

March 2026



AI-based Forms Recognition for the Salesforce Platform

SheepDocs AI for Salesforce

Executive Summary

Documents

Processes batches of forms contained in PDF files located in Microsoft OneDrive folders.

Audience

Targeted at production environments processing large numbers of forms on a regular basis.

Records

Auto creation (or update) of records stored in Salesforce based on data extracted from the forms including tables.

Upload

Optionally upload the processed forms to Salesforce and link them to the created or updated records.

Performance

Recognizes multiple forms simultaneously using parallel processing for maximum efficiency.

Technology

Native Salesforce app built on top of Microsoft's Azure Document Intelligence and Content Understanding (using Apex and LWCs).



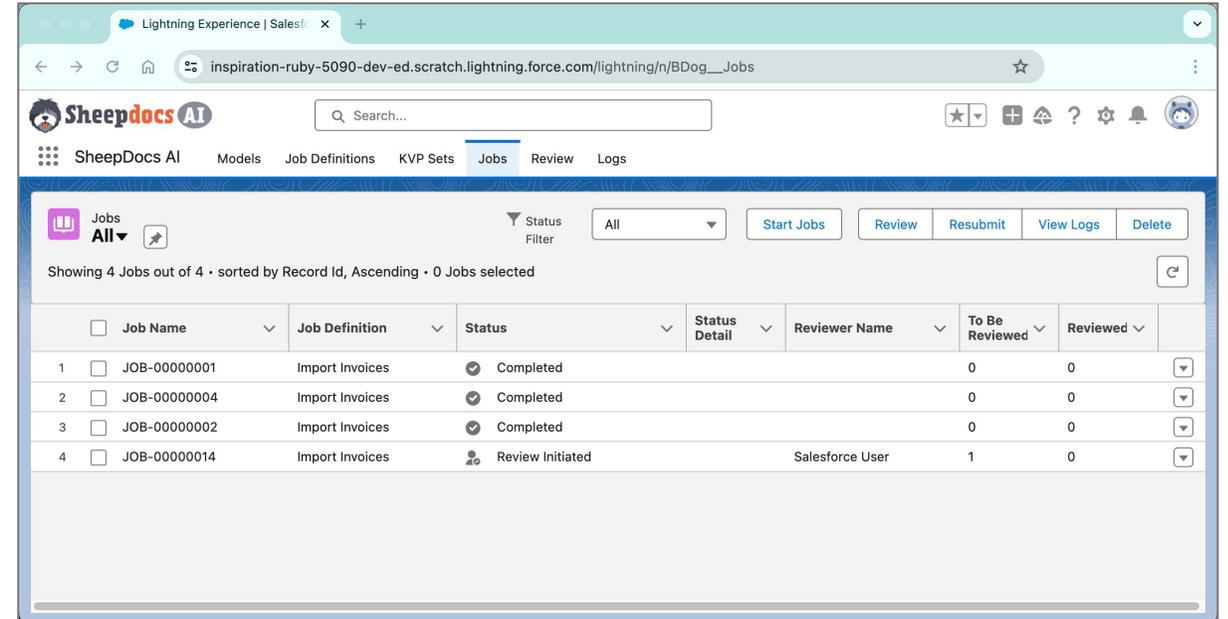
Document Intelligence vs Content Understanding

- **Azure Document Intelligence:** Use this for precise, structured data extraction from known document types like invoices, receipts, contracts, and ID documents . It is the go-to service for high-accuracy OCR, prebuilt models for common forms, and training custom models with clear visual templates to extract Key-Value pairs and tables.
- **Azure Content Understanding:** Opt for this when you need schema-driven, flexible extraction and generative AI inference over documents, often using zero-shot output without extensive labeling. It is recommended for a simplified starting experience, classification, and advanced features like inferred fields (e.g., calculating tax).
- **Combined Use:** Integrate both when you require Document Intelligence's high-fidelity extraction (for documents like an invoice) as an initial step and then use Content Understanding for advanced reasoning and validation.



Jobs View

- List view for completed jobs and jobs in progress
- Status updates for jobs in progress reflected immediately
- Select one or more Job Definitions to create and start new jobs
- Initiate review of jobs that reported low confidence values or other problems
- Resubmit reviewed jobs
- Switch to the Log view of a job
- Delete completed or failed jobs



Jobs View

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inspiration-ruby-5090-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Jobs

 Search...

SheepDocs AI Models Job Definitions KVP Sets **Jobs** Review Logs

Jobs **All**  Status Filter **All** [Start Jobs](#) [Review](#) [Resubmit](#) [View Logs](#) [Delete](#)

Showing 4 Jobs out of 4 • sorted by Record Id, Ascending • 0 Jobs selected 

<input type="checkbox"/>	Job Name	Job Definition	Status	Status Detail	Reviewer Name	To Be Reviewed	Reviewed	
1	<input type="checkbox"/> JOB-00000001	Import Invoices	<input checked="" type="checkbox"/> Completed			0	0	
2	<input type="checkbox"/> JOB-00000004	Import Invoices	<input checked="" type="checkbox"/> Completed			0	0	
3	<input type="checkbox"/> JOB-00000002	Import Invoices	<input checked="" type="checkbox"/> Completed			0	0	
4	<input type="checkbox"/> JOB-00000014	Import Invoices	 Review Initiated		Salesforce User	1	0	



Jobs View With Start Job(s) Popup

The screenshot shows the SheepDocs AI interface. The top navigation bar includes 'SheepDocs AI', 'Models', 'Job Definitions', 'KVP Sets', 'Jobs', 'Review', and 'Logs'. The 'Jobs' tab is active. The main content area shows a list of jobs with columns for 'Job Definition Name', 'Job Creation', 'Source Folder', 'Completion Action', and 'Review Queue'. A 'Start Jobs' button is visible in the top right of the job list. A modal dialog is open, titled 'Select One Or More Job Definitions To Create Jobs For'. The dialog contains a table with the following data:

<input type="checkbox"/>	Job Definition Name	Job Creation	Source Folder	Completion Action	Review Queue
<input checked="" type="checkbox"/>	Import Invoices	Immediate	Tmp/Invoices		On Error Only

