



**CONFERO**

# USER MANUAL

## **IntelliDocs**

AI Document Recognition  
for Creatio

Version 1.0 Freedom UI

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# Introduction

In today's business environment, companies receive a large number of emails with various attachments on a daily basis. Processing these messages manually can be time-consuming, inefficient and prone to errors.

To address this challenge we have developed **IntelliDocs** – a **native add-on** for the Creatio platform, designed to operate within its **no-code/low-code** environment.

Leveraging **Artificial Intelligence (AI)**, IntelliDocs automatically recognises, classifies, and manages the content of incoming emails and their attachments.

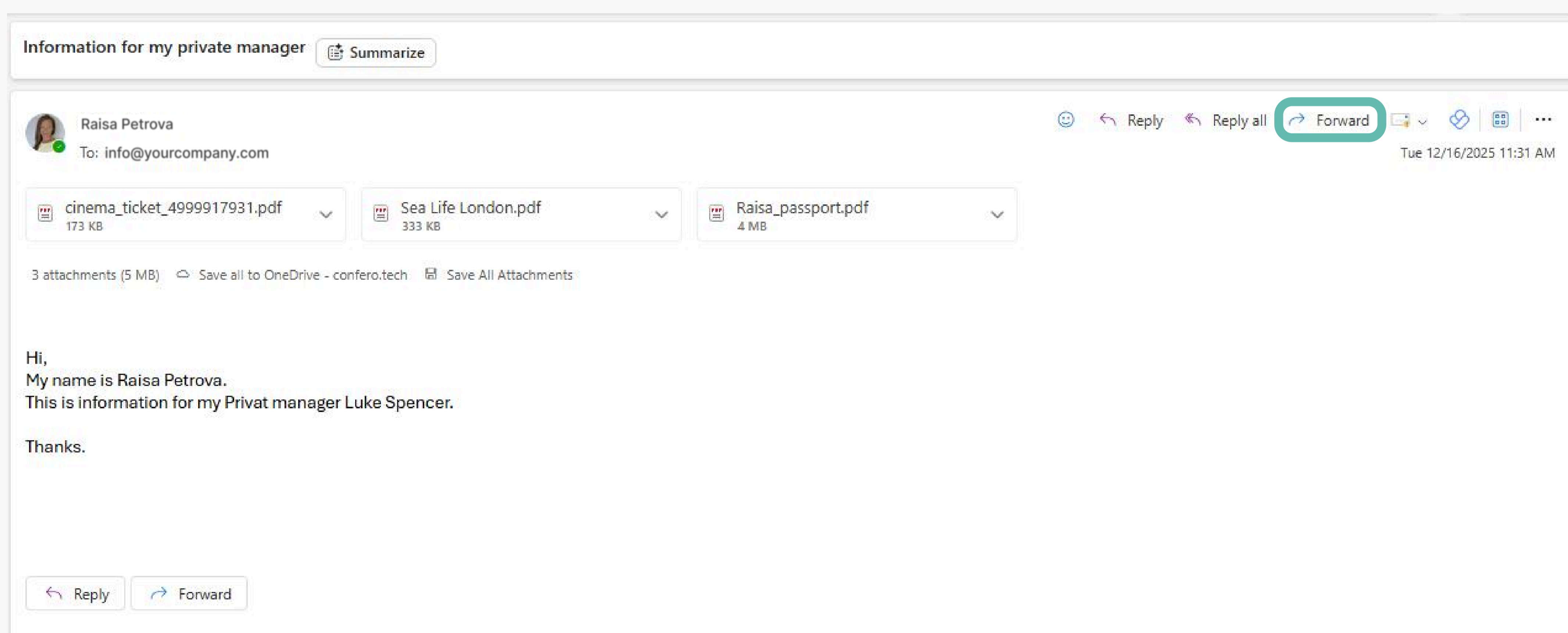
The functionality of IntelliDocs ensures that all important information is **captured, organised, and securely stored** in the system, reducing manual effort and improving overall efficiency.

This **user manual** provides detailed, step-by-step instructions for working with the **IntelliDocs - AI Document Recognition** application.

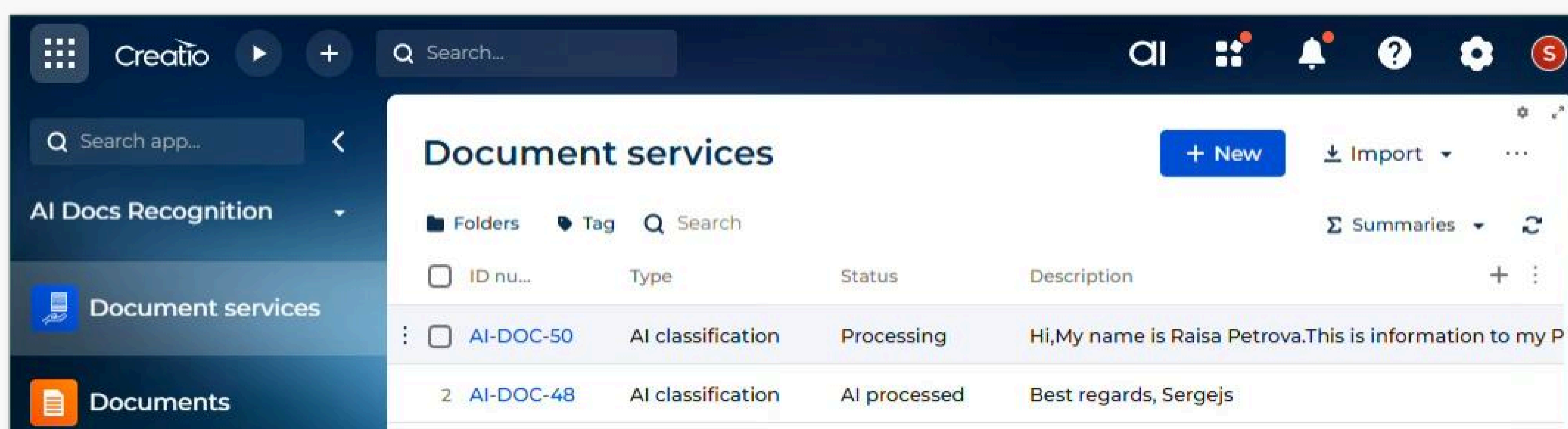
**Note:** IntelliDocs requires an external microservice in a Kubernetes cluster and an active Anthropic Claude account to operate.

# AI Document Recognition Process

1. The user sends or forwards an email with attachments to a specific internal email address connected to the IntelliDocs solution. Once the email is received, all attached documents are automatically processed by IntelliDocs and AI. A detailed step-by-step description of the process is provided below.



