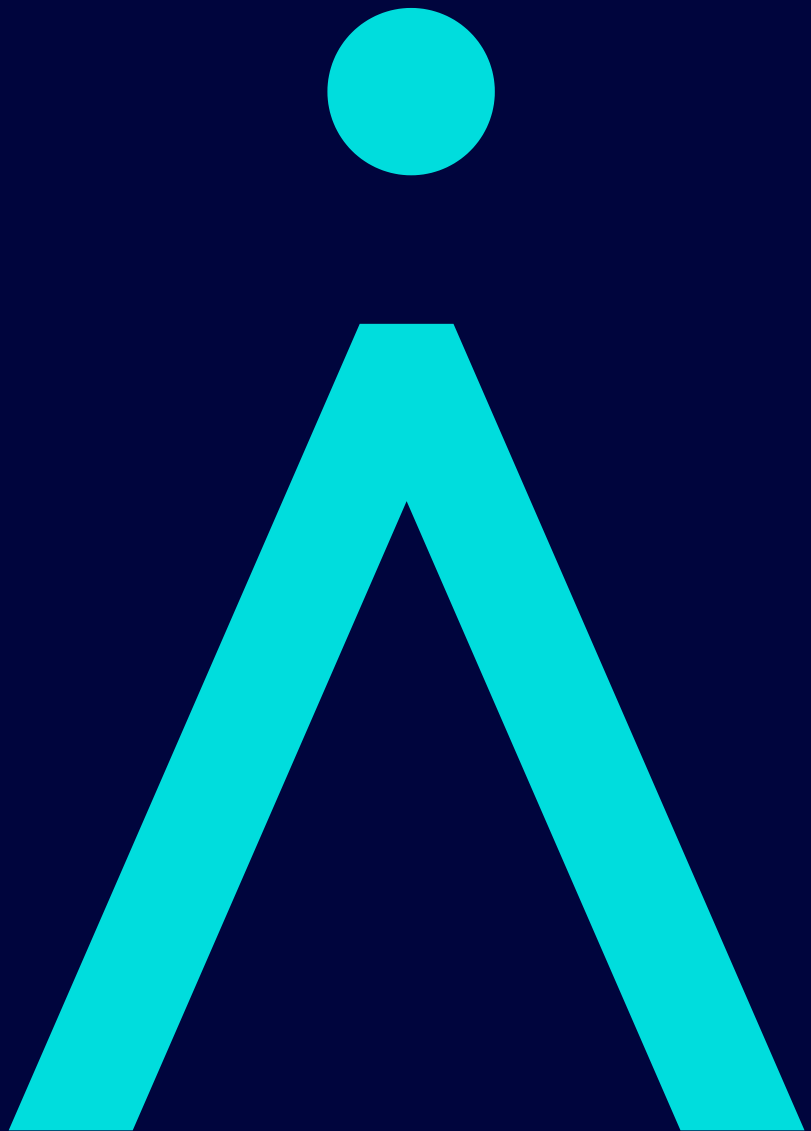


BÄSE64

User Manual

Last updated on
December 18, 2025



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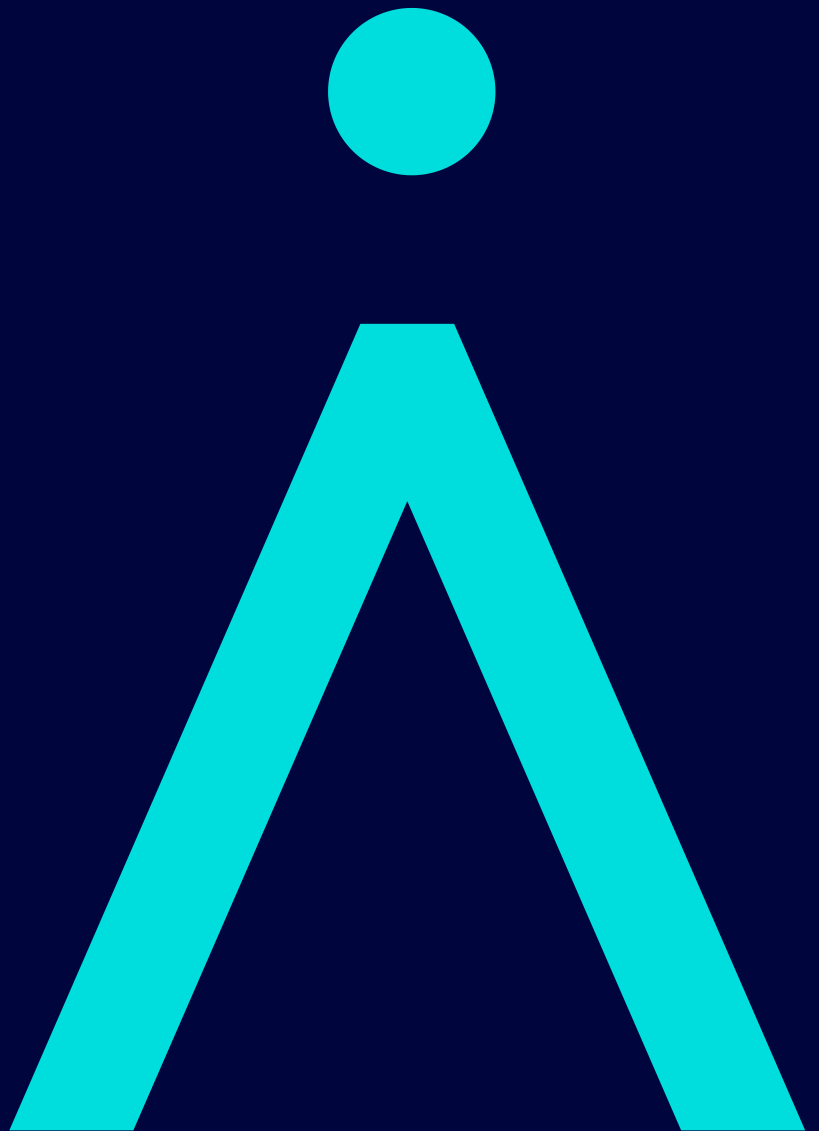
Privacy Policy: <https://base64.ai/privacy-policy/>

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BASE64

Introduction

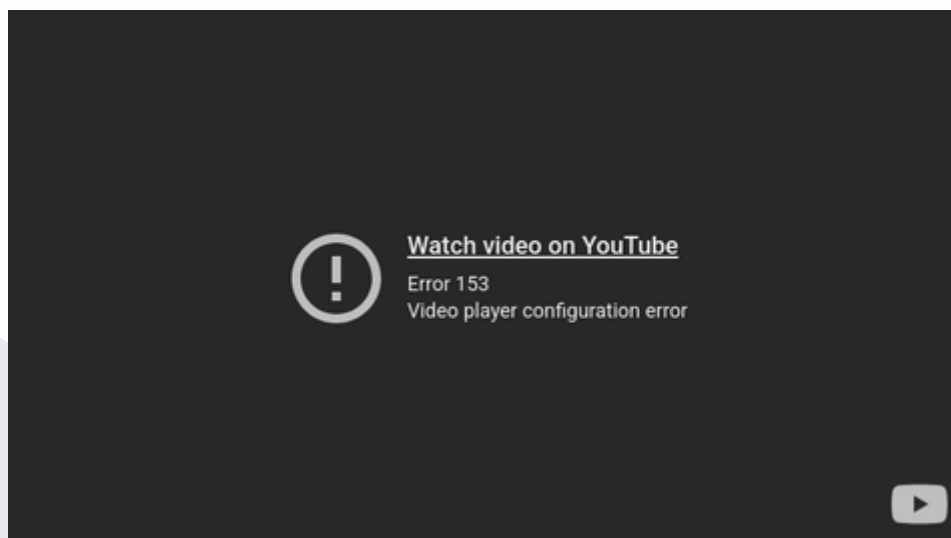
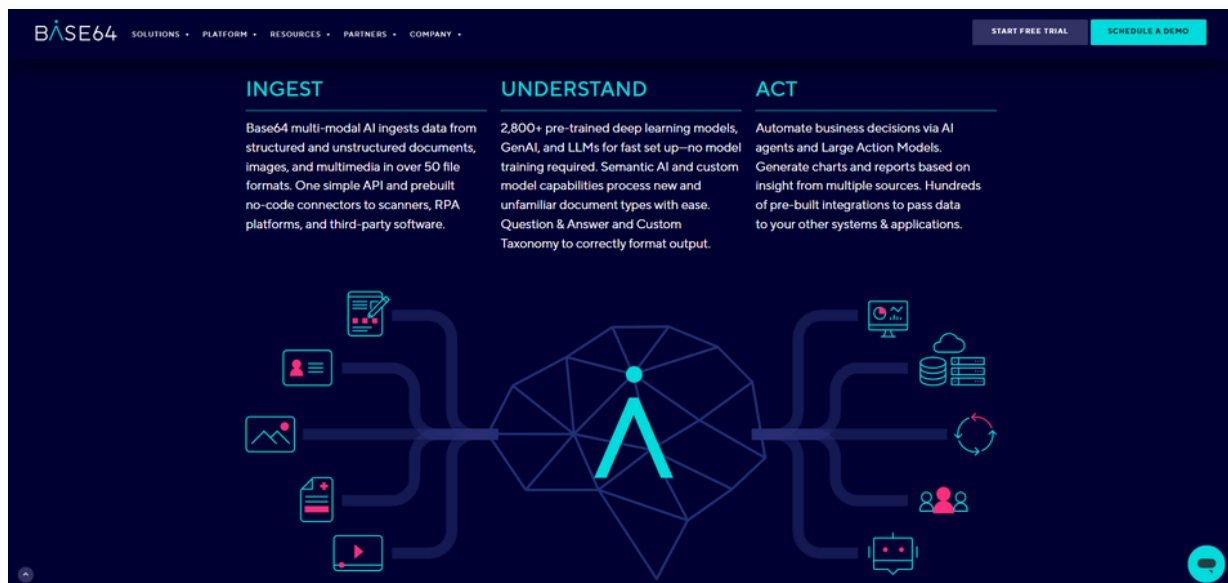


Welcome to Base64

- Welcome to the Base64 Platform, your all-in-one solution for intelligent document automation. Whether you're a business analyst, developer, IT administrator, or product owner, this guide is designed to help you get up and running quickly with our no-code and API-first tools for document classification, data extraction, and workFlow automation.

What Is Base64?

- Base64 is an AI-powered document processing platform. It enables businesses to ingest, classify, and extract data from a wide variety of documents, including invoices, IDs, forms, contracts, and more — all through a single API or through our intuitive UI-based tools.
- With over 2,800 prebuilt AI models and powerful Semantic AI, the platform handles both standard and custom document types, including those it hasn't seen before in over 165 languages.



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.

Signup and Login

- Visit the [Sign Up](#) page to set up an account.
- If you already have an account, you can head to the [Login](#) page.
- You may sign up and log in using multiple methods, including email & password, Google, LinkedIn, Microsoft, OAuth, LDAP, and Passkey/FaceID, depending on your deployment configuration.
 - Base64 accounts are tied to email; if you signed up via email, you can log in with the same LDAP account.

Sign up for Base64



SIGN UP

or continue with



By clicking "SIGN UP", you agree to our [Terms of Service](#) and acknowledge you have read the [Privacy Policy](#).

Log in to begin

[Forgot Password?](#)

LOGIN

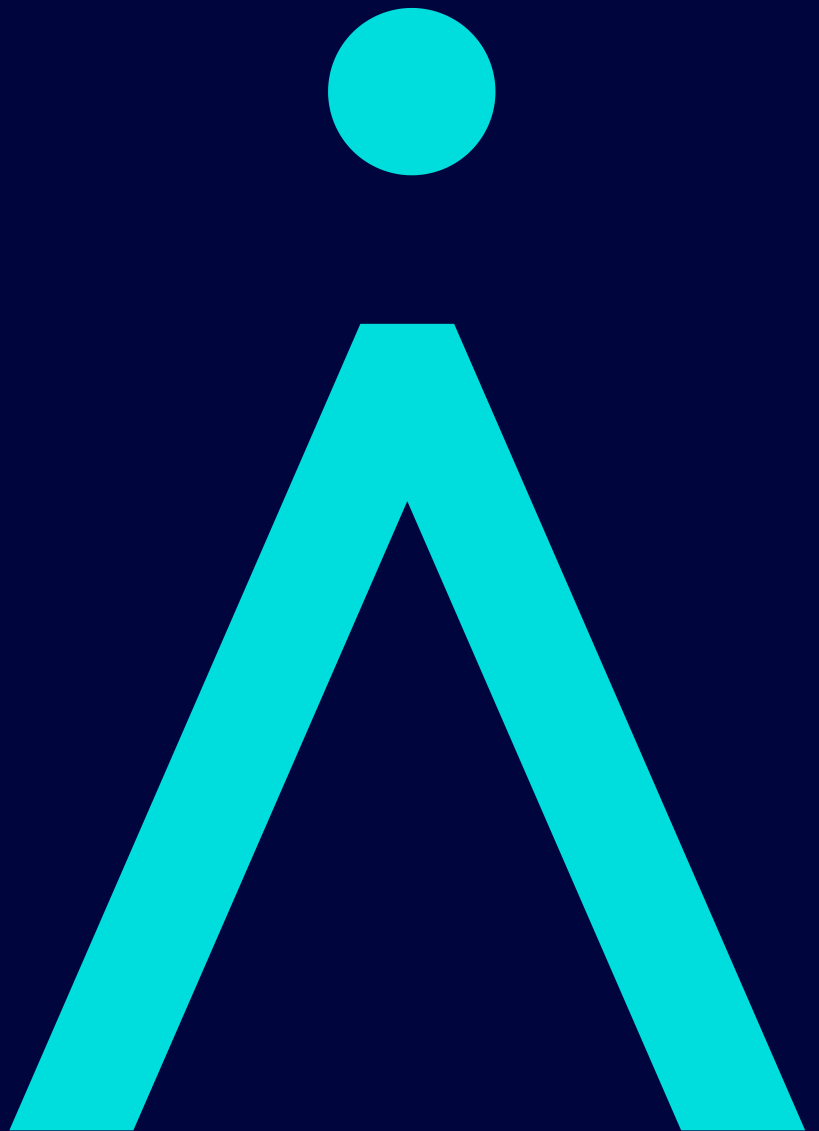
or continue with



[Don't have access? Signup.](#)

BASE64

AI Platform



Processing Documents Using Flows

- A Flow is a workspace that defines how documents are processed. Each Flow determines how documents are ingested, reviewed, enhanced with AI, and sent to your systems.

My Flows
Create workflows to automate your document processes.