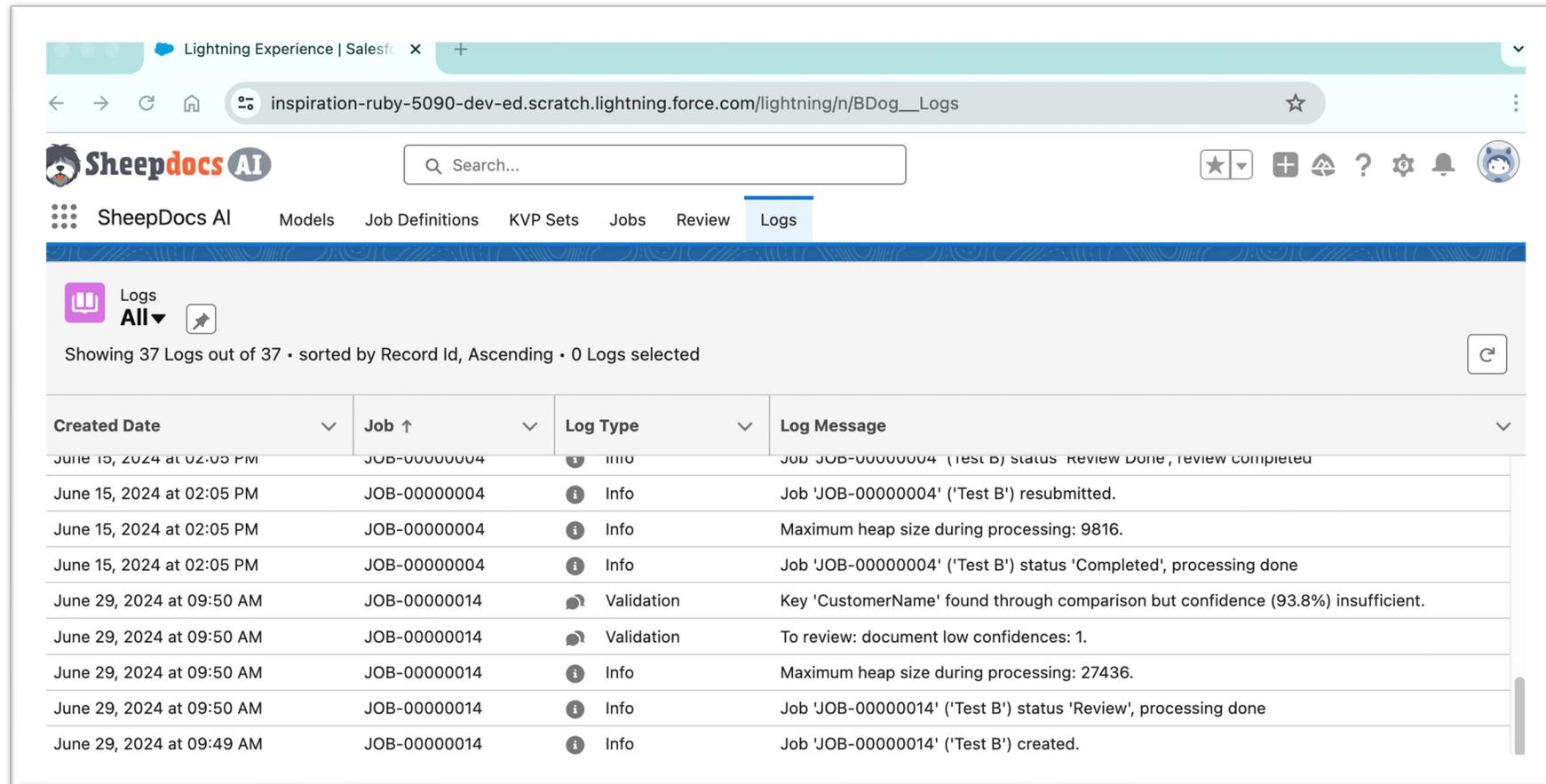
At the bottom of the dialog, there is a question: 'Start job for the selected Job Definition?' and two buttons: 'Cancel' and 'Confirm'.

Multiple (different) Jobs can be started to run sequentially



Log View

- List view for messages generated during job execution
- Provide details in case the job encounters an error



The screenshot displays the 'Log View' interface for SheepDocs AI. The browser address bar shows the URL: `inspiration-ruby-5090-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Logs`. The interface includes a search bar and navigation tabs for 'Models', 'Job Definitions', 'KVP Sets', 'Jobs', 'Review', and 'Logs'. The 'Logs' tab is active, showing a list of 37 logs. The logs are sorted by 'Record Id, Ascending' and 0 logs are selected. The table below shows the details of the logs.

Created Date	Job	Log Type	Log Message
June 15, 2024 at 02:05 PM	JOB-00000004	Info	Job 'JOB-00000004' ('Test B') status 'Review Done', review completed
June 15, 2024 at 02:05 PM	JOB-00000004	Info	Job 'JOB-00000004' ('Test B') resubmitted.
June 15, 2024 at 02:05 PM	JOB-00000004	Info	Maximum heap size during processing: 9816.
June 15, 2024 at 02:05 PM	JOB-00000004	Info	Job 'JOB-00000004' ('Test B') status 'Completed', processing done
June 29, 2024 at 09:50 AM	JOB-00000014	Validation	Key 'CustomerName' found through comparison but confidence (93.8%) insufficient.
June 29, 2024 at 09:50 AM	JOB-00000014	Validation	To review: document low confidences: 1.
June 29, 2024 at 09:50 AM	JOB-00000014	Info	Maximum heap size during processing: 27436.
June 29, 2024 at 09:50 AM	JOB-00000014	Info	Job 'JOB-00000014' ('Test B') status 'Review', processing done
June 29, 2024 at 09:49 AM	JOB-00000014	Info	Job 'JOB-00000014' ('Test B') created.

Log View

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inspiration-ruby-5090-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Logs

Sheepdocs AI

Search...

