

# Generative and specialized AI to process any document

April 2025 Future of Finance event



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# Your business doesn't need another point solution



It's about how the pieces fit together, not the pieces themselves.

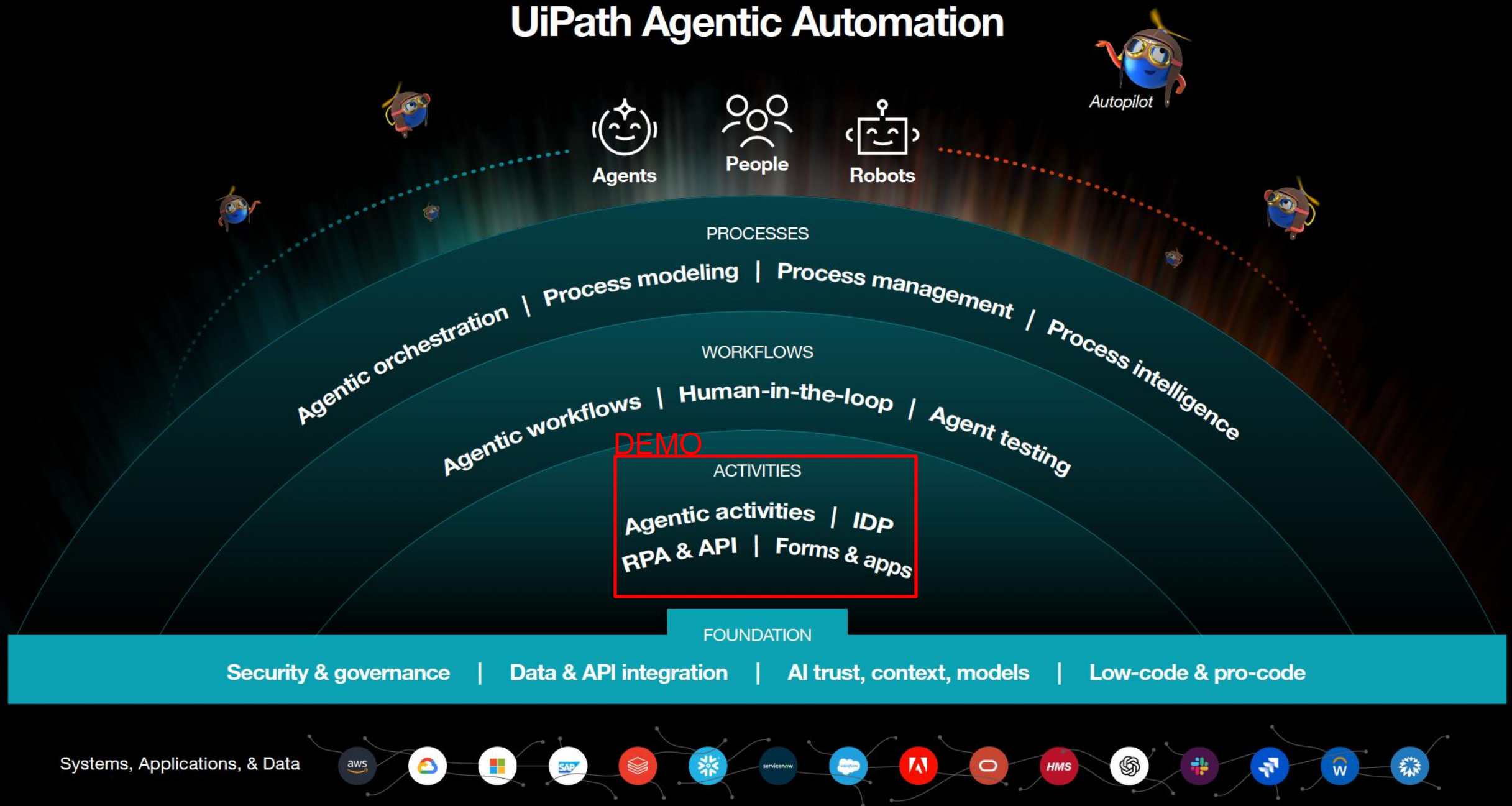
The challenge lies in orchestrating the range of interactions and integrations at scale.

Each use case often needs to access multiple models, vector databases, prompt libraries, and applications.

