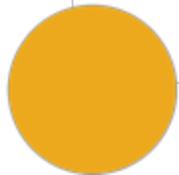




Introduction to **Instabase**





Only **20%** of
documents are
structured

Source: Forbes

Structured

Fixed Templates

e.g. California Driver's License

Low Variability

e.g. Tax Forms

Unstructured

High Variability

e.g. Financial Accounts

Natural Language

e.g. Emails



Structured

Unstructured

Investment Banking

Share Certificates
Board Resolutions
Customer Contracts
Standard Settlement Instructions
Broker Confirmations

Insurance

Claims Invoices
Supporting Documentation
Customer Evidence

Services

Resumes
Vendor Agreements

Retail Banking

Global Bank Statements
Global Passports & IDs
Proof of Address
Investment Portfolio Statements

Business & Commercial Banking

Financial Statements
Bill of Lading
Certificate of Incorporation
Shipping Bill
SWIFT Message
Commercial Invoice



Instabase has solved this **complex data** problem by reinventing what computers can **automatically understand**



Instabase Value Add



Understand **highly-variable** documents

- ✔ Powerful building blocks
- ✔ Rapid development
- ✔ No templates, brittle rules or generic models



Build **end-to-end solutions** to specific problems

- ✔ Manipulate Documents (digitize, clean-up, classify, validate and split-up)
- ✔ Extend Solutions (custom functions, human review, external data)



Deploy and scale **enterprise wide**

- ✔ On-premise and private cloud
- ✔ Fully isolated deployments
- ✔ Go-live in weeks

Instabase helps with end to end workflow



Digitize



Classify



Split Up



Understand



Validate



Review



Custom

Search

Discover

Business Solutions

Manage Store

Instabase Applications Out of the Box

Internal Apps



Medical Invoices

Processes documents submitted by hospitals and care providers to outline the associated costs in delivering care.

Open

Try



Change of Address

Processes change of address forms submitted by prospective customers as part of onboarding for relevant products.

Open

Try



Account Mandates

Processes account mandate documents indicating which directors have authority on an account.

Open

Try



Credit Memo

Processes bank credit memos submitted by Commercial Customers.

Open

Try

Global Apps



Bank Statements

Extracts income data from bank statements issued from institutions worldwide.

Open

Try



Passports

Processes passport documents issued by governments globally.

Open

Try



Checks

Processes documents submitted by hospitals and care providers to outline the associated costs in delivering care.

Open

Try



Paystubs

Processes payroll information from Paystubs issued in the United States.

Open

Try



Driver's License

Extracts identity information from identity cards issued globally.

Open

Try



Resumes

Processes technical resumes to understand skills, experience and education.

Open

Try



Personal Tax Forms

Processes Form W-2, W4, W-9, and 1040 with associated schedules.

Open

Try



Car Title

Processes Car Title documents to understand make, model and vehicle registration number.

Open

Try



Financial Spreading

Processes financial statements to understand Balance Sheet, Income Statement and CashFlow Statement.