SheepDocs AI Models Job Definitions KVP Sets Jobs Review **Logs**

Logs All 

Showing 37 Logs out of 37 • sorted by Record Id, Ascending • 0 Logs selected

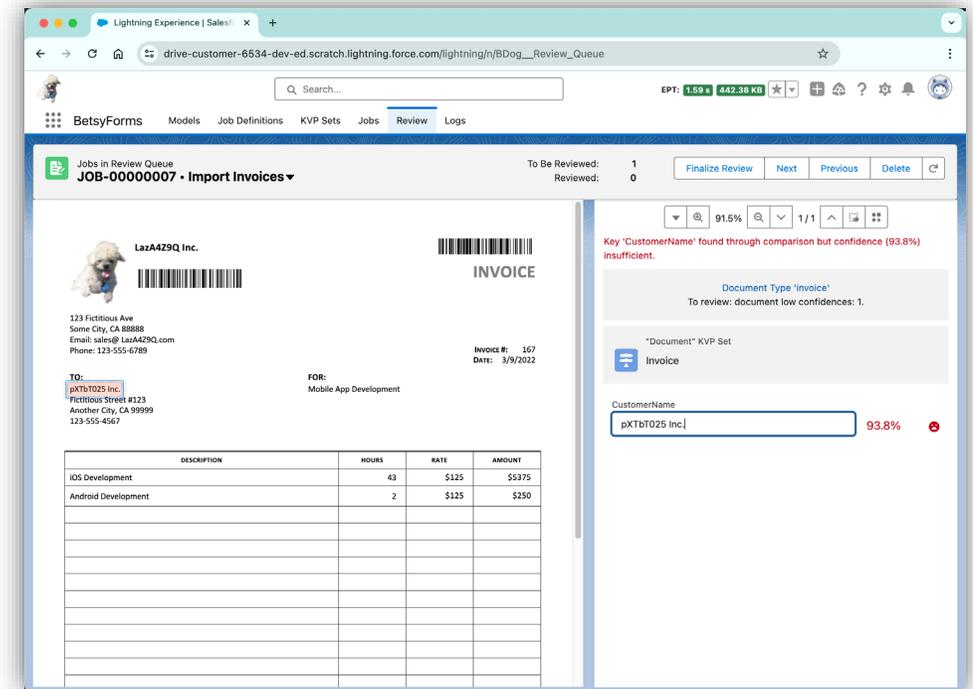
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June 29, 2024 at 09:50 AM	JOB-00000014	Info	Job 'JOB-00000014' ('Test B') status 'Review', processing done
June 29, 2024 at 09:49 AM	JOB-00000014	Info	Job 'JOB-00000014' ('Test B') created.

Logs are deleted when the Job is deleted.



Review Queue

- Split view showing both the PDF and a form containing the field values to review
- Field values with insufficient confidence are flagged for review and can be corrected manually
- Field values missing in the recognition results all together are flagged and can be entered manually
- Optionally show all field values (both with sufficient and insufficient confidence)
- The PDF shows the field values with different color backgrounds and outlines
- The currently selected input field on the form is outlined on the PDF



Review Queue with Only Fields to Correct

Lightning Experience | Salesforce | drive-customer-6534-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Review_Queue

Sheepdocs AI Search... EPT: 1.59 s 442.38 KB

SheepDocs AI Models Job Definitions KVP Sets Jobs **Review** Logs

Jobs in Review Queue **JOB-00000007 • Import Invoices** To Be Reviewed: 1 Reviewed: 0 [Finalize Review](#) [Next](#) [Previous](#) [Delete](#)

91.5% 1/1

LazA4Z9Q Inc.
123 Fictitious Ave
Some City, CA 88888
Email: sales@LazA4Z9Q.com
Phone: 123-555-6789

INVOICE
INVOICE #: 167
DATE: 3/9/2022

TO: pXTbT025 Inc.
Fictitious Street #123
Another City, CA 99999
123-555-4567

FOR: Mobile App Development

DESCRIPTION	HOURS	RATE	AMOUNT
iOS Development	43	\$125	\$5375
Android Development	2	\$125	\$250

Key 'CustomerName' found through comparison but confidence (93.8%) insufficient.

Document Type 'invoice'
To review: document low confidences: 1.

"Document" KVP Set
Invoice

CustomerName
pXTbT025 Inc. 93.8%



Review Queue Continued

- The error message for the selected input field is shown at the top of the form
- The reviewer cycles through all documents for which a discrepancy is reported
- The recognition results for a document can be deleted during review
- The information in the header shows the number of documents still to review
- The reviewer can pause the review and return to it later
- Reviewers are tracked so the same job cannot be selected by another reviewer

The screenshot displays the SheepDocs AI review interface. At the top, the browser address bar shows the URL: drive-customer-6534-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Review_Queue. The SheepDocs AI logo is in the top left, and a search bar is in the top center. The top right shows EPT: 1.59 s and 442.38 KB. The main header indicates 'Jobs in Review Queue' with 'JOB-00000007 - Import Invoices' and 'To Be Reviewed: 1' and 'Reviewed: 0'. Buttons for 'Finalize Review', 'Next', 'Previous', and 'Delete' are visible. The document being reviewed is an invoice from 'LazA429Q Inc.' with a barcode. The invoice details include: 123 Fictitious Ave, Some City, CA 88888, Email: sales@LazA429Q.com, Phone: 123-555-6789. Invoice #: 167, DATE: 3/9/2022. TO: pXtbt025 Inc., Fictitious Street #123, Another City, CA 99999, 123-555-4567. FOR: Mobile App Development. A table of invoice items is shown below:

DESCRIPTION	HOURS	RATE	AMOUNT
iOS Development	43	\$125	\$5375
Android Development	2	\$125	\$250

On the right side, the recognition results are shown. A key message states: 'Key *CustomerName* found through comparison but confidence (93.8%) insufficient.' Below this, the document type is 'invoice' with a note: 'To review: document low confidences: 1.' The 'Document* KVP Set' includes 'Invoice' with a plus icon. The 'CustomerName' field contains 'pXtbt025 Inc.' with a confidence of 93.8% and a red error icon. Other fields include '_Barcode2_', 'Test Invoice' (100.0%), '_Barcode1_', and 'BetsyForms' (100.0%). The 'Table* KVP Set' includes 'Invoice Line Items' with a plus icon. Below this, the 'Description' field contains 'iOS Development' (93.8%) and 'Android Development' (93.7%), both with green checkmarks.



Review Queue Showing All Fields (sufficient and insufficient confidence)

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drive-customer-6534-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Review_Queue

Sheepdocs AI

Search...

EPT: 1.59 s 442.38 KB

Jobs in Review Queue
JOB-0000007 • Import Invoices

To Be Reviewed: 1
Reviewed: 0

Finalize Review Next Previous Delete

91.5% 1/1

Key 'CustomerName' found through comparison but confidence (93.8%) insufficient.

