

BASE64 Document AI One Pager

- **Base64 is an AI platform for automated document processing.** This one-pager outlines its essential functionality. See the [User Manual](#) for more details.
- **Your documents are organized in workflows called “Flow”.**
 - Flows are AI instances that can be configured for [AI features](#), [user access controls](#), and [integrations](#). Each user starts with a “Default Flow”.
 - In a nutshell, here is how Flow processes your document:
 - **Import** the file from any source (e.g., manual upload, email, API, scanner)
 - **Process** with AI
 - Identifies the document type (e.g., U.S. passport, invoice)
 - Extracts data (e.g., [OCR text](#), key-value pairs, tables, [signatures](#))
 - Creates a structured JSON output
 - Allows the user to validate and correct the AI results (optional)
 - **Export** results (e.g., reply to email, add to database, respond via API, 400+ no-code integrations)
 - [Creating a new Flow](#) enables optimizations specific to use-cases:
 - “ID Flow” for validating IDs, visas, and passports with [facial recognition](#).
 - “Invoice Flow” for invoices received via email, automatically updating the accounting system, and replying to the sender.
 - You can disable facial recognition in Invoice Flow because invoices don’t contain faces. This saves time and resources.
- **Base64 understands your documents using AI routines called “Model”.**
 - If the document is one of the [2,800+ Prebuilt Models](#), Base64 automatically processes it. They are ready out of the box; no training is required.
 - Otherwise, you should create a “[Custom Model](#)” to provide:
 - **Classification:** Provide information to identify the document type.
 - Free text description: Define the document type in a paragraph, or
 - Advanced methods, such as pattern matching and statistical probability.
 - **Data extraction:** Define how the AI will generate results.
 - **For structured documents**, i.e., pristine forms that always have the same layout and the data is always at the same location, create fields by selecting areas in the [Structured Form Reader](#).
 - **For unstructured documents** with variable layout:
 - [Create fields by asking questions](#), e.g., Total = “What is the total?”
 - Select prebuilt layout models, e.g., forms, tables, signatures
 - Improve outcomes with [Taxonomy](#) and [Post-processing](#).
 - **Added Flows:** Select Flows that will use your Custom Model.
- **Get started now:** Visit the [Sign Up](#) page to create an account or [Login](#) if you already have one. The on-screen tutorial will guide you along the way. Our [Sales Team](#) and [24/7 support](#) are available for your questions.