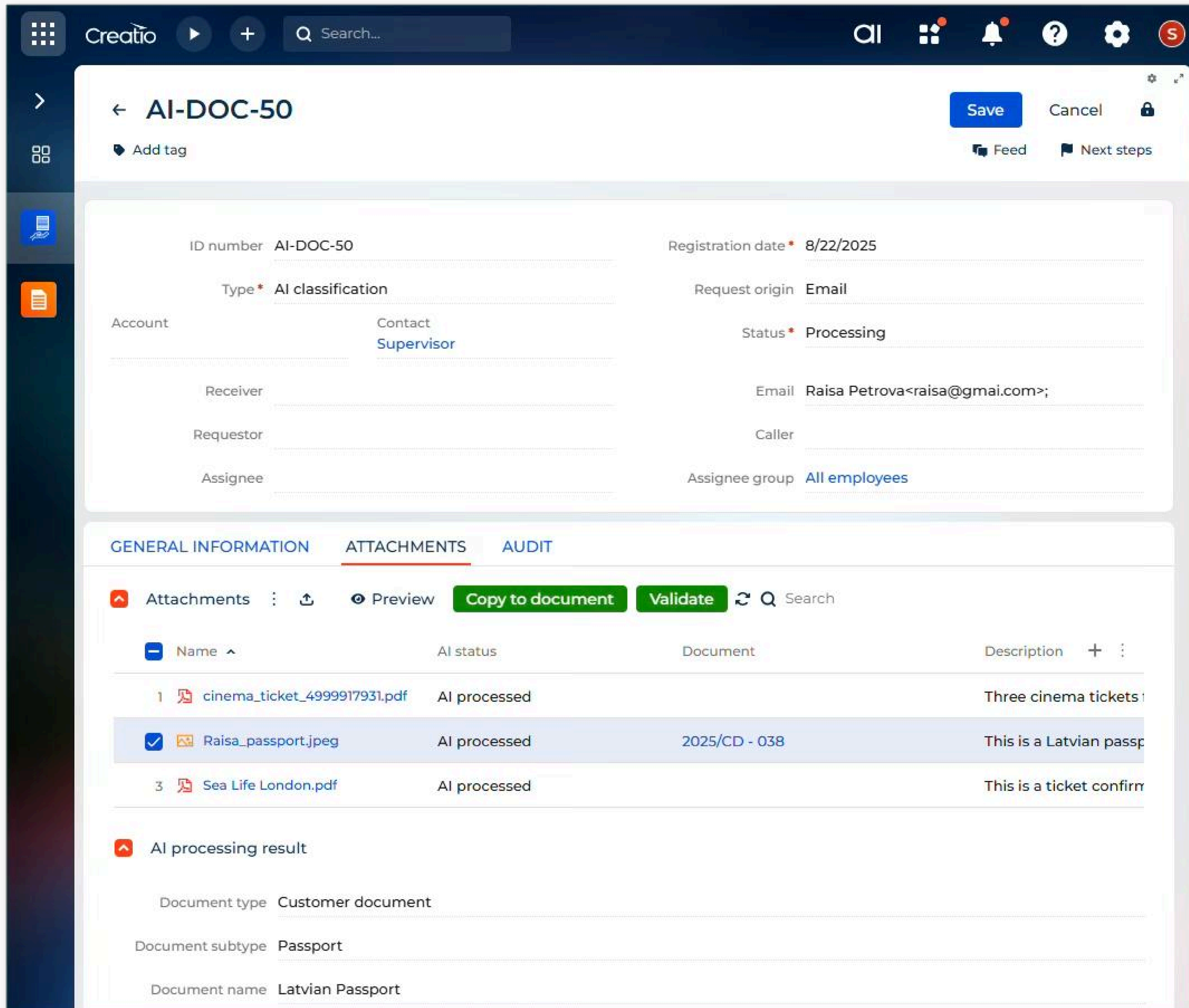
2. The email is automatically registered in the **Document Services** section.



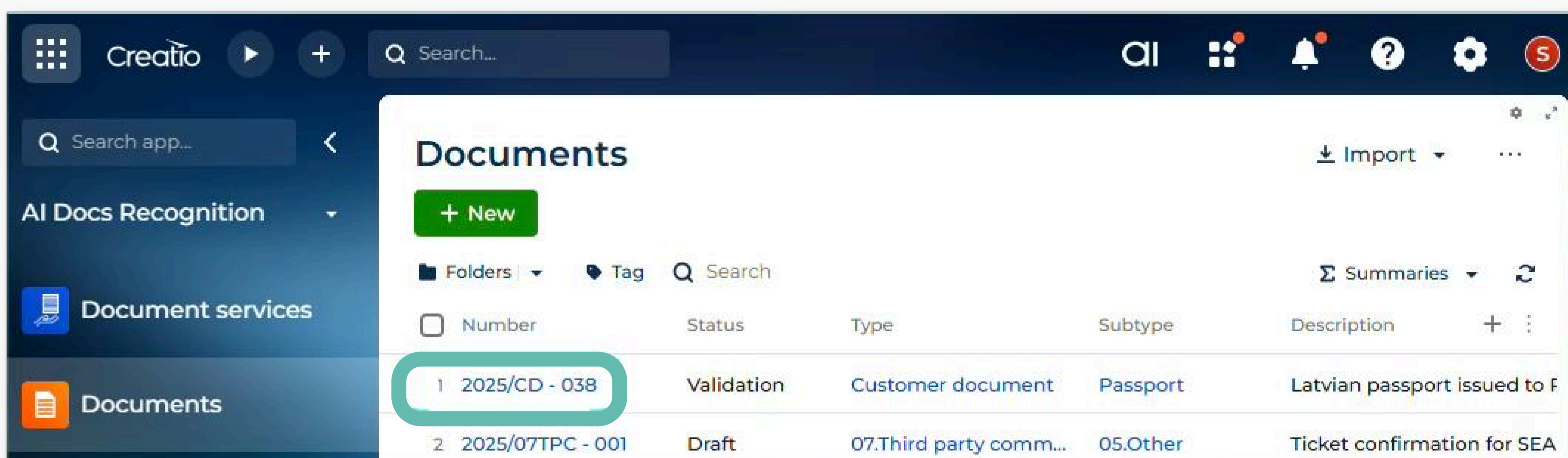
The form layout and field properties are described in the **“Document Services”** section of this manual.

## If Automatic Processing is Enabled

1. The system automatically assigns a document number to the attached file and saves it in the **Documents** section based on the assigned classification.