Document Type 'invoice'
To review: document low confidences: 1.

"Document" KVP Set
Invoice

CustomerName
pXTbT025 Inc. 93.8%

__Barcode2__
Test Invoice 100.0%

__Barcode1__
BetsyForms 100.0%

"Table" KVP Set
Invoice Line Items

Description
iOS Development 93.8%

Description
Android Development 93.7%

LazA4Z9Q Inc.

123 Fictitious Ave
Some City, CA 88888
Email: sales@LazA4Z9Q.com
Phone: 123-555-6789

INVOICE

INVOICE #: 167
DATE: 3/9/2022

TO: pXTbT025 Inc.
Fictitious Street #123
Another City, CA 99999
123-555-4567

FOR: Mobile App Development

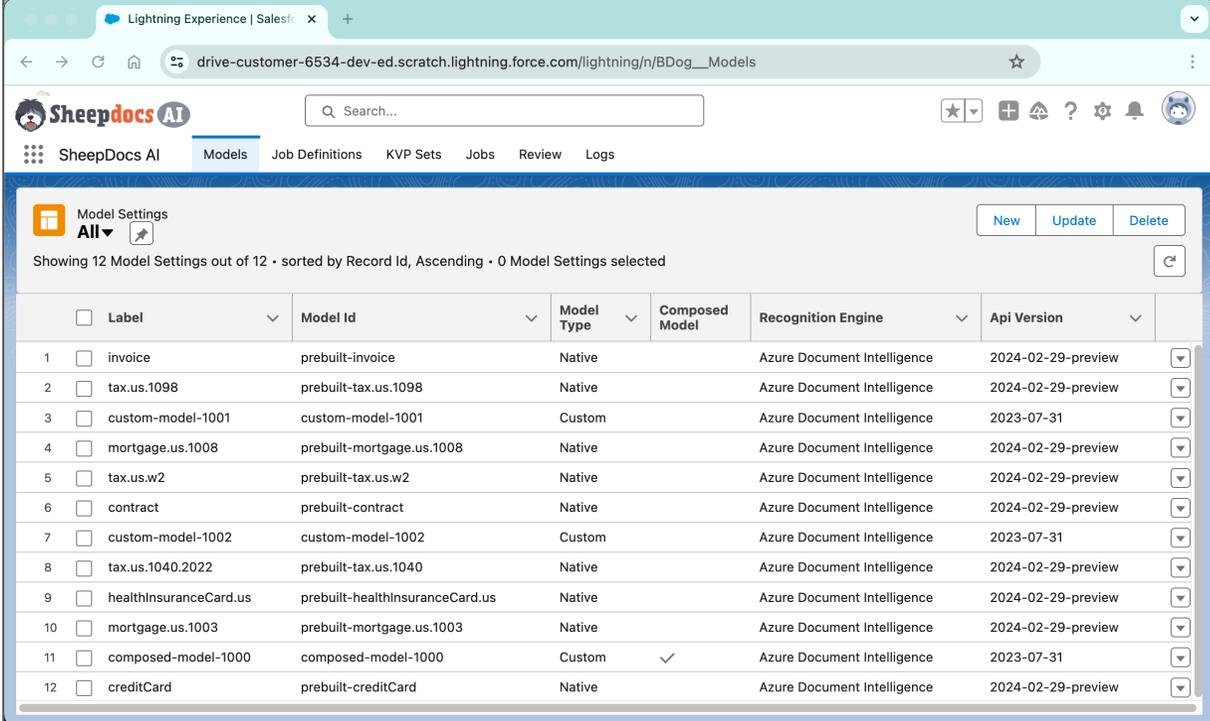
DESCRIPTION	HOURS	RATE	AMOUNT
iOS Development	43	\$125	\$5375
Android Development	2	\$125	\$250

Toggle between showing all fields or only fields with low confidences.



Model View

- List view for the Models imported from Azure Document Intelligence and the Analyzers from Azure Content Understanding
- Both pre-built and custom models/analyzers can be imported for use in SheepDocs
- Imported models/analyzers become selectable in KVP Sets
- For when a new version of Document Intelligence or Content Understanding becomes available, already imported models can be updated



The screenshot shows the 'Model Settings' page in the SheepDocs AI interface. The page displays a table with 12 rows of model settings. The columns are: Label, Model Id, Model Type, Composed Model, Recognition Engine, and Api Version. The 'Composed Model' column has a checkmark for the 'composed-model-1000' entry. The 'Recognition Engine' for all entries is 'Azure Document Intelligence'. The 'Api Version' varies, including '2024-02-29-preview' and '2023-07-31'. The interface includes a search bar, navigation tabs (Models, Job Definitions, KVP Sets, Jobs, Review, Logs), and action buttons (New, Update, Delete).

<input type="checkbox"/>	Label	Model Id	Model Type	Composed Model	Recognition Engine	Api Version	
<input type="checkbox"/>	invoice	prebuilt-invoice	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	tax.us.1098	prebuilt-tax.us.1098	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	custom-model-1001	custom-model-1001	Custom		Azure Document Intelligence	2023-07-31	
<input type="checkbox"/>	mortgage.us.1008	prebuilt-mortgage.us.1008	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	tax.us.w2	prebuilt-tax.us.w2	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	contract	prebuilt-contract	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	custom-model-1002	custom-model-1002	Custom		Azure Document Intelligence	2023-07-31	
<input type="checkbox"/>	tax.us.1040.2022	prebuilt-tax.us.1040	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	healthInsuranceCard.us	prebuilt-healthInsuranceCard.us	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	mortgage.us.1003	prebuilt-mortgage.us.1003	Native		Azure Document Intelligence	2024-02-29-preview	
<input type="checkbox"/>	composed-model-1000	composed-model-1000	Custom	<input checked="" type="checkbox"/>	Azure Document Intelligence	2023-07-31	
<input type="checkbox"/>	creditCard	prebuilt-creditCard	Native		Azure Document Intelligence	2024-02-29-preview	



Model View

The screenshot shows the 'Model View' interface in the SheepDocs AI application. The browser address bar indicates the URL: `drive-customer-6534-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Models`. The application header includes the 'Sheepdocs AI' logo and a search bar. The main navigation menu contains 'SheepDocs AI', 'Models', 'Job Definitions', 'KVP Sets', 'Jobs', 'Review', and 'Logs'. The 'Models' tab is active, displaying 'Model Settings' for 'All' models. A message states 'Showing 12 Model Settings out of 12 · sorted by Record Id, Ascending · 0 Model Settings selected'. Below this is a table with columns for 'Label', 'Model Id', 'Model', and 'Model Settings'. The first row, with 'Record Id' 1, is highlighted by an orange callout bubble. The table contains 12 rows of model settings.