Open

Try



On-Premise
deployment



Days
to configure
new solutions



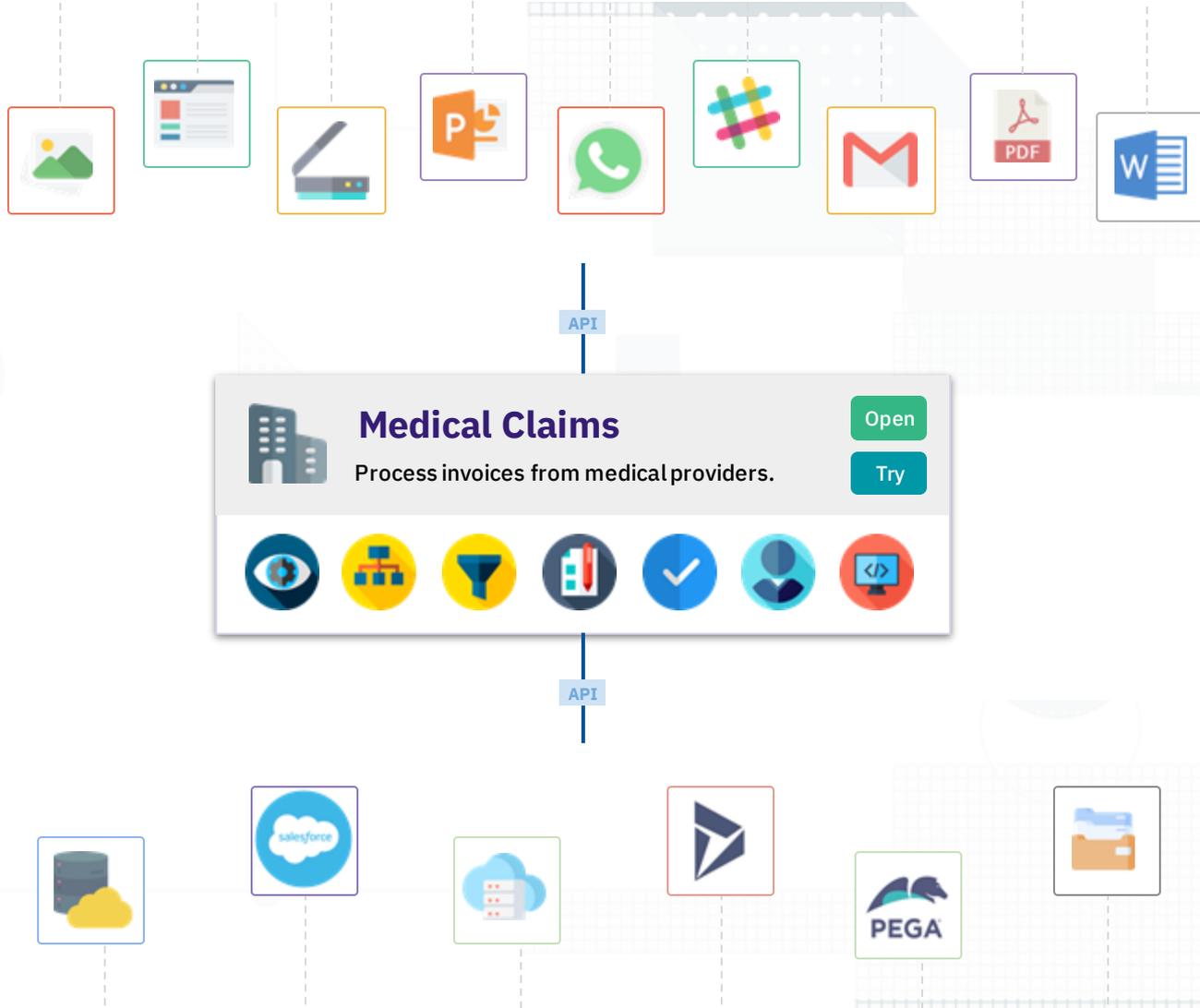
Avoid
lengthy model
training



Read
from any
format



Integrate
with open
APIs





Use Case: Mortgages

Top 3 Global Bank 

Goal:

Automate the understanding of the huge variety of documents customers submitted as part of a mortgage application, reducing costs and improving customer experiences.

Impact:

\$4.8m

savings over the next three years

470

different document types

1.4M

pages processed every month

6 month

return on investment through a single use case



Bank Statements



Paystubs



Personal Tax Forms



Student Loans



Agent Confirmation



Utility Bill

and many others!



INSTABASE

Toolkits

Marketplace





Use Case: Consumer Lending

Top 3 US Bank 

Goal:

Automate the classification, extraction and validation of income and identity documents in order to increase conversion and reduce manual overheads.

Impact:

85%

of consumer income documents automatically digitized and understood.

\$8m

of operational savings unlocked for **every** 500k documents processed.

>1m

of documents processed using Instabase at scale.

2%

increase in conversion rate through online loan portal, attributed to being able to serve customers faster.



Bank Statements



Paystubs



Personal Tax Forms



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Next Steps:
Schedule a demo [here](#)



Contact Us

info@instabase.com

Appendix



Instabase Product Taxonomy



Marketplace

Business Apps



Global Passport



Cheques



Bank Statements



Commercial Invoices

Developer Exchange



Classification Packages



Doc Splitting Packages

Toolkits

Flow

Digitize



Classify



Extract



Redact



Diff



Review



Sheet



Platform

Filesystem



Flexible File Storage Integration

Deployment



On-Prem or in Private Cloud

Scaling



Auto-Scaling on Kubernetes

Control



Enterprise Security & Access Controls

Integration



Flexible REST APIs



Medical Claims

MetLife Insurance 

Goal:

Automate the digitization, extraction and validation of invoice data and feed it directly into their workflow tool to provide time back to the business.

Impact:

100%

of claims invoices successfully classified by type upon receipt.

78%

of fields automatically extracted across long-tail homecare claims.

2 Days

new Average Handling Time vs previous 10 Days.

5 Weeks

to configure working prototype on their data set.



Agency Invoices



Care Home Invoices



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Trade Finance

Standard Chartered 

Goal:

Automatically classify and understand Letter of Credit information in SWIFT MT700 messages, process and understand supporting documents such as Bill of Ladings, Bill of Exchange, Commercial Invoices and Airway Bills.

Impact:

90%+

of fields successfully extracted across client population.

5 FTE

saved on average for each client relationship.

10 secs

to process checklist vs **45 mins**



SWIFT Message



Bill of Lading



Bill of Exchange



Commercial Invoice



Airway Bill



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Client Onboarding

Standard Chartered 

Goal:

Automate the classification, extraction and validation of identity and ownership documents to facilitate faster Client Onboarding across Institutional Banking.

Impact:

500 hrs

saved per month for each of 25 countries live today

25

different types of highly variable documents automatically understood

60%

reduction in onboarding time for clients.



Passports



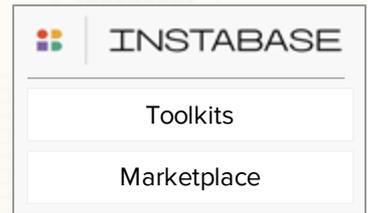
Share Certificates



Financial Statements



Corporate Tax Forms



Mailroom Automation

MetLife Insurance 

Goal:

Automate the classification, extraction and validation of identity and ownership documents to facilitate faster Client Onboarding across Institutional Banking.

Impact:

500

Errors eliminated

96%

automatically classify 96% of incoming documents

40 FTE

40 FTE freed up to focus on higher value projects



Medical History Form



Fax Cover Sheet



Healthcare Forms



INSTABASE

Toolkits

Marketplace



The image shows a modern office lobby with a white reception desk in the foreground. On the wall behind the desk, the Standard Chartered logo and name are displayed in a large, metallic font. The logo consists of three stylized, overlapping curved lines. The background is a bright, well-lit space with a polished floor and recessed ceiling lights.

Standard
Chartered

Group CIO, Standard Chartered:

“[We]...saw tremendous potential in how Instabase...could automate highly manual operations across the bank, from client due diligence, to Retail Bank statements, to vendor invoice processing”





AVP of Digital Automation,
Top 3 US Insurer:

“It made it a no brainer.”

- Assessed against 6 traditional vendors in comprehensive bake-off
- Instabase achieved over 2.5x the second closest vendor on accuracy

