How does Disclosure Ready classify credit card and bank statements automatically?

AI Matter Intelligence · https://disclosureready.us.legalready.ai/knowledge/how-does-disclosure-ready-classify-credit-card-and-bank-statements-automatically/

Upload your bank statements into Disclosure Ready and the system will do the following admin tasks for you:

1. Update the document name
2. Extract the individual bank statement's date range
3. Create subfolders for each bank account and sort the bank statements automatically by date within them

Disclosure Ready will also highlight any missing bank statements for you, simplifying the process of reviewing financial data and reducing to seconds a task that would normally take hours to perform.

Watch the video below to see the magic of the "Bank Accounts" folder in action:

Embedded media: https://player.vimeo.com/video/1061128436?h=6fe7a795ef&dnt=1&app_id=122963