Record Id	Label	Model Id	Model	Model Settings
1	invoice	prebuilt-invoice	Native	Azure Document Intelligence
2	tax.us.1098	prebuilt-tax.us.1098	Native	Azure Document Intelligence
3	custom-model-1001	custom-model-1001	Custom	Azure Document Intelligence
4	mortgage.us.1008	prebuilt-mortgage.us.1008	Native	Azure Document Intelligence
5	tax.us.w2	prebuilt-tax.us.w2	Native	Azure Document Intelligence
6	contract	prebuilt-contract	Native	Azure Document Intelligence
7	custom-model-1002	custom-model-1002	Custom	Azure Document Intelligence
8	tax.us.1040.2022	prebuilt-tax.us.1040	Native	Azure Document Intelligence
9	healthInsuranceCard.us	prebuilt-healthInsuranceCard.us	Native	Azure Document Intelligence
10	mortgage.us.1003	prebuilt-mortgage.us.1003	Native	Azure Document Intelligence
11	composed-model-1000	composed-model-1000	Custom	Azure Document Intelligence
12	creditCard	prebuilt-creditCard	Native	Azure Document Intelligence

The prebuilt (i.e., pretrained) Invoice model has been AI trained by Microsoft to cover many different invoice formats (allows for processing of a mixed batch of many different type of invoices). This “virtualization” is provided in other prebuilt models too.



Model View with Import Model Popup

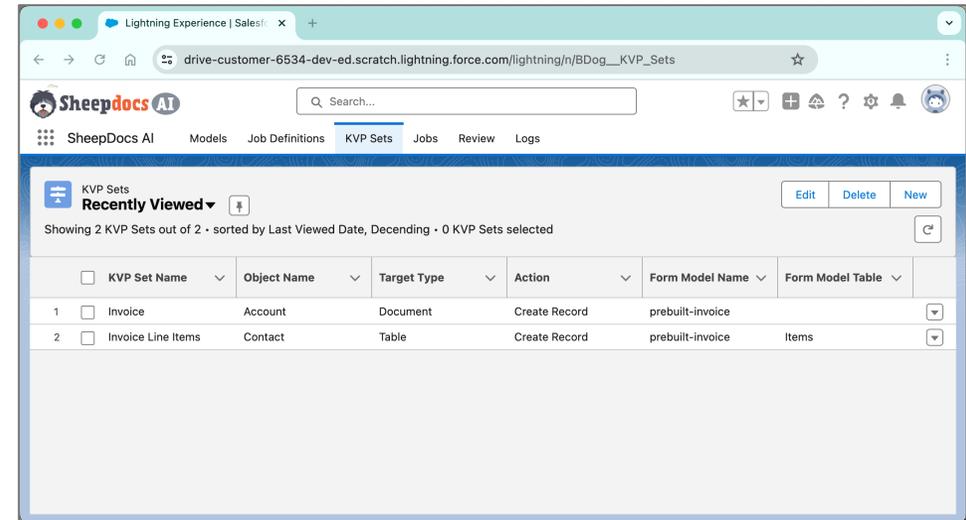
The screenshot displays the Sheepdocs AI web application. A modal window titled "Select Model (DI) or Analyzer (CU)" is open, showing a table of available models and analyzers. The background interface includes a search bar, navigation icons, and a list of models.

Model/Analyzer Id		Description	API ...
<input type="radio"/> prebuilt-utilityBill	CU	Extract utility bill document fields.	2025-11-..
<input type="radio"/> prebuilt-video	CU	Analyze videos to extract transcript and description for each segment.	2025-11-..
<input type="radio"/> prebuilt-videoSearch	CU	Analyze videos to extract transcript and description for each segment.	2025-11-..
<input type="radio"/> prebuilt-videoSynopsis	CU	Analyze video segment to extract transcripts and descriptions.	2025-11-..
<input type="radio"/> composed-model-1003	DI	Custom invoice and business letter	2024-11-..
<input type="radio"/> custom-model-1004	DI	Test simple invoice	2024-11-..
<input type="radio"/> custom-model-1005	DI	Business letter	2024-11-..
<input type="radio"/> prebuilt-bankStatement.us	DI	Extract key information from US bank statement.	2024-11-..



KVP Sets

- KVP Sets (“Key-Value Pair Sets”) specify the mapping between recognized model/analyzer data and Salesforce Objects
- Key names represent the labels of the values to be recognized (e.g., “Quantity”, “Invoice Number”)
- The mapped Object field is set to the recognized content (i.e., the “value”)
- For Document Intelligence, specify up to 20 “Query Fields” to dynamically extract items that are not trained Key/Value Pairs
- Select an Action (Create Record, Create/Update Record, and Update Record)
- Enter the required confidence factor (reported confidences less than required cause a review of the result values)



The screenshot shows the Salesforce Lightning Experience interface for configuring KVP Sets. The page title is "KVP Sets" and it shows "Recently Viewed" items. The table below lists the configured KVP Sets:

<input type="checkbox"/>	KVP Set Name	Object Name	Target Type	Action	Form Model Name	Form Model Table
<input type="checkbox"/>	Invoice	Account	Document	Create Record	prebuilt-invoice	
<input type="checkbox"/>	Invoice Line Items	Contact	Table	Create Record	prebuilt-invoice	Items



KVP Sets Continued

- Optionally enter the Developer Name of a Record Type to be applied
- Create the Key Value Pairs to map Key names to Object field names
- Specify whether the Key (i.e., the label) is optional (i.e., could be absent)
- Optionally enter a Transform to preprocess the recognized field content (a SOQL query to e.g., lookup an ID using the content or a Regex to extract or replace data in the content)
- Indicate whether the recognized value must be used to lookup an existing record (to update it)
- Create separate KVP Sets for documents and their table(s) which are assumed to have a Master-Detail relationship