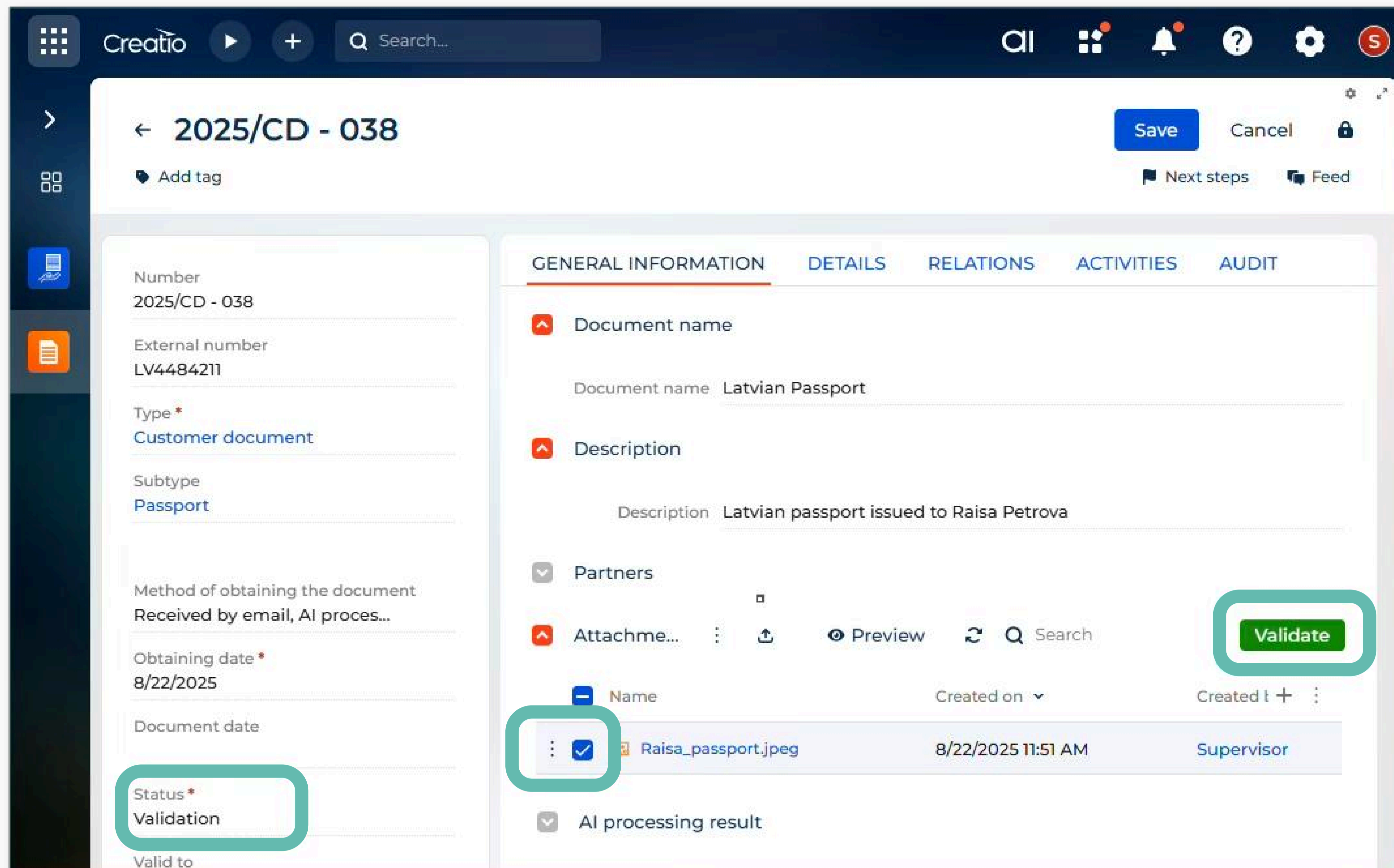


2. The document can be opened either via the provided link containing its document number, or directly from the **Documents** section.

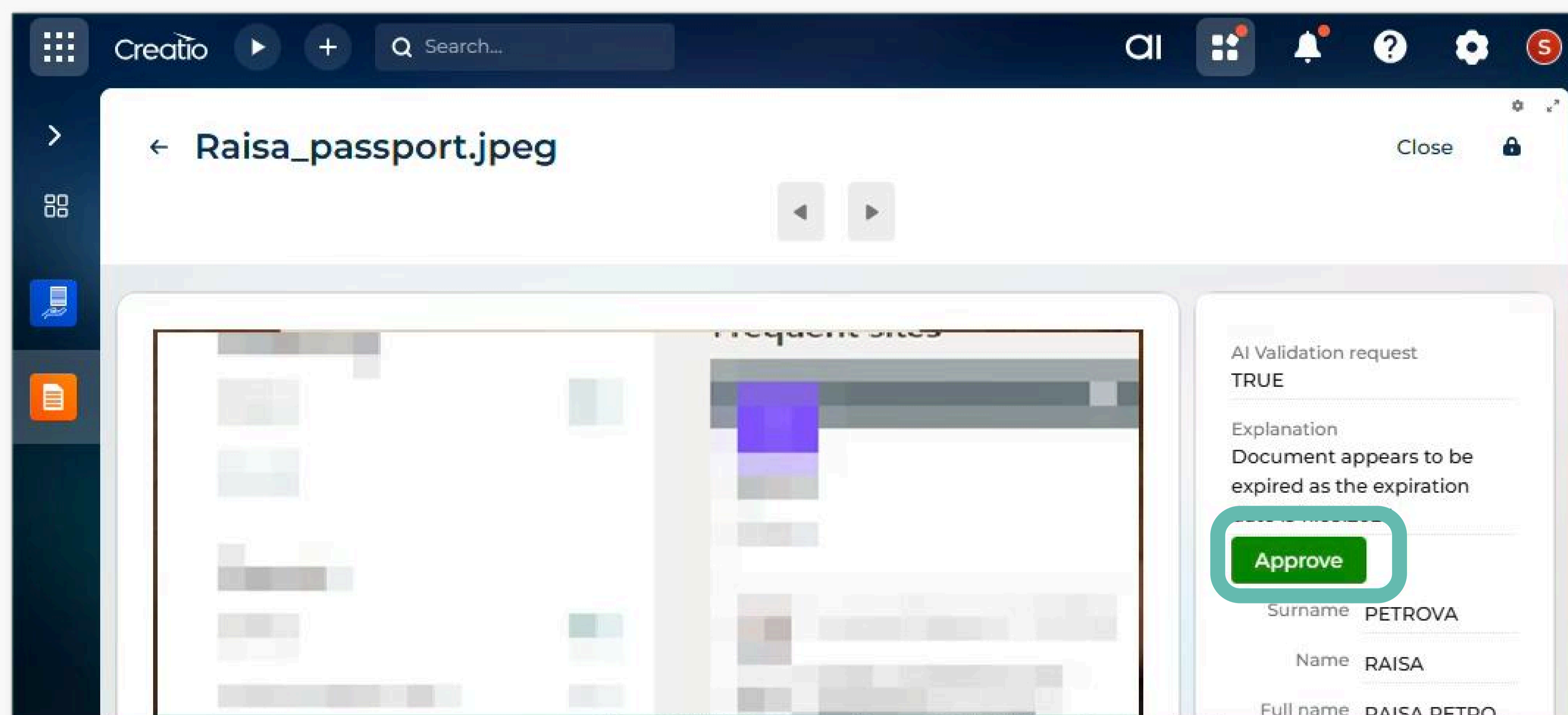


The form layout and field properties are described in the **“Documents”** section of this manual.

