

Release Notes 1.1

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29 APRIL 2025

Welcome to the Release Notes.

What's in the Release Notes?

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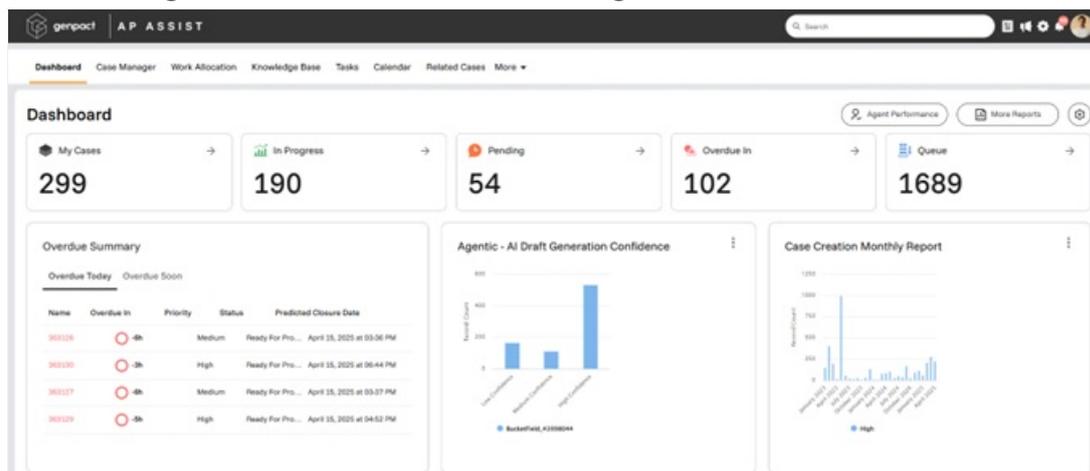
About

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.

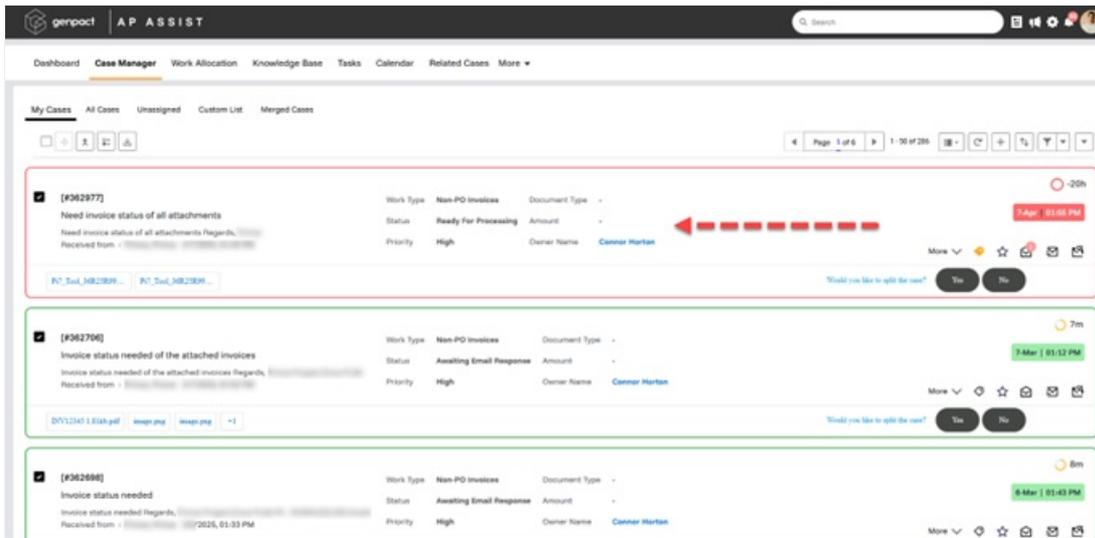
solution automates case and workflow management across any F&A business process for better operational control and provides robust reporting with case status dashboards backed by configurable reports. The solution is based on configurable business rules, approval management, and auto-alerts to streamline 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.