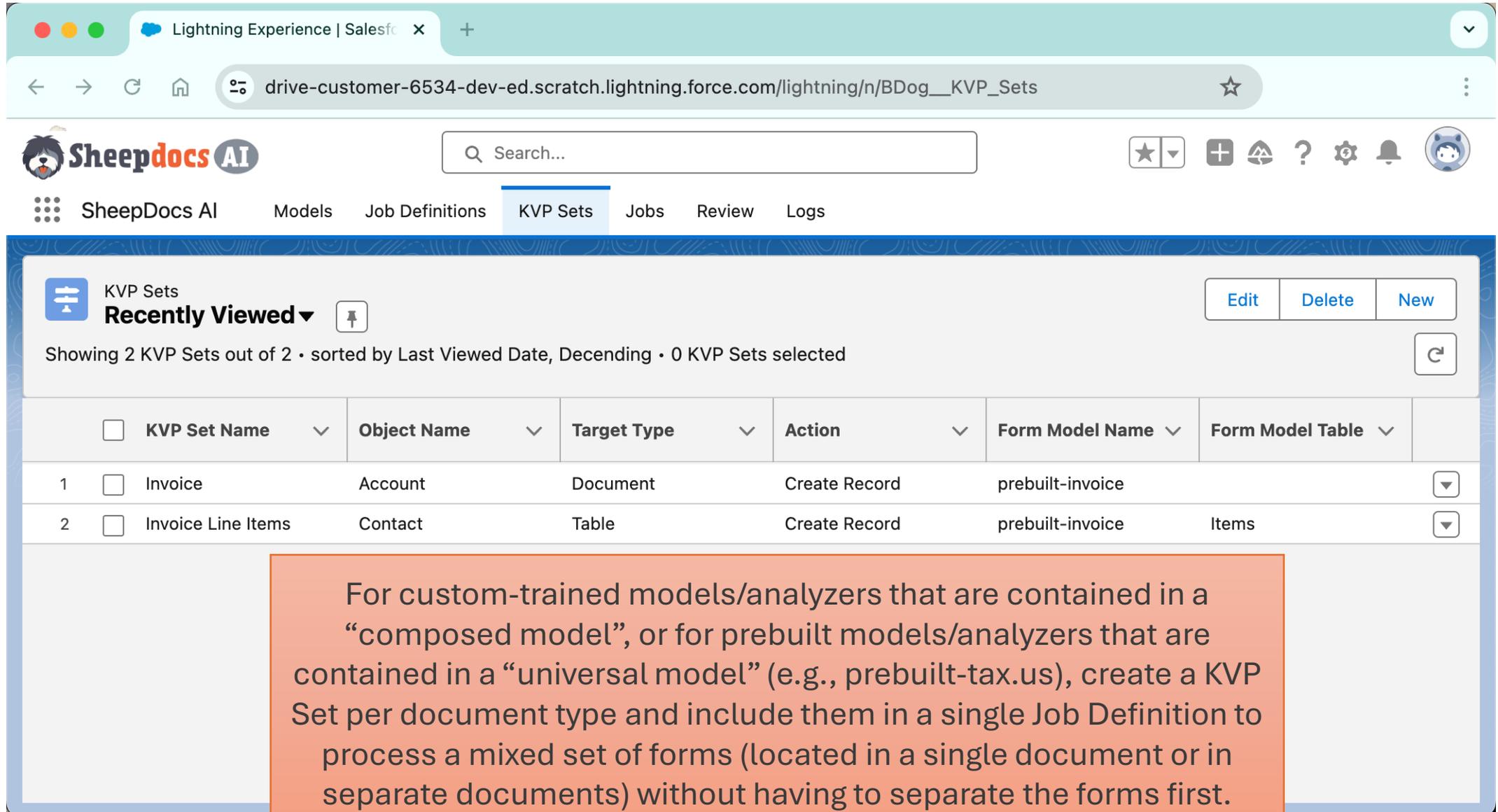
The screenshot shows the 'Update KVP Set' interface. The 'KVP Set Name' is 'Invoice'. The 'Action' is 'Create Record'. The 'Form Model Name' is 'invoice (prebuilt-invoice)'. The 'Form Model Table' is 'Select form table name'. The 'Object Name' is 'Account'. The 'Confidence Factor' is '90.00%'. The 'Query Fields' is 'Supplier'. The 'Record Type Dev Name' is empty. The 'High Resolution' checkbox is unchecked. The 'Detect Barcodes' checkbox is checked. The 'Available' pane is empty. The 'Selected' pane contains 'Invoice Line Items'. The 'Key Value Pairs' section has a table with the following data:

Key Name	Field Name
CustomerName	Account Name
__Barcode1__	Account Description
__Barcode2__	Account Site
Supplier	Account Source

The 'Save New Key Value Pair' section has the following values: Key Name: __Barcode__ (String), Barcode Number: 1, Field Name: Account Description, Field Type: Textarea (32000), Optional: unchecked, Transform: empty.



KVP Sets



The screenshot shows a web browser window with the URL `drive-customer-6534-dev-ed.scratch.lightning.force.com/lightning/n/BDog__KVP_Sets`. The page header includes the SheepDocs AI logo, a search bar, and navigation tabs for Models, Job Definitions, KVP Sets (selected), Jobs, Review, and Logs. The main content area displays a table of KVP Sets under the heading "Recently Viewed".

Showing 2 KVP Sets out of 2 • sorted by Last Viewed Date, Decending • 0 KVP Sets selected

	<input type="checkbox"/> KVP Set Name	Object Name	Target Type	Action	Form Model Name	Form Model Table	
1	<input type="checkbox"/> Invoice	Account	Document	Create Record	prebuilt-invoice		▼
2	<input type="checkbox"/> Invoice Line Items	Contact	Table	Create Record	prebuilt-invoice	Items	▼

For custom-trained models/analyzers that are contained in a “composed model”, or for prebuilt models/analyzers that are contained in a “universal model” (e.g., prebuilt-tax.us), create a KVP Set per document type and include them in a single Job Definition to process a mixed set of forms (located in a single document or in separate documents) without having to separate the forms first.