3. The document receives the status **Validation** and must be reviewed.  
To validate the document, open it and click the **Validate** button.



4. Open the document, review the data, and make any necessary corrections.  
After verification, click **Save**, then **Approve**.



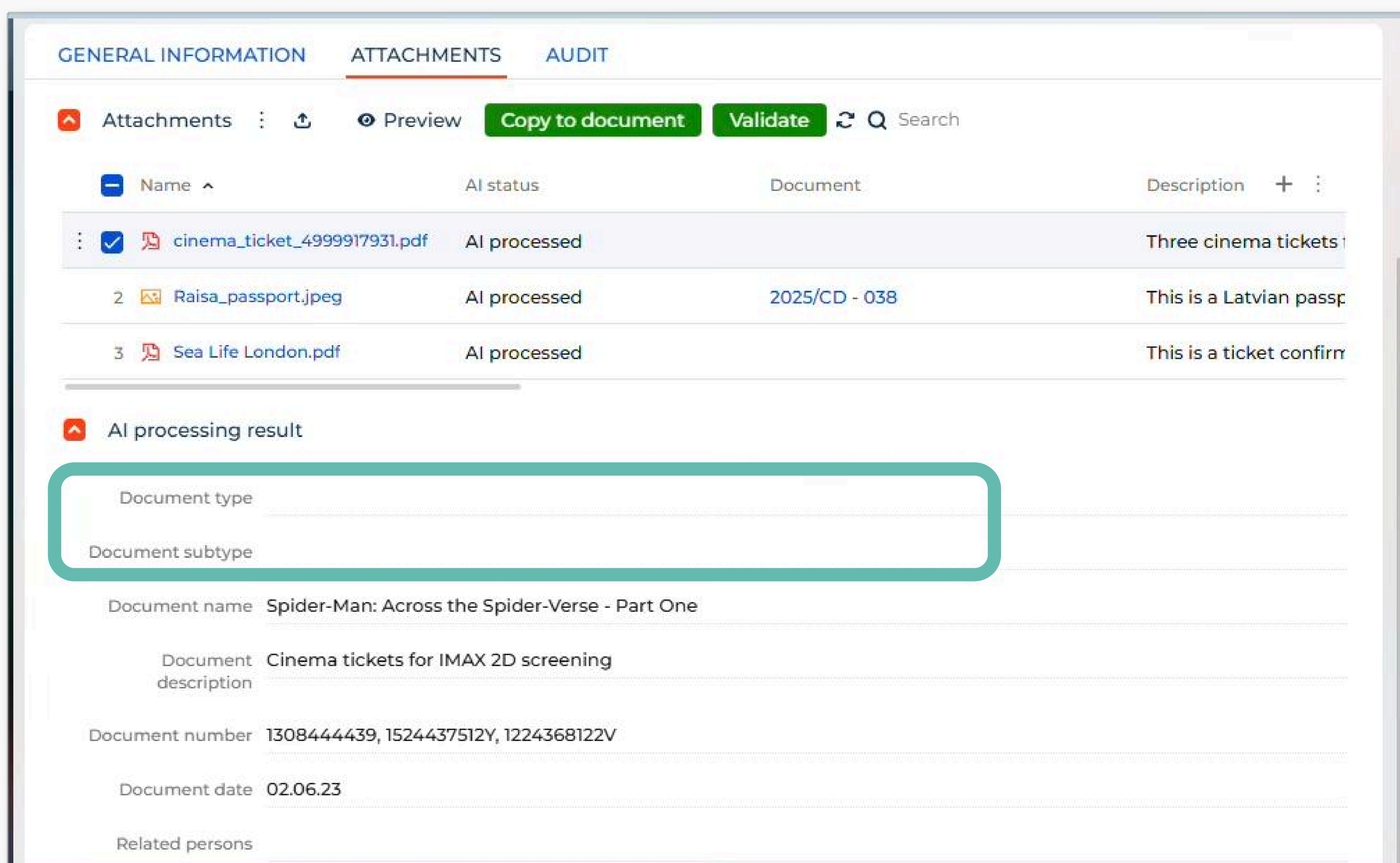
4. Once approved, the document status automatically changes to **AI processed**.

## If Automatic Processing is not Enabled

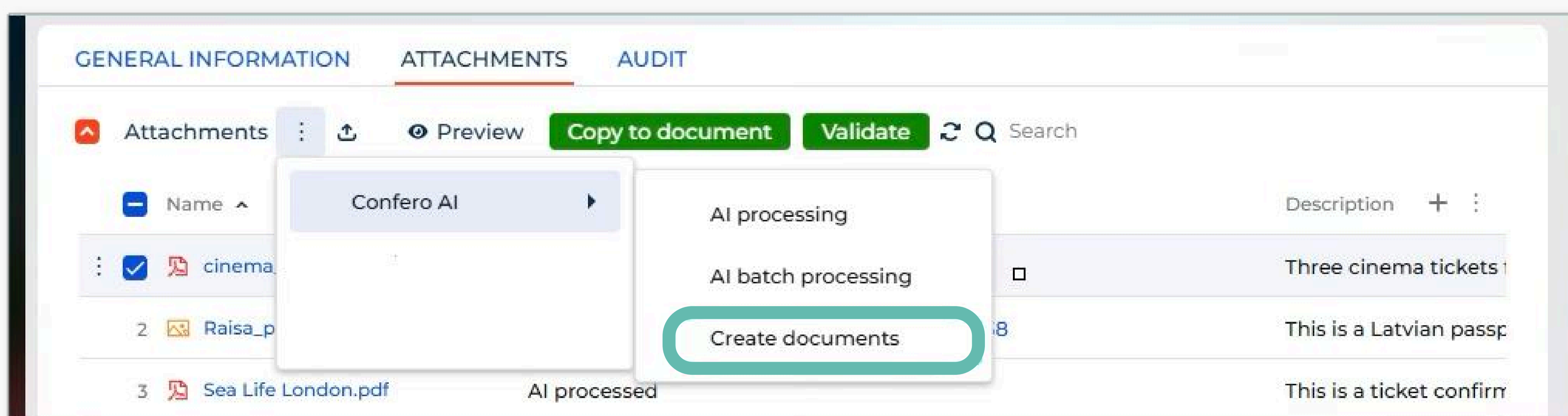
If automatic processing is not enabled, attachments can be classified manually.