Select columns [CREATE A NEW FLOW](#)

Name	Your role	Needs review	Total	Last updated
Umut's Default Flow	admin, owner	51	52	2025-07-09 09:14:23
Alp Havaçılık	admin, owner	6	6	2025-04-18 14:58:10
Botteq Egitim Flow	admin, owner	3	4	2025-04-15 16:03:22
Copy of Transportation-Northeast Northeast Application	admin, administrator, owner	2	2	2025-01-30 19:11:03
cuttingham	admin, owner	0	0	Never
cuttingham	admin, owner	5	5	2025-09-24 13:59:32
cube flow	admin, owner	0	0	Never
cuttingham	admin, owner	0	0	Never
Daneme2	admin, owner	3	3	2024-12-24 12:53:47
Expanding	admin, owner	0	0	Never
Generic IDP	admin, administrator	6	13	2025-02-17 14:13:37
hola gmail.com	admin, sponsor	0	0	2025-04-22 11:54:03
idm	admin, owner	0	0	Never
Policies	admin, reviewer	15	30	2025-03-05 16:13:55
Quiz gen	admin, owner	13	24	2025-03-05 17:13:50
THY Flow	admin, owner	7	107	2025-02-21 14:52:01
Umut's Default Flow gmail.com	admin, sponsor	3	3	2024-10-11 16:32:15
Velox EDI - MSL Policy	admin, reviewer	1	1	2025-04-13 17:02:37
Wednesday Night	admin, owner	1	1	2024-12-19 15:58:02
Your New Base64 Flow gmail.com	admin, sponsor	0	0	Never

- After Selecting the Flow you want to work on, click on the Flow and start uploading documents. As First Step click on upload button positioned on right up pane.

BASE64 FLOWS CUSTOM MODELS DEMOS INTEGRATIONS UMUT.COORDINATOR@BASE64.AI

Demo's Default Flow
List and review results you processed in this Flow

Search like "Show me driver licenses that are expired" |

File name	Name	Updated at	Status
Forms like ACORD	ACORD 25: Certificate of liability insurance form	2025-07-13 16:22:46	Needs review
Barcodes like PDF417	North Carolina driver license	2025-07-13 16:16:52	Rejected
Invoice	Invoice	2025-07-13 16:15:16	Approved

- Next, select the document type from the drop-down list and click the upload file button to choose the document you want to process.

Demo's Default Flow
List and review results you processed in this Flow

Search like "Show me driver licenses that are expired" |

Filter document types...

MODELS

Driver license

Finance

ID

Insurance

Legal

OCR & Handwriting

Semantic




Forms like ACORD

Barcodes like PDF417

UPLOAD FILE

ACORD 25: Certificate of liability insurance form	2025-07-13 16:22:46	Needs review
North Carolina driver license	2025-07-13 16:16:52	Rejected

Document Review Page (HITL)

- Base64 provides a Human-in-the-Loop (HITL) interface that allows users to manually review, approve, or reject documents before final export.
- The statuses can be set manually or programmatically.
- Document statuses include:
 -  **Approved** – Document and data extraction results are accepted and sent to your connected system.
 -  **Rejected** – Document is not accepted, e.g., poor image quality or invalid document type.
 -  **Needs Review** – Awaiting human input to review and correct AI results, followed by manual approval or rejection of the document.

Demo's Default Flow
List and review results you processed in this Flow

Search like "Show me driver licenses that are expired" | [Filter] [Export] [Download] [Share] [List] [Settings]

File name	Name	Updated at	Status
Barcodes like PDF417	North Carolina driver license	2025-07-13 16:16:52	Rejected
Invoice	Invoice	2025-07-13 16:15:16	Approved
Receipt	US receipt	2025-07-09 09:09:06	Needs review

- To review documents:
 - Navigate to your Flow.
 - Select a document.
 - Verify and edit extracted fields.
 - Mark the document as Approved or Rejected.

Demo's Default Flow > Forms like ACORD

ACORD **CERTIFICATE OF LIABILITY INSURANCE** **DATE (MM/DD/YYYY)** 5/31/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Hollywood Insurance Brokers 9800 Santa Monica Blvd Beverly Hills, CA 90210	CONTACT NAME: John Hancock PHONE (A/C, No, Ext): (987) 654 - 3210 FAX (A/C, No): (123) 555-6789 E-MAIL ADDRESS: johnthebroker@hollywoodbrokers.com														
INSURED A Cow Jumped Over the Moon, LLC 500 Manhattan Ave., Ste. G New York, NY 10001	<table><thead><tr><th>INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr></thead><tbody><tr><td>INSURER A: A Really Good Insurance Company</td><td>12345</td></tr><tr><td>INSURER B: Fire and Rain Insurance</td><td>67890</td></tr><tr><td>INSURER C:</td><td></td></tr><tr><td>INSURER D:</td><td></td></tr><tr><td>INSURER E:</td><td></td></tr><tr><td>INSURER F:</td><td></td></tr></tbody></table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: A Really Good Insurance Company	12345	INSURER B: Fire and Rain Insurance	67890	INSURER C:		INSURER D:		INSURER E:		INSURER F:	
INSURER(S) AFFORDING COVERAGE	NAIC #														
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INSURER B: Fire and Rain Insurance	67890														
INSURER C:															
INSURER D:															
INSURER E:															
INSURER F:															

COVERAGES **CERTIFICATE NUMBER:** ABC-12345 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY					EACH OCCURRENCE \$ 1,000,000

APPROVE

Ask current document

Q & A Type or speak your question...

Summarize the document

Summarize in Spanish

List issues in the document

Model

ACORD 25: Certificate of liability insurance form

Date

2020-05-31

Contact name

John Hancock

Producer

Hollywood Insurance Brokers 9800 Santa Monica Blvd Beverly Hills, CA 90210

Contact phone

(987) 654-3210

Contact fax

(123) 555-6789

Contact email

johnthebroker@hollywoodbrokers.com

Note: Approval and rejection will run the downstream integrations, e.g., inserting results into a database, paying the invoice. Changing the document status back to needs review will not revert the changes in the downstream systems.

Document Review Page (HITL)

- Review and edit each extracted field before approving the document.

← Demo's Default Flow > Forms like ACORD

Document: 1/1Page: 1/1

ACORD

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Hollywood Insurance Brokers
9800 Santa Monica Blvd
Beverly Hills, CA 90210

CONTACT NAME: John Hancock

PHONE (A/C, No, Ext): (987) 654 - 3210FAX (A/C, No): (123) 555-6789

E-MAIL ADDRESS: johnthebroker@hollywoodbrokers.com

INSURER(S) AFFORDING COVERAGE

INSURER A: A Really Good Insurance Company12345

INSURER B: Fire and Rain Insurance67890

INSURED

APPROVE

Ask current document

🔍 Type or speak your question...

Summarize the document

Summarize in Spanish

List issues in the document

Model

ACORD 25: Certificate of liability insurance form

Date

2020-05-31

Contact name

John Hancock

Producer

- Ask questions to extract data and speed up your review.

← Base64.ai's Default Flow > Forms like ACORD

Document: 1/1Page: 1/1

ACORD

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INSURER(S) AFFORDING COVERAGE

INSURER A: A Really Good Insurance Company12345

INSURER B: Fire and Rain Insurance67890

INSURED

A Cow Jumped Over the Moon, LLC
500 Manhattan Ave., Ste. G
New York, NY 10001

APPROVE

Ask current document

🔍🗣 Insurer A code? X▶

Summarize the document

Summarize in Spanish

List issues in the document

🕒 Insurer A code?

🕒 12345

🔍🗣 Ask a follow up question...

What is the name of Insurer A?

What is the code for Insurer B?

Who is the contact person for the insurance?

- The tables are also available for your edit and review.

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500 Manhattan Ave., Ste. G
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INSUR LTR

TYPE OF INSURANCE

ADD'L SUBR

INSUR WVD

X

GENERAL LIABILITY

X

COMMERCIAL GENERAL LIABILITY

TableChart

Table 2

INSURER(S) AFFORDING COVERAGE

NAIC

A Really Good Insurance Company12345

Fire and Rain Insurance67890

Integrations

- Base64.ai makes it easy to integrate your processes. We will deep dive into that in the following pages.
 - Flows are the easiest way to design your integrations.
 - The second option is the API Integration. Any system capable of making a REST API call can be integrated with Base64.
 - Base64 is connected to many RPA systems and hardware scanners.

BASE64

FLOWSDOCUMENT MODELSDEMOSINTEGRATIONS

UNIT.COCDNA@BASE64.AI

Integrations

INTEGRATE YOUR WAY

Supercharge your existing software with Base64 Document AI.
With hundreds of prebuilt integrations across cloud platforms, on-premise systems, scanners, and RPA tools, you can get started in under 5 minutes.

Option 1: Flows

Flows are the easiest way to automate document processing with Base64.
Create workflows to automate document processing in minutes using 400+ prebuilt third-party integrations. Flows also allow humans to review the document results with Base64 human-in-the-loop verification technology.

LAUNCH FLOW MANAGER

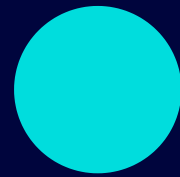
Option 2: API integration

1 simple API call for all document types.
SDKs in 27 programming languages and libraries.
No machine learning expertise required.
[Read the API docs](#)

RECREATE AN API KEYGET YOUR API KEY

Deep Dive: Flow

BASE64



Creating and Managing Flows

- A Flow is an AI workspace that defines how documents are processed. Each Flow determines how documents are ingested, reviewed, enhanced with AI, and sent to your systems. While Flows work individually, you can still send documents across Flows.

My Flows
Create workflows to automate your document processes.

Select columns [CREATE A NEW FLOW](#)

Name	Your role	Needs review	Total	Last updated
Umut's Default Flow	admin, owner	51	52	2025-07-09 09:14:23
Alp Havaçılık	admin, owner	6	6	2025-04-18 14:58:10
Botteq Egim Flow	admin, owner	3	4	2025-04-15 16:03:22
Copy of Transportation-Norland NonTest Application	admin, administrator, owner	2	2	2025-01-30 19:11:03
cuttingham	admin, owner	0	0	Never
cuttingham	admin, owner	5	5	2025-01-24 13:59:32
cube flow	admin, owner	0	0	Never
cuttingham	admin, owner	0	0	Never
Deneme2	admin, owner	3	3	2024-12-24 12:53:47
Expanding	admin, owner	0	0	Never
Generic IDP	admin, administrator	6	13	2025-02-17 14:13:37
hola gmail.com	admin, sponsor	0	0	2025-04-22 11:54:03
nbn	admin, owner	0	0	Never
Policies	admin, reviewer	15	30	2025-03-05 16:13:55
Quiz gem	admin, owner	13	24	2025-03-05 17:13:50
Thry Flow	admin, owner	7	107	2025-02-21 14:52:01
Umut's Default Flow gmail.com	admin, sponsor	3	3	2024-10-11 16:32:15
Velox EDI - MBL Policy	admin, reviewer	1	1	2025-04-13 17:02:37
Wednesday Night	admin, owner	1	1	2024-12-19 15:58:02
Your New Base64.ai Flow gmail.com	admin, sponsor	0	0	Never

- For first-time users, Base64 creates a default Flow for you when your account is created. If you want to create a new Flow from scratch or an existing one, click on the "Create a New Flow" button on the upper right of your Flow page.

Create a Flow

Name

Your New Base64.ai Flow

Description

Settings

☒ Create from scratch

☐ Use a settings file

☐ Copy from another flow

Select a flow

CANCEL **CREATE**

- Write the name of your Flow and description.
- Create a new Flow by duplicating the settings of an existing one from the selection menu.
- Alternatively, import a Flow settings file from your drive to create a new Flow.

Flow Settings: Info

- In addition to AI Features, Integration options (to be covered in later pages), and the Q&A Feature (also to be covered in later pages), Base64 enables you to configure your Flows.
- You can start configuring your Flows by clicking on the settings button positioned at the top right of your Flow page.

Demo's Default Flow Settings
Customize your existing Flow.

Info >
Permissions >
Classification >
Extraction >
AI features >
Retention >
Restrictions >
Integrations >
Review page >
Delete >

Info

Name

Demo's Default Flow


Description

Enter a description for your flow...

Tags


Enter tags... ▾

Owner

umut.cocen@base64.ai 

[Transfer ownership](#)

Flow ID

dde5bff1-0fe5-4103-b5be-97619d0fdf51 

- You can update the Flow name, description, and tags from the Info tab.
- You can transfer the ownership to another user.
- Easily copy the Flow ID for integration purposes.

Flow Settings: Permissions

- Flow owner or Domain Administrators can control the user access levels:
 - Administrators can configure Flow, upload, and review documents.
 - Uploaders can only upload documents.
 - Reviewers can only review uploaded documents.

Permissions

Administrators

Administrators can edit the Flow settings including deleting the Flow. They can upload and review the results. Flow owners have administrator permissions thus they can also upload and review the documents.

Uploaders

Uploaders are allowed to upload documents to this Flow.

Enter a domain name (such as example.com) to add everyone within a company or specify individual emails.

☐ **Allow public uploads**

Allow anyone to upload documents to this Flow

Reviewers

Reviewers are allowed to see the uploaded documents and make changes to the AI results on the review page.

Enter a domain name (such as example.com) to add everyone within a company or specify individual emails.

☒ **Allow the following users to see, review, and approve the results:**

☐ **Allow file downloads**

Allow reviewers to download original files

☐ **Auto-approve the results without a human review**

Notifications

Automatically alerts reviewers when documents are submitted, helping maintain a smooth and timely review workflow.

☐ **Notify reviewers**

Send a notification email to reviewers when a document is uploaded to the flow

[Learn more](#) about roles and their permissions.

Flow Settings: Classification

- Choose which models will be used in your Flow for document processing.
 - Select from 2,800+ pre-trained models for instant, out-of-the-box accuracy.
 - Use your own Custom Model, either standalone or combined with pre-trained models.
 - Define a fallback strategy using one of three available options for model selection priority.

Demo's Default Flow Settings
Customize your existing Flow.

Info

Permissions

Classification

Extraction

AI features

Retention

Restrictions

Integrations

Review page

Delete

Classification

Base64 automatically detects the document type and processes it using the appropriate model. You can customize this behavior if needed.

Document types

Specify document types that should be used for classification. Base64 understands over 2,800 document models out-of-the-box. You can also add your [Custom Models](#).

☒ Use Base64 pretrained document types

Select or enter document types...

Fallback strategy

Specify the document type to use when the document does not match any of the listed types.

