents, handwritten notes, and unformatted files including contracts, letters, etc.
- **Fraud detection built-in.** The app analyzes structure, metadata, and formatting to verify consistency while providing a fraud risk score for each document.



What it does —

What It Reads

- **Bank statements**, credit card statements, and profit and loss statements
- **Income documents** such as pay stubs, tax forms, SSA 1099s, contracts, invoices
- **Identity docs** like passports, driver's licenses, SSN docs & **custom forms** like medical bills, insurance, etc.
- **Handwritten notes**, semi-structured pages, or any custom form you define

What Comes Back

- **Structured fields** are mapped to an existing Salesforce record or a new record created for them
- Each field has a **confidence score**, and anything under your threshold goes into a review queue.
- **Transaction-level parsing** provides revenue, cash flow, average balance, NSF days, and overdraft patterns
- Charges, codes, authorizations, and patient details for **medical intake and billing** processes

4.93/5 customer satisfaction • **1,500+** projects delivered • **400+** customers

Streamline doc processing and data extraction in Salesforce.

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