Generative AI to speed up manual processes and increase accuracy

01 Challenges

> Our sales reps need to transform email requests from prospects and customers into the CRM quickly.

> When we have a new supplier to set up in our ERP, there are many details to input, much of which can come from the supplier or the procurement team by email. Accuracy is key in this process.

> Sometimes our customer support team must send quick Teams chat messages to alert our Field Service schedulers of a need for a work order. The information within the chat has to be copied into the CRM for work orders which is open to errors due to the urgency.

02 What are LLMs (Large Language Models)?

An LLM is Generative AI technology applied to text, these models are able not only to work in a question-answer flow, but also to perform natural language tasks on text, such as detecting entities in your work applications.

Much of a business´ recurring administrative tasks focus on capturing, transferring and storing information via forms in ERP and CRM. The resulting challenges of efficiency, accuracy and productivity impact the bottom line.

The Generative AI revolution | Talk with data

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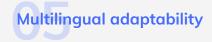
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03 What is AI Form Assistant?

AI Form Assistant provides your users with real-time suggestions for automatically filling in forms within your business applications from a source text such as an email, chat or document.

Available out-of-the-box and integrated directly within your familiar Microsoft Dynamics 365 ERP (Business Central and Finance & Supply Chain Management) and CRM (Customer Engagement) applications.

04 Real time contextual understanding

AI Form Assistant can interpret user input, anticipate the intended context, and offer near real-time suggestions to populate form fields accordingly.

05 Multilingual adaptability

When users receive a text in any language, they can ask the AI Form Assistant to directly extract the information needed without the need to previously translate the information.

06 Handling unstructured data

The user can directly paste the text from any source in any format and send it to the AI Form Assistant to extract the desired fields, with no pre-processing needed.

07 Enhanced user experience and error reduction

AI Form Assistant automates the process of data extracting and cross-referencing against the given text, so the user only needs to put in the input text and approve or modify the suggestions, AI Form Assistant takes care of the rest.

Ask for a demonstration today of how AI Form Assistant allows your employees to spend their time on value-add projects rather than repetitive admin, for better accuracy and smoother operational processes.

→ Contact us

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