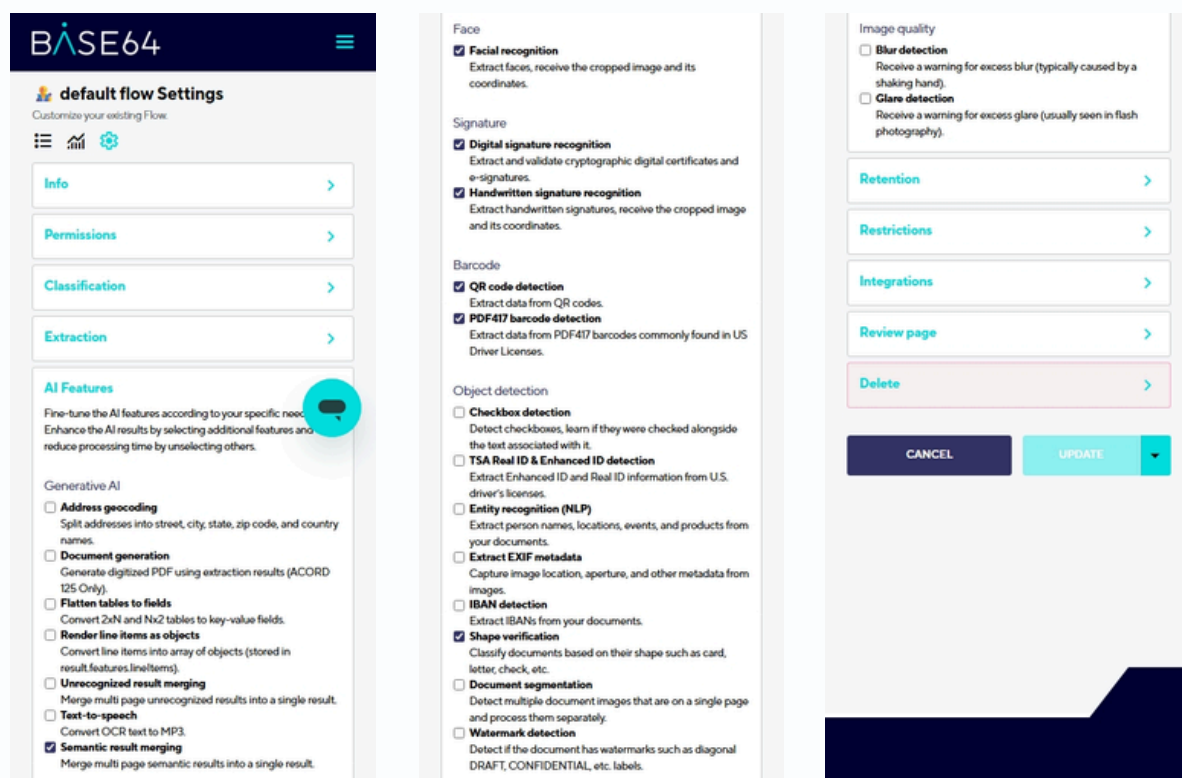
☐ Closest match

☒ Semantic (OCR, tables, and forms)

☐ Unrecognized (OCR only)

Flow Settings: AI Features

- Base64 allows you to fine-tune each Flow by enabling only the AI features you need. This reduces processing time, improves accuracy, and ensures your automation pipeline is optimized for your specific use case.
- Check the boxes that match your goals — from checkbox detection to signature recognition — directly in the Flow settings.



- **Note:** In addition to these, Base64 AI also offers AI features in Custom Model, Q&A, and post-processing.
- All these will be covered in related sections.

Flow Settings: Extraction & Retention

Extraction

Changes made here will be reflected in the API result.
Our AI will make the data extraction in the same order of this page.

Field taxonomy

Different documents may have alternative wording for the same table header.
Add alternative spelling, wording, or synonyms to your taxonomy to fall back on if the preferred field does not exist in the result.
[Learn more about the taxonomy.](#)

Preferred field

Preferred field...

+ Add column

Data source

Enter alternative spelling, wording, or synonyms...

Replace matched

☐

Table taxonomy

Normalize table headers using our table taxonomy.
Add alternative spelling, wording, or synonyms to your taxonomy to fall back on if the preferred header does not exist in the result.

Preferred header

Preferred header...

Data source

Enter alternative spelling, wording, or synonyms...

Additional required fields

Add essential field names that must be present in the result even if they were not found in the document.
Template Builder, Custom Taxonomy, and Question & Answer keys are already required fields, so there is no need to add them here.
The order of fields does not change the output.

Select or enter required fields...

Disabled fields

Add field names you want to remove from the AI extraction results.

Select or enter disabled fields...

☐ Disable all non-required fields

Post-processing

Navigate to the [Integrations Tab](#) to augment the AI results with custom business logic and data from external systems.

- Configure your Data Extraction options like:
 - Taxonomy configuration on fields and tables
 - Defining Additional Required and Disabled fields on top of Q&A-related fields

- Configure data retention and searchability policies for your Flows.:
 - Data retention – How long do you want to keep the document and the AI result after the result is approved or rejected?
 - Documents in “needs review” status stay indefinitely.
 - Do you want your other Flows to be able to search content in this Flow?
 - This feature is also known as RAG (Retrieval Augmented Generative AI)

Retention

Data retention policy

Specify when files and their extracted data should be deleted, excluding those in needs review status.

Only files that are approved, auto-approved, or rejected will be subject to deletion. If the retention period is set to 0, files will be deleted immediately after processing is complete.

☐ Limit data retention period

Document search engine

Search documents in this Flow by their type and contents, e.g. “show me driver licenses that aren’t expired”

☒ Enable AI powered search engine

Add Index fields...

Flow Settings: Restrictions

- Do you have exceptional cases/scenarios?
 - No worries, Base64 also has some out-of-the-box features that help you to overcome some exceptional cases.

Restrictions

These settings are useful for special scenarios only. Enabling them could break regular data extraction.

Specialized workloads

- ☐ **Hide DOM**
DOM (document object model) shows locations of each page block, line, and word along with their OCR confidence scores. Hiding DOM reduces the response size about 20x.
- ☐ **Convert DOM text blocks to result fields**
Use the blocks of text in documents as result fields. This setting disables data extraction.
- ☐ **Partial result extraction for US IDs**
Continue processing US IDs and driver's licenses even if a document is mostly unreadable or cropped. This setting would not allow you to process other document types.
- ☐ **Process Excel tables only**
Only return data from Excel tables. This disables all other data extraction.
- ☐ **Merge multi-page tables**
Merge tables that span across multiple pages.
- ☐ **Keep original tables**
Keep original tables instead of normalized tables.

Set start page

Begin reading documents from the specified start page. Pages before this will be ignored.

- ☐ Set start page number

Set page limit

Read documents up to the specified number of pages. The remaining pages will be discarded.

- ☐ Set limit pages count

Reject long documents

Return an error if the document has more than the specified number of pages. No processing will occur.

- ☐ Set maximum page count

Document classification only

If selected, our AI will only classify the document type but will not extract data from documents.

- ☐ Run only document classification

- If you don't want to make your Flow available anymore, you can
 - **Delete:** Deletes your data.
 - **Freeze:** Keeps your data but will not accept new documents.

Delete

Warning: This is the danger zone.

Use the following options to pause or delete operations within this particular Flow.

Freeze flow

Keep your data and settings, but do not accept new files.

FREEZE

Delete Flow

Delete your documents and settings. This action is not reversible.

DELETE

Flow Settings: Integrations

- Integrations allow your Flow to communicate with over 400 popular platforms such as Google Drive, Dropbox, and Salesforce using the built-in no-code components. Ingest new documents as they come, augment the results with your custom business logic, and export the results to any external system without requiring coding or servers.

Import

Email integration

Import emails and attachments sent to `scan+dde5bffa-0fe5-4103-b5be-97619d0fdf51@base64.ai`.

☐ **Process email message**

Converts the email text and images into PDF, which will be processed as a single upload.

☒ **Process attachments**

Each attachment file will be processed as a separate upload.

Software integrations

API access is always enabled.

Hardware integrations

Connect your Flow to hardware devices like scanners and fax machines to automatically ingest paper documents.

No-code form integration

Create a smart form to allow your customers to upload a document. Customers can review & edit results before sending to email, CRM, or API

No-code injection integration

Retrofit your legacy website HTML forms with AI-powered autofill capability.

Import workflow

Use hundreds of no-code integrations that automatically import documents into this Flow.

Edit your existing Import Integration or add another

Post-processing

Post-processing workflow

Augment the AI results with custom business logic and data from external systems. Changes made here will be reflected in the API result.

Create your post-processing Integrations

Export

Export workflow

Send the document and the results to external systems such as your database or file share. The result will include any manual review changes.

Create your export Integrations

Email replies

Send an email with the results of the document processing.

Enter email addresses to receive results...

☐ **Reply all**

Reply to all recipients of the original email with the processing results.

Flow Settings: Review Page

Review page

Help

Adjust the Flow User Interface (UI) settings to review the documents more efficiently.

Upload instructions

Provide a file that explains your review processes. The reviewers can access it from the review page for guidance.

UPLOAD A DOCUMENT

Display additional columns

Select the additional columns to display on the Flow results list.
Select the suggested items or enter custom data sources, which should be as in the API result format, e.g., companyName, dateOfBirth, etc.
File name of the document and status of the result are static columns.

Display name

Name

Updated at

+ Add column

Data source

Model name

Updated at

Table editor chart background color

Set the background color for the chart in the table editor on the download operation.

Table editor highlight threshold

Set a confidence level between 0 and 100% to highlight the cells with low confidence score.

10 %

Table editor default position

Set the default position of the table editor in the flow page.

Center

Review time SLA

Set document review timeline to highlight overdue items.

☐ Expected review time

Reviewer watermarks

Displays documents to reviewers behind a watermark.

☐ Hide watermarks on reviewed documents

Menu position

Set the position of the document editor menu.

Right

Fit to page

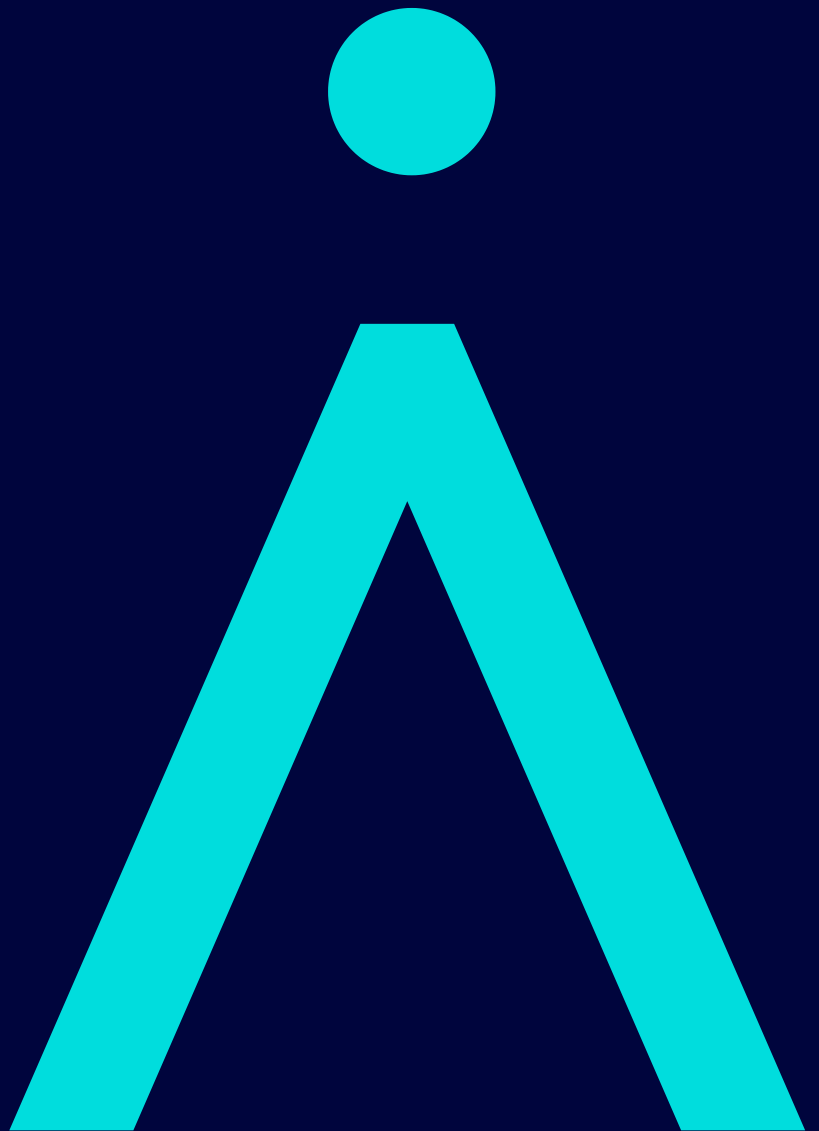
Set page fit and alignment of the document.

Fit to width

- Configure your Review Page.

