



PAPERLESS
ENVIRONMENTS

Xtracta
Your AI Data Engine

From Manual Entry to 70% Faster Processing: Paperless Environments Transforms Construction AP

For the construction industry, where thin margins and complex supply chains are the norm, back-office efficiency is just as critical as on-site competence.

Paperless Environments, a U.S.-based leader in document management, has spent two decades helping firms navigate this paper-heavy landscape. However, it wasn't until they integrated Xtracta's AI-driven engine into their flagship pVault® platform that they truly unlocked the "touchless" potential of Accounts Payable (AP) automation. By replacing rigid, template-based legacy systems, Paperless has delivered a transformative 60%-70% reduction in manual data-entry time for its clients.

The Burden of Rigid Legacy Systems and High Support Overhead

Before partnering with Xtracta, Paperless Environments utilized a legacy OCR product that was a barrier to both sales and customer satisfaction. This older system was expensive, time-consuming to install, and relied heavily on manual customization. For the 99% of construction firms that simply wanted a solution to "work on its own," this legacy approach was massive overkill.

The primary technical hurdle was its reliance on static templates. In the construction world, subcontractors frequently update their invoice formats, change remittance addresses, or operate from multiple regional branches. Under the old system, every minor variation required the user to stop their workflow and manually reconfigure a template. This friction was reflected in the data: while Paperless managed accounts for firms processing up to 800,000 documents a year, only 4%-5% of their clients were willing to struggle with the legacy OCR module.

Rapid Deployment Over In-House Development

Faced with the choice of building an extraction engine from scratch or partnering with a modern provider, Jim Andrews, VP of Sales and Marketing at Paperless Environments, advocated partnering to deliver immediate market value. The goal was a "turnkey" digital infrastructure that could be deployed in weeks, not years.

Within just a few months of partnering with Xtracta, Paperless had fully integrated the technology—essentially white-labelling it—so that it sat seamlessly within the pVault® environment.

A Seamless Workflow: From the AP Inbox to the ERP

The Xtracta-powered workflow in pVault® is designed to handle the heavy lifting before an AP clerk even begins their day. The process starts with an email importer that constantly monitors a client's AP inbox. When an invoice arrives, the system automatically reads the attachment or the email body and places the data into an OCR work queue.

By the time the staff logs in, half the job is already done. The software has already extracted key header and line-item data, allowing the user to simply review the information rather than type it. Once verified, the digital document is routed through a customized approval chain—reaching project managers or executives for a digital sign-off—before being exported directly into the firm's ERP system, such as Sage, Viewpoint, or Foundation.

Smart Technology for Complex Supplier Networks

What sets Xtracta apart for Paperless's clients is its "Smart Learning" AI, which thrives where templates fail. Construction firms deal with a massive range of suppliers with completely differing invoice designs. Xtracta's technology doesn't just look for a box on a page; it reads the document contextually to -



“If I've got a product sitting in front of me that I can be selling, working in a month or two, and pulling in revenue on it, I would much rather go that route than build something ourselves.”

Jim Andrew
Vice President of Sales & Marketing

identify the specific vendor and branch. It then pulls data from the client's ERP system to backfill vendor information that matches the invoice.

Removing the Financial Barrier with Flexible Pricing

A key component of Xtracta's success is a modern, tiered pricing structure designed to overcome the common industry issue of "use it or lose it" software. By offering a wide variety of plans, Xtracta ensures users can select a tier that closely matches their actual document volume.

This flexibility allows Paperless to offer options that scale with its clients' needs. To help users become comfortable with the technology, Paperless even includes an initial 3,000 documents for free in its cloud products. Once a customer sees the speed and accuracy, they rarely return to manual entry.

Expanding into High-Stakes Compliance

The partnership is now expanding beyond standard AP invoices into the complex world of construction compliance. Paperless is currently developing a cloud-based portal that uses Xtracta to read AIA forms, lien waivers, and certificates of insurance.

In this upcoming workflow, a subcontractor will upload a compliance document to the portal. Xtracta will read the document and compare it against the specific insurance or licensing parameters stored in the system. If the document has expired or the coverage is insufficient, the system will automatically trigger an alert to the AP team and notify the subcontractor. This ensures that payments are only released to compliant vendors, significantly reducing risk for the general contractor.

A Proven Competitive Edge

The results of this partnership speak for themselves. Since moving to Xtracta, Paperless has seen its OCR adoption rate soar from 5% to 70% of new clients. By eliminating the "template trap" and providing a scalable, flexible solution, Paperless has turned document management into a high-speed engine for growth.

Says Andrews: "Any time you can tell somebody you can achieve a 50 to 75% reduction in the amount of time that you're spending on data entry, it's a winner."



"It's not a template that you're teaching, it's actually reading the document and looking for keywords and then bringing those in and refilling them so that you don't have to"

Jim Andrew
Vice President of Sales & Marketing