1. In the **Attachments** details, select the document for manual classification.

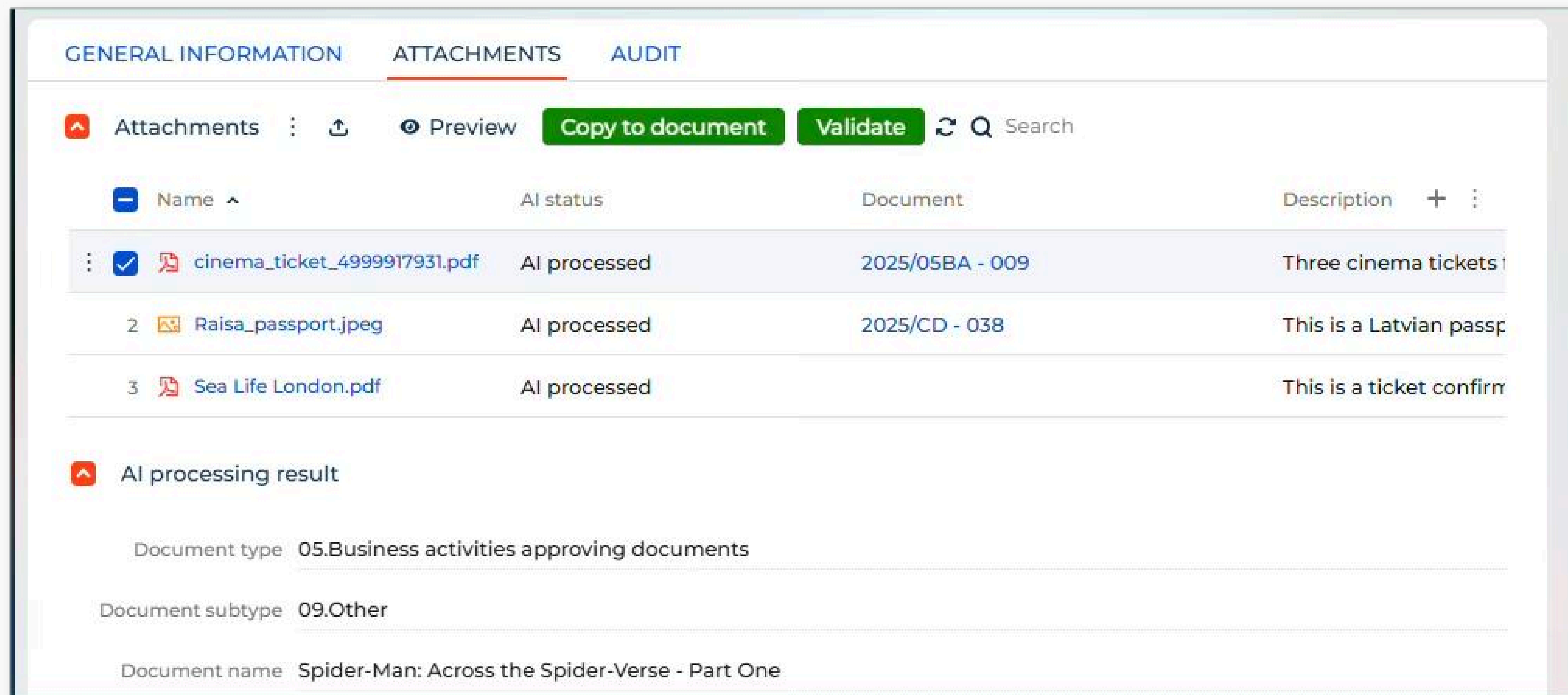
2. In the **AI processing result** field block, fill in the **Type** and **Subtype** fields.



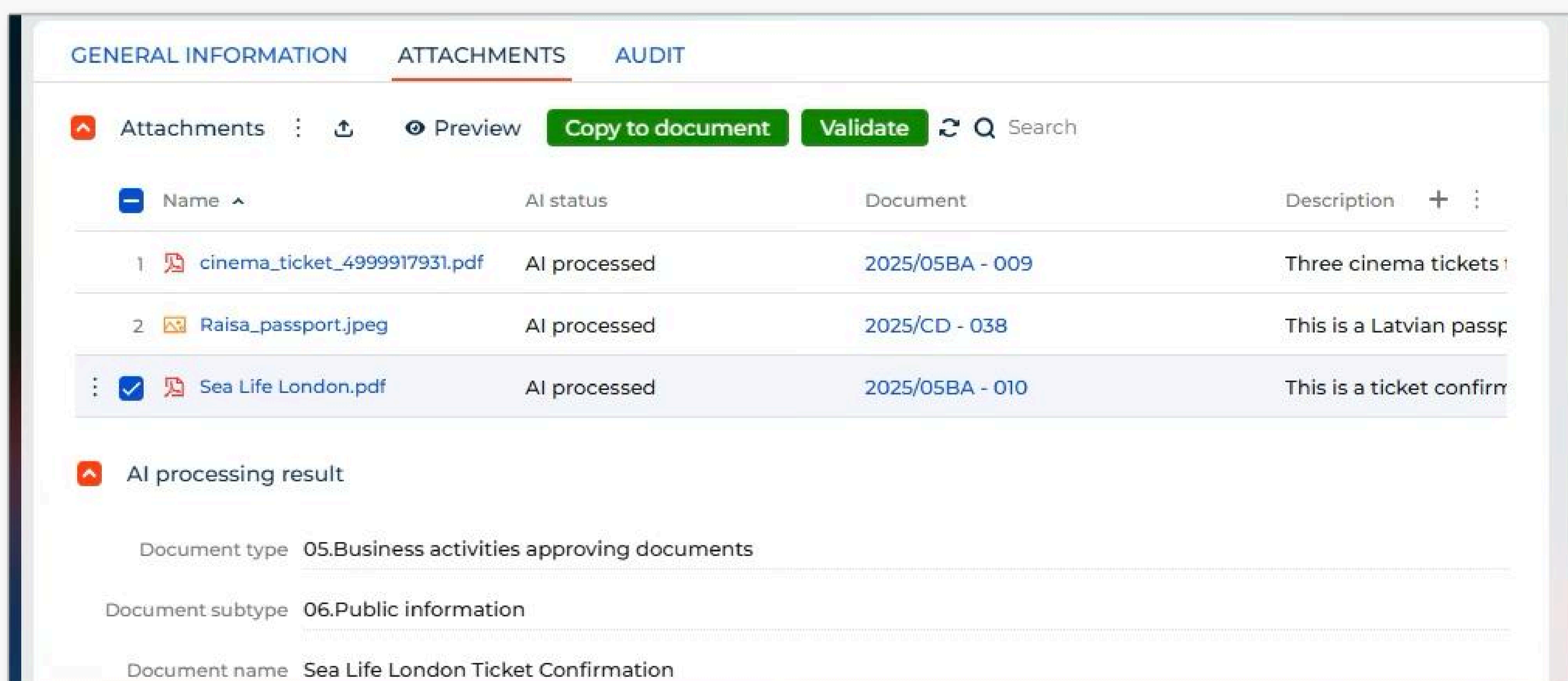
3. To save the changes select the action **Confero AI → Create documents**.



