INSTABASE

Introduction to Instabase

Strategic Initiative for expansion and development of the Indian Market

Indian Regulatory Authority for Accounting

Instabase is turning the world's unstructured data into insights, instantly

Instabase AI Hub helps organizations unlock unstructured data to automate critical processes and make better, faster decisions

300+
business solutions in production

$2bn
valuation, backed by a16z, NEA & Index

270
team members around the world

Deloitte. Technology Fast 500™

Forbes AI50 TOP AI FIRMS TO WATCH 2022

Goldman Sachs
BUILDERS & INNOVATORS SUMMIT HONORING THE 100 MOST INTRIGUING ENTREPRENEURS

Uber

JPMorgan Chase & Co.

Bank of America

Citi

Goldman Sachs

Northwestern Mutual

Capital One

AXA

P&G

UBS

NatWest

ROCKET Mortgage

Munich RE

S&P Global

RSA

BNY MELLON

gusto

RenaissanceRe

Generative AI will enable a total unlock of unstructured data

Fully automated
AI decisioning

Discover insights across
all enterprise data

Query & analyze
complex documents

Extract data from
document workflows

Adoption of AI
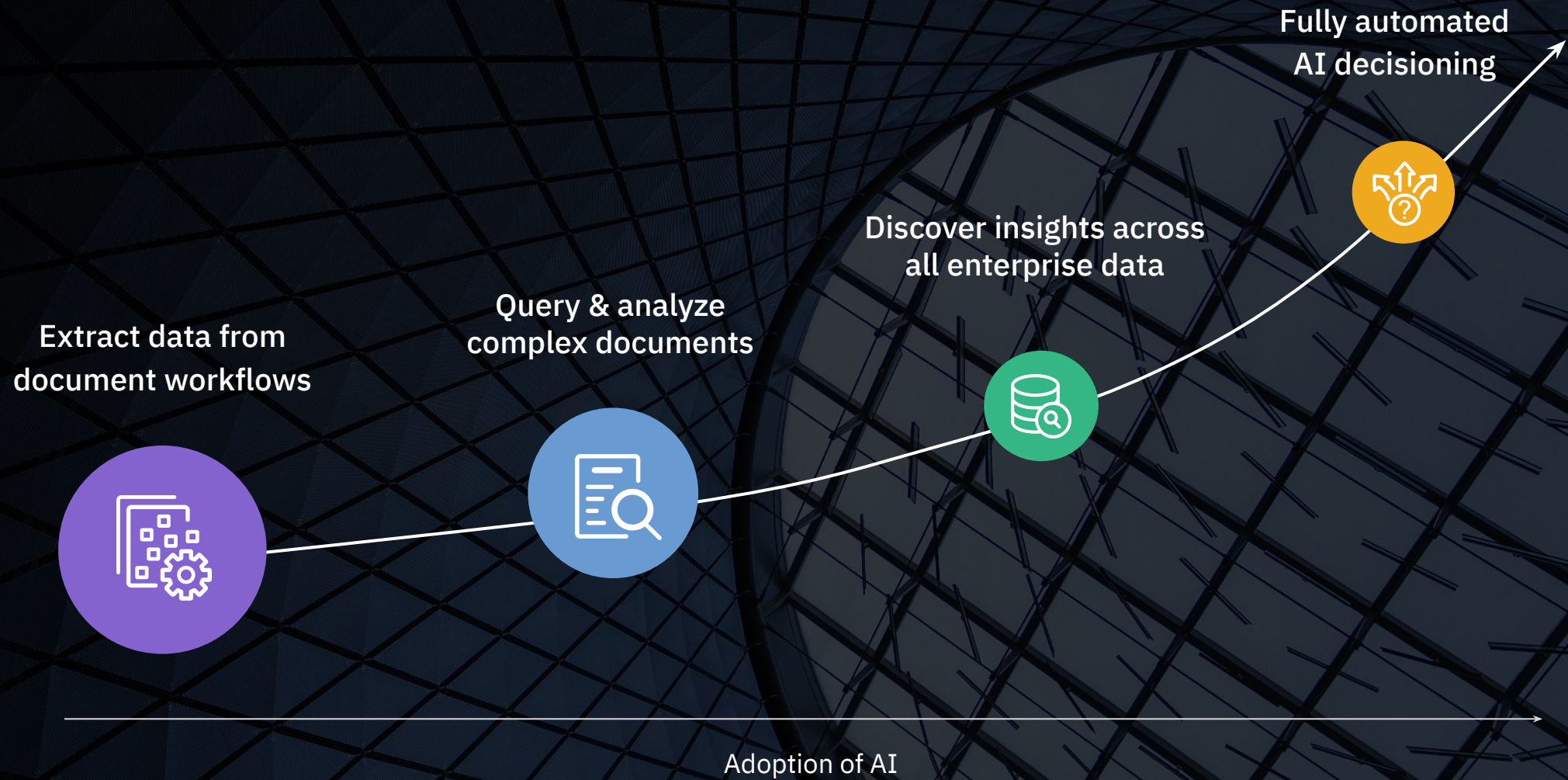
AI Hub turns unstructured data into insights on one platform