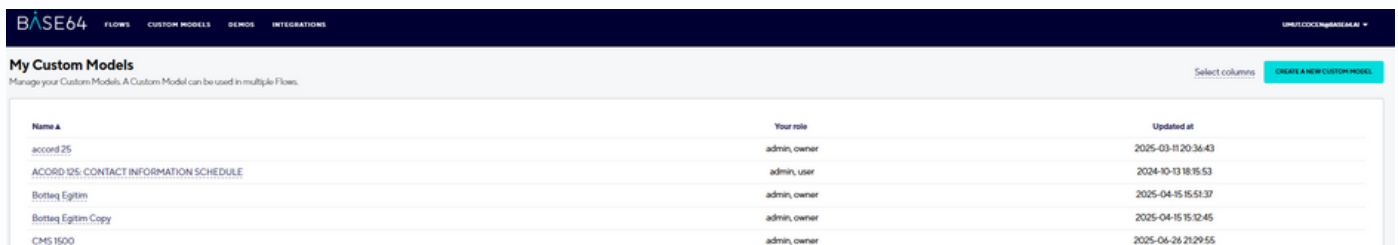
BASE64

Deep Dive: Custom Models



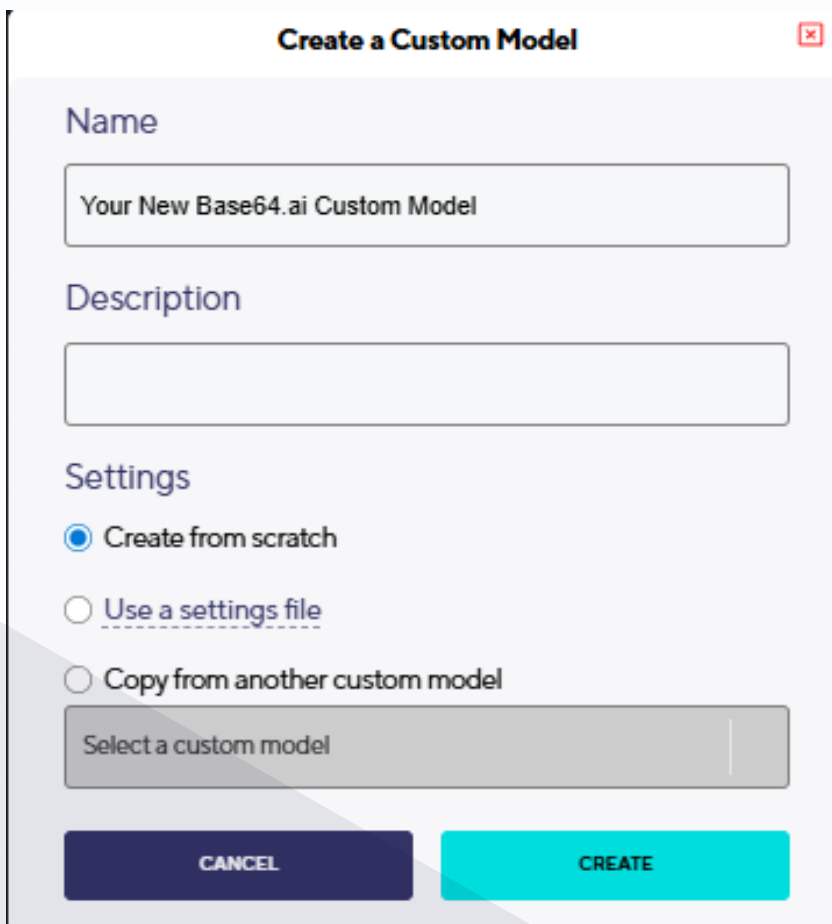
Creating & Managing Custom Models

- The Custom Model Builder allows you to train the AI on your unique document types.
- When to use it:
 - You process industry-specific layouts not covered in the default library.
 - You want to fine-tune field detection for a specific use case.
- Key Benefits:
 - Handles non-standard document layouts.
 - Boosts accuracy with targeted extraction rules.
 - Supports layout-based training and field overrides.



Name	Your role	Updated at
accord 25	admin, owner	2025-03-11 20:36:43
ACORD 125 CONTACT INFORMATION SCHEDULE	admin, user	2024-10-13 18:15:53
Botteq Egitim	admin, owner	2025-04-15 15:51:37
Botteq Egitim Copy	admin, owner	2025-04-15 15:12:45
CMS 1500	admin, owner	2025-06-26 21:29:55

- To create a Custom Model from scratch or an existing one, click on the "Create a New Custom Model" button positioned on the upper right of your Flow page.



Create a Custom Model

Name

Description

Settings

☒ Create from scratch

☐ Use a settings file

☐ Copy from another custom model

Select a custom model

CANCEL **CREATE**

- Write the name of your Custom Model and description.
- Create a new Custom Model by duplicating an existing model's configuration from the selection list.
- Alternatively, import a Custom Model settings file from your drive to create a new Flow.

CM: Info & Permissions

- On top of AI Features, Integration options (will be shown in later pages), and Q&A Feature (will be shown in later pages), Base64 allows you to create/configure your c.
- You can start configuring your Custom Models by clicking on the name of the Custom Model you want to configure.

accord 25 Settings
Customize your existing Custom Model.

Info

Model name
accord 25

Model description
Your Custom Model description

Model category
☒ **Documents:** Classification and data extraction for entire documents (e.g., understanding custom forms, contracts, IDs, etc.)
☐ **Features:** Object recognition within documents (e.g., detecting logos, fingerprints, or rubber stamps, etc.)
☐ **Document splitter:** Split documents into multiple subdocuments based on your criteria (e.g., page count, section, etc.)

Tags
Enter tags...

Owner
umut.cocen@base64.ai
[Transfer ownership](#)

Model type
custom/user/e5d95c3d-7473-4599-be52-f028f4488b62

[Clone Custom Model](#)
Create a new Custom Model using the parameters of the current Custom Model. This clone operation does not copy the post-processing integration

[Clone Custom Model](#)

- You can update the Custom Model name, description, and tags from the Info tab.
- You can transfer the ownership to another user.
- Easily copy the Flow ID for integration purposes.
- You can update the model category.
- You can clone your Custom Model.

accord 25 Settings
Customize your existing Custom Model.

Permissions

Model administrators
Specify the emails of Flow owners and administrators who can edit this model and use it in their Flows.
Enter the emails or domains of model administrators...

Model users
Specify the emails of Flow owners and administrators who can use this model in their Flows but cannot make any further changes on it.
Enter the emails or domains of model users...

- You can manage the permissions by assigning administrators and model users who can use it in their Flows.

CM: Classification

- Fine-tune document classification using “must-have” and “banned” keywords.

accord 25 Settings
Customize your existing Custom Model.

Info >

Permissions >

Classification >

Extraction >

Flows >

Delete >

Classification

You can automatically classify documents based on their text content, such as words, phrases, and regular expressions. This operation is case-sensitive unless you use regular expressions, e.g., `/New York/i` matches New York, NEWYORK, and new york.

Overrides

Override a classification match using the following rules. This section is useful for fine-tuning classification across multiple document types.

Must-have text
Your document will only be classified under this Custom Model if **all** of the following text is present.

Enter text...

Banned text
Your document will not be classified under this Custom Model if **any** of the following text is present.

Enter text...

- Identify key text for classification using either the express method or probability thresholds.

Classification

Select a classification method below and provide its texts.

☒ **Express method**
If your document includes **all** of the following text, it will be automatically classified as this custom model. Otherwise, the AI will use other classification methods.

You can upload a number of your documents here for analysis and automatic classification generation.

UPLOAD SAMPLE DOCUMENTS HERE (MINIMUM 3)

Enter text...

☐ **Probability score**
Add the following text from the document to increase the classification probability. The more of the following text is found in the document, the more likely it is to be classified as this custom model.

Enter text...

Page count

Select the expected page count. Single-page documents such as IDs are 1 page. Certain forms may have a fixed page length. Some documents, such as contracts, do not have page limits.

Unlimited

Document shape

Classify documents based on shape, such as "Letter" for invoices and "Card" for IDs.

Unspecified

CM: Extraction

- Base64 provides numerous features to facilitate data extraction from documents. SFR (which we will discuss in the following pages) and AI-supported Layout Features are among the available options.

accord 25 Settings
Customize your existing Custom Model.

Info

Permissions

Classification

Extraction

Flows

Delete

Extraction

Changes made here will be reflected in the model result.
Our AI will make the data extraction in the same order of this page.

Template Builder

Define document fields using coordinates to extract key information accurately, even from complex layouts.

Edit template Delete template

Layout Features

Select the layout features you want to add.
Additional features, such as facial and signature recognition, can be enabled in the Flow settings.

☐ **Enable form reader**
Detect form fields and key-value pairs.

☐ **Enable table reader**
Detect tabular data layouts.

☐ **Enable checkbox detection**
Detect checkboxes, learn if they were checked alongside the text associated with it.

☐ **IBAN detection**
Extract IBANs from your documents.

☐ **Re-Order Lines and Words**
Re-order lines and words in the OCR of the document.

☐ **Enable handwritten signature recognition**
Extract handwritten signatures, receive the cropped image and its coordinates.

☐ **Enable face detection**
Extract faces, receive the cropped image and its coordinates.

☐ **Enable QR code detection**
Extract data from QR codes.

☐ **Enable entity recognition**
Extract person names, locations, events, and products from your documents.

- Apply taxonomy to categorize fields and tables for more structured output.

Field taxonomy

Download

Upload

Add alternative spelling, wording, or synonyms to your taxonomy to fall back on if the preferred field does not exist in the result.
[Learn more about the taxonomy.](#)

Preferred field

Data source

Replace matched

Preferred field...

Enter alternative spelling, wording, or synonyms...

☐ ☒

+ Add column

Table taxonomy

Download

Upload

Normalize table headers using our table taxonomy.
Add alternative spelling, wording, or synonyms to your taxonomy to fall back on if the preferred header does not exist in the result.

Preferred header

Data source

Preferred header...

Enter alternative spelling, wording, or synonyms...



☐

+ Add a new header

CM: Extraction

- Base64 provides the option to define required and disabled fields. With post-processing options, you can increase the quality of your data extractions.

Questions & Answers



Add questions you want our AI to answer, which will generate fields in the result.

You can upload a sample of your document here for analysis and automatic question generation.

UPLOAD SAMPLE DOCUMENTS HERE (MINIMUM 1)

Field name	Question	Modality	Data source
<input type="text" value="Field name..."/>	<input type="text" value="Ask a question..."/>	<div>Text</div>	<div>Ask current document</div>

+ Add question

Additional required fields

Add essential field names that must be present in the result even if they were not found in the document. Template Builder, Custom Taxonomy, and Question & Answer keys are already required fields, so there is no need to add them here. The order of fields does not change the output.

Disabled fields

Add field names you want to remove from the AI extraction results.

☐ Disable all non-required fields


Predefined extensions

Extend the AI results with predefined document understanding modules. Changes made here will be reflected in the API result. [Learn more about the extensions.](#)

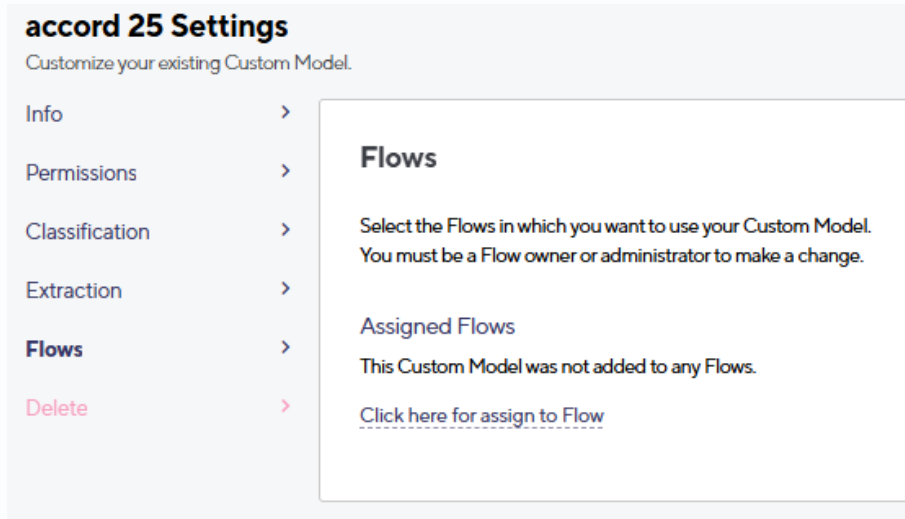
Post-processing

Post-processing workflow

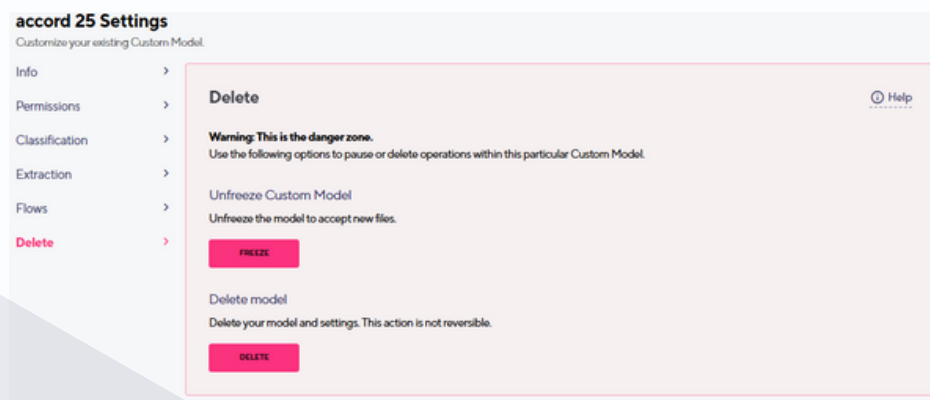
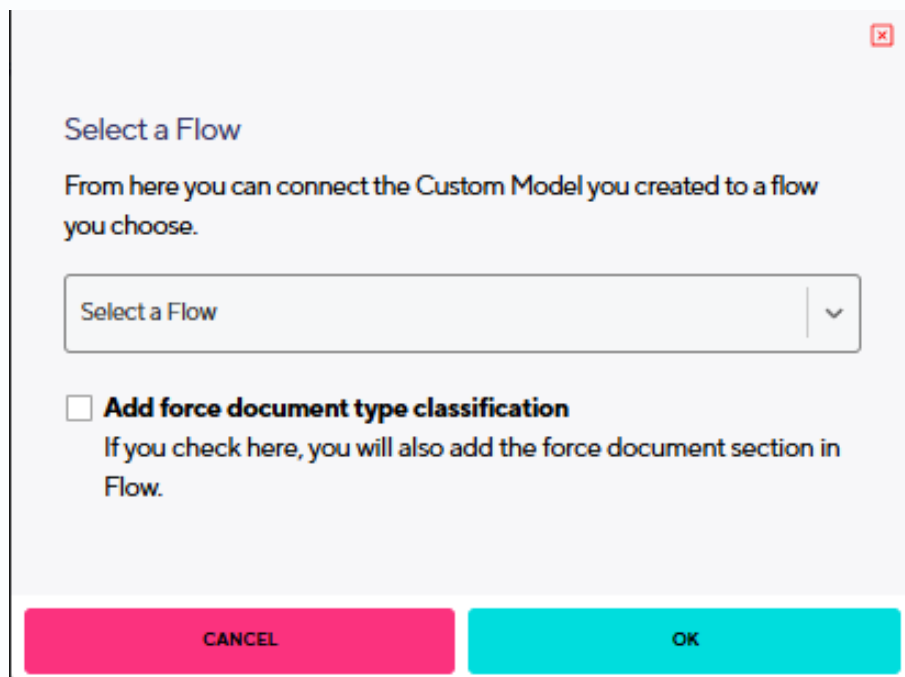
Augment the AI results with custom business logic and data from external systems. Changes made here will be reflected in the API result.

 Need help?

CM: Flows & Delete



- From Custom Models, you can assign which Flows can use your Custom Model while processing the documents.
- You can also ensure that your Custom Model is set as a forced document type within the assigned Flow.



- Base64 offers you the option to delete or freeze/unfreeze a Custom Model.