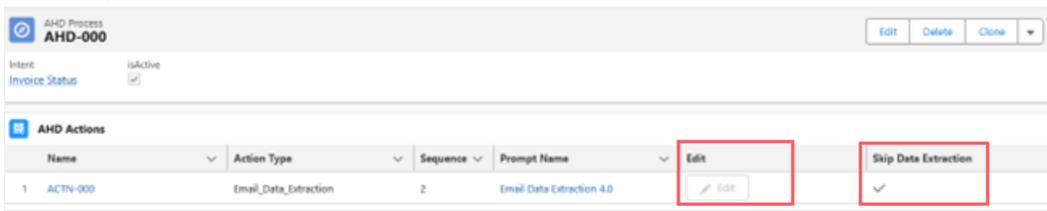
The Case Manager List View page is designed to deliver a modern, responsive, and user-centric interface to transform the way users interact with invoice data.



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.

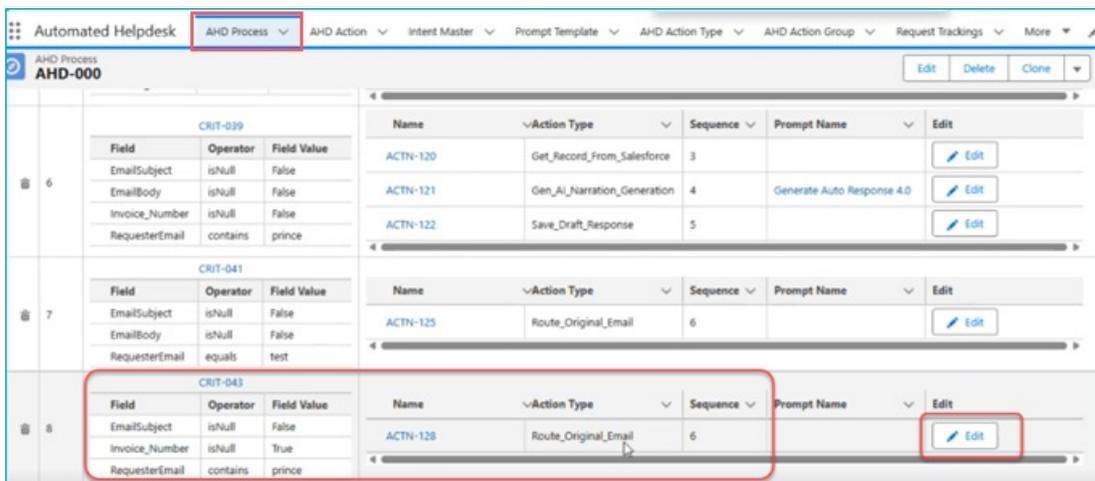


If the Skip Data Extraction is enabled for an intent, then after Intent Identification, the intent directly goes to Criteria Checking and their actions. Make sure to add only those actions that don't require email data extraction output.

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.

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.

The screenshot shows the 'Edit AHD Action' form with the following fields and options:

- AHD Action Type:** Route Original Email
- Action Sequence:** 5.0
- Action Type Name:** Route_Original_Email
- *Route To Email Address:** @genpact.com
- From Address:** plm_ap_po@b-35iduush2699n19q6sost2rolb03yzcn9z941gy2vh1qmp62.1n-1tblruaa.na78.apex.s
- Include Attachments?**

Buttons: Submit, Cancel

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.

The screenshot shows the 'Edit AHD Action' form with the following fields and options:

- AHD Action Type:** Save Draft Response
- Action Sequence:** 5.0
- Action Type Name:** Save_Draft_Response
- From Address:** [Redacted]
- Include TO Recipient?**
- Include CC Recipient?**
- Include Mail Trail**

Buttons: 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 Process	AHD Action	Intent Master	Prompt Template	AHD Action Type	AHD Action Group	AHD Extract Table	More
AHD Extract Attributes									
AHD Attribute		Case Manager Field							
Invoice_Number	-H	AHDInvoice_Number_c							
PO_Number	-H	AHDPO_Number_c							
Vendor_Number	-H	AHDVendor_Number_c							
Vendor_Name	-H	AHDVendor_Name_c							
Invoice_Amount	-H	AHDInvoice_Amount_c							
Invoice_Date	-H	AHDInvoice_Date_c							
Intent	-H	AHDIntent_c							

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](#).