Document Processing

Document Querying

Automate document-based workflows

- Extract data points from any document
- Classify and split-up packets by document class
- Validate accuracy with confidence & business logic

Query and interact with documents

- Ask questions across a group of documents
- Complex multi-step question answering
- Scanned images, machine-readable PDFs & web links

We have deep experience across the insurance value chain

Submissions

- Submission Email
- Broker Presentation
- Loss Runs
- Schedule of Values
- Slip (MRC)

Claims

- Notice of Loss
- Accident / Police Report
- Summons
- Complaints

Bordereaux

- Proportional Claims
- Non-proportional Claims
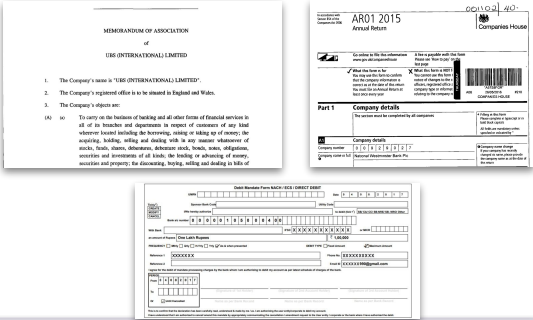- Proportional Bordereaux
- Non-proportional Bordereaux
- PDF / XLS

Quotation Documents

- Quotation Documents
- Slips
- Emails

Northwestern Mutual   AXA   Munich RE   RSA   RenaissanceRe   [intact]

We have deep experience across Commercial Banking
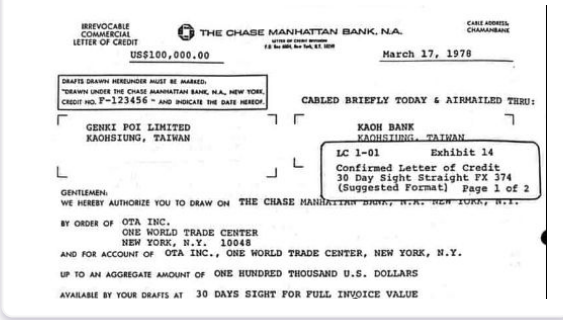
Client Onboarding & KYC

- Passports & Drivers Licences
- Tax forms
- Articles of Incorporation
- Board Resolutions
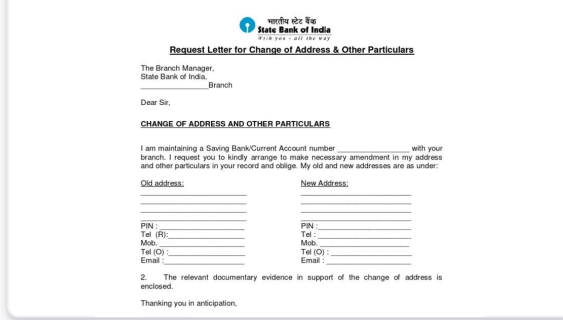- Annual Reports
- Trust Deeds

Commercial Lending

- Financial Statements
- Annual Reports
- Credit agreements
- Leases and Rent Rolls
- Collateral and Covenant documents

Trade & Payments

- Letters of Credit
- Invoices, Bills of Lading
- Trade agreements
- Payment Instructions
- Transaction monitoring
- Cheque & Lockbox

Shared Services

- Change of Address
- Account Mandates
- Mailroom & Email Automation
- Customer service & communication
- Corporate Actions

JPMorganChase & Co.   Citi   Bank of America   NatWest   Capital One

Our customers are driving impact in market today

Fortune 500 entity

Major global lender

Use Case

Mailroom Automation

Mortgage Processing

Before

- **5m** pieces of mail manually processed and routed yearly

- **Delays** to critical communication for several lines of business

- **168,000** loan applications processed manually

- **20** days from submission to offer

After

- **84%** automation rate

- **46,000** processing hours saved per year

- **60%** increase in underwriting capacity

- **20%** faster time to offer

Use Case: Enterprise Chatbots

Quickly surface best-practise answers from a contact centre knowledge base

Kick-start developer productivity with bespoke instructions based on Product Documentation

Help employees become valuable out of the gate when joining the business

TM — Do we cover home loss payments for tenants less than 1 year?

Housing_Compensation_Policy__2_.pdf

No, according to the "Types of Housing Compensation paid by RBK" section of the document, home loss payments may only be made to tenants or owner-occupiers who have lived in their property for a minimum of 12 months and are required to move home permanently as a result of redevelopment or demolition of their home.