CM: Structured Form Reader (SFR)

- Base64 offers another AI-supported Data Extraction Feature called Structured Form Reader (SFR).
- As its name suggests, this feature helps extract data from structured forms and/or fields within unstructured forms.
- Design or update templates from the Extraction tab in Custom Model Settings.

accord 25 Settings
Customize your existing Custom Model.

Info >
Permissions >
Classification >
Extraction >
Flows >
Delete >

Extraction

Changes made here will be reflected in the model result.
Our AI will make the data extraction in the same order of this page.

Template Builder
Define document fields using coordinates to extract key information accurately, even from complex layouts.
[Edit template](#) [Delete template](#)

Layout Features
Select the layout features you want to add.
Additional features, such as facial and signature recognition, can be enabled in the Flow settings.

<input type="checkbox"/> Enable form reader Detect form fields and key-value pairs.	<input type="checkbox"/> Enable handwritten signature recognition Extract handwritten signatures, receive the cropped image and its coordinates.
<input type="checkbox"/> Enable table reader Detect tabular data layouts.	<input type="checkbox"/> Enable face detection Extract faces, receive the cropped image and its coordinates.
<input type="checkbox"/> Enable checkbox detection Detect checkboxes, learn if they were checked alongside the text associated with it.	<input type="checkbox"/> Enable QR code detection Extract data from QR codes.
<input type="checkbox"/> IBAN detection Extract IBANs from your documents.	<input type="checkbox"/> Enable entity recognition Extract person names, locations, events, and products from your documents.
<input type="checkbox"/> Re-Order Lines and Words Re-order lines and words in the OCR of the document.	

- Upload a new document or replace an existing one using the top-right button.
- You can also save the changes by clicking on the save button.

← accord 25 > Template Builder

[SAVE](#)
[UPLOAD DOCUMENT](#)

Upload a reference document to create data fields automatically. Add new fields by selecting an area in the document.

Template document not found

CM: SFR: Design Fields

- The Selected Field Pane helps you to see and edit the chosen field. You can define/edit:
 - Order of the field
 - Name of the field
 - Name of the field key
 - Type of the field
 - Post Processing details (AI Feature)

← CMS 1500 - Template Builder

The screenshot displays the CMS 1500 form template builder interface. On the left is a preview of the 'HEALTH INSURANCE CLAIM FORM' with a QR code and various fields. On the right is the 'Selected field' pane, which is highlighted with a red border. This pane shows the configuration for a specific field, including its order, name, display name, field key, type, and post-processing details. Below the 'Selected field' pane is the 'All fields' list, which contains a list of all fields defined in the template, each with a checkbox and a label. The 'Selected field' pane is currently set to 'Insured's id number'.

- The All Fields pane helps you to see all the defined fields for this template. When you import the template for the first time, our AI eases your life by identifying possible fields. Modify or delete suggested fields by clicking on them in the list.

← CMS 1500 - Template Builder

This screenshot shows the same CMS 1500 form template builder interface, but with the 'All fields' pane highlighted with a red border. This pane lists all the fields defined in the template, each with a checkbox and a label. The fields are organized into a list, and the user can modify or delete them by clicking on them. The 'Selected field' pane is still visible on the right, but it is not the focus of this screenshot. The 'All fields' pane is currently set to 'Insured's id number'.

CM: SFR: Metadata Formatting

- Adjust field name capitalization using the left-hand options menu. You have options like: All capitals, initials are capital, all small.
- Use the field name as its key with a single click from the left-side menu.

Selected field

Field order
1

Page number
1

Display name
A↑ Insured's Id number

Field key
Insuredsidnumber

Type
Text

Post-processing
Type an LLM prompt or write JavaScript code.

- SFR supports fields like checkbox, text, signature, image.

Selected field

Field order
1

Page number
1

Display name
A↑ Insured's Id number

Field key
Insuredsidnumber

Type
Text
Checkbox
Signature
Image
Text

CM: SFR: Post Processing & Labelling

Selected field

Field order

1

Page number

1

Display name

At Insured's id number

Field key

Insuredsidnumber

Type

Text

Post-processing

Type an LLM prompt or write JavaScript code.

Custom suggestions

format as us currency

format as yyyy-mm-dd

format it into yyyy-mm-dd

Id number only

Default suggestions

Format as US phone number

Format as yyyy-mm-dd

Name only

Only email

- With the “Post-Processing” option, you can fine-tune the data extraction from the field. You can define the date format to display processed data in enterprise standards.

- Highlight an area to define a new field, then configure its attributes.

BASE64

FLAWS

CUSTOM MODELS

DEMOS

INTEGRATIONS

CHMS 1500 - Template Builder

HEALTH INSURANCE CLAIM FORM

APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

1. MEDICARE (Medicare)

2. MEDICAID (Medicaid)

3. TRICARE (ID#)

4. CHAMPVA (Member ID#)

5. GROUP HEALTH PLAN (ID#)

6. FECA BOX/LUNG (ID#)

7. OTHER (ID#)

8. INSURED'S I.D. NUMBER (For Program in Item 1)

9. PATIENT'S BIRTH DATE (MM/DD/YY)

10. PATIENT'S NAME (Last Name, First Name, Middle Initial)

11. INSURED'S NAME (Last Name, First Name, Middle Initial)

12. PATIENT'S ADDRESS (No., Street)

13. INSURED'S ADDRESS (No., Street)

14. PATIENT RELATIONSHIP TO INSURED (Self, Spouse, Child, Other)

15. RESERVED FOR NUCC USE

16. INSURED'S POLICY GROUP OR FECA NUMBER

17. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial)

18. OTHER INSURED'S POLICY OR GROUP NUMBER

19. RESERVED FOR NUCC USE

20. INSURANCE PLAN NAME OR PROGRAM NAME

21. EMPLOYMENT? (Current or Previous)

22. AUTO ACCIDENT?

23. OTHER ACCIDENT?

24. CLAIM CODES (Designated by NUCC)

25. IS THERE ANOTHER HEALTH BENEFIT PLAN?

Field order

175

Page number

1

Display name

At Patient's Name

Field key

PatientsNameLastFirstNameMiddleInitial

Type

Text

Post-processing

Type an LLM prompt or write JavaScript code.

All fields

Insured's id number

checkbox Medicare

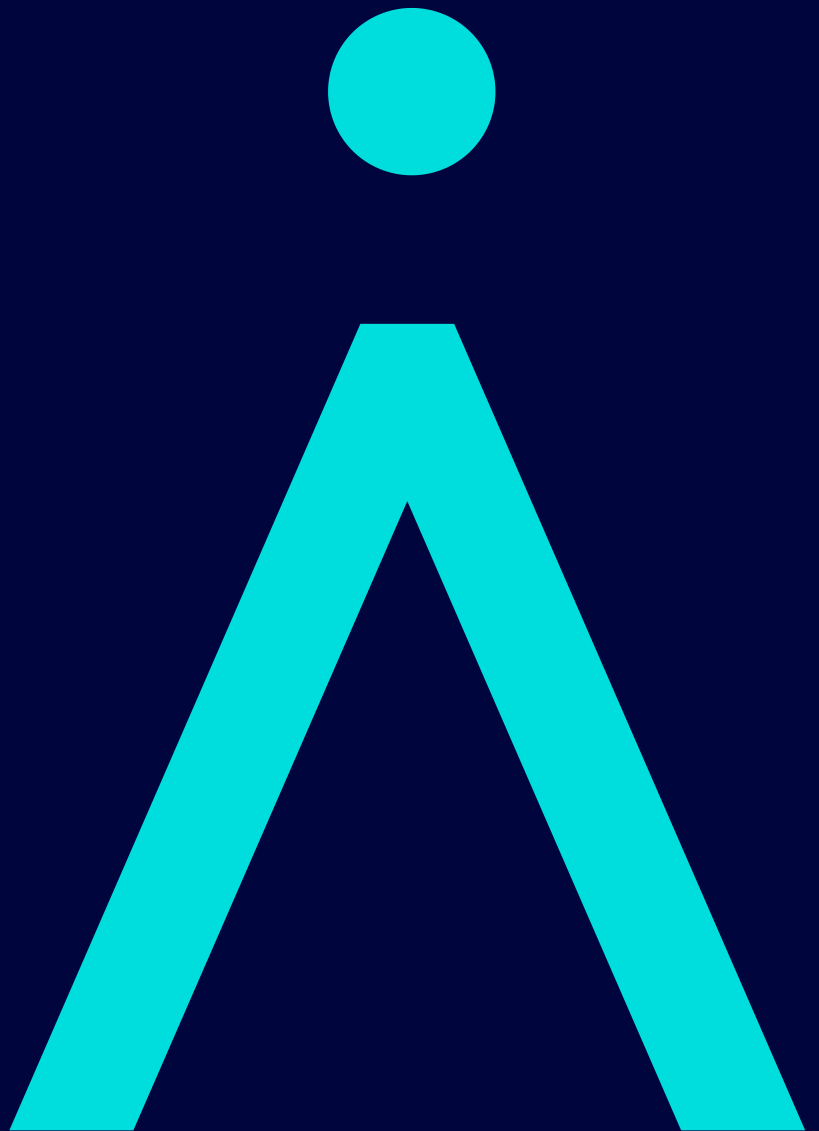
checkbox Medicaid

checkbox Champva

checkbox Group Health Plan

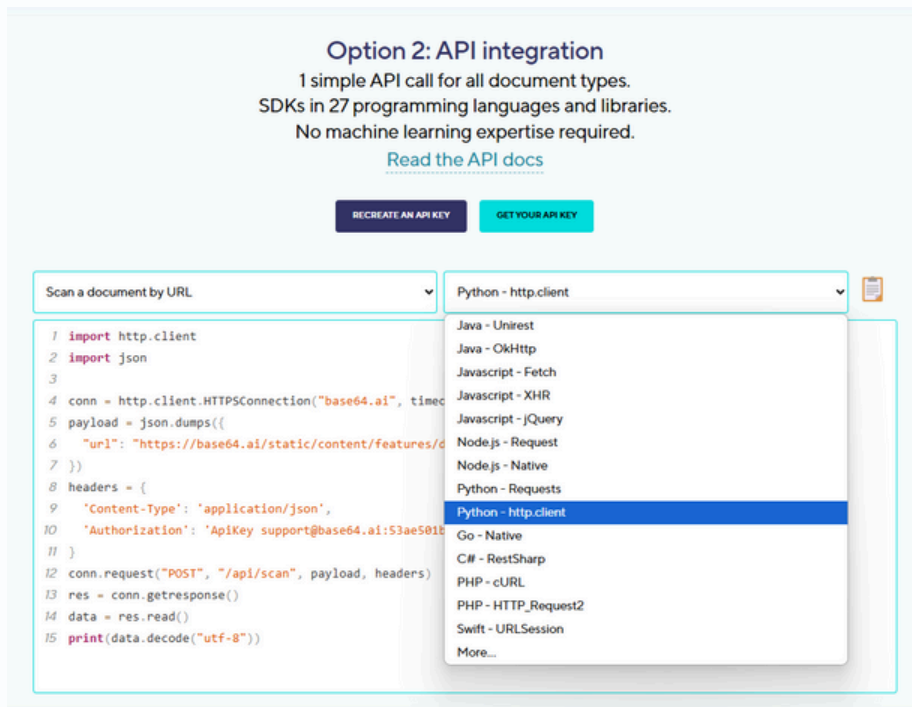
BASE64

Deep Dive: Automation



Automation: RPA & API Integration

- The way we connect to your existing software, workflows, and RPA systems. Setup takes 5 minutes or less. [Click here](#) to navigate to the integrations page.



- Base64 is API first, providing real-time updates for our users.
- All documents will provide the same JSON schema with three main parts:
 - **Model:** Document type, e.g., invoice
 - **Fields:** Key-value pairs, e.g., tax=100
 - **Features:** Tables, signatures, faces, detailed OCR, image properties, etc.



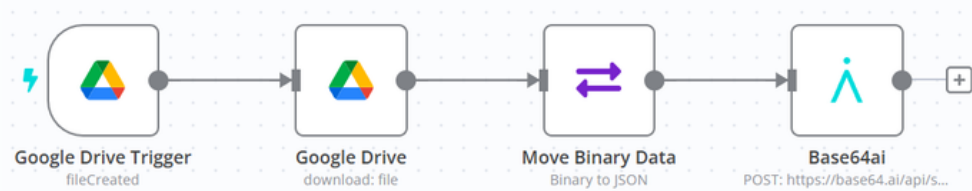
Automation: Flow Integrations

Third-Party Integrations:

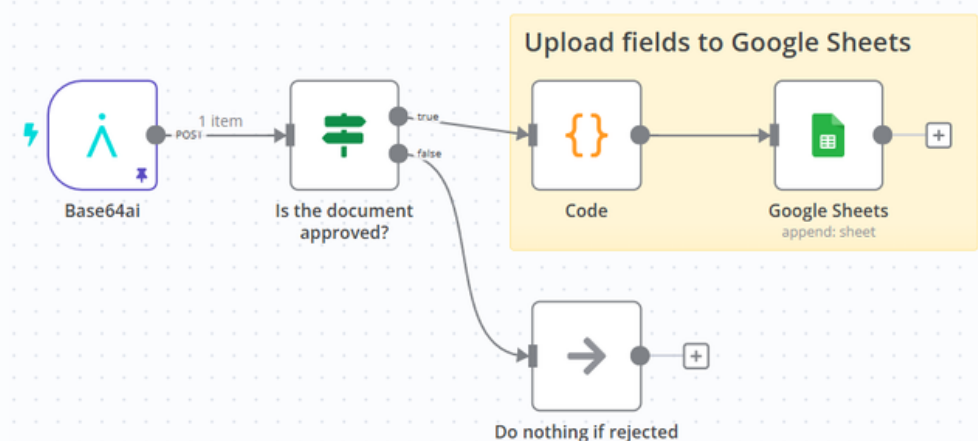
Flows allows integration with third-party services using convenient no-code/low-code nodes.

In the example below, we have set up an import integration from a Google Drive folder. This folder is checked every minute for new documents. When a new document is found, it is sent to Base64 for processing. The processed data is then exported to a Google Sheet.

We have templates like the one shown below, as well as more, under the Flow settings integrations pages.



The screenshot shows the 'Parameters' tab of the 'Google Drive Trigger' node configuration. It includes a 'Fetch Test Event' button, a dropdown for 'Credential to connect with' (Google Drive account 181), and 'Poll Times' settings (Mode: Every Minute, Add Poll Time button). The 'Trigger On' section is set to 'Changes Involving a Specific Folder'. Under 'Folder', it shows 'From list' and 'Flow Demo'. The 'Watch For' section is set to 'File Created', with a warning: 'Changes within subfolders won't trigger this node'. The 'Options' section is currently empty with an 'Add option' button.



