

Configure AI-enabled Auto Tagging

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V1.0

Overview

Genpact AP Advance supports an AI-enabled auto tagging system for invoices based on predefined rules. The cutting-edge functionality leverages the advanced AI to provide specific instruction prompts to the system, enabling it to act accordingly, and thus significantly improve the efficiency and accuracy of invoice tagging.

One such use case is where Gen AI can automatically translate product service descriptions, which is particularly useful when language discrepancies arise between invoices and the system of record. In such cases, invoices are typically sent to manual queues for further processing. By activating Gen AI, the system can automatically translate and match the invoices, transitioning the process into a hands-free workflow.

For example, in the Europe region, a line-level auto-match may fail due to language differences (English versus German or Spanish), resulting in missing descriptions. The AI powered language translation can resolve the issue, ensuring accurate and complete invoice processing.

How it works?

1. **Specify invoices for AI:** The user instructs the system to select the invoices that should be sent to AI. For instance, instruct the system to pick invoices that are in the Ready for GenAI Tagging state.

The screenshot shows the 'Edit Invoice - INV-00328390' interface. At the top, there are fields for 'Invoice Type: Goods/Material', 'Total Amount: 0.000', 'Amount: 0.000', and 'Other Charges/Surcharges:'. Below these are 'Invoice Date', 'Total Amount (C):', 'Exception Reason:', and 'Status:'. A navigation bar includes 'Invoice Details', 'PO', 'GRN Reference', 'Approval Detail', 'Interaction History', 'Invoice History', 'Payment Line', 'Payment', 'Invoice History', and 'Testpayment'. The 'INVOICE HEADER' tab is active. The 'User Action' dropdown menu is highlighted with a red box and set to 'Ready For GenAI Tagging'. Other fields include 'Final Amount: 0.000', 'Current State: Rework QC Issues', 'W Date: YYYY-MM-DD', 'Pending Reason: Select an Option', 'W Date Time: YYYY-MM-DD', 'AP Reason for Fraud: Type or select reason', 'Amount: 0.000 (USD 0.000)', 'Total Amount', 'Other Charges/Surcharges', 'Current Comment', and 'Exchange Rate'.

2. **Send invoices to AI:** The system then selects the invoices based on the specified instruction and sends them to AI. The system selects the invoices in Ready for GenAI Tagging state.
3. **AI processes invoices:** AI processes the selected invoices and tags them based on the prompts provided in the configuration.
 - o On Invoice Line: Updates the GenAI Match Percentage, GenAI Match Reason, Purchase Order and PO Line Item.
 - o On Invoice: Updates the User Action with GenAI Tagging Pass or GenAI Tagging Fail.

1. Log in to the Salesforce classic as an administrator.
2. Go to **All Tabs >> AP Integration >> Create New Integration as GenAITaggingAPI** and add the following:
 - o Token End Point URL: The URL to access the API endpoint.
 - o Method: The type of HTTP request (GET or POST).
 - o Authorization Token: The security token used to authenticate the API requests.

AP Integration Set Up
Edit "GenAITaggingAPI"

Integration Information

Integration Name: GenAITaggingAPI

Do you want to send attachment?

Integration Connection Params

End Point: [Empty]

Token End Point: https://APFlowGenAIGPT35VA.openai.azure.com/openai/deployments/gpt35Turbo/chat/completions?api-version=

Do you want to insert Remote Setting?

Method: POST

Authorization Token (Static): c11600a312b(

Static Header Param (# Separator): [Empty]

Maximum Attempt: [Empty]

- o In the Run Prediction Criteria section, add Code Prediction. In the example below, the code prediction defines fields that AI will be using from POL and Invoice. Similarly, you can create you own code prediction.

Run Prediction Criteria

To Update Field On Success: [Dropdown]

GL/Cost Code View Configuration: [Dropdown]

Code Prediction:

```
{
  "POL_Field_API_NAME": "Name.Product_Service_Description__c.Product_Service_No__c",
  "INVL_Field_API_NAME": "Name.Product_Service_Description__c.Product_Service_No__c"
}
```

Criteria and Validation

Batch State (ML Scenario): [Dropdown]

Initiation Type: [Dropdown]

Batch Size: 10

Threshold (Static): [Input]

User Action: [Input]

Query *Only editable at record level: [Input]

Additionally, specify the Batch Size to determine the number of invoices sent to AI during batch processing.

NOTE

We recommend having a batch size of 10 or fewer, with each invoice having no more than 20 line items and 50 PO line items.