Housing_Compens...

I'm building a mobile app to process drivers licenses. I've built an AI Hub app that can get all important info from a drivers' license. How can I call the AI Hub app from my mobile app to do the processing? My code is in Javascript

Show steps ⌄

To call your AI Hub app from your mobile app using Javascript, you need to make an API call to the AI Hub. Here are the steps:

1. **Authorization:** All AI Hub API calls require a token to authorize the request. You can manage tokens and locate your user ID and organization context (for Commercial accounts) in your user settings.

2. **Headers:** You need to include the following headers in your API call:

   ◦ 'Authorization': 'Bearer {API_TOKEN}'
   ◦ 'IB-Context': '<Organization_ID>' (for

What are the typical expectations of new employees in the first 3 months?
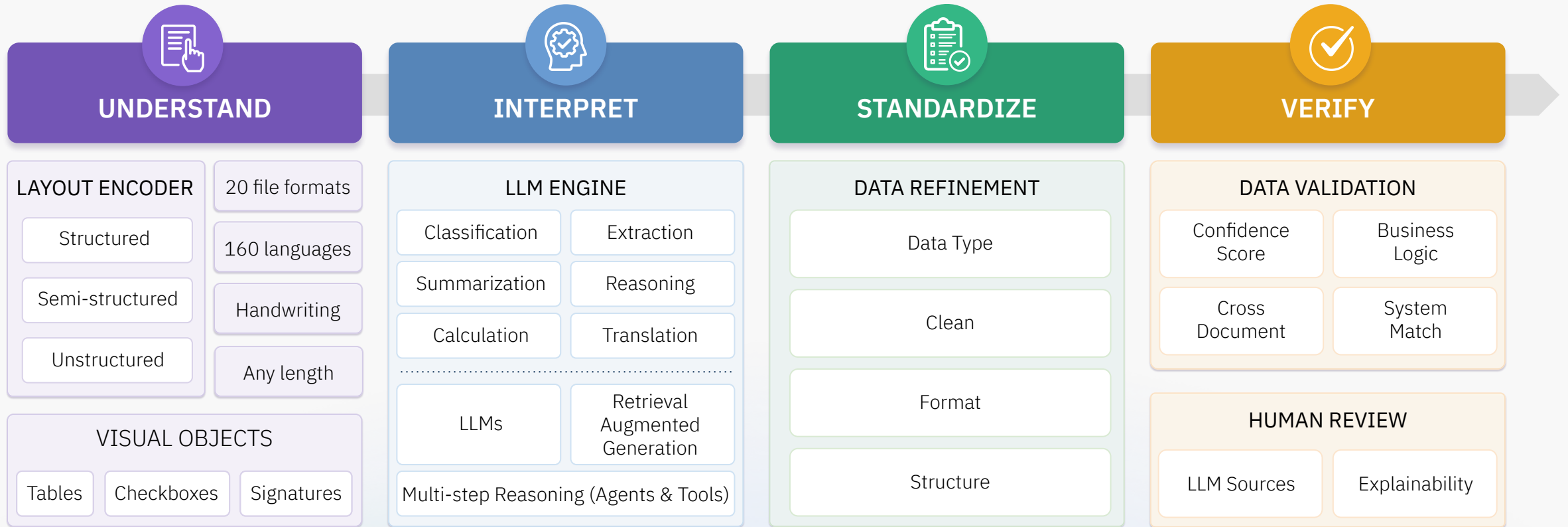
Instabase_Sales_Onboarding_Handbook_2021.pdf

According to the document, the typical expectations of new employees in the first 3 months at Instabase are:

- Build your Account Maps, upload to gdrive, discuss with your manager
- Demonstrate an understanding of Instabase use cases and know how to identify/qualify prospects for each
- Meet your Team: Regional Sales Managers (RSMs), Account Development Reps (ADs), Sales Engineers (SEs), Business Value Consultants (BVCs), Technical Account Managers (TAMs)
- Establish a regular cadence (RSMs & ADs)
- Memorize customer success stories and use effectively in conversations
- Understand key terms/acronyms found in the Instabase Glossary

Contact Centre SOPs	**Product Documentation**	**New Starter Onboarding**

Capability Deep Dive

UNDERSTAND

LAYOUT ENCODER

Structured

Semi-structured

Unstructured

20 file formats

160 languages

Handwriting

Any length

VISUAL OBJECTS

Tables | Checkboxes | Signatures

INTERPRET

LLM ENGINE

Classification | Extraction

Summarization | Reasoning

Calculation | Translation

LLMs | Retrieval Augmented Generation

Multi-step Reasoning (Agents & Tools)

STANDARDIZE

DATA REFINEMENT

Data Type

Clean

Format

Structure

VERIFY

DATA VALIDATION

Confidence Score | Business Logic

Cross Document | System Match

HUMAN REVIEW

LLM Sources | Explainability

AI with Enterprise-grade security

- **No data retention**

  No data is retained by Instabase or any relevant third-party processors such as OpenAI.