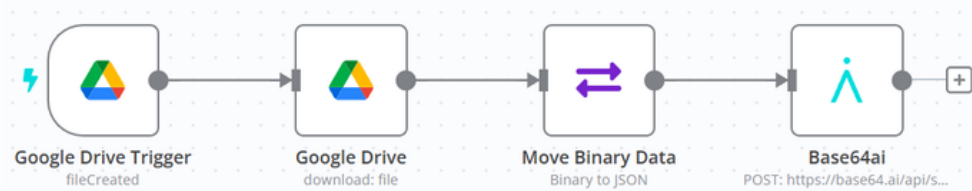
Automation: Integration Options

Third-Party Integrations:

Flows allows integration with third-party services using convenient no-code/low-code nodes.

In the example below, we have set up an import integration from a Google Drive folder. This folder is checked every minute for new documents. When a new document is found, it is sent to Base64 for processing. The processed data is then exported to a Google Sheet.

We have templates like the one shown below, as well as more, under the Flow settings integrations pages.



Google Drive Trigger Fetch Test Event

Parameters Settings Docs

Credential to connect with
Google Drive account 181

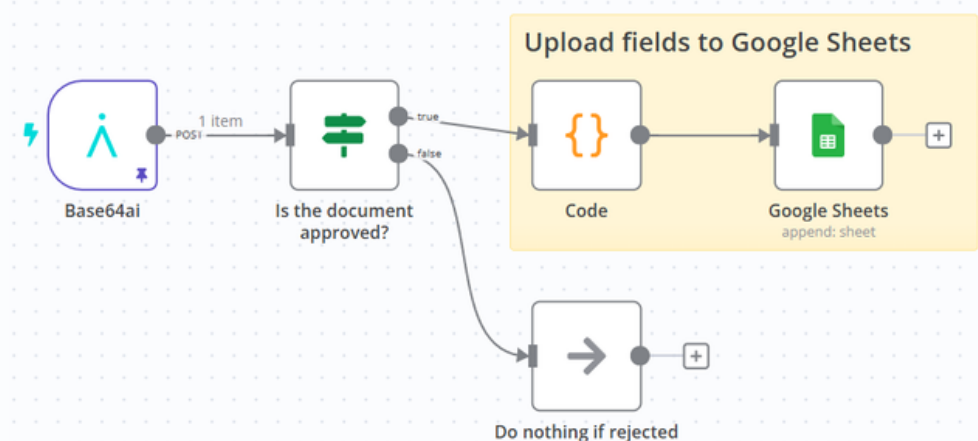
Poll Times
Mode
Every Minute
Add Poll Time

Trigger On
Changes Involving a Specific Folder

Folder
From list Flow Demo

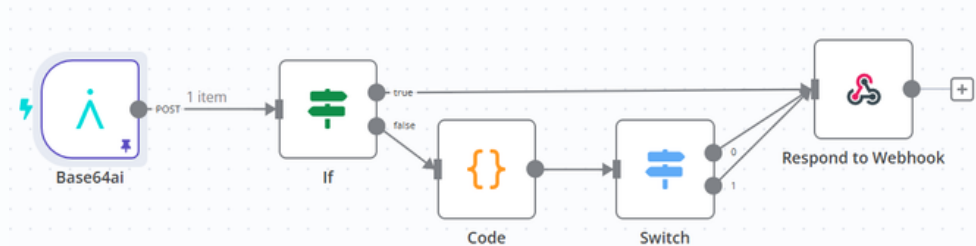
Watch For
File Created
Changes within subfolders won't trigger this node

Options
No properties
Add option



Post Processing

- Post-processing is the step after Base64 has extracted the data and before the reviewers see it on the HITL page. At this step, you can create customizations that modify the results, including adding new fields.
- For example, you can query a database for vendor details or add business logic before entering third-party software like Salesforce.



1. Code node

`Code` nodes modify the document output by modifying the `result` object.

When a fresh `Code` node is added, the code will look like below:

```
// Loop over input items and add a new field called 'myNewField' to the JSON of each one
for (const item of $input.all()) {
  const result = item.json.body.results[0];
}

return $input.all();
```

Any changes made to the `result` object here will reflect to the output (assuming these changes form a connection chain into the `Respond to Webhook` node)

1.1 Adding a new field

As shown above, adding a new field requires changes to the result. In this case `result.fields` object, which holds the results.

This code snippet shows adding a new field using constant values:

```
// Loop over input items and add a new field called 'myNewField' to the JSON of each one
for (const item of $input.all()) {
  const result = item.json.body.results[0];

  result.fields['fizz'] = {
    key: 'Fizz',
    value: 'Buzz',
    confidence: 0.99, // optional
    isValid: true // optional
  }
}

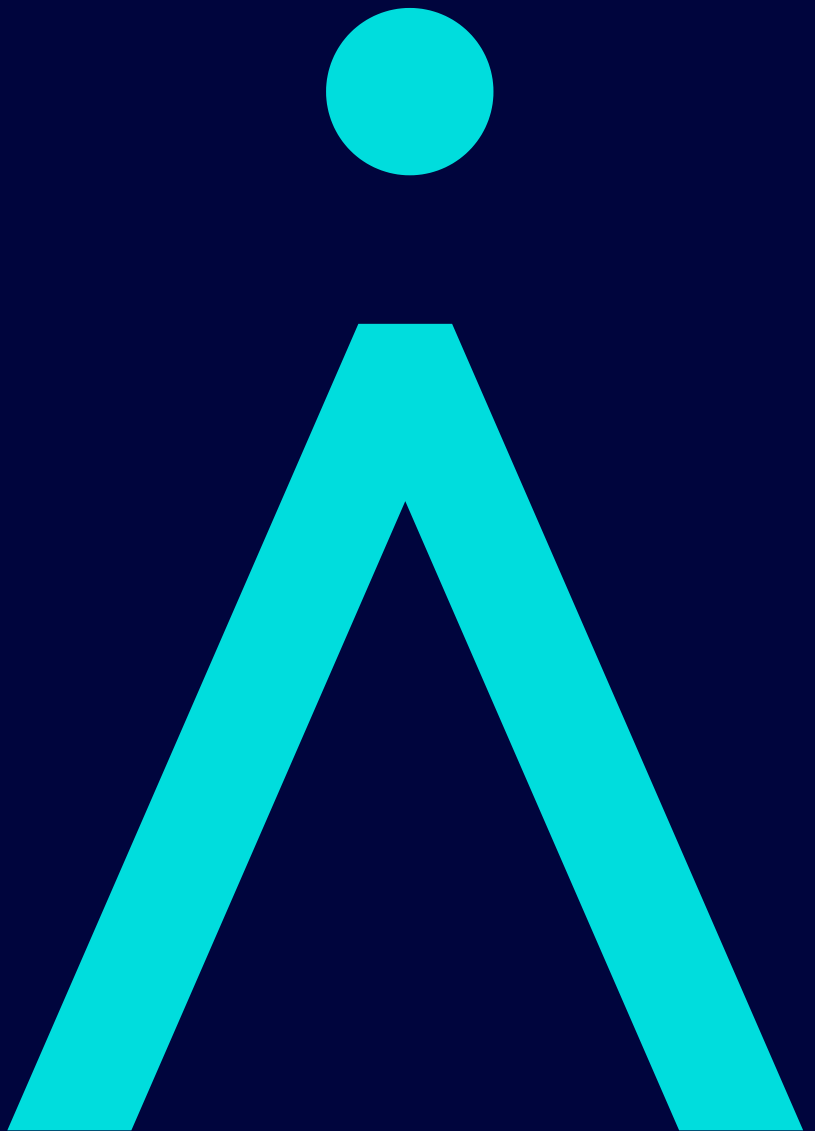
return $input.all();
```

For more details, visit:

- [Post Processing Guide](#)
- [Post Processing Documentation](#)
- [Post Processing Extensions](#)

BASE64

Deep Dive: Generative AI

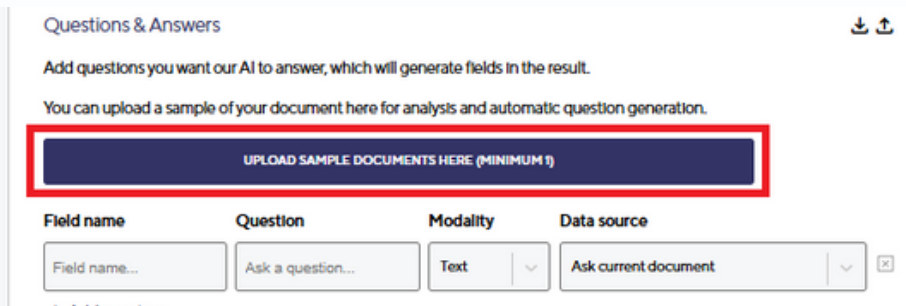


Generative AI: Question & Answers

- Base64's one of the most powerful features is Q&A Generative AI. Base64 gives you the option to use this powerful feature while:
 - Designing a Custom Model
 - Configuring Flows
 - Reviewing the processed document

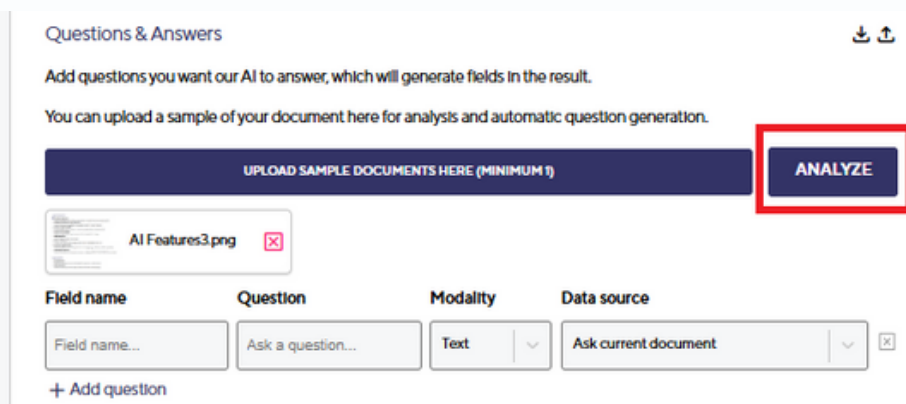
Q&A in Custom Model

- This feature is available in the "Data Extraction" tab of Custom Model Settings.
- With this powerful tool, you can ask the AI, "What should I ask to document in the processing time?". It allows you to predefine your questions and ensure that they are answered in a specific field during the process.
- First, upload the template or example document to the system.



The screenshot shows the 'Questions & Answers' section of the Base64 interface. It includes instructions to add questions for the AI to answer and a note about uploading a sample document. A red rectangle highlights the 'UPLOAD SAMPLE DOCUMENTS HERE (MINIMUM 1)' button. Below this, there is a table with columns for Field name, Question, Modality, and Data source. The 'Field name' column has a text input field with 'Field name...' as a placeholder. The 'Question' column has a text input field with 'Ask a question...' as a placeholder. The 'Modality' column has a dropdown menu with 'Text' selected. The 'Data source' column has a dropdown menu with 'Ask current document' selected. There is also a '+ Add question' link at the bottom left.

- After uploading the document, click on the "Analyze" button.



This screenshot shows the same 'Questions & Answers' interface as the previous one, but now a document named 'AI Features3.png' has been uploaded, as indicated by the thumbnail and filename below the upload button. A red rectangle highlights the 'ANALYZE' button located to the right of the upload button. The rest of the interface, including the table and input fields, remains the same.

Generative AI: Question & Answers

Q&A in Custom Model

- View the recommended fields, and "Reject" or "Accept"

Analysis result

11 questions are generated.

Questions:

Object Detection: What objects are detected in the document?

Checkbox Detection: Are there any checkboxes in the document, and are they checked?

TSA Real ID & Enhanced ID Detection: Is there a Real ID or Enhanced ID present in the document?

Entity Recognition: What person names, locations, events, or products are mentioned in the document?

EXIF Metadata: What EXIF metadata is available in the image?

IBAN Detection: Is there an IBAN present in the document?

Shape Verification: What is the shape classification of the document?

Document Segmentation: Are there multiple document images on a single page?

Watermark Detection: Does the document have any watermarks?

Image Quality - Blur Detection: Is there any excess blur in the image?

Image Quality - Glare Detection: Is there any excess glare in the image?

Note: This operation will append these questions to the existing question list.

Do you want to accept these changes?

REJECT

ACCEPT

- If you accept the recommended questions, then you can start editing recommendations. You can delete, change defined field name, question, modality and even data source the question is going to be asked.
 - Ask the AI predefined or custom questions to extract specific information not only from this processed document but also you have the option to extract from the documents processed in the Flow or in other Flows.

Questions & Answers

Add questions you want our AI to answer, which will generate fields in the result.

You can upload a sample of your document here for analysis and automatic question generation.

UPLOAD SAMPLE DOCUMENTS HERE (MINIMUM 1)

ANALYZE

AI Features3.png

Field name	Question	Modality	Data source
Object Detection	What objects are detected	Text	Ask current document
Checkbox Detection	Are there any checkboxes	Text	Ask current document
TSA Real ID & Enhanced	Is there a Real ID or Enh	Text	Ask current document
Entity Recognition	What person names, loc	Text	Ask current document
EXIF Metadata	What EXIF metadata is a	Text	Ask current document
IBAN Detection	Is there an IBAN present	Text	Ask current document
Shape Verification	What is the shape classif	Text	Ask current document
Document Segmentation	Are there multiple docum	Text	Ask current document
Watermark Detection	Does the document have	Text	Ask current document
Image Quality - Blur Dete	Is there any excess blur i	Text	Ask current document
Image Quality - Glare De	Is there any excess glare	Text	Ask current document

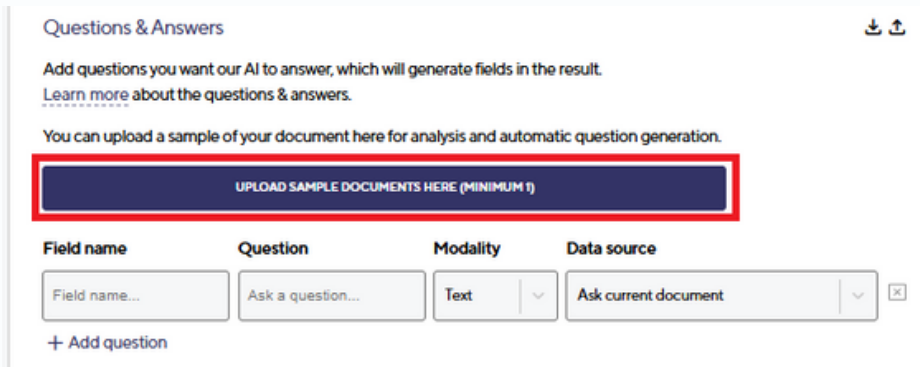
+ Add question

Need help

Generative AI: Question & Answers

Q&A in Flow

- This feature is available in the "Extraction" tab of Flow Settings.
- With this powerful tool, you can ask the AI, "What should I ask the documents that are going to be processed in this Flow?" This way, you can predefine your questions and make sure that these are answered in a specific field for each document type.
- First, upload the template or example document to the system.



