



CONFERO

ADMIN MANUAL

IntelliDocs

AI Document Recognition

Version 1.0 Freedom UI

CONTENTS

Introduction	3
Microservice Installation	4
Access to Operations	6
List of AI Document Recognition System Settings	7
AI Data Extraction	9
AI Data Extraction Settings	11
Setting up Anthropic Account	14
Model Management	16

Introduction

IntelliDocs is a **native add-on** for the Creatio platform, designed to operate within its **no-code/low-code** environment.

The solution enables **automatic** or **manual classification** and **processing** of email attachments and uploaded documents. It is integrated with **Anthropic's Claude AI** to provide intelligent **document recognition** and **data extraction** capabilities within **Creatio** workflows – enabling **scalable automation** and **reducing manual input**.

The functionality is provided as a Creatio application in a **.zip** archive containing several interdependent **Creatio packages**. All packages must be installed together as part of a single application.

Installation is performed via **System Designer → Applications → Installed applications**.

This **admin manual** provides **detailed instructions** for administrators on:

- Defining and managing system settings
- Configuring classification rules and processing workflows
- Monitoring processing results and system performance
- Integrating with external services and storage platforms

Note: IntelliDocs requires an external microservice in a Kubernetes cluster and an active Anthropic Claude account to operate.

Microservice Installation

(applicable only for on-premises deployment)

1. Add secret to your Kubernetes cluster using command below.

```
kubectl create secret docker-registry regcred-confero \  
--docker-server=https://ctdevacr01.azurecr.io \  
--docker-username=<will be provided> \  
--docker-password=<will be provided>
```

2. Copy and unzip provided helm chart.

3. Edit values.yaml file according to your needs.

- clouds.AzureConfero.repo – ACR address (no need to change)
- ingress.enabled - true if you want to use ingress, false – to disable it
- ingress.namespace - k8s namespace for ingress
- ingress.annotations – ingress annotations
- ingress.className – ingress class name
- ingress.host – address using in ingress
- ingress.path – container path
- ingress.tls – true if you will use tls
- ingress.tlsSecret – name of the secret where certificate is stored
- image.imageName – image name (no need to change)
- image.imageVersion – image version
- image.pullPolicy – image pull policy from repository (Always, IfNotPresent, Never)
- existingImagePullSecret: secret name used to pull image from repository
- service.annotations – service annotations
- service.type – service type (ClusterIP, NodePort)
- service.port – container internal port
- replicas – service replica count
- containerPort – container port, if service.type = NodePort, container external port
- logLevel – log level
- memory – memory size request limit

- model – LLM code name
- maxtokens - with Claude 3.7 and 4 models, max_tokens (which includes your thinking budget when thinking is enabled) is enforced as a strict limit. The system will now return a validation error if prompt tokens + max_tokens exceeds the context window size.
- temperature - parameter that controls the randomness of a model's predictions during text generation. Higher temperatures lead to more creative and diverse outputs, allowing for multiple variations in phrasing and, in the case of fiction, variation in answers as well. Lower temperatures result in more conservative and deterministic outputs that stick to the most probable phrasing and answers. Adjusting the temperature enables users to encourage a language model to explore rare, uncommon, or surprising word choices and sequences, rather than only selecting the most likely predictions

4. Install program using command

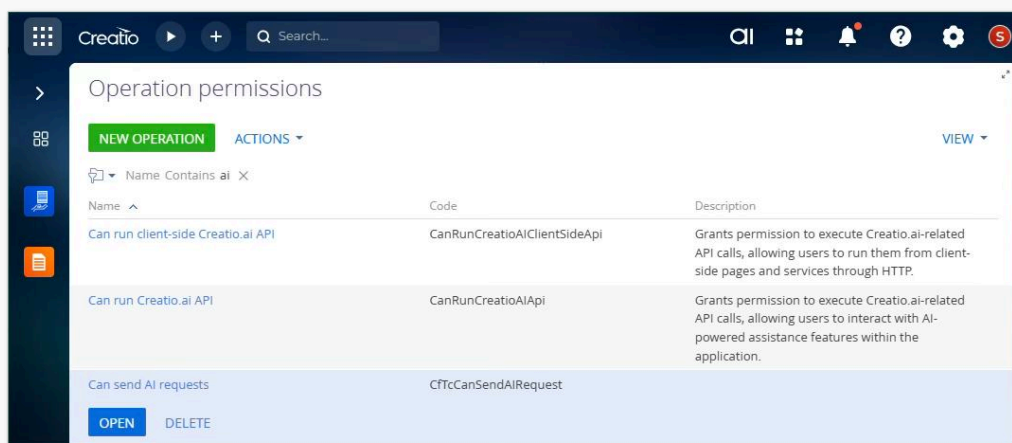
```
helm install <helm_chart_name> path_to_extracted_folder
```

Access to Operations

The Operation permissions section is used to implement additional control over access rights to operations.