Create or Edit a KVP Set

Update KVP Set

KVP Set Name: Action:

Form Model Name: Form Model Table:

Object Name: Confidence Factor:

Query Fields: Record Type Dev Name:

High Resolution: Detect Barcodes:

Sort Selected

Select Table KVP Sets

Available:

Selected:

Key Value Pairs

Key Name	Field Name	
<input type="radio"/> CustomerName	Account Name	<input type="text"/>
<input type="radio"/> __Barcode1__	Account Description	<input type="text"/>
<input type="radio"/> __Barcode2__	Account Site	<input type="text"/>
<input type="radio"/> Supplier	Account Source	<input type="text"/>

Key Name:

Barcode Number:

Field Name:

Field Type:

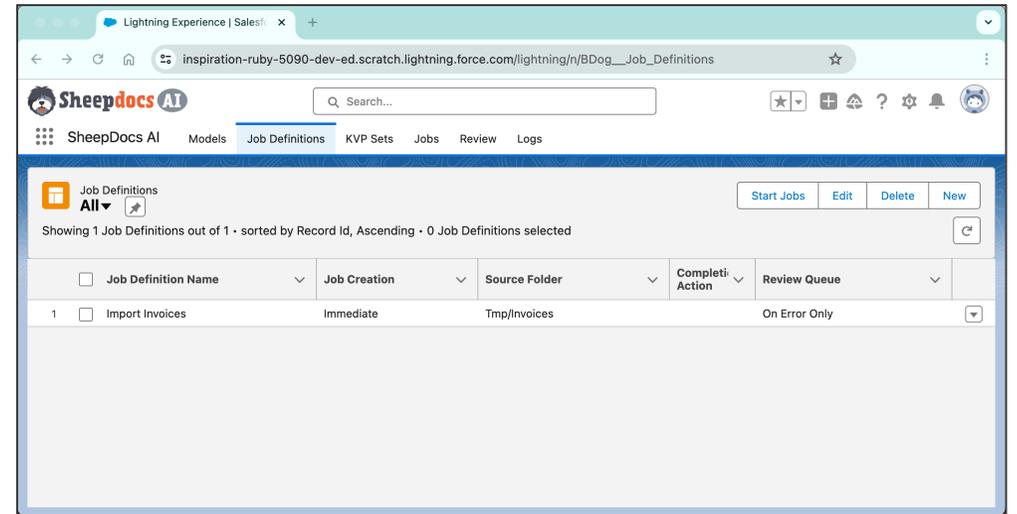
Optional:

Transform:



Job Definitions

- Job Definitions are “templates” used to create Jobs. Forms processing and Salesforce record creation occurs in Jobs
- Selecting “Start Job” for a particular Job Definition creates a Job and queues the new Job to start processing
- Select one or more KVP Sets to be applied to each document (allows for different types of records to be created per document)
- Select whether the Job runs immediately or scheduled
- Select the OneDrive folder to process
- Optionally select a “trash” folder to store processed documents



Job Definitions Continued

- Optionally select whether a multi-PDF document must be logically or physically separated
- Document review-wise, select Always or On Error Only
- Optionally upload and link documents to the created records
- Optionally enter a Salesforce Custom Permission required to run the job
- No limit on the number of Job Definitions that can be created

The screenshot shows the 'Update Job Definition' form in the Sheepdocs AI interface. The form is titled 'Update Job Definition' and is displayed over a background of the application's job definitions list. The form fields include:

- Job Definition Name: Import Invoices
- Job Creation: Immediate
- Source Folder: Tmp/Invoices
- File Handling: --None--
- Completion Action: --None--
- Trash Folder: (empty)
- Schedule Date Time: (Date and Time fields)
- Schedule Repeat: Never
- Page Separation: --None--
- Pages Per Document: 1
- Review Queue: On Error Only
- Custom Permission: (empty)
- Keep Raw Results:

A 'Select KVP Sets' section shows 'Available' and 'Selected' lists, with 'Invoice' selected in the 'Selected' list. A 'Sort Selected' button is located below the 'Selected' list. At the bottom of the form are 'Cancel' and 'Update Job Definition' buttons.



Job Definitions

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inspiration-ruby-5090-dev-ed.scratch.lightning.force.com/lightning/n/BDog__Job_Definitions

 Search...

SheepDocs AI Models **Job Definitions** KVP Sets Jobs Review Logs

 Job Definitions **All** 

Start Jobs Edit Delete New

Showing 1 Job Definitions out of 1 • sorted by Record Id, Ascending • 0 Job Definitions selected 

<input type="checkbox"/>	Job Definition Name	Job Creation	Source Folder	Completion Action	Review Queue	
1 <input type="checkbox"/>	Import Invoices	Immediate	Tmp/Invoices		On Error Only	



Create or Edit a Job Definition

The screenshot shows the 'Update Job Definition' form in the Sheepdocs AI interface. The form is titled 'Update Job Definition' and contains the following fields and sections:

- Job Definition Name:** Import Invoices
- Job Creation:** Immediate
- Source Folder:** Tmp/Invoices
- File Handling:** --None--
- Completion Action:** --None--
- Trash Folder:** (empty)
- Schedule Date Time:** Date and Time fields are empty.
- Schedule Repeat:** Never
- Page Separation:** --None--
- Pages Per Document:** 1
- Review Queue:** On Error Only
- Custom Permission:** (empty)
- Keep Raw Results:**

The **Select KVP Sets** section includes two lists: 'Available' (empty) and 'Selected' (containing 'Invoice'). A 'Sort Selected' button is located below the 'Selected' list.

