

FormGenie AI for Creatio – User Guide & Setup Manual

1. Overview

FormGenie AI is a document processing component for Creatio that extracts structured data from uploaded pdf/docx files and maps it directly to CRM records.

It reduces manual data entry and improves data consistency by allowing users to review and apply extracted values within the same record.

FormGenie AI works with:

- Standard Creatio objects (Accounts, Contacts, Leads, etc.)
 - Custom objects configured in Creatio
 - Multi-document scenarios within a single record
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2. Business Value

FormGenie AI helps organizations:

- Reduce manual data entry effort
- Improve data accuracy and consistency
- Accelerate onboarding and processing workflows
- Detect duplicate records before updates
- Prevent conflicting data from being applied
- Maintain control through review and confirmation

Typical use cases include:

- Customer onboarding (KYC, applications)
 - Contract and document processing
 - Lead and account data capture
 - Back-office data entry automation
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3. Key Capabilities

Document Data Extraction

Extracts structured data from:

- PDF files
- DOCX files

Supports multiple documents per record.

Smart Field Mapping

- Automatically maps extracted values to CRM fields
 - Supports flexible matching even when field names differ
 - Works across standard and custom objects
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Duplicate Detection

When extracted values match existing records:

- The system identifies potential duplicates in the same object
- Users are notified before applying updates
- Duplicate information is displayed with matching details

This helps prevent:

- Duplicate account creation
 - Data inconsistency across records
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Conflict Detection

When multiple attached files contain conflicting values:

- FormGenie AI highlights conflicting data
 - Users can review differences before applying updates
 - No automatic overwrite occurs
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Controlled Data Update

- Users can update individual fields or all fields
- Updates require confirmation
- System validates:

- Permissions
 - Lookup values
 - Duplicate conditions
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4. How It Works

Typical workflow:

1. User attaches document(s) to a record
2. FormGenie AI processes files
3. Extracted data is displayed in the UI
4. User reviews extracted values
5. User updates selected fields

Before saving:

- Duplicate checks are executed
 - Lookup values are validated
 - Conflicts are highlighted
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5. Installation

1. Download the FormGenie AI package
 2. Upload the package via Application Hub
 3. Install in your Creatio environment
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6. Adding FormGenie AI to a Page

1. Open Freedom UI Designer
 2. Open the target page
 3. Locate **FormGenie AI** under Custom Components
 4. Drag and drop the component onto the page
 5. Save and publish
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IMPORTANT: Required Page Configuration

To enable full functionality, you must configure the page to pass context to FormGenie AI.

Step 1: Add Attributes

```
viewModelConfigDiff: [  
  {  
    operation: "merge",  
    path: ["attributes"],  
    values: {  
      PDS_GenieRecordId: { value: "" },  
      PDS_GenieEntityName: { value: "" },  
      PDS_GenieNameColumn: { value: "" },  
      PDS_GenieColumns: { value: [] } // optional but recommended  
    }  
  }  
]
```

Step 2: Add Handler

```
handlers: [  
  {  
    request: "crt.HandleViewModelResumeRequest",  
    handler: async (request, next) => {  
      const result = await next?.handle(request);  
  
      const context = request.$context;  
      const model = context.formApiModel;  
  
      setTimeout(() => {  
        const formValue = model?.value ?? {};  
        const pds = context?._primaryModelName || "PDS";  
        const schema = context?.dataSchemas?.[pds];  
  
        if (!schema) return;  
  
        const entityName = schema.name;  
        const idColumn = schema.primaryAttributeName || "Id";
```

```

const nameColumn = schema.primaryDisplayAttributeName || "Name";
const recordId = formValue?.[idColumn] || "";

const attributes = schema?.attributes || [];
const columns = attributes.map(attr => ({
  name: attr.name,
  caption: attr.caption
}));

context["PDS_GenieEntityName"] = entityName;
context["PDS_GenieRecordId"] = recordId;
context["PDS_GenieNameColumn"] = nameColumn;
context["PDS_GenieColumns"] = columns;

}, 300);

return result;
}
}
]

```

Step 3: Add FormGenie AI Using Drag-and-Drop

1. Open the page in **Freedom UI Designer**
2. Locate **FormGenie AI** in the components panel
3. Drag and drop it onto the desired area of the page
4. Save and open the page

Step 4: Bind Component Properties

After placing the component, configure its properties inside the values {} section of the component insert block. To do this, locate the component section and its insert object, and add the following assignments under values {}:

```

page_record_id = $PDS_GenieRecordId
page_entity_name = $PDS_GenieEntityName
page_name_column = $PDS_GenieNameColumn
page_columns = $PDS_GenieColumns

```

The block should look similar to the following:

```
{
  "operation": "insert",
  "name": "Cwdemopkg_8xwch3q",
  "values": {
    "type": "mrkt.Cwdemopkg",
    "page_record_id": "$PDS_GenieRecordId",
    "page_entity_name": "$PDS_GenieEntityName",
    "page_name_column": "$PDS_GenieNameColumn",
    "page_columns": "$PDS_GenieColumns"
  },
  "parentName": "CardContentContainer",
  "propertyName": "items",
  "index": 0
}
```

// Note: **Cwdemopkg_8xwch3q** name may change depending on the generated component instance

Expected Behavior

After configuration:

- The component should render directly on the page where it is placed
- No additional panels or layouts should be created
- The component should automatically detect the current record and enable document extraction

7. Duplicate Handling

FormGenie AI checks for duplicates when updating data.

If duplicate values are detected:

- A message is displayed before update
- Matching records are listed
- User can decide whether to proceed

Duplicate detection works across:

- Account records
 - Contact records
 - Custom objects
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8. Conflict Handling

When multiple files contain conflicting values:

- Conflicts are identified across all attached files
 - Users can review differences
 - System prevents unintended overwrites
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9. Lookup Field Handling

For lookup fields:

- Values are matched against reference objects
- Only valid matches are updated
- Invalid values are ignored

This prevents:

- Incorrect lookup assignments
 - Data corruption
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10. Security & Permissions

FormGenie AI respects Creatio security:

- User permissions are enforced
 - Non-editable fields are skipped
 - System fields are protected
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11. Supported Objects

FormGenie AI works with:

- Accounts
 - Contacts
 - Leads
 - Opportunities
 - Custom objects
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12. Summary

FormGenie AI enables organizations to automate document-based data entry directly within Creatio while maintaining full control over data quality.

It combines:

- AI-based extraction
- Smart mapping
- Duplicate detection
- Conflict awareness

to deliver a reliable and scalable data processing experience.