1. To access the section, open the **System Designer** by pressing the **Settings** button in the top right corner of the application. Under **Users and administrations**, select **Operation permissions**.

There are a number of built-in system settings used when working with a document.



2. These permissions can be added to functional, organisational roles and just to the user directly.

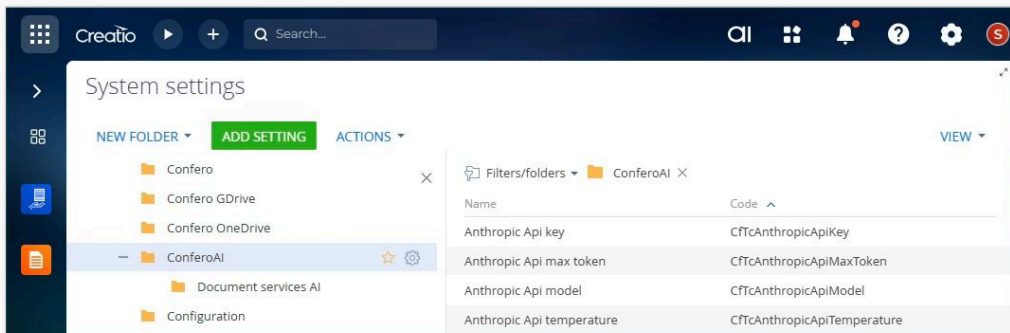
You can also add rights to a user directly through a functional and organisational role.

List of AI Document Recognition System Settings

The System Settings section is used to configure additional parameters for system modules.

1. To access the section, open the **System Designer** by pressing the **Settings** button in the top right corner of the application. Under **System setup**, select **Operation permissions**.

The settings related to AI Document Recognition are grouped into a dedicated folder named **Confero AI** and **Document Services AI**.




Title	Code	Default value
Anthropic Api key	CfTcAnthropicApiKey	
Anthropic Api max token	CfTcAnthropicApiMaxToken	0
Anthropic Api model	CfTcAnthropicApiModel	claude-sonnet-4-20250514
Anthropic Api temperature	CfTcAnthropicApiTemperature	0.00
Anthropic client url	CfTcAnthropicClientUrl	
Anthropic, describe document file additional prompt	CfTcAnthropicDescribeDocumentFilePrompt	Also write document pages count to field {"Pages count"}
Anthropic, document fields to define	CfTcAnthropicDocumentFieldsToDefine	Document date;Document name;Document description;Document number

Title	Code	Default value
Document columns general prompt	CfTcDocColumnsGeneralPrompt	You are an advanced document analysis system. Your task is to extract specific information from the given document(s). One document can be presented as several images or text messages, carefully recreate the document(s) from these parts. If any of the field data is not present in the document return empty string. Translate data to English, unless specifically mentioned in field specific prompt.
File types to image	CfTcFileTypesToImage	png;jpg;jpeg;bmp;tiff
File types to text	CfTcFileTypesToText	doc;docx;rtf;html;odt;txt;djvu;pdf
Fix image angle	CfTcFixImageAngle	v
Anthropic, fix image angle use AI	CfTcFixImageAngleAI	v
The maximum number of document page images in a request.	CfTcMaxDocImagesInRequest	3
The maximum number of document pages in a request.	CfTcMaxDocPagesInRequest	20
Group same types, subtypes files	CfTcGroupFilesByType	v
Use batch AI in email processing	CfTcUseBatchAIEmailProcess	-
Validate AI before create document	CfTcValidateAIBeforeCreateDoc	-

AI Data Extraction

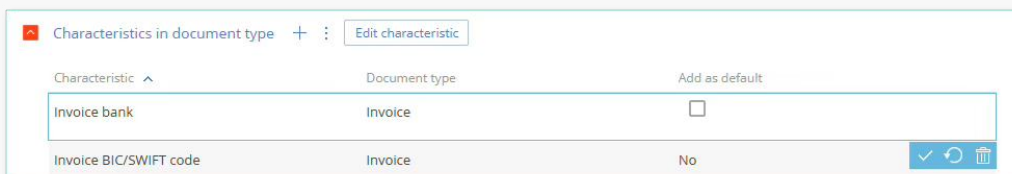
1. You can configure data extraction rules for each document type and field individually.