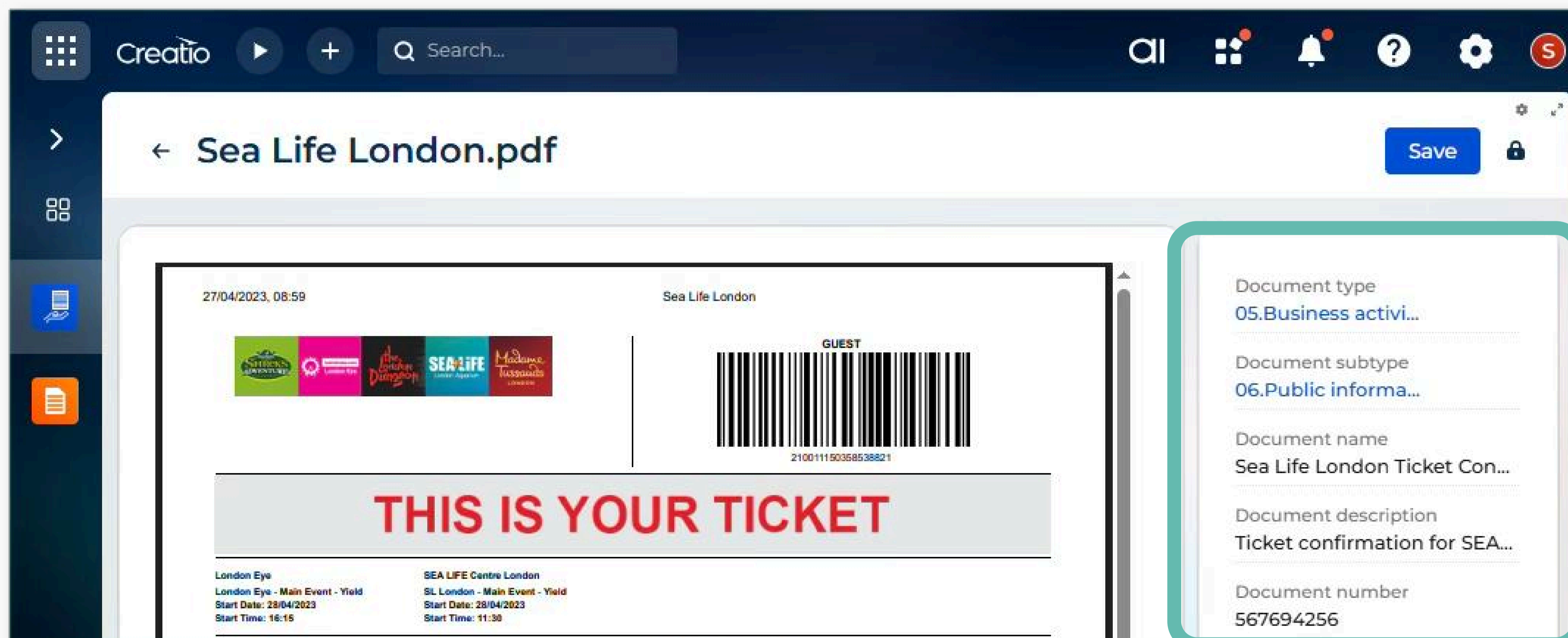
4. Upon saving, the attached file is placed in the **Documents** section and automatically receives a number according to the classification rules.



5. The system allows you to verify and update the data by pressing **Validate**.



6. After reviewing the opened form with document properties and making changes, click **Save** to confirm.



7. After making changes to the document properties, you can create a new document again by selecting the action **Confero AI → Create documents**.

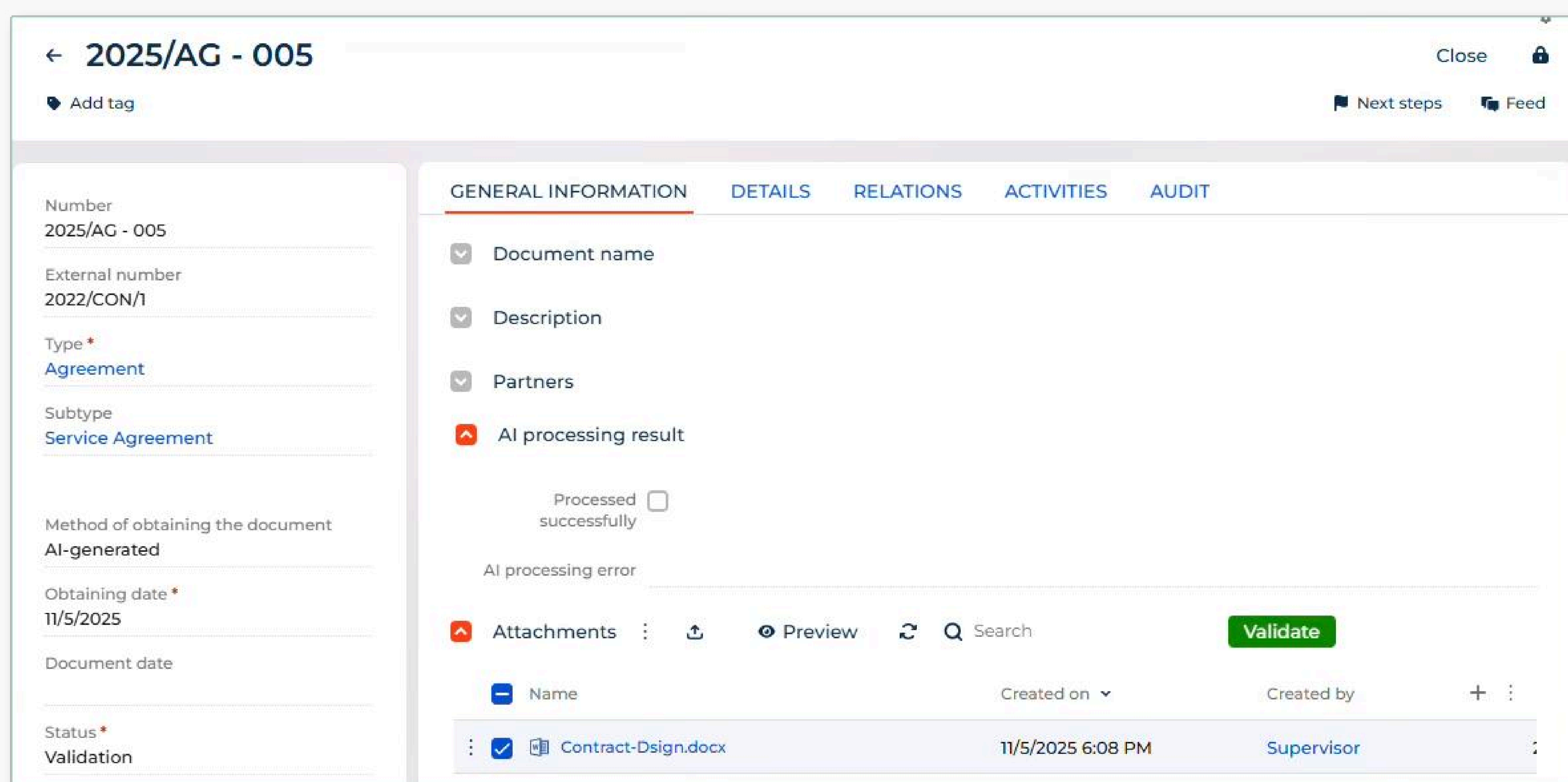
8. A new document will be created in the section **Documents**, while the link to the previous one remains active.