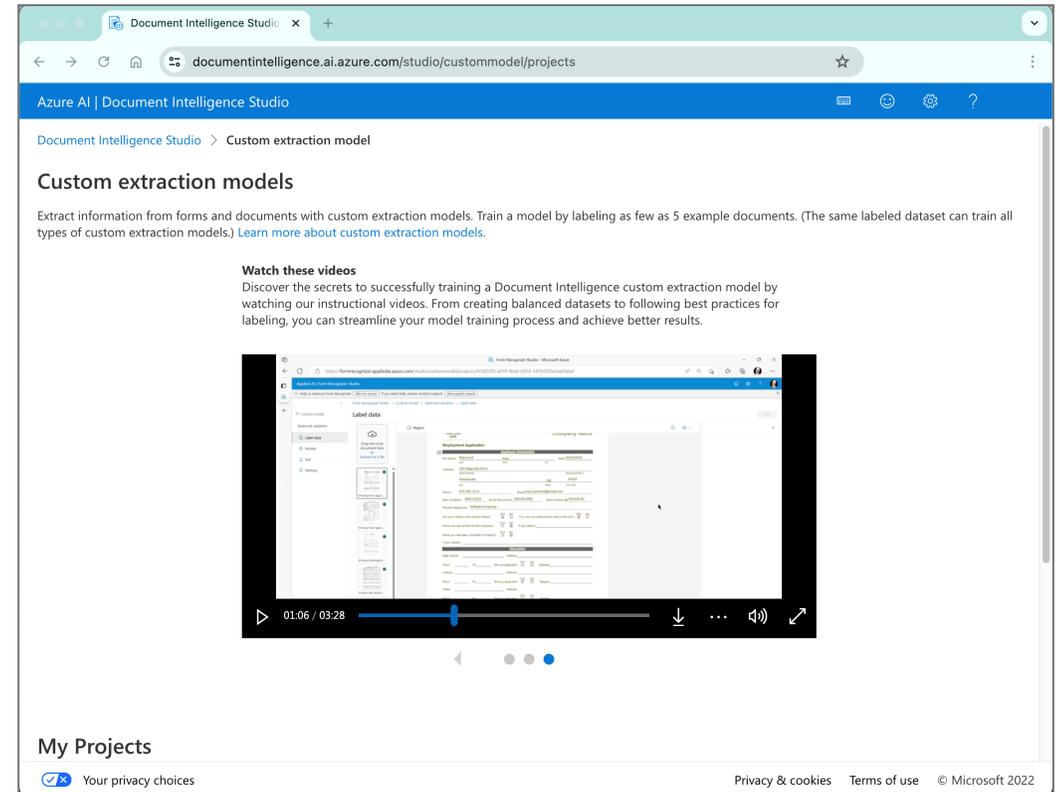
At the bottom of the form, there are 'Cancel' and 'Update Job Definition' buttons.

Multiple KVP Sets can be included to allow different sections of the document to be stored in different Salesforce records or to process a mixed batch of documents.



Document Intelligence Studio

- The Document Intelligence Studio by Microsoft required for training of custom documents
- Import Microsoft pre-trained models for Invoices, Tax Forms, etc. as is
- Custom documents, however, must be trained using this DI Studio application
- Train a custom model by labeling as few as 5 example documents
- Upon training completion, the custom models can be imported into SheepDocs



Document Intelligence Studio by Microsoft

Document Intelligence Studio

documentintelligence.ai.azure.com/studio/custommodel/projects

Azure AI | Document Intelligence Studio

Document Intelligence Studio > Custom extraction model

Custom extraction models

Extract information from forms and documents with custom extraction models. Train a model by labeling as few as 5 example documents. (There are two types of custom extraction models.) [Learn more about custom extraction models.](#)

Watch these videos

Discover the secrets to successfully training a Document Intelligence custom extraction model by watching our instructional videos. From creating balanced datasets to following best practices for labeling, you can streamline your model training process and achieve better results.

01:06 / 03:28

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SheepDocs customers use the DI Studio to create custom models for their specific documents.

Prospective customers could experiment with the DI Studio to make sure their documents are successfully recognized before purchasing SheepDocs.

AI Training in the DI Studio consists of submitting at least 5 different versions of the same document for training and then defining the fields of interest (known as “labeling”).



SheepDocs Enhancements for Custom Models

- The DI Studio recognizes tables that span pages as separate tables. Through naming convention (e.g., “tableName.1”, “tableName.2”, etc.), these separate tables are merged both during model import and during the processing of the recognition results.
- This table merging feature includes table cells that span pages.
- DI Studio does not handle complex table cells containing elements such as check marks, for example. Through naming convention (e.g., “tableName.columnName.elementName”), SheepDocs allows for creating check marks (and other elements) on top of a table cell during labeling.
- During model import and during processing of the recognition results, these elements are processed as if they were part of the table (e.g., they can be mapped to fields of a “table” record).

Write	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Review	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Submit Draft	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Publish Final	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No



Content Understanding Studio

- The Content Understanding Studio by Microsoft required for creating custom analyzers
- Upon completion, the custom models can be imported into SheepDocs AI
- This studio can also be used to experiment with pre-created analyzers
- Import Microsoft pre-created analyzers for Receipts, Mortgage Applications, etc. as is

The screenshot displays the 'Try prebuilt analyzer' interface in Content Understanding Studio. At the top, there are navigation links for 'Home', 'Discover', and 'Build'. Below the header, the document type is set to 'US tax' and the category to 'All'. A 'Run analysis' button is visible, along with an 'Auto run analysis' toggle. The central area shows a preview of a 2024 Form 1040 with various fields highlighted. On the right, a 'Fields' tab is active, showing a list of extracted fields and their confidence scores:

Field	Confidence
TaxYear	98.20%
2024	
Taxpayer	
SSN	96.20%
22 08 99295	
LastName	98.30%
Glover	
FirstNameAndMiddleInitial	97.10%
Jimmie L.	
Address	90.30%

At the bottom of the interface, there are links for 'Privacy & cookies', 'Terms of use', and '© Microsoft 2025'. The URL in the address bar is <https://contentunderstanding.ai.azure.com/?tenantId=0282b4b7-4eba-42a3-9633-fa05e1645745>.



Content Understanding Studio by Microsoft

The screenshot displays the Azure AI Content Understanding Studio interface. At the top, there is a navigation bar with 'Azure AI | Content Understanding Studio', 'Home', 'Discover', 'Build', and a settings icon. Below this, a 'Try prebuilt analyzer' section features dropdown menus for 'Document' (set to 'US tax'), 'US tax', and 'All'. A 'Run analysis' button is visible, along with an 'Auto run analysis' toggle switch. The main content area shows a scanned '1040 U.S. Individual Income Tax Return' form with various fields highlighted in green and yellow. On the right side, a 'Fields' panel lists extracted data points: 'TaxYear' (2024), 'Taxpayer' (SSN: 22 08 99295, LastName: Glover, FirstName: Jimmie), and 'Address'. At the bottom, there is a footer with a privacy policy link and a copyright notice.

SheepDocs AI customers use the CU Studio to create custom analyzers for their specific documents.

Prospective customers could experiment with the CU Studio to make sure their documents are successfully processed before purchasing SheepDocs AI.

Unlike DI, creating CU custom analyzers does not require “labeling” and AI training. However, field names and descriptions must be carefully selected and experimentation will be needed.





**A comprehensive integration of Azure
Document Intelligence and Content
Understanding into the Salesforce
Platform with significant added value**

