

Putting Your Data Into Motion

Your Complete Guide to
Intelligent Capture Automation



The State of Capture Automation

Your business decisions depend on timely, accurate information. But before you can act, you need access. Information is frequently trapped in documents such as emails, invoices, contracts, and more. For decades, capture automation has allowed businesses to extract this information. In fact, [59% of CIOs](#) consider capture one of their top investments. But this technology and the processes involved have changed drastically over time and are once again undergoing a major evolution.

Templates: A Dwindling Technology

For countless years, templates, the process of mapping the format of documents for capture, was the primary way of extracting information, but it came with significant challenges:



Unstructured Data: Many documents, such as contracts and hiring notes, did not use a definite structure, making them impossible to capture accurately.



Maintenance: With each format change to a document, revisions needed to be made to these templates, a process involving heavy technical knowledge and time.



Hindered ROI: The lengthy implementation times and maintenance costs involved in templated capture often made capture automation less worthwhile for those considering it.

The AI Innovation

Recent breakthroughs in AI and machine learning have fueled new methods for extracting information, and a select few providers have been able to apply these methods to any document.

Referred to collectively as Intelligent Capture, the market for these new technologies is expected to [grow by 29.9%](#) over the next decade as they facilitate:



Accurate Capture of Any Document

Extract any field from any document with unprecedented accuracy.



Faster, Less Costly Implementations

Expect complete implementations in fractions of the previous time.



Enhanced ROI

See financial returns from your solution far faster than ever before.

What to Expect from This Guide

With such rapid advancement in capture automation technology, this guide will provide insights, strategies, and predictions to help you navigate your decisions for any capture automation implementation. Whether you are a long-time user of capture automation or a business looking to digitize during an exciting time, this will be the ideal guide to start your research out strong.



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Benefits of Intelligent Capture Automation

Leveraging the data hidden within your documents holds enormous value for any business, allowing organizations to leverage it for automation, analysis, and decision-making. Before we discuss capture automation in detail, let's highlight these benefits:

✓ Eliminate Errors

91% of data professionals say data quality issues hurt company performance ([Business.com](https://www.business.com)). By replacing manual entry with highly accurate automated capture, your team can focus on data validation, ensuring quality.

✓ Effortlessly Access Information

48% of employees say it's hard to find documents quickly ([Business.com](https://www.business.com)). By using captured data to index documents, both records and the information itself are effortlessly searchable.



✓ More Efficiently Use Time

94% of knowledge workers do some repetitive, time-consuming work, and 44% don't feel efficient during the day ([Forbes](https://www.forbes.com)). Capture automation helps redirect employee time towards more strategic tasks.

✓ Impactful Cost Savings

Digitally mature companies are 23% more profitable than their peers ([Forbes](https://www.forbes.com)). Eliminating costly errors and boosting productivity with reallocated time creates a much healthier bottom line.

Putting Your Data Into Motion

These benefits are enhanced when paired with the right tools and strategies, such as AI extraction, confidence reporting, no-code implementations, and workflow automation. Your organization will benefit by providing highly reliable data to all of your business applications and putting it into motion.

Highly Reliable Data - AI-driven capture unlocks critical business information with near-100% accuracy.

Workflow-Driven Processes - Route data for approvals, notifications, and workflow execution with ease.

Seamless Integration - Connect your data across systems to eliminate silos and maximize efficiency.



Intelligent Data Recognition (IDR) is quickly becoming the new standard for capture automation. This level of capture uses AI and machine learning to add context to the extracted information. This helps OCR to verify its accuracy, frequently ensuring the data it extracts is near-100% accurate.



Intelligent Document Processing (IDP) uses AI and machine learning to contextualize information like IDR. However, besides improving accuracy, this context helps classify, index, archive, and route the information throughout your organization.

Each of these levels of capture adds additional accuracy, efficiency, and automation.

Defining Intelligent Captures Levels

You may have heard various terms to describe capture automation, such as Optical Character Recognition, Intelligent Data Recognition, and Intelligent Document Processing. Each level of capture automation builds on the last while adding additional value.



Optical Character Recognition (OCR) technology is at the basis of all capture automation. It transforms source documents into characters that a computer can recognize. This technology alone can frequently make mistakes, which is why additional levels of capture are needed to verify what it sees.



Intelligent Capture Strategies For Any Document

While intelligent capture is still evolving and many providers still rely on templates for many implementations, some providers have developed effective strategies to remove templates entirely, the most promising of which is generative AI.