9. The relation is displayed in the **Document / Document Services Relations** details.

# AI Data Extraction Process

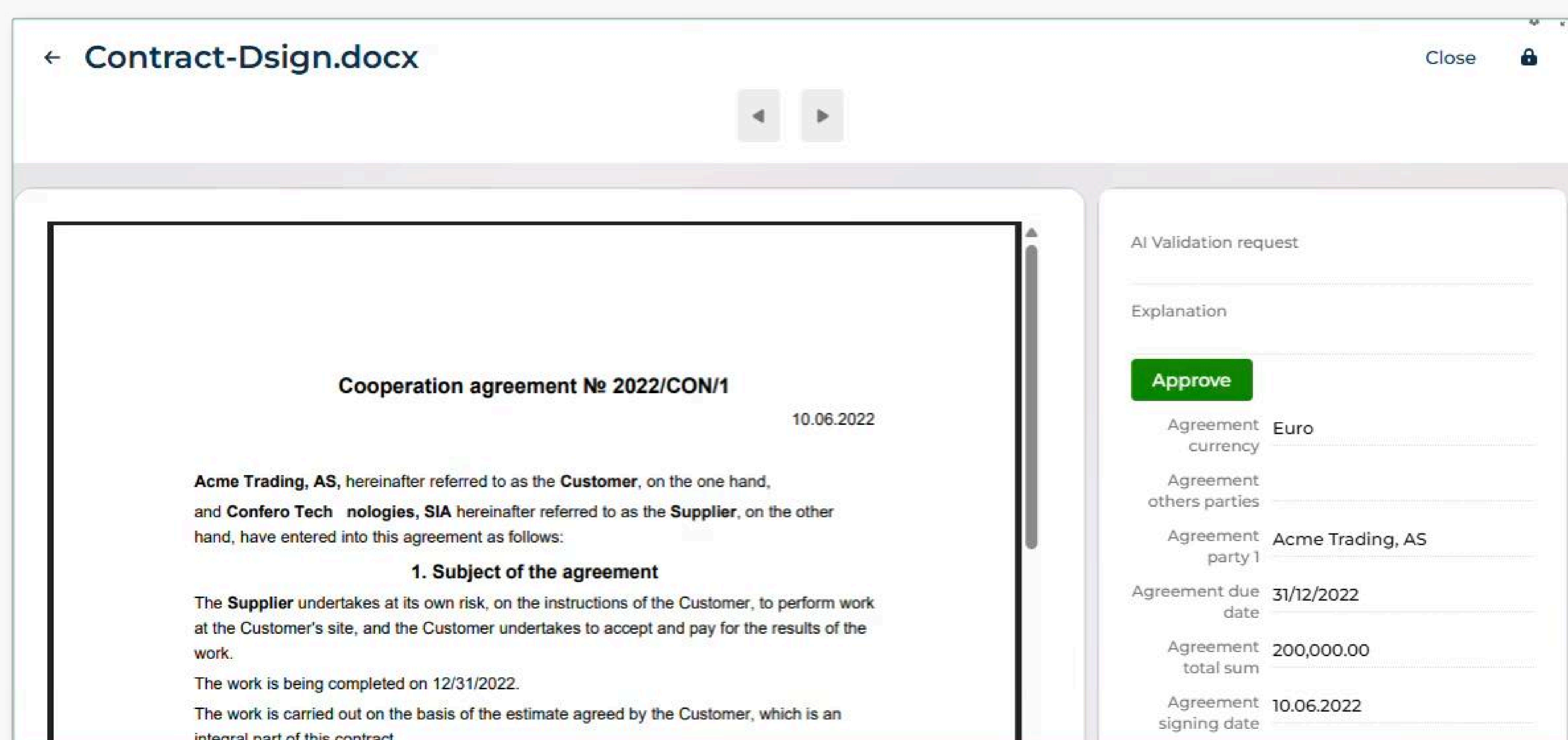
## Validation

1. The created document receives the status **Validation** and must be reviewed. To validate the document, open it and click the **Validate** button.



2. The user must open the document, verify the data, and make corrections if necessary.

3. After verification, click **Save** and then **Approve**.

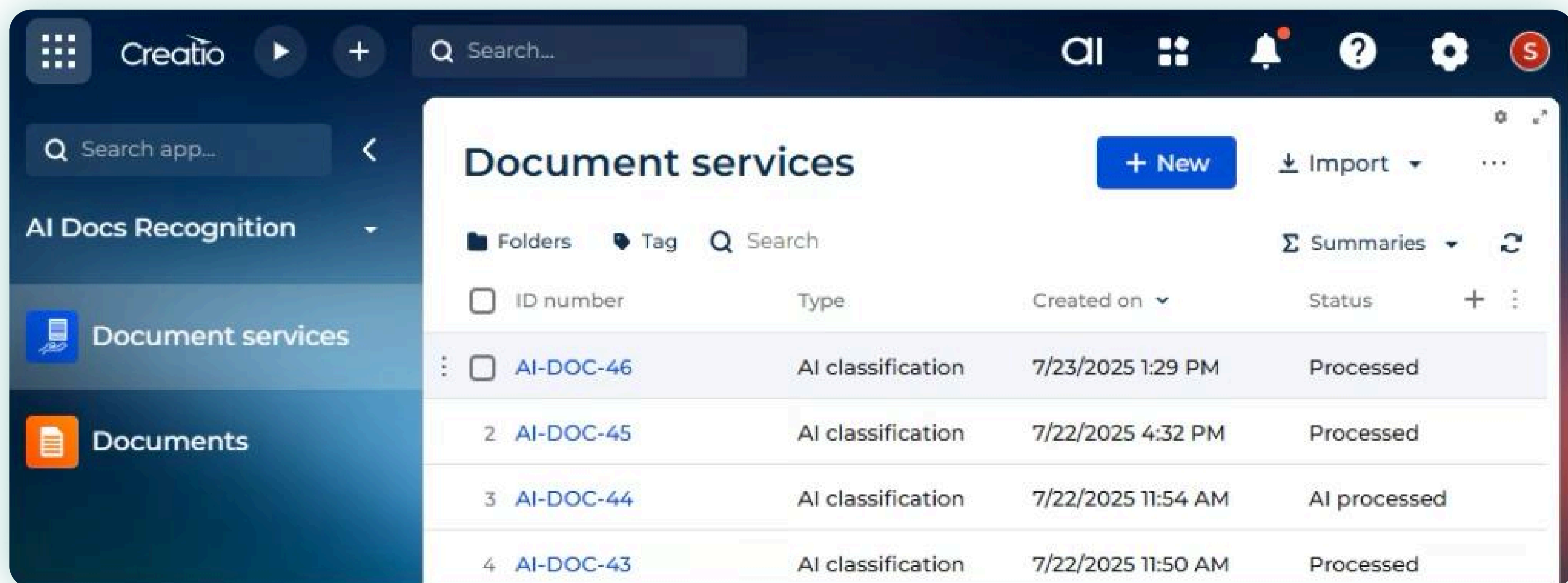


Once approved, the document status automatically changes to **AI processed**.