2. Open **System Designer** by clicking on  in the right upper corner of the application. Then click on the link **Lookups** in the group System setup. Go to the lookup Document type.



Name	Description	Code	Active
Template		TMP	Yes
Invoice		I	<input checked="" type="checkbox"/>
Identification document		CD	Yes

3. Add fields you want AI to extract from this type of document, then configure the prompt for each individual field by clicking button **Edit characteristic**.



Characteristic	Document type	Add as default
Invoice bank	Invoice	<input type="checkbox"/>
Invoice BIC/SWIFT code	Invoice	No

3. Enter prompt into **AI prompt** field. You can be as specific and detailed as needed. The AI will handle complex instructions including:

- Original language or translation requirements
- Specific date or time formats
- Currency format
- Country format
- Any other custom commands, logic or specifications

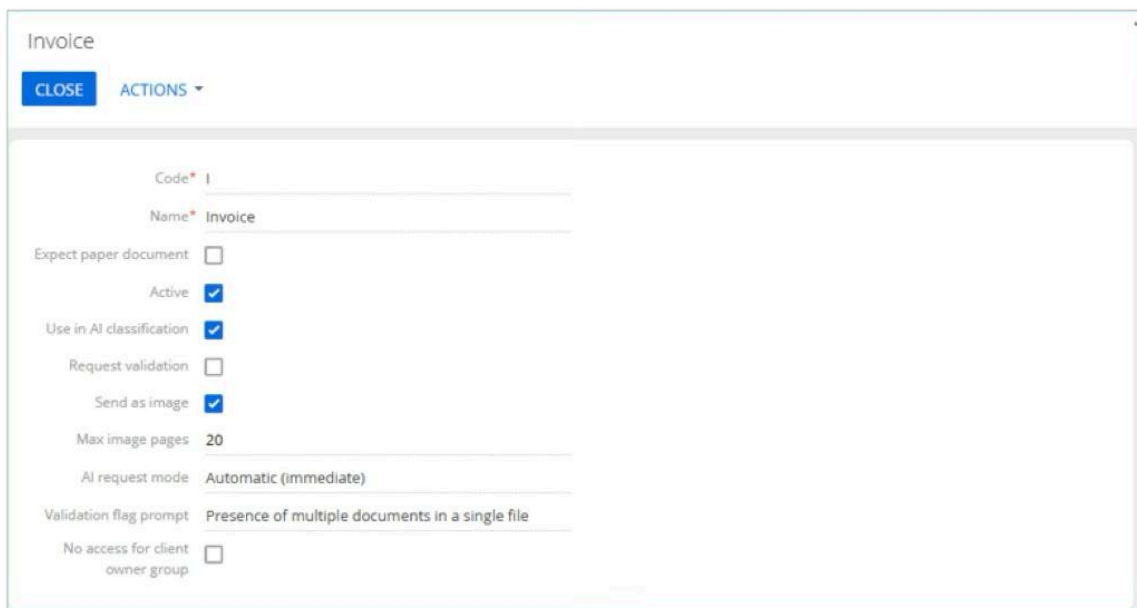


The screenshot shows a configuration window titled "Invoice bank" with a "CLOSE" button. The form contains the following fields:

Code	
Name*	Invoice bank
Type	String
String*	Unlimited length text
AI prompt	Return invoice bank name, if there are several ret...
Description	

AI Data Extraction Settings

The main reference point for AI data extraction settings is the **Document Type** lookup. The following chapter describe the fields required for accurate document recognition and AI-driven auto-filling.