Questions & Answers ⬇ ⬆

Add questions you want our AI to answer, which will generate fields in the result.
[Learn more about the questions & answers.](#)

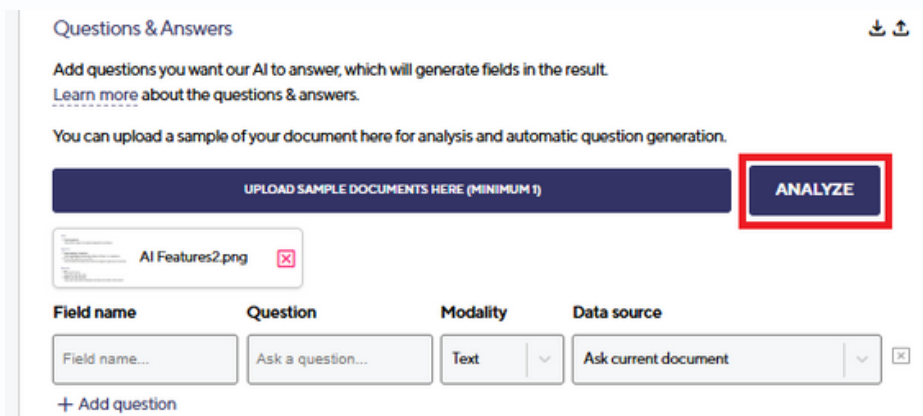
You can upload a sample of your document here for analysis and automatic question generation.

UPLOAD SAMPLE DOCUMENTS HERE (MINIMUM 1)

Field name	Question	Modality	Data source
<input type="text" value="Field name..."/>	<input type="text" value="Ask a question..."/>	<input type="text" value="Text"/> ▾	<input type="text" value="Ask current document"/> ▾ ✕

+ Add question

- After uploading the document, click on the "Analyze" button.



Questions & Answers ⬇ ⬆

Add questions you want our AI to answer, which will generate fields in the result.
[Learn more about the questions & answers.](#)

You can upload a sample of your document here for analysis and automatic question generation.

UPLOAD SAMPLE DOCUMENTS HERE (MINIMUM 1) **ANALYZE**

✕

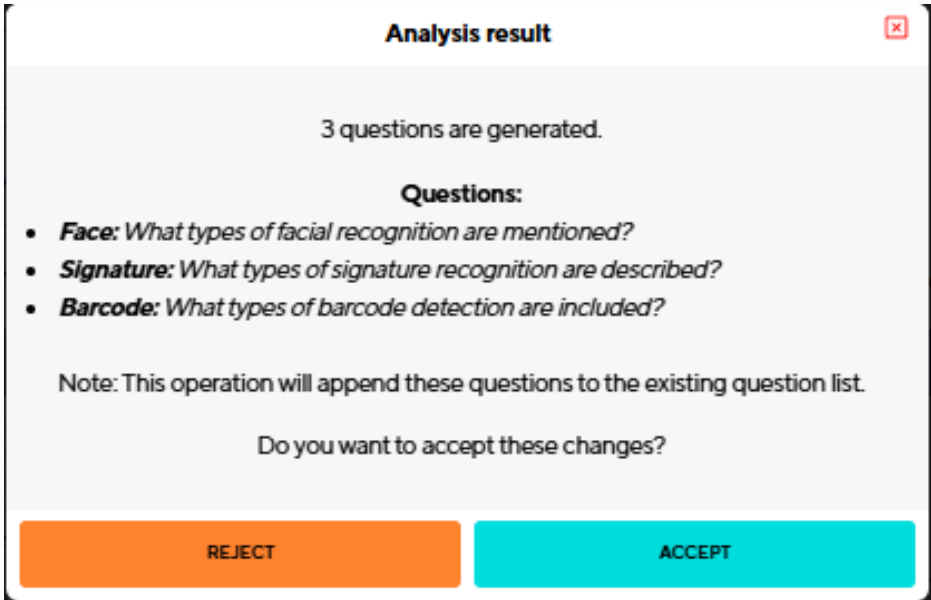
Field name	Question	Modality	Data source
<input type="text" value="Field name..."/>	<input type="text" value="Ask a question..."/>	<input type="text" value="Text"/> ▾	<input type="text" value="Ask current document"/> ▾ ✕

+ Add question

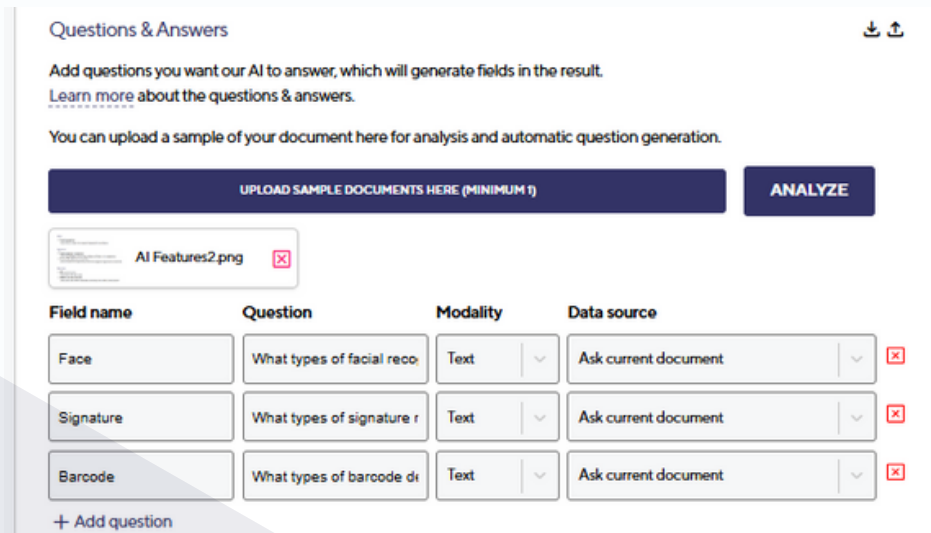
Generative AI: Question & Answers

Q&A in Flow

- View the recommended fields, and "Reject" or "Accept".



- If you accept the recommended questions, then you can start editing recommendations. You can delete, change the defined field name, question, modality, and even the data source from which the question is going to be asked.
 - Ask the AI predefined or custom questions to extract specific information not only from this processed document, but also, you have the option to extract from the documents processed in the Flow or other Flows



Generative AI: HITL

Q&A in HITL

- This feature is available in the HITL.
- Ask the AI predefined or custom questions to extract specific information. You can even ask AI to create a table for you.
- The Q&A Feature is available to you under the “Approve” button on the HITL page.

← Demo's Default Flow → Forms like ACORD

ACORD

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
5/31/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: John Hancock	
Hollywood Insurance Brokers	PHONE (A/C, No Ext): (987) 654 - 3210	
9800 Santa Monica Blvd	FAX (A/C, No): (123) 555-6789	
Beverly Hills, CA 90210	E-MAIL: johnthebroker@hollywoodbrokers.com	
	ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A: A Really Good Insurance Company	12345
	INSURER B: Fire and Rain Insurance	67890
	INSURER C:	
	INSURER D:	

INSURED

A Cow Jumped Over the Moon, LLC
500 Manhattan Ave., Ste. G

APPROVE

Ask current document

Type or speak your question...

Summarize the document

Summarize in Spanish

List issues in the document

Model

ACORD 25 Certificate of liability insurance form

Date

2020-05-31

Contact name

John Hancock

Producer

Hollywood Insurance Brokers 9800 Santa Monica Blvd Beverly Hills, CA 90210

- Like Custom Model and Flow options, you have the option to define the source from which the question is going to be answered. Possible options are:
 - Entire current document
 - A table in the current document
 - A Flow that AI-Search option is enabled

APPROVE

Ask current document

Exclusions And Conditions Of Such Of Pertain Policies Requirement Insurance Listed Below Have Been Term Or Condition Of Any The Insurance Afforded By Limits Shown May Have Been Issued To Contract The Policies Reduced By The Insured Or Other Described Paid Claims Named Above For The Document With Respect Herein Is Subject To Policy Period To Which This All The Terms

ASK A FLOW THAT HAS AI SEARCH ENABLED

Demo's Default Flow

Policies

Velox EDI - MBL Policy

Your New Base64.ai Flow

Generative AI: HITL

Q&A in HITL

- You can select and ask one of the sample (predefined) questions. These questions can be changed on the "Review Page" in the Flow Settings.

APPROVE

Ask current document

🔍 🗣️

Type or speak your question...

Summarize the document

Summarize in Spanish

List issues in the document

Summarize the document

The document is a Certificate of Liability Insurance for "A Cow Jumped Over the Moon, LLC," detailing various insurance coverages, limits, and providers, including general, automobile, umbrella, and worker's compensation liabilities, issued by Hollywood Insurance Brokers with John Hancock as the contact person.

🔍 🗣️

Ask a follow up question...

What is the policy number for general liability?

Who is the contact person for the Insurance?

What is the effective date of the automobile liability policy?

- You can ask AI to reanswer (analyze) the question or you can ask a follow up question.

APPROVE

Ask current document

🔍 🗣️

Type or speak your question...

Summarize the document

Summarize in Spanish

List issues in the document

🔍 🗣️

Ask a follow up question...

What is the policy number for general liability?

Who is the contact person for the Insurance?

What is the effective date of the automobile liability policy?

ⓘ Summarize the document

⊕ The document is a Certificate of Liability Insurance for "A Cow Jumped Over the Moon, LLC," detailing various insurance coverages, limits, and providers, including general, automobile, umbrella, and worker's compensation liabilities, issued by Hollywood Insurance Brokers with John Hancock as the contact person.

🔄

Retry to get a different answer

Generative AI: HITL

Q&A in HITL

- For future use, you can add the result and the question to the document result fields and also to Flow.

- First click on the plus icon positioned next to the answer.

The screenshot shows a user interface for interacting with a document. At the top is a teal bar with the word "APPROVE" and a dropdown arrow. Below it is a search bar with the placeholder text "Ask current document". Underneath the search bar are four buttons: "Summarize the document", "Summarize in Spanish", and "List Issues in the document". A light blue box contains the summary of the document, titled "Summarize the document" with an information icon. The summary text is: "The document is a Certificate of Liability Insurance for 'A Cow Jumped Over the Moon, LLC,' detailing various Insurance coverages, limits, and providers, including general, automobile, umbrella, and worker's compensation liabilities, Issued by Hollywood Insurance Brokers with John Hancock as the contact person." A plus icon in a red circle is next to the summary text. To the right of the summary box is a button that says "Retry to get a different answer". Below the summary box is another search bar with the placeholder text "Ask a follow up question...". Underneath this search bar are three buttons: "What is the policy number for general liability?", "Who is the contact person for the Insurance?", and "What is the effective date of the automobile liability policy?".

- Review the question & answer and update options. If you want to proceed, click on the add button.

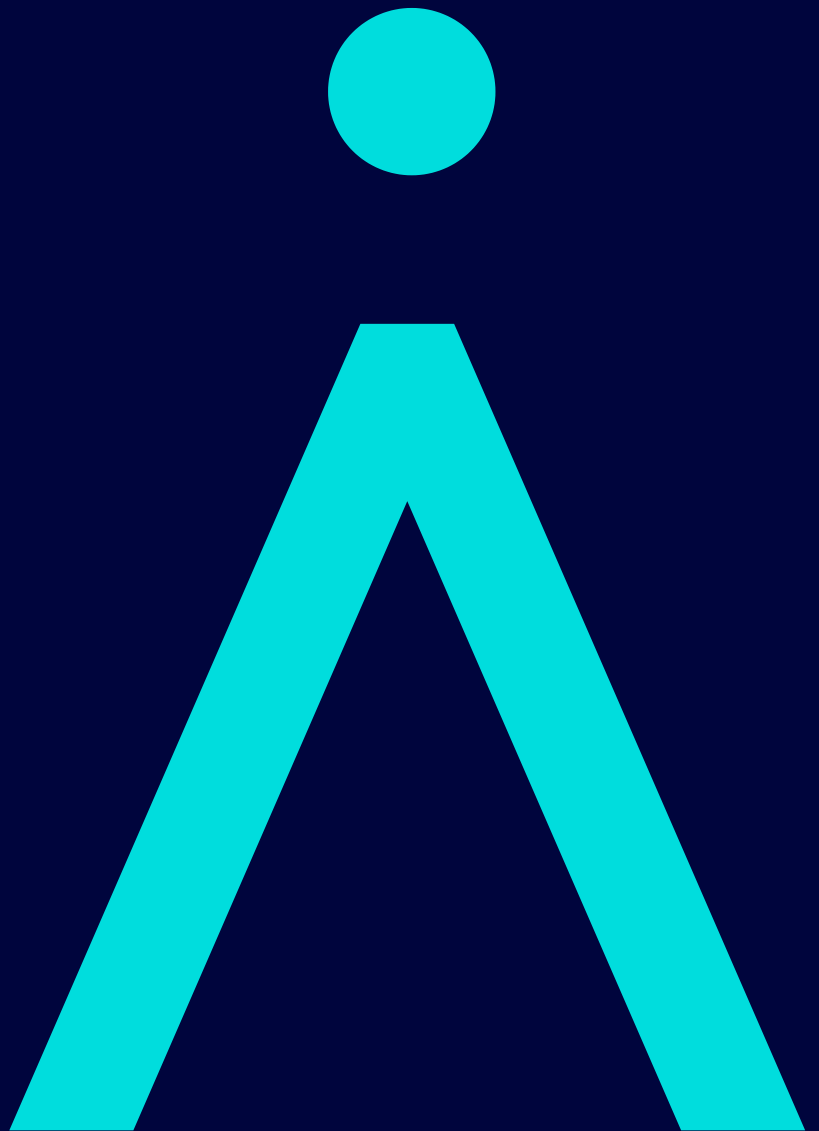
The screenshot shows a dialog box titled "Add answer" with a close button in the top right corner. The dialog box contains the following fields and options:

- Question:** Summarize the document
- Field name:** Summarize the document
- Answer:** The document is a Certificate of Liability Insurance for "A Cow Jumped Over the Moon, LLC," detailing various Insurance coverages, limits, and providers, including general, automobile, umbrella, and worker's compensation liabilities, Issued by Hollywood Insurance Brokers with John Hancock as the contact person.
- Update:**
 - ☒ **Result**
Add to result
 - ☐ **Flow**
Add to flow

At the bottom of the dialog box are two buttons: "CANCEL" and "ADD".

