

TURN DOCUMENTS INTO USABLE BUSINESS DATA

Your documents contain valuable information that drives workflows, approvals and business decisions. Getting that information into your systems shouldn't require employees to manually find it and key it in.



IndexAgent uses AI to understand the context of documents already captured in DocLink, identify the business-critical information you need and automatically populate index values. Because it works after capture, documents can enter DocLink virtually any way, with no document-by-document training or template creation required.



DataMatchAgent takes automation further, using information identified by IndexAgent to automatically find and match the correct vendor or customer record. It then enriches the document with additional ERP data, eliminating manual lookups and helping ensure accurate information moves through downstream processes.

HOW IT WORKS



Capture Your Way

Documents enter DocLink through your existing capture processes, including email, automated import, ERP document capture, vendor or customer portals, and more.



Let AI Find the Data

IndexAgent understands the document in context and automatically identifies the values you want indexed, such as PO numbers, invoice numbers, dates, totals, vendor information and other business data.



Match It to Your ERP

DataMatchAgent uses extracted information to identify the appropriate vendor or customer record and can add related ERP data such as vendor IDs, customer IDs and other reference information.



Put the Data to Work

With documents accurately indexed, DocLink can use that information to drive workflows, approvals, matching, routing and other automated processes.

If it's in DocLink, IndexAgent can index it. It's not limited to invoices or a single business process. Put AI-powered indexing to work on POs, receipts, contracts, forms, reports and other document types across your organization.



WHAT USERS ARE SAYING

"When they put this in front of me the very first day, I knew it was going to be a game changer for us. Simply because how accurate it was pulling the information on varying different types of documents."

WHY YOU'LL LOVE IT

Up And Running Faster	Eliminate Repetitive Data Entry And Errors	Handle Changing Document Formats
No templates to build. No stack of documents to train. IndexAgent uses your existing DocLink document type configuration to know which values to find, with plain-language prompts available to further refine results when needed.	Let AI find and index information employees would otherwise have to locate and enter manually. DataMatchAgent eliminates another step by automatically resolving vendor and customer information against ERP data.	IndexAgent understands information based on context rather than relying on fixed locations or anchors. When a vendor changes the layout of a document, you don't automatically have to reconfigure how the data is found.
Expand Automation Beyond AP	Keep Humans In Control	Start Small - Expand As You See Value
Use IndexAgent across document types and departments wherever employees spend time finding information in documents and entering it into DocLink.	Choose the level of review that's right for each process. Documents can be reviewed before continuing through workflow, and prompts can be refined when you want IndexAgent to handle information differently.	A flexible annual subscription and DocLink AI Credits provide a lower cost of entry without requiring large document volumes or fixed processing tiers. Add credits as your use of AI expands, and unused Credits don't expire.



Your Data Stays Your Data

Customer documents and data remain private and are not used to train underlying AI models.

LESS SETUP.
LESS MANUAL WORK.
MORE AUTOMATION.

Stop spending valuable employee time finding, typing and matching information that's already in your documents.

Let DocLink AI Agents turn it into usable business data automatically—and use that data to automate what happens next.

