

## USE CASE

# Document Classification and Retrieval

Financial institutions handle extensive volumes of documents that must be classified and easily retrievable. Manually processing and tagging these documents can slow down operations. Qualco Process Automation, powered by document classification and automated data extraction, automates the document classification and retrieval process within a Document Management System (DMS).

## HOW IT WORKS



### Document Submission

Users upload documents such as contracts and customer correspondence into the system.



### Document Classification

QPA automatically categorises the documents based on their content, such as contracts or compliance reports.



### Data Extraction

The solution extracts metadata and critical information, tagging and indexing the documents for quick retrieval.



### Searchability

The system enhances search functionality, allowing users to locate documents using the extracted metadata.

## WHAT TO EXPECT

- **Speed up document retrieval** through text-based tagging and indexing.
- **Automatically classify and organise** documents, reducing filing needs.
- **Ensure correct categorisation** and tagging for regulatory compliance and audits.
- **Minimise handling time** and quickly access critical information.

# About Qualco Process Automation

[Qualco Process Automation](#) offers a comprehensive suite of tools that allows enterprises to efficiently manage their workflows from planning to implementation with intelligent forms, streamlined processes and operations, and seamless integration with existing IT systems. Our platform enables enterprises to transform while boosting process effectiveness via improved user experiences, making it effortlessly easier for them to navigate change successfully.

**Take the first step towards automation.**

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