McKinsey  
& Company



# UiPath Agentic Automation



# Processes run on documents, communications, and other types of content...

## Structured

Fixed-in-format, structured documents are files or data formatted in a consistent and organized manner.

Examples: Forms, passports, licenses, time sheets, etc.



## Semi-structured

Semi-structured documents are files or data containing fixed and variable elements (e.g. tables).

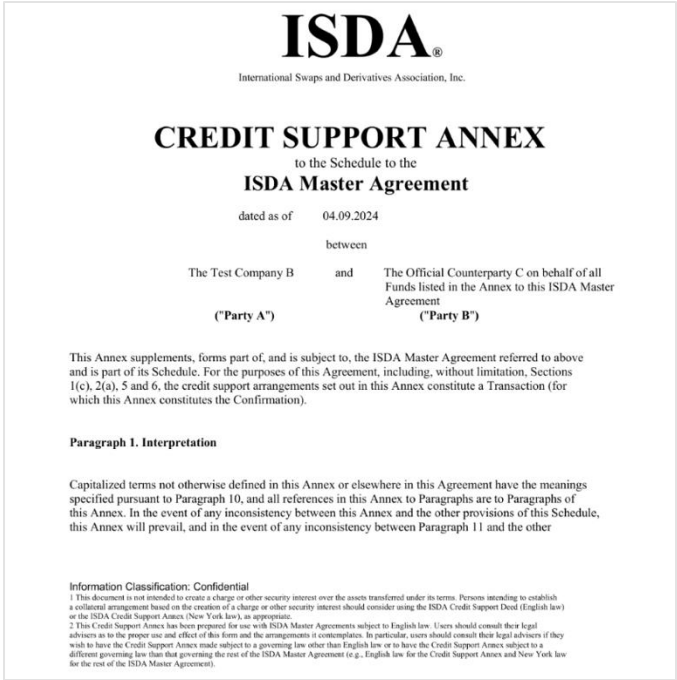
Examples: Invoices, receipts, purchase orders, bills, etc.