- **Model accuracy & reliability**

  Comprehensive data validations, human review, and knowledge grounding to limit risk of inaccuracy.

- **End-to-end security**

  Encrypt data in transit and at rest and keep access protected behind your enterprise SSO.
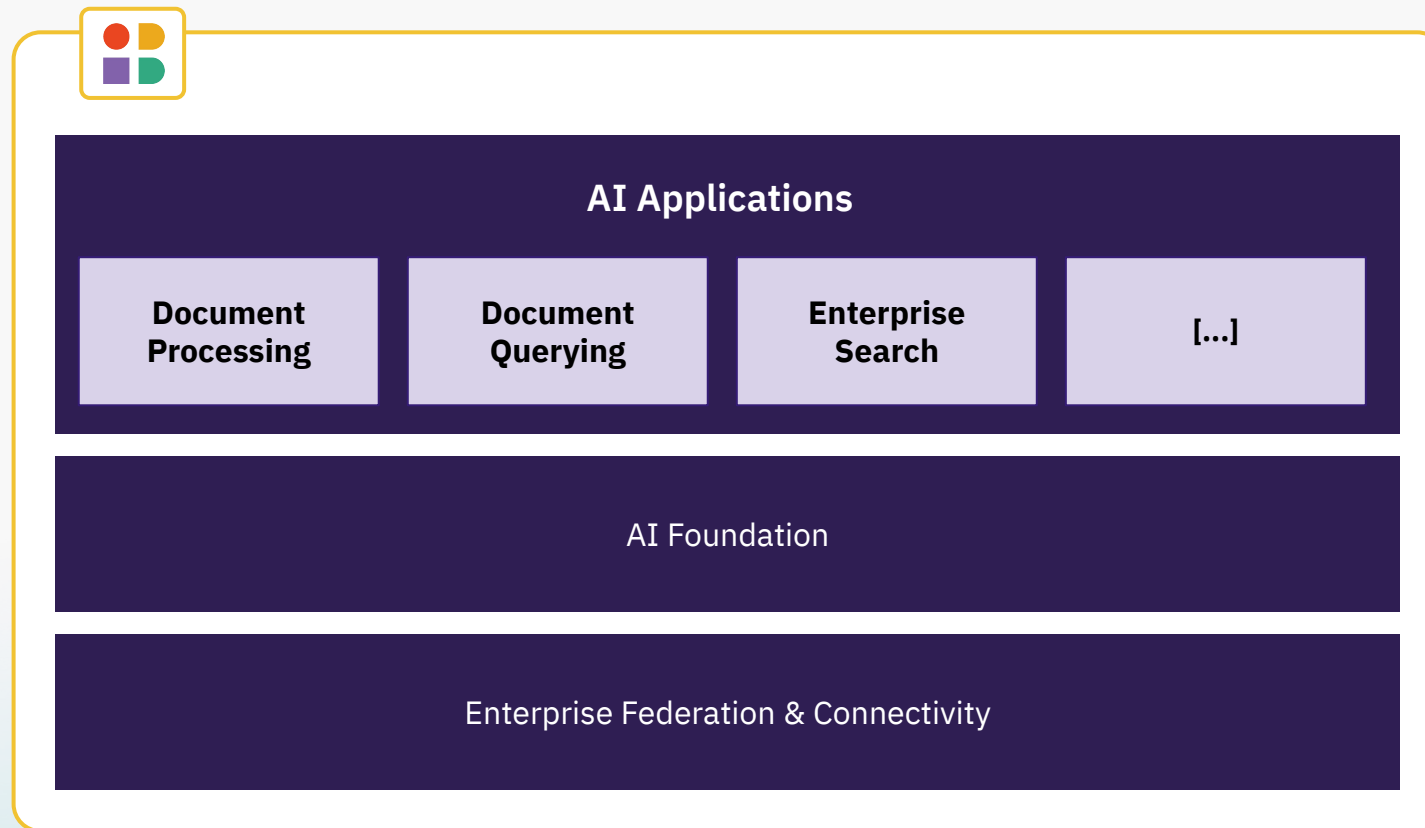
- **Your data, your region**

  Select where your data is processed and mount your own external cloud storage to stay in control.

- **Adhere to global standards**

  Our security program is designed to comply with frameworks such as SOC 2 Type II, GDPR, HIPAA, and CCPA.

AI Hub is the System of Insights for turning the world's unstructured data into insights, instantly

Enterprises are built on unstructured data