The screenshot shows a settings form for a document type named 'Invoice'. At the top left, there is a 'CLOSE' button and an 'ACTIONS' dropdown menu. The form contains the following fields and options:

- Code***: I
- Name***: Invoice
- Expect paper document**:
- Active**:
- Use in AI classification**:
- Request validation**:
- Send as image**:
- Max image pages**: 20
- AI request mode**: Automatic (immediate)
- Validation flag prompt**: Presence of multiple documents in a single file
- No access for client owner group**:

Request validation

Set mandatory manual user validation requirements for every new document created, or let AI decide if manual validation is necessary in each individual case.

Send as image

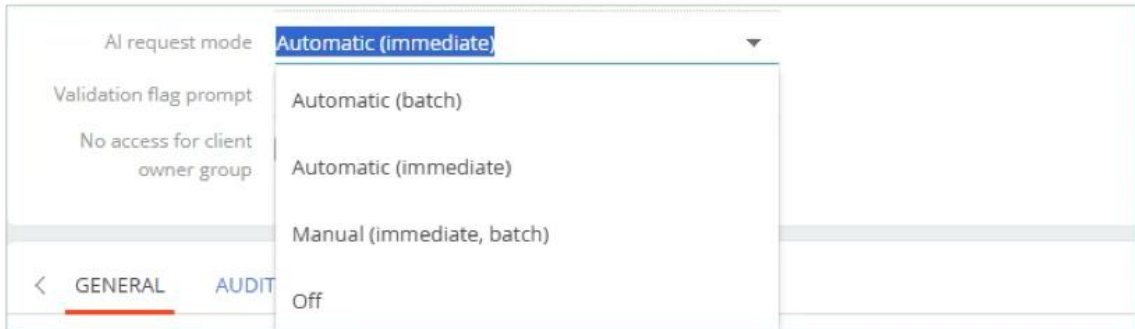
Check this setting (recommended) to convert all types of files to an image before sending to AI, including text-based PDFs and DOCX files. That will improve recognition and comprehension of the document by AI.

Max image pages

Put maximum number of image-converted pages sent for data extraction (20 recommended) to control input tokens used, as there are limitations per request (sending up to 80 pages or more is possible, depending on the model context window) and cost considerations.

AI request mode

This setting enables AI data extraction after the document is created and the type is assigned.



- **Batch mode automatic processing** (recommended) - Use batch mode instead of immediate AI response. Processing may take up to 24 hours (usually less than 10 minutes, depending on server load), but costs 50% less than standard token pricing.
- **Manual processing** – to call data extraction manually.

Validation flag prompt

Configure AI validation request rules using custom prompt in **Validation flag prompt**.

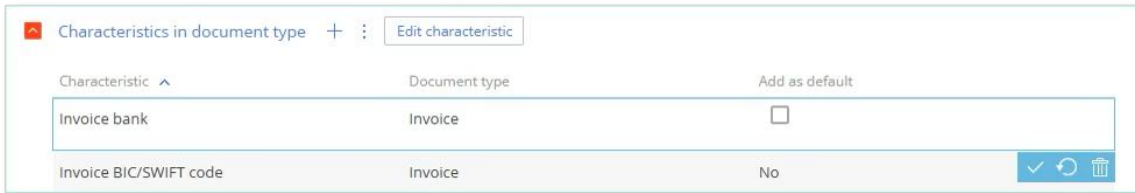
Validation is performed while extracting data from the document and will allow user to manually validate extracted data if it is decided by AI model that validation rule did not pass.

Some **examples** of using this option could be:

- Outdated documents
- Invoices exceeding certain amounts
- Incomplete documents
- Poor scan quality detection
- Inconsistent information
- Ambiguous date formats or currency
- Unsigned agreements
- Any other criteria

Characteristics in document type

1. Add fields you want AI to extract from this type of document by clicking **+**
2. Then configure the prompt for each individual field by clicking button **Edit characteristic**.



3. Enter prompt into AI prompt field



You can be as specific and detailed as needed.
The AI will handle complex instructions including:

- Original language or translation requirements
- Specific date or time formats
- Currency format
- Country format
- Any other custom commands, logic or specifications

Setting up Anthropic Account

Claude API Integration Setup

Prerequisites

Before integrating **Claude** with this solution, you'll need to set up an **Anthropic API** account and configure the necessary credentials.