BASE64

User Management



User Settings: User & Company

- Visit the [User Settings](#) page from your account, located in the upper right corner of your page.
- You can update your profile and company

User Settings
Manage your account information

Info >

Company >

Default Flow >

Layout >

User management >

Promo code >

Password >

Delete >

Login email

Your email
[redacted]@base64.ai

Work email
[redacted]@base64.ai

Contact us if you want to change your emails.

Name

Name
[redacted]

Surname
[redacted]

Change your phone number

Phone Number
[redacted]

User Settings
Manage your account information

Info >

Company >

Default Flow >

Layout >

User management >

Promo code >

Password >

Delete >

Company information

Company Name
[redacted]

Company Website
[redacted]

- You can set default Flow & Layout

User Settings
Manage your account information

Info >

Company >

Default Flow >

Layout >

User management >

Promo code >

Password >

Delete >

Default Flow

You are using **Umut's Default Flow** as your Default Flow. The API requests without base64ai-flow-id header or the files you upload on the Demo Page will go to that Flow.

Your Default Flow can be any Flow that you own or are allowed to upload to.

Umut's Default Flow

User Settings
Manage your account information

Info >

Company >

Default Flow >

Layout >

User management >

Promo code >

Password >

Delete >

Layout

Customize the columns that appear in the Flows and Custom Models tables.

Flows

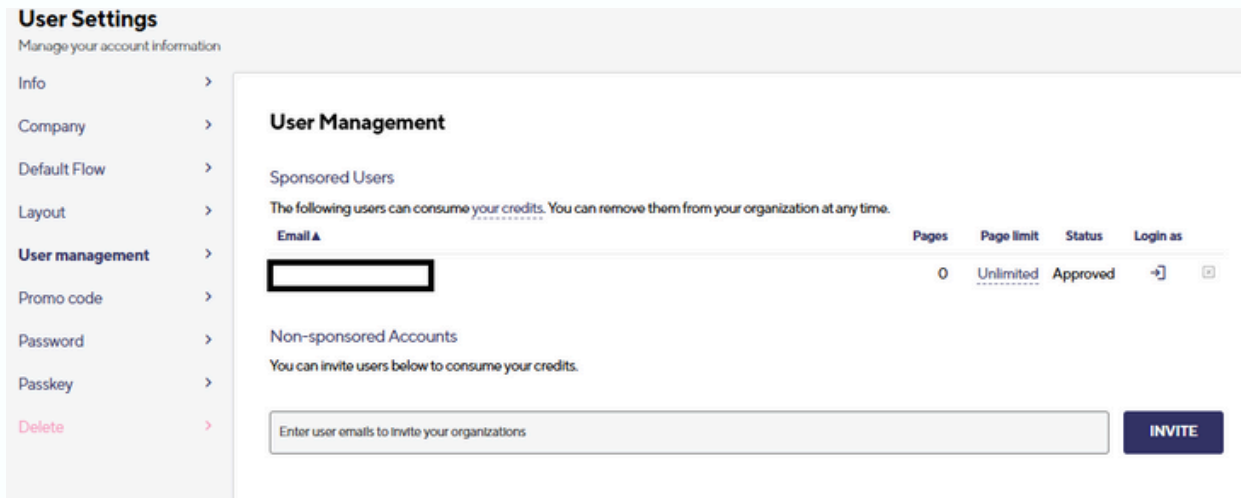
Name Your role Needs review Total Last uploaded

Custom Models

Name Your role Updated at

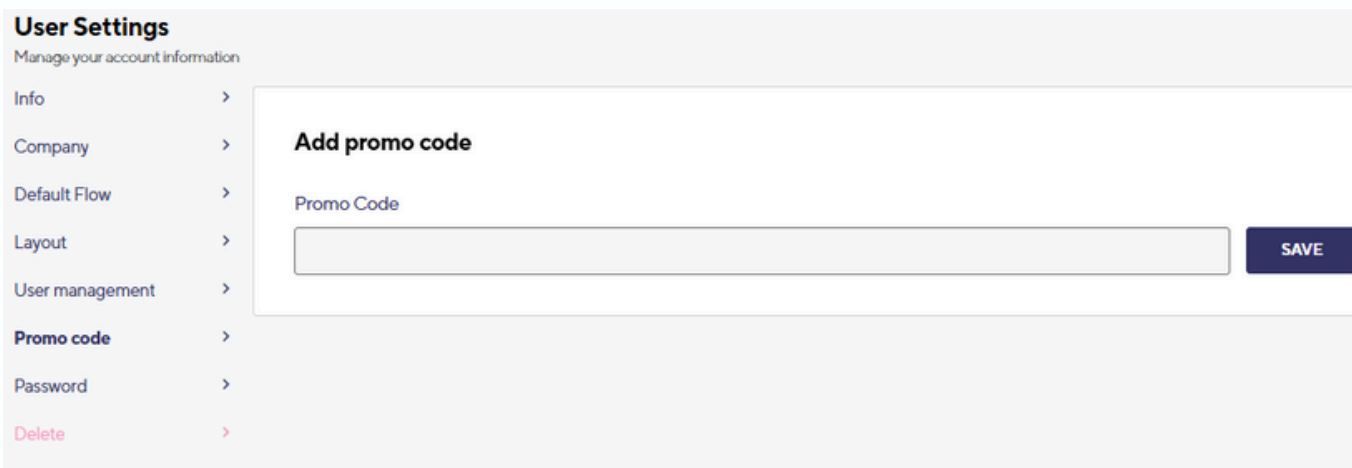
User Settings: User Management

- If you are a system administrator, invite users to your organization from the User Management section.



The screenshot shows the 'User Management' section of the 'User Settings' interface. On the left is a sidebar with options: Info, Company, Default Flow, Layout, User management (highlighted), Promo code, Password, Passkey, and Delete. The main content area is titled 'User Management' and contains two sections: 'Sponsored Users' and 'Non-sponsored Accounts'. The 'Sponsored Users' section includes a table with columns: Email, Pages, Page limit, Status, and Login as. The first row shows an email field (with a dropdown arrow), '0' pages, 'Unlimited' page limit, 'Approved' status, and two login as icons. Below this is a text input field for entering user emails to invite, followed by an 'INVITE' button. The 'Non-sponsored Accounts' section has a heading and a brief instruction.

- If you are a demo user and need to add a new quota, you can enter the promo code by asking your account manager.



The screenshot shows the 'Add promo code' section of the 'User Settings' interface. The sidebar is the same as in the previous screenshot, but 'Promo code' is now highlighted. The main content area is titled 'Add promo code' and contains a single text input field labeled 'Promo Code'. To the right of the input field is a 'SAVE' button.

- Change your password in the User Settings – Password section.



The screenshot shows the 'Password' section of the 'User Settings' interface. The sidebar is the same, but 'Password' is now highlighted. The main content area is titled 'Password' and contains three text input fields: 'Old Password', 'New Password', and 'Repeat Password'.

User Settings: Delete Account

- To delete your account, use the Delete section. Be aware, this action is not reversible.

User Settings

Manage your account information

Info >

Company >

Default Flow >

Layout >

User management >

Promo code >

Password >

Delete >

Delete your account

DELETE

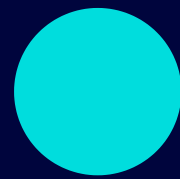
User Settings: Admin Panel

- If you are a system administrator, view detailed usage statistics per user from the Admin panel, including quota consumption and timestamps.

[illegible]

BASE64

Appendix



Troubleshooting & Support

Help Ecosystem

Interactions will automatically create a Zendesk ticket with a tracking number.

- **Contact Sales:** <https://base64.ai/contact>
- **Support Home:** <https://base64.ai/support>
- **Email Support:** Support@Base64.ai
- **Knowledge Base:** [Help.Base64.ai](https://help.base64.ai)
- **Ticketing:** <https://base64ai.zendesk.com/>
- **Call/Text Now:** [833-866-4646](tel:833-866-4646) (toll-free in the U.S. & Canada)

Cloud SLAs

- **Note:** On-premises SLAs are based on a per-contract basis and may differ from cloud.
- **Guaranteed Uptime:** 99% uptime is guaranteed, excluding holidays, weekends, and scheduled maintenance. Critical outages are prioritized for resolution.
- **Monitor Status:** [Base64 API Status](#)

Severity Definitions

Severity Level	Response Time	Examples
P0 Outage	Within 15 minutes, updates every 30 minutes, 7 days a week.	<ul style="list-style-type: none">• API is not accessible or does not return any result.• Security issues.
P1 Critical error	Within 2 hours	<ul style="list-style-type: none">• A high-impact problem that is not causing work stoppage but significantly impairs service.• Significant customer satisfaction concern.
P2 Urgent issue	Within 24 hours	<ul style="list-style-type: none">• Document parsing errors and edge cases• An important issue that does not have a significant productivity impact.• New feature requests

Security & Compliance Certifications

Certified for ISO, HIPAA, SOC 2, and GDPR, Base64 cloud and on-premise solutions offer top-quality data extraction at the highest security standards.

Accessing the reports require signing an NDA for security and privacy purposes.



ISO 27001 CERTIFIED

ISO/IEC 27001 is the globally recognized standard for information security management systems (ISMS). It guides organizations in establishing, implementing, maintaining, and improving an ISMS across various sectors and sizes. Compliance with ISO/IEC 27001 signifies that Base64.ai has implemented a system to manage data security risks, enhancing cyber-resilience, and achieving operational excellence.



ISO 20243 CERTIFIED

The ISO/IEC 20243, also known as the Open Trusted Technology Provider Standard Certification (O-TTPS), is a standard created by The Open Group. The ISO/IEC 20243 O-TTPS Certification ensures that the organization follows a set of guidelines, recommendations, and requirements throughout all phases of a product lifecycle including design, sourcing, build, fulfillment, distribution, sustainment, and disposal. It certifies the integrity of Base64.ai as a commercial off-the-shelf (COTS) product and protects the security of the global supply chain of our customers.



GDPR COMPLIANT

The General Data Protection Regulation (GDPR) is the toughest privacy and security law in the world. Though it was drafted and passed by the European Union (EU), it imposes obligations onto organizations anywhere, so long as they target or collect data related to people in the EU.



SOC 2 TYPE 1 & 2 CERTIFIED

System and Organization Controls (SOC) validates the security and integrity of the internal controls and information systems. The SOC 2 has been widely accepted as a US standard for information security. It is used by SAAS companies as well as financial organizations, insurance companies and datacenters. The SOC 2 Type 1 Report assesses the design of security processes at a specific point in time, while the SOC 2 Type 2 Report assesses how effective those controls are over time by observing operations for several months.



HIPAA CERTIFIED

The Health Insurance Portability and Accountability Act (HIPAA) Privacy, Security, and Breach Notification Rules protect the privacy and security of health information and gives individuals rights to their health information. HIPAA establishes standards to protect PHI (personal health information) held by the processing entities and their business associates.



PBSA ACCREDITED

Professional Background Screening Association (PBSA) was established to represent the interest of companies offering employment and tenant background screening services. The Association currently represents over 880 member companies engaged in employment and tenant background screening across the United States. Member companies range from Fortune 100 companies to small local businesses, conducting millions of employment related and tenant background checks each year as part of the hiring and leasing process. PBSA Member companies are defined as 'consumer reporting agencies' pursuant to the Fair Credit Reporting Act (FCRA) and are regulated by both the FTC and CFPB.



AMERICAN CAR RENTAL ASSOCIATION MEMBER

Base64.ai is a member of the American Car Rental Association, whose mission is to help drive growth and innovation in mobility services on behalf of its members. Base64.ai supports ACRA members and the global vehicle rental and leasing community with its cutting edge artificial intelligence service that automatically processes worldwide IDs, driver licenses, passports, vehicle registrations, and vehicle insurance cards.



ACORD MEMBER

ACORD forms are central to insurance operations. ACORD (Association for Cooperative Operations Research and Development), founded in 1970, is a nonprofit, industry-owned organization that provides standardized forms and electronic data standards to enable fast, accurate, and efficient data exchanges across the global insurance and related financial services industries.



COUNCIL FOR INCLUSIVE CAPITALISM MEMBER

Base64.ai is a member of the Council for Inclusive Capitalism, a global movement of leaders doing business in ways that benefit people, our communities, and the planet. In order to create more economic opportunities for low-income, low-education, and underprivileged members of society, Base64.ai automated document processing created "remote document reviewer" (RDR) job positions for people with limited experience with computers. RDRs can work from anywhere in the world 100% remotely. Base64.ai also commits building products and systems to enable its customers (i.e. other companies) to offer jobs to RDRs belonging to underrepresented, special, or disadvantaged groups, such as veterans, people with health impairments, sexual minorities, or geographical locations.

Details & More

Useful Links

Custom Model Builder Guide

- The Custom Model Builder automatically classifies documents based on their text content, enabling you to create a tailored model for your specific needs. This guide will help you navigate the various aspects of this feature and utilize it effectively.
 - [Automatic & Express Classification](#)
 - [Classification Overrides](#)
 - [Classification Probability](#)
 - [Enhancements](#)
 - [Page Counter and Document Shape](#)
 - [Delete](#)

Prebuilt Document Model Library

- Base64 2800+ document types out-of-the-box. Our AI automatically recognizes, classifies, and processes these documents without additional training, & our Semantic AI even processes unfamiliar document types.

Flow Guide

- Flows help organize and process files, allowing you to customize document management according to your requirements. The platform includes features such as human-in-the-loop (HITL) review, Custom Model creation, advanced Q&A using language models, post-processing refinement, and over 400 no-code connectors for seamless integration.
 - [AI Features](#)
 - [Create a New Flow](#)
 - [Basic Information](#)
 - [Enhancements](#)
 - [Integration](#)
 - [Restrictions](#)
 - [Review Page](#)

Useful Links

API Integration

- Base64's versatile API can extract and analyze text, tables, images, and signatures from all document types. It also supports real-time facial recognition and identity verification, making it a powerful tool for a variety of applications.

API Docs

- This document covers standards, supported document types, and code samples

Error Codes

- This contains the list of possible error codes. When contacting support, please share the error code that starts with 0xB64.

Frequently Asked Questions

- Find answers to common questions about using the platform, including setup, features, and troubleshooting. This section aims to address typical inquiries to help you get started quickly.

BASE64

**We Thank You
For Your Business**