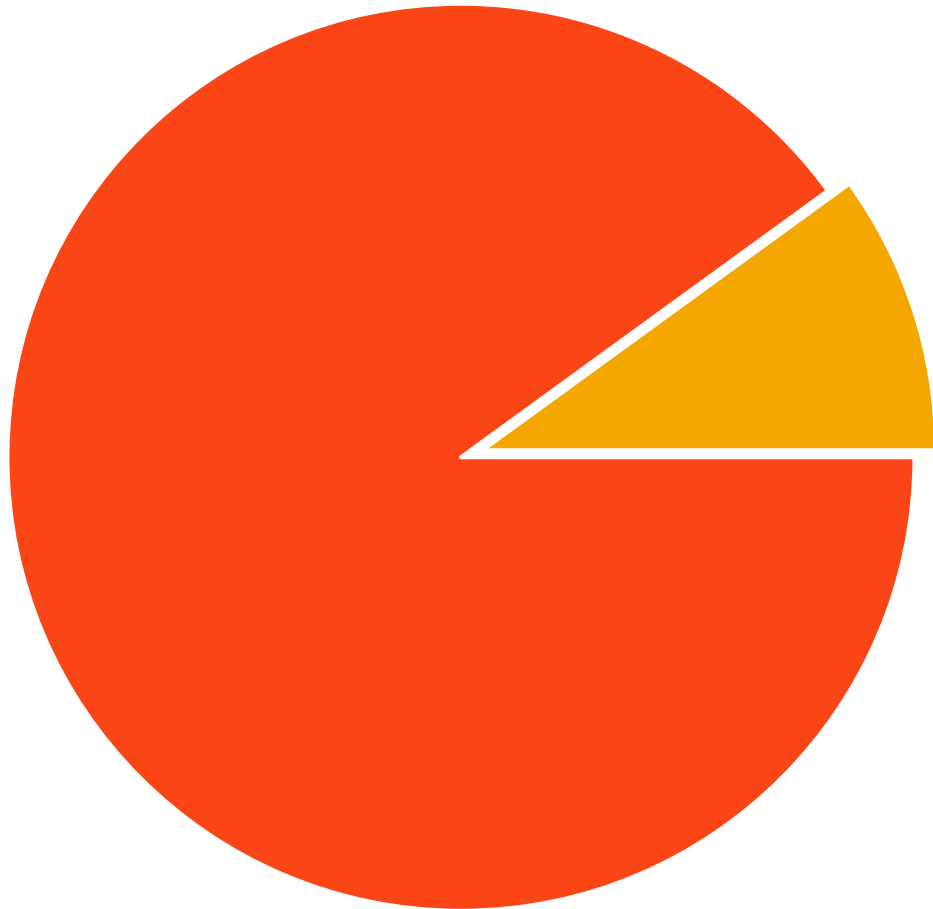
## Unstructured

Unstructured documents are files or data with no fixed format, containing variable elements (e.g. free form text).

Examples: Emails, messages, contracts, agreements, etc.



# Unstructured and complex data accounts for most enterprise data



■ **90% Unstructured Data** ■ **10% Structured Data**

Charting a path to the data-and-AI-driven enterprise of 2030 - McKinsey & Company

- **Businesses that unlock their unstructured data can identify new insights, extend automation into new areas, and outperform their competition.**
- For decades, businesses have worked mostly with structured data.
- Unstructured data has long been out of reach for automation, creating inefficiencies and limiting end-to-end process automation.

A person in an orange shirt is standing on a dirt path on a grassy hill, taking a photo of a lake and mountains. The scene is a wide-angle landscape shot with a person in the foreground, a lake in the middle ground, and mountains in the background. The sky is blue with some clouds. There are large, semi-transparent circular overlays on the image.

# Demo

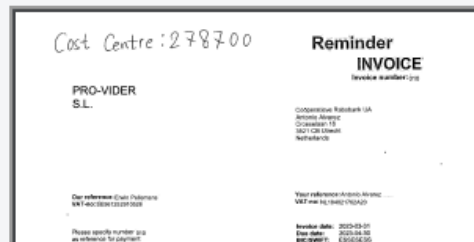


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AutoPilot

Gen AI example

Reminder invoice HW.pdf



ER

Wat is de kostenplaats en het totaal bedrag?



Searched Analyze PDF Document ⓘ

Bedankt voor uw vraag. Ik heb de factuur geanalyseerd en kan u de volgende informatie geven:

1. **Kostenplaats:** 278700
2. **Totaal bedrag:** 4.984,00 EUR (inclusief BTW)

Hier is een uitsplitsing van het bedrag:

- User Fee: 2.000,00 EUR
- Success Fee: 2.984,00 EUR
- Totaal (excl. BTW): 4.984,00 EUR
- BTW: 0,00 EUR
- Totaal (incl. BTW): 4.984,00 EUR

Opmerking: Er wordt geen BTW in rekening gebracht omdat er een verleggingsregeling van toepassing is (Reverse charge Art 44 VAT-Dir) voor klanten binnen de EU.

Heeft u nog andere vragen over deze factuur?



Suggested prompts:

Kunt u meer details geven over de verleggingsregeling

Wat betekent de User Fee en Success Fee precies

Zijn er nog andere kosten die niet op deze factuur staan

Document Understanding - Training the AI

UiPath

Document Understanding

Build

Measure

Publish

Monitor

Documentation

Manage access

Project settings

Build

FIFdemotest5 > Build

Move to

Tags

Delete

1 selected

Add document type

Automatic classification

No documents

Click to browse or drop sample documents to upload

Supported file formats: PNG, JPG/JPEG, PDF, TIF/TIFF

Invoices

5 documents

Average

Document name	Upload date	Tag	Status
Invoice For PO-12345.png	4/2/25, 10:43 AM		Available
invoice23.png	4/2/25, 10:43 AM		Available
<input checked="" type="checkbox"/> invoice37.png	4/2/25, 10:43 AM		Available
invoice34.jpg	4/2/25, 10:43 AM		Available
invoice27.jpg	4/2/25, 10:43 AM		Available

invoice37.png

Document type

Invoices

INVOICE

Chris Coyier  
123 Appleswood Street  
Applesville, WI 53719  
Phone: (555) 555-5555

chriscoyierdesign

Widget Corp.  
c/o Steve Widget

Invoice #	000123
Date	December 15, 2009
Amount Due	\$625.00

Item	Description	Unit Cost	Quantity	Price
Web Updates	Monthly web updates for http://widgetcorp.com (Nov. 1 - Nov. 30, 2009)	\$650.00	1	\$650.00
SSL Renewals	Yearly renewals of SSL certificates on main domain and several subdomains	\$75.00	3	\$225.00
Subtotal				\$875.00
Total				\$875.00
Amount Paid				\$0.00
Balance Due				\$875.00

TERMS

NET 30 Days. Finance Charge of 1.5% will be made on unpaid balances after 30 days.