Step-by-Step Setup

1. Create Your Anthropic Account

- Visit the Anthropic Console at <https://console.anthropic.com>
- Sign up for a new account or log in to your existing account
- Navigate to **Settings** → **Billing** to add payment information and fund your account
 - Link: <https://console.anthropic.com/settings/billing>

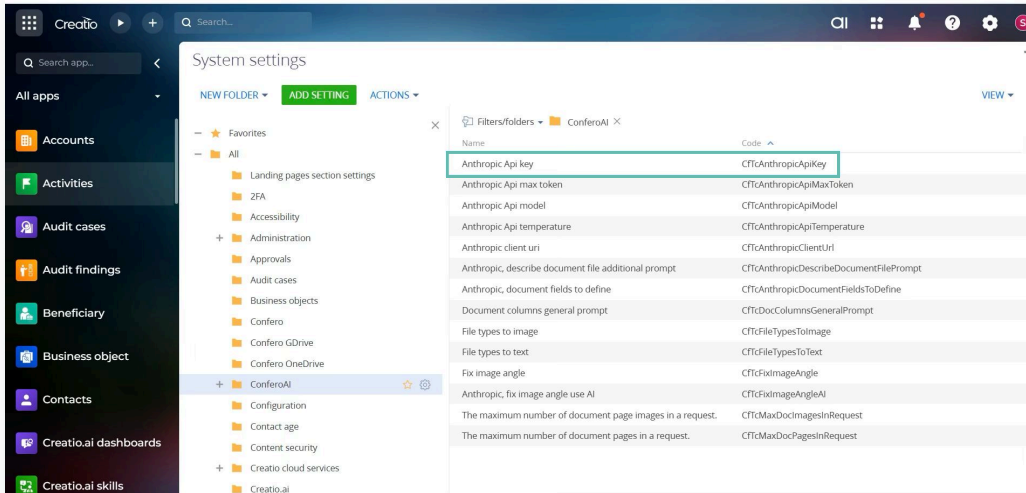
2. Generate Your API Key

- Go to **Settings** → **API Keys** in the Anthropic Console
 - Link: <https://console.anthropic.com/settings/keys>
- Click **Create Key** to generate a new API key

Important: Copy and securely store this key immediately - you won't be able to view it again.

3. Add your API key in Creatio System Settings

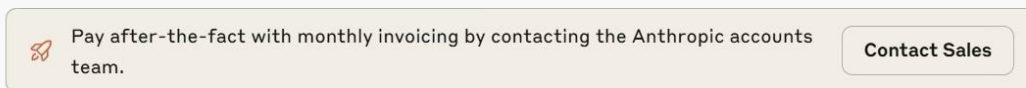
- Navigate to **System Settings** → **ConferoAI**
- Add the key to Anthropic Api key field



3. Request Higher Usage Limit

For production use, contact Anthropic Sales to upgrade your account tier to tier 4:

- Click the **Contact Sales** button in your console dashboard



Request Tier 4 access (usually Anthropic auto-replies to this request), which provides:

- Up to \$5,000 monthly token usage
- Higher rate limits for production workloads
- Larger input token limit (up to 1 million tokens per request)

3. Monitor Account Usage

Keep track of your API usage and account balance:

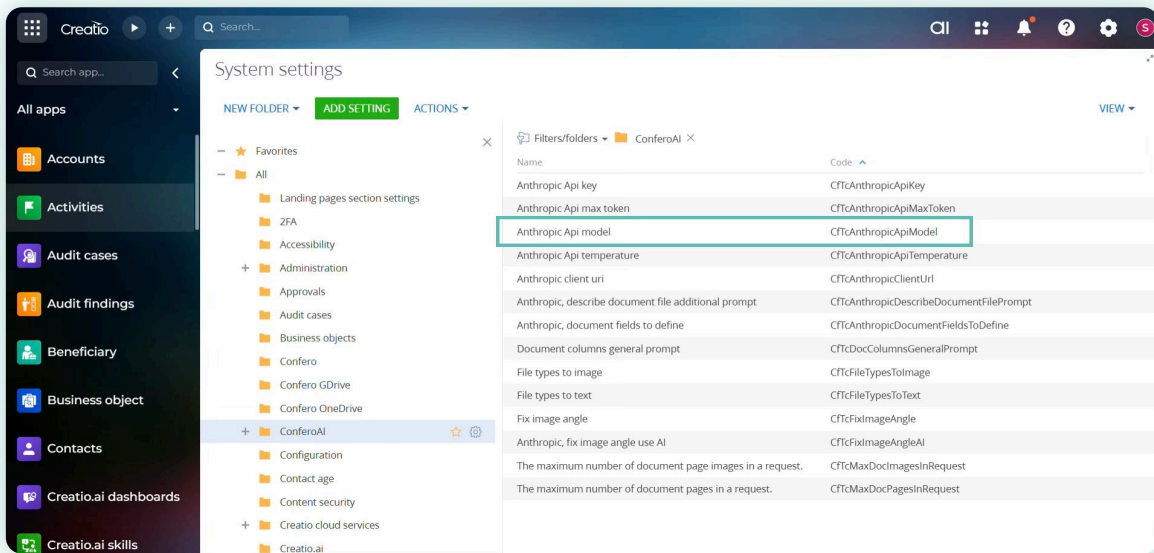
- **Current Balance:** Regularly monitor remaining balance in your account to avoid unexpected service interruption.
- **Usage Tracking:** Review monthly consumption patterns.
- **Auto-reload:** Enable automatic credit top-ups to prevent service interruptions.
- **Navigate** to billing settings and enable auto-reload when credits are low.