- ✓ **AI Capture Models:** AI-driven capture automation can yield near 100% accurate results, even for header, footer, line item, and hand-written data. The caveat is that these models are designed for specific document types and data points, and will not effectively capture information atypical of the documents they are trained on.
- ✓ **Machine Learning Solutions:** By training machine learning solutions to pair data points with information within a document, they can yield the same accuracy as AI-driven models. These solutions can be more easily trained than AI, allowing them to be applied more broadly, but their training is more case-by-case.
- ✓ **Generative AI:** At the forefront of innovation, generative AI can now be used to capture any document accurately with minimal technical expertise needed for implementation and maintenance. While few providers offer this option due to how new this technology is, it is the best of both worlds, offering the benefits of intelligent capture to any document, regardless of the data or structure involved.



Getting Started with AI Capture Automation

Getting started with capture automation is much simpler once your organization's needs are clear. While we have covered several common challenges and strategies for capture automation so far, we can only show you the door.

Signs It's Time to Implement Capture Automation

Capture automation becomes a necessity once organizations scale, but what are the tell-tale signs? Below are some key considerations to help guide your decision on when to implement capture automation.

- ✓ **A Backup of Paper or PDF Documents:** Accumulating physical documents indicates that manual data entry can't keep up with digitization and often leads to inaccessible information.
- ✓ **Time Consuming or Costly Data Entry:** When manual data entry takes countless hours, is error-prone or is hampering productivity in other ways, it's time to consider capture automation.
- ✓ **Inefficient data access and collaboration:** When information becomes time-consuming to access, it slows down countless processes and hampers productivity. This is a tell-tale sign that capture automation is needed.

- ✓ **Information Compliance is Challenging to Maintain:** Regulatory compliance requires heavy documentation as proof during audits. Mad dashes during audit preparation indicate the need for a new system, and capture automation is typically a crucial component.
- ✓ **Workflow Bottlenecks Are Costing Other Processes:** Delays in data entry can affect other areas of business that rely on that information. If processes are bottlenecked by trapped data, capture automation is likely the solution.



Future Trends in Document Capture

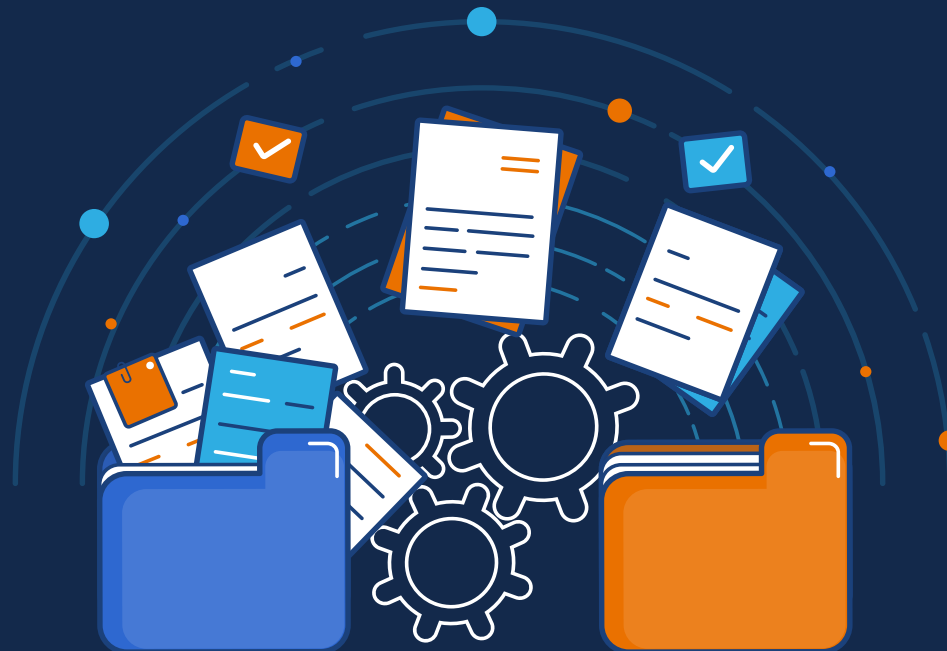
Capture automation will continue to evolve as new technologies and strategies emerge, especially as intelligent capture strategies begin to take shape. Below are some future trends to look out for.

✓ Continued AI Advancements

AI technology will continue to become more sophisticated, offering better contextualization, accuracy, integration capabilities, and versatility. In fact, 63% of organizations intend to adopt AI globally within the next three years ([National University](#)). Intelligent capture will also see a rise in agentic AI, allowing users to request data from sources in their own words.

✓ Increased Adoption of Cloud Solutions

Cloud solutions offer enhanced scalability, more manageable security, and better integration with other cloud services. These benefits continue to appeal to the majority of solution buyers and are crucial to intelligent capture methods where security and resource management are prime concerns. Cloud solutions are currently adopted at some level by 94% of companies worldwide ([Forbes](#)).