Click, edit, print

Document 3 of 5

Cancel

Annotate

UiPath

Document Understanding

Training the AI

Labelling



Build

Measure

Publish

Monitor

RFIDemoTests > Build > Invoices

Search

Filter

Invoice For PO-12345...

Invoice23.png

Invoice27.png

Invoice34.jpg

Invoice27.jpg

INVOICE

Chris Coyier  
123 Appleseed Street  
Appleville, WI 53719  
Phone: (555) 555-5555

chriscoyierdesign

Widget Corp.  
c/o Steve Widget

Invoice #	000123
Date	December 15, 2009
Amount Due	\$625.00

Item	Description	Unit Cost	Quantity	Price
Web Updates	Monthly web updates for http://widgetcorp.com (Nov. 1 - Nov. 30, 2009)	\$650.00	1	\$650.00
SSL Renewals	Yearly renewals of SSL certificates on main domain and several subdomains	\$75.00	3	\$225.00

Subtotal	\$875.00
Total	\$875.00
Amount Paid	\$0.00
Balance Due	\$875.00

TERMS

NET 30 Days. Finance Charge of 1.5% will be made on unpaid balances after 30 days.

Upload more documents

Fields

N

Vendor Name

Chris Coyier

V

Vendor Address

123 Appleseed Street Appleville, WI 53719

B

Billing Name

Widget Corp.

I

Billing Address

Marked as missing

S

Shipping Address

Marked as missing

O

Invoice Number

000123

P

Purchase Order Number

Marked as missing

E

Vendor VAT Number

Marked as missing

D

Document Date

2009-12-15

T

Tax Amount

Marked as missing

A

Total Amount

\$75.00

Y

Payment Terms

NET 30 Days, Finance Charge of 1.5% will be made on unpaid balances after 30 days.

-

Net Amount

\$75.00

U

Due Date

Marked as missing

C

Discount Amount

Marked as missing

M

Discount Amount

Marked as missing

I

Bank IBAN

Marked as missing

K

Tax Rate

Marked as missing

Table

Click, edit, print

Documentation

Manage access

Project settings

Document 3 of 5

Confirm

Document Understanding

Measure the quality



Build

Measure

Publish

Monitor

FiFdemotest5 > Measure

The Project score factors in the classifier and extractor scores for all document types.

61

Average

Extraction

The Document Type score factors in the overall performance of the model as well as the size and quality of the dataset.

Invoices

5 documents

Average

Compare model

Annotate

FactorsDatasetMetrics

Base model: InvoicesTotal fields: 21Download advanced metrics

Field name	Content type	Training pages	Rating	Accuracy
Vendor Name	Tr String	5 pages	Excellent	100%
Vendor Address	Tr String	5 pages	Excellent	100%
Billing Name	Tr String	4 pages	Excellent	100%
Billing Address	Tr String	3 pages	Poor	0%
Shipping Address	Tr String	2 pages	Poor	0%
Invoice Number	ID Number	5 pages	Excellent	100%
Purchase Order Number	ID Number	4 pages	Poor	0%
Vendor VAT Number	ID Number	1 pages	Poor	0%
Document Date	Date	5 pages	Excellent	100%
Tax Amount	Number	3 pages	Poor	0%
Total Amount	Number	5 pages	Excellent	100%
Payment Terms	Tr String	3 pages	Poor	0%
Net Amount	Number	4 pages	Excellent	100%
Due Date	Date	1 pages	Poor	0%
Discount Amount	Number	2 pages	Poor	0%
Payment Address	Tr String	1 pages	Poor	0%
Bank IBAN	ID Number	0 pages	Not Available	N/A
Tax Rate	Number	1 pages	Poor	0%
Table				
Items - Descriptions	Tr String	5 pages	Excellent	100%
Items - Quantities	Number	4 pages	Excellent	100%
Items - Unit Prices	Number	4 pages	Excellent	100%
Items - Line Amounts	Number	5 pages	Excellent	100%
Items - Customer Purchase Order Numbers	ID Number	0 pages	Not Available	N/A
Items - Line Numbers	ID Number	0 pages	Not Available	N/A
Items - Part Number	ID Number	0 pages	Not Available	N/A