Model Management

Models are configured in **System Settings** → **ConferoAI**.
Look for the setting: **Anthropic Api model** (CfTcAnthropicApiModel)

Default Model is set to: claude-sonnet-4-20250514

Important: Always use the exact Model ID, not the display name or alias. Refer to the Anthropic API documentation for current model names and specifications:
<https://docs.anthropic.com/en/docs/about-claude/models/overview>



1. Recommended Model Selection

We recommend using Claude Sonnet family models because they:

- Provide high-quality image recognition capabilities
- Offer lower hallucination rates compared to other model families
- Balance performance with cost-effectiveness

Production Recommendation: Use specific model versions with dates (e.g., claude-sonnet-4-**20250514**) rather than dynamic aliases like claude-sonnet-4-**latest** to ensure consistent behavior in production environments.

2. Model Lifecycle Management

Claude models become deprecated or receive updates over time.

To maintain optimal performance:

Monitor Anthropic Communications: Monitor Anthropic's email notifications for model updates and deprecation notices.

Test New Versions: When new models are released, test them in your development environment before upgrading production. Test on various document types for any abnormal behavior.

Image recognition capability (vision): Use only models that have image recognition capability.

Regular Reviews: Periodically review your model selection to ensure you're using the most appropriate version for your use case:

<https://docs.anthropic.com/en/docs/about-claude/models/overview>

The screenshot shows the Anthropic Developer Platform website. The main content area features a table titled "Model comparison table" which lists various Claude models and their aliases. A callout box highlights that aliases are subject to the same rate limits and pricing as the underlying model version they reference. The table includes columns for Model, Alias, and Model ID, with rows for Claude Opus 4.1, Claude Opus 4, Claude Sonnet 4, Claude Sonnet 3.7, and Claude Haiku 3.5. Below the table, there is a section for "Model comparison table" with a description and a table of features.

Model	Alias	Model ID
Claude Opus 4.1	cClaude-opus-4-1	cClaude-opus-4-1-20250805
Claude Opus 4	cClaude-opus-4-0	cClaude-opus-4-20250514
Claude Sonnet 4	cClaude-sonnet-4-0	cClaude-sonnet-4-20250514
Claude Sonnet 3.7	cClaude-3-7-sonnet-Latest	cClaude-3-7-sonnet-20250219
Claude Haiku 3.5	cClaude-3-5-haiku-Latest	cClaude-3-5-haiku-20241022

Model comparison table

To help you choose the right model for your needs, we've compiled a table comparing the key features and capabilities of each model in the Claude family:

Feature	Claude Opus 4.1	Claude Opus 4	Claude Sonnet 4	Claude Sonnet 3.7	Claude Haiku 3.5	Claude Haiku 3
Description	Our most	Our	High-	High-	Our fastest	Fast and

3. Troubleshooting

If you encounter issues:

- **API Key Issues:** Verify your API key is correctly configured and hasn't expired.
- **Usage Limits:** Check your account balance and usage limits in the Anthropic Console.
- **Model Compatibility:** Ensure your model settings match currently supported Claude models.



CONFERO

Expertise
that powers

Confero Technologies, SIA

Reg. number: 40203176720

+371 67775111

info@confero.tech

Elizabetes Street 23, Riga, LV-1010, Latvia