Key Questions to Ask Before You Deploy

Successful strategies come in many forms, and what works for your business often comes down to your specific organizational needs. Below are some key questions to ask yourself, as well as some suggested strategies.

- ✓ **How Will You Validate Data?:** Ensuring the accuracy of captured data through automated validation checks is a must, but data routed to other applications should also be verified by your staff.
- ✓ **How Do You Plan to Approach Unstructured Information?:** Intelligent data recognition tools like generative AI can help you leverage unstructured data like never before, integrating with other applications for analysis and summarizing information for easy digestibility.
- ✓ **Does It Make Sense to Integrate with Existing Systems?:** Integrations allow your organization to leverage additional automation. Planning for future integration needs prevents workflow disruptions and unexpected costs down the road.

In Summary

Capture automation is a crucial component to leverage the data your organization needs to drive automation. As capture-related technology and strategies continue to evolve, your data can be more reliably put into motion in new and exciting ways. Planning your capture automation strategy still requires careful consideration of your goals and knowledge of how to reach them, but with careful research and aid from your provider of choice, you can ensure a lasting return on a powerful investment.



Success Stories

The Dutch Group

Founded in 1972, the Dutch Group is a leader across several states in the fuel, retail, and health services industries. With a need to streamline operations across their many locations and a need to leverage data from their transaction documents within their ERP system, the Dutch Group looked to Square 9 and its AI-powered capture automation solutions to solve these challenges.

The Result

The Dutch Group now has significantly increased visibility of its financial information, leading to more effective reporting, operational management, and customer service at its retail and pharmacy locations.



"When the AI was implemented, the system just captured the vendor information and made things very easy. Now, pharmacists don't have to work in the capture automation tool anymore because the AI already handles it."

- Lily Setiwan

Corporate Controller at The Dutch Group

Retired Public Employees Council of Washington

The Retired Public Employees Council (RPEC) of Washington is a legislative advocacy organization dedicated to promoting the interests of state, county, city, and local public sector retirees. To more effectively maintain financial compliance and access past transaction records, the organization looked to digitally archive these records, previously kept in bankers' boxes since the 70s.

The Result

Through Square 9, RPEC was able to successfully contextualize, index, sort, and archive its documents without the additional workstations and scanners suggested by other providers to work effectively.



"With Square 9, we can take a stack of payable invoices, run them through the scanner, and import them into GlobalCapture. The AI determines who it is and where it belongs. For staff, this is a great time and expense saver."

- Derek Van Spoor

Associate Director at Retired Public Employees Council of Washington

Industry Terms Index

- ✓ **OCR (Optical Character Recognition):** A technology that transforms written, printed, and image-based characters into computer-readable, legible text that can be leveraged in automation.
- ✓ **IDR (Intelligent Document Recognition):** Advanced technology that captures text from documents and understands their context and structure for more accurate data extraction.
- ✓ **IDP (Intelligent Document Processing):** A suite of technologies that expands on the capabilities of IDR, using the added context to classify, archive, and add additional automation to captured documents.
- ✓ **AI (Artificial Intelligence):** A broad field of technologies that for capture automation, is used to analyze, contextualize, and add additional accuracy to extracted information.
- ✓ **Machine Learning:** A broad set of technologies that, for capture automation, can be trained to recognize patterns within documents to add additional accuracy.
- ✓ **Unstructured Data:** Information that does not adhere to a specific format or structure, making it challenging to collect, process, and analyze, such as emails, contracts, onboarding notes, and much more.
- ✓ **Document Capture:** The process of converting physical documents into digital form and leveraging the information inside.
- ✓ **Indexing:** The process of assigning keywords or metadata to digital documents to make them easily searchable and retrievable within an information management system.
- ✓ **Verifying:** In the context of capture automation, it refers to the process of checking the accuracy and validity of captured data, often using automated methods to ensure the data extracted from documents is correct and complete.



square9
Taking the Paper Out of Work

Why Square 9

Square 9 is a ground-breaking innovator in generative AI-powered capture automation, transforming the way you access, extract, and activate information so that you can move from insight to action faster than ever before.

Our AI-driven platform locates and extracts high-value data from any source documents, emails, invoices, contracts, and more, regardless of format. No manual entry. No delays. Just the right information, exactly when and where you need it.

Contact Square 9 for a no-obligation discovery session and see how capture automation can streamline your operations and propel your organization into the future.

Contact Square 9 for a no-obligation discovery session and see how transforming your government agency can lead to a more efficient, secure, and informed agency.

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