Documentation

Manage access

Project settings

Document Understanding

Publish the model



Build

Measure

Publish

Monitor

Project versions

Export model training datasets

Search

Deployment Tag: All

Name	Deployment Tag	Date	Version	Status
FIFdemoProject		Apr 2, 2025, 10:59:29 AM	1	Deployed

1 of 1

Page 1 / 1

Automate your process

Use this Document Understanding project in an automation of choice in Studio, Studio Web or APIs.

FIFdemoProject

Apr 2, 2025, 10:59:29 AM

Documentation

Manage access

Project settings

Create project version

Name\*

New project

Description

Models to include \*

Invoices

Deployment tag

None

Only deployed project versions can be tagged.

Cancel

Create

# Studio Web

## Running the matching flow

UiPath Studio

Invoice-PO-matching (FIF) > Main

Saved recently

Test on cloud

Test step-by-step

Publish

Submit as template

Share

Extract PO Data

Successful

Document Understanding project \*

Predefined

Extractor \*

Purchase Orders

Extracted fields: Purchase Order Number, Purchase Order Date, Purchase Order Expiry Date, Payment Terms, Buyer Company Name, Buyer Company Address, Buyer VAT Number, Buyer Phone Number, Buyer Email Address, Buyer Fax, Buyer Website, Buyer ...

Input\*

File

Show additional properties

Compare based on AI

Successful

UiPath GenAI Activities connection \*

erik.rijken@uipath.com [ default ]

Model name\*

claude-3-5-sonnet

Prompt \*

Do the PO# number and the total amount match within these 2 documents {x} Invoice and {y} PO ? Start answering with Yes or No please.

PII detection

True

False

System prompt

You are a helpful assistant

Context grounding

None

Manage Properties

Show additional properties

Output

Successful

Download logs

The second document shows:

Purchase Order Number: PO00495

Total Amount: 228.47

Both the PO numbers and the total amounts are different between the two documents.

13:31:17 Task created with Id 5535026

13:31:17 Processing invoice: invoice23.png

13:31:25 Processing PO: PO-12345.jpg

13:31:35 No, the PO# numbers and total amounts do not match between these two documents.

The first document shows:

Purchase Order Number: 2312/2019

Total Amount: 154.06

The second document shows:

Purchase Order Number: 12345

Total Amount: 215.80

Both the PO numbers and total amounts are different between the two documents.

13:31:36 Task created with Id 5535027

13:31:36 Processing PO: po-process-example-purchase-order-1547776366.jpg

13:31:46 No, the PO# number and the total amount do not match within these two documents.

The first document shows:

Purchase Order Number: 2312/2019

Total Amount: 154.06

The second document shows:

Purchase Order Number: PO00495

Total Amount: 228.47

Both the purchase order numbers and the total amounts are different between the two documents.

13:31:47 Task created with Id 5535028

13:31:47 Invoice-PO-matching (FIF) execution ended



Action center

Running action apps

UiPath Action Center

Overview

Inbox

Admin Settings

?

79

Tenant: CustomerDemo

EA

My Tasks

Search...

Filter (1)

Clear all

Time :

Last 30 days

Pending

Unassigned

Completed

Manual matching Invoice PO

#5535028

No Labels Added

8 minutes ago

End of List.

Manual matching Invoice PO #5535028

Pending

PO and Invoice Matching Form

Po number: \*

PO00495

Invoice number: \*

US-001

Po total amount: \*

228,47

Invoice total amount: \*

154,06

Not ok

Ok



Extract the information you need from documents and communications.  
Automate more and extend end-to-end automation into areas previously untouched.

Demo by Evert A. Rijken — sales engineer  
[Erik.Rijken@uipath.com](mailto:Erik.Rijken@uipath.com)