# Document Services

This section has a standard structure and does not differ from the basic version.

The standard registry view of this section is shown below:



List and description of fields is provided below:

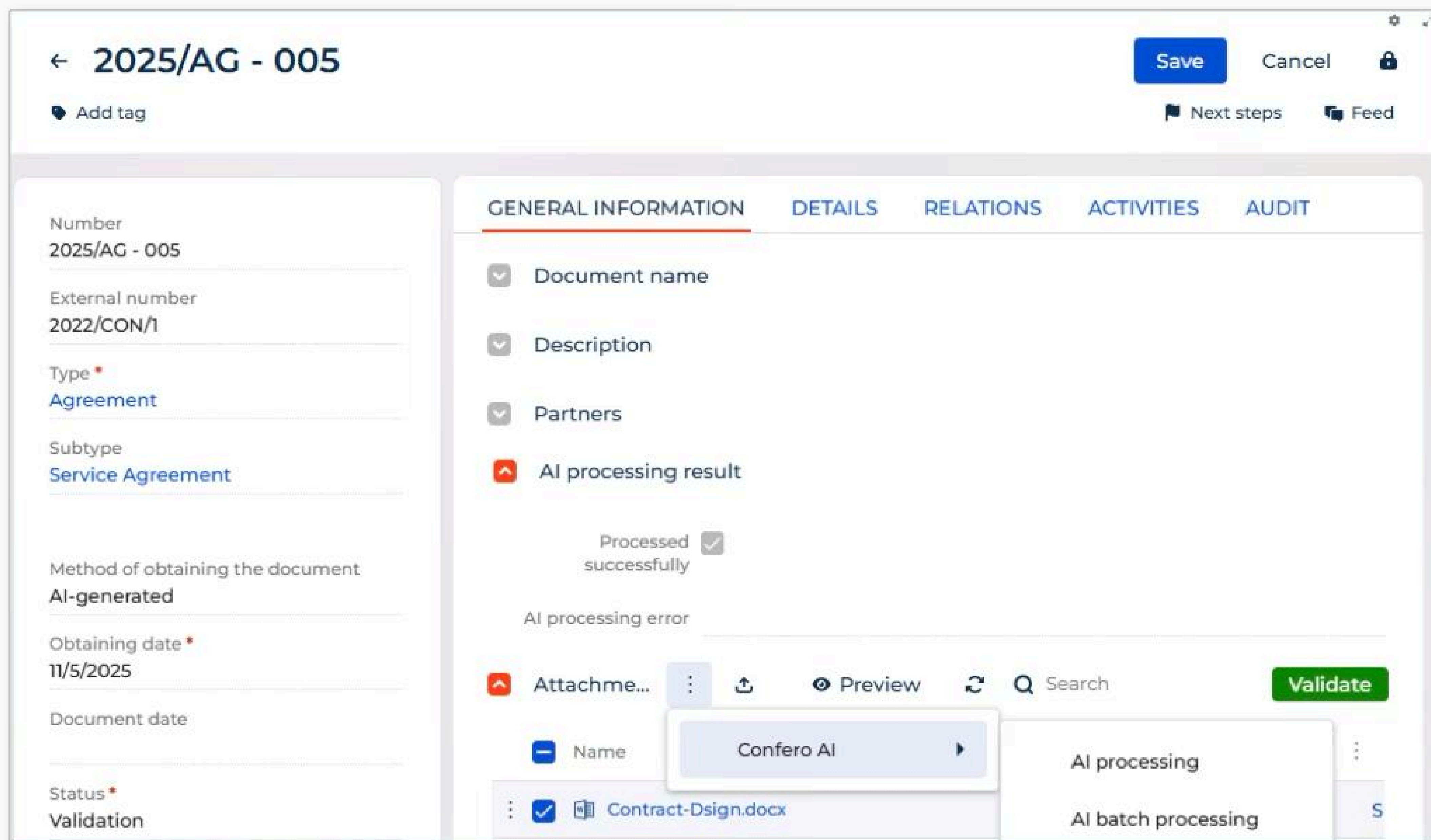
## Profile Fields

Field	Description
ID number	Full document number Generated automatically by the system according to mask upon initial saving Read only
Registration date*	Date on which the email was received Filled in automatically
Type*	Filled in automatically Value from lookup Type Filled in automatically if AI processed = AI classification
Request origin	Filled in automatically Value from lookup Request origin Filled in automatically if AI processed = Email
Account	Select from section Account
Contact	Select from section Contact

# Manual Data Extraction

1. System allows manually classify attachments by clicking **Attachments** 

3. In the **Attachment** details, under the **Confero AI** action, the following processes can be initiated manually:



- **AI processing** – allows immediate extraction of information from the selected document.
- **AI batch processing** – asynchronous data extraction, which may take more time.

## Profile Fields

Field	Description
Status*	Filled in automatically Value from lookup Status Filled in automatically if AI processed = Processing
Receiver	Text field
Email	Text field Filled in automatically
Requestor	Value from table Contact
Caller	Value from table Contact
Assignee	Value from lookup Assignee
Assignee group	Value from lookup Assignee group

## Tab General Information

Field	Description
Information*	Subject from e-mail Text field Filled in automatically if AI processed
Description	Body from e-mail Text field Filled in automatically if AI processed
Planned due date	Value from calendar
Document services notes	Can be added by clicking +
Properties	Can be added by clicking +
Activities	Activities (detail) Shows all activities related to the document Can create new activity by filling in card Task
Email	Email (detail) Shows all emails related to this document
Document / document services relations	Related documents (detail) Filled in automatically All documents related with this e-mail

## Tab Attachments

Field	Description
Attachments	Attachments (Detail) All files from e-mail Actions at this detail allow manually classify attachments Confero AI → <ul style="list-style-type: none"><li>• AI processing</li><li>• AI batch processing</li><li>• Create documents</li></ul>
AI processing result	Active if attachment selected Show all document characteristics
Notes	Text field
Links	Text field Can be added by clicking +

