Release Notes 1.1

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Welcome to the Release Notes.

What's in the Release Notes?

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About

is a GenAI solution that provides an automated helpdesk (AHD) to automate ingestion, interpretation, and response generation of queries. provides a robust, future-proofed management platform powered by a dynamic workflow with a focus on service-level agreements, quality processes and collaboration between multiple teams.

solution automates case and workflow management across any F&A business process for better operational control and provides robust reporting with case status dashboards backed by configurable reports. The solution is based on configurable business rules, approval management, and auto-alerts to streamline business processes. With centralized case content repository, enables quick and easy access across teams and cuts case resolution time significantly. The solution also facilitates real-time collaboration between the business, service delivery teams, and customers enabled by role-based authorization and access features. Case status reports and data dashboards increase visibility and offer configurable reports and templates.

Main features

• Dashboard & Managing List View page: The dashboard offers an industry-standard, modern experience designed for efficiency and ease of use. You can enjoy a refined and intuitive user interface, ensuring seamless navigation and instant access to critical insights.

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The Case Manager List View page is designed to deliver a modern, responsive, and user-centric interface to transform the way users interact with invoice data.

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For details, see this article.

• Skip email data extraction: For certain intents, AI data extraction may not be required. has an option to configure an AHD process to exclude data extraction for specific intents as per your preference. Edit the Skip Data Extraction field in the AHD.

If the Skip Data Extraction is enabled then the Edit option is disabled.

AHD Process AHD-000						Edit Delete Clone 🔻
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Name	~	Action Type	✓ Sequence ✓	Prompt Name \lor	Edit	Skip Data Extraction
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If the Skip Data Extraction is enabled for an intent, then after Intent Identification, the intent directly goes to Criteria Checking and their actions. Make sure to add only those actions that don't require email data extraction output.

For detailed instructions, refer to the AI-enabled Automated Helpdesk.docx.

• Route original email: has an option to configure an AHD process to route the original mail. You can select the From address and choose whether to include attachments. Additionally, the email is recorded as an interaction in the case.

	Automa	ated Helpdesk	AHD Proces	ss 🗸 AHD Act	tion v Intent Master	✓ Prompt Template ✓ AHD Ac	tion Type 🗸	AHD Action Group 🗸 🛛 Requ	uest Trackings 🗸 More 🔻 🌶
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		EmailSubject	isNull	False	ACTN-121		4		
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In Criteria Builder, edit the AHD Action.

In the Edit AHD Action, add the following:

- Action Type Name: Route_Original_Email.
- Route to Email Address: The email address to which the original email is routed.

- From Address: Add emails to appear in the From Address option.
- Include Attachments: Select to enable "Include Attachments" option.

	Edit AHD Action
AHD Action 1	pe
Boute	Original Email
Action Seque	nce
6.0	
Action Type I	ame
Route_Orig	nal_Email
· Route To Er	ail Address
-	©genpact.com I
From Addres	
plm_ap_p	@b-35iduu5hzl6i9ln19q6sosf2rolb03yzcn9z941qy2vh1qmp62.1n-1tnlruaa.na78.apex.
Please use to Include Attac	e active orgwide email with valid format like email@address.com uments?

For detailed instructions, refer to the AI-enabled Automated Helpdesk.docx.

• Include Mail Trail in Draft Response: has an option to configure an AHD process to include the mail trail in an AHD draft response, if needed.

In Criteria Builder, edit the AHD Action.

In the Edit AHD Action, add the following:

- Action Type Name: Save_Draft_Response.
- Include Mail Trail: Select to enable include mail trail in draft response.

Edit AHD Action	
Save Draft Response	
Action Sequence	
5.0	
Action Type Name	
Save_Draft_Response	
From Address	
de l'agriculture	
Please use the active orgwide email with valid format like email@address.com	
Include TO Recipient ?	
Include CC Recipient ?	
Include Mail Trail	
	Submit Cancel

For complete setup instructions, refer to the AI-enabled Automated Helpdesk.docx.

- Store extracted data individually in Case Manager Custom fields: As an admin, you can store extracted data individually in Case Manager object fields.
 Navigate to the AHD Extract Table tab, and map all attributes to their respective fields, and update the
- field mappings as needed.These fields originate from the AHD Extract Attributes object. To edit any field, navigate to the Object Records and add or modify the respective Case Manager field.

Automated Helpdesk AHD Proce AHD Extract Attributes	is V AHD Action V Intent Master V Promp	pt Temp	late v AHD Action Type v AHD Action Group v AHD Extract Table	-
1D Attribute		c	ase Manager Field	
Invoice_Number	•	н [AHDInvoice_Number_c]
PO_Number		н [AHDPO_Number_c]
Vendor_Number		н [AHDVendor_Number_c]
Vendor_Name		н [AHDVendor_Name_c]
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Invoice_Date		н [AHDInvoice_Date_c	
Intent		H	AHDIntentc	1

To ensure all field data is successfully saving in Case Manager fields, call the Packed Flow from the main flow. Then, add an Apex action named (CoraGenAIAHD_HandleCaseManager) and pass the Case Manager ID and Request Tracking ID.

For detailed instructions, refer to the AI-enabled Automated Helpdesk.docx.