2. Define the Integration details in labels

1. Log in to Salesforce classic as an administrator.
2. Go to **All Tabs >> Custom Labels >> AP_GenAI_TaggingConfigName** and mention the same value that you

have mentioned in Integration Name field above.

Custom Label
AP_GenAI_TaggingConfigName
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Custom Label Detail

Short Description	AP_GenAI_TaggingConfigName	Name	AP_GenAI_TaggingConfigName
Language	English		
Categories			
Value	GenAITaggingAPI		
Created By		Modified By	

3. Create record in the Gen AI System Configuration metadata

1. Log in to Salesforce classic as an administrator.
2. Go to **Setup >> Custom Metadata Types >> Manage Records for Gen AI System Configuration >> GenAITagging**, and add the following:
 - o Gen AI Batch Where Clause: Provide system information to specify the invoices that should be sent to AI.
 - o System Instruction Prompt: Provide instructions to Gen AI.
For example, the System Instruction Prompt provides the following step-by-step instructions for matching invoice line items with purchase order lines.
 - Match Product/Service: Compare the product/service description and number of the invoice line with the purchase order line.
 - Translate if Needed: If the descriptions or numbers are not in English, translate them first.
 - Synonyms and Abbreviations: Match descriptions even if they contain synonyms or abbreviations.
 - Exclude Organization Names: Ensure the product/service description does not contain any organization names.
 - o Response Format Prompt: Specify the expected format for a response.

In this case, the format is as follows:

```
PATTERN FOUND=[<Invoice Line Item Name>:<AP Ref No of Purchase order>:<Match Percentage>:  
<Matching Reason>]  
<Invoice Line Item Name>: The name of the invoice line item.  
<AP Ref No of Purchase order>: The reference number of the corresponding purchase order.  
<Match Percentage>: The percentage of matching between the invoice and purchase order.  
<Matching Reason>: The reason for the match (e.g., synonym, abbreviation).
```

Gen AI System Configuration

[← Back to List: Gen AI System Configurations](#)

Gen AI System Configuration Detail

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Label	GenAITagging
Gen AI System Configuration Name	GenAITagging
Gen AI Batch Where Clause	Current_State__c = 'GENAITAG'
Enable Auto Match Check	<input type="checkbox"/>
Feedback Rendering Section	
Created By	Lalit Kumar, 03.06.2024, 16:36
Priority Queue Enabled	<input type="checkbox"/>
Priority Invoice Queue Name	
Priority Invoice Queue Size	
System Instruction Prompt	Use the following step-by-step instructions to respond to user inputs. Step 1 Match Product/Service Desc and Product/Service No. of Invoice Line with Purchase Order line. Step 2 If Product/Service Desc and Product/Service No. of invoice lines is not in english than first translate it in english and than match them. If Product/Service Desc and Product/Service No. are not matched than give matching percentration 0 else give 100. Step 3 Product/Service Desc of Invoice line and Purchase order line can contain synonym. Match them if synonym found. Step 4 Product/Service Desc of Invoice line and Purchase order line can contain abbreviation. Match them if abbreviation found. Example: TCC is the abbreviation of The Coca Cola company. Step 5 If Product/Service Desc should not contain any organization name. if Lines are not matched than ignore it.
Query Prompt	
Response Format Prompt	Respond in format- PATTERN FOUND=[< Invoice Line Item Name>:<AP Ref No of Purchase order> :<Match Percentage>:<Matching Reason>]
Exclude Few Shot Examples	<input type="checkbox"/>

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4. Define the Integration details in labels

1. Log in to Salesforce classic as an administrator.
2. Go to **All Tabs** >> **Custom Labels** >> **AP_GenAI_TaggingMatadataName**.
3. Mention the Gen AI System Configuration name field value same as in step 3 (*Create record in the Gen AI System Configuration metadata*).

Custom Label
AP_GenAI_TaggingMatadataName
[← Back to List: Custom Labels](#)

Custom Label Detail

Short Description	AP_GenAI_TaggingMatadataName	Name	AP_GenAI_TaggingMatadataName
Language	English		
Categories			
Value	GenAITagging		
Created By	Lalit Kumar, 03.06.2024, 16:41	Modified By	Lalit Kumar, 03.06.2024, 16:42

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Mention the same value in GenAI Integration Setup >> Integration name

NOTE

To find the API failure error logs, go to All Tabs (Salesforce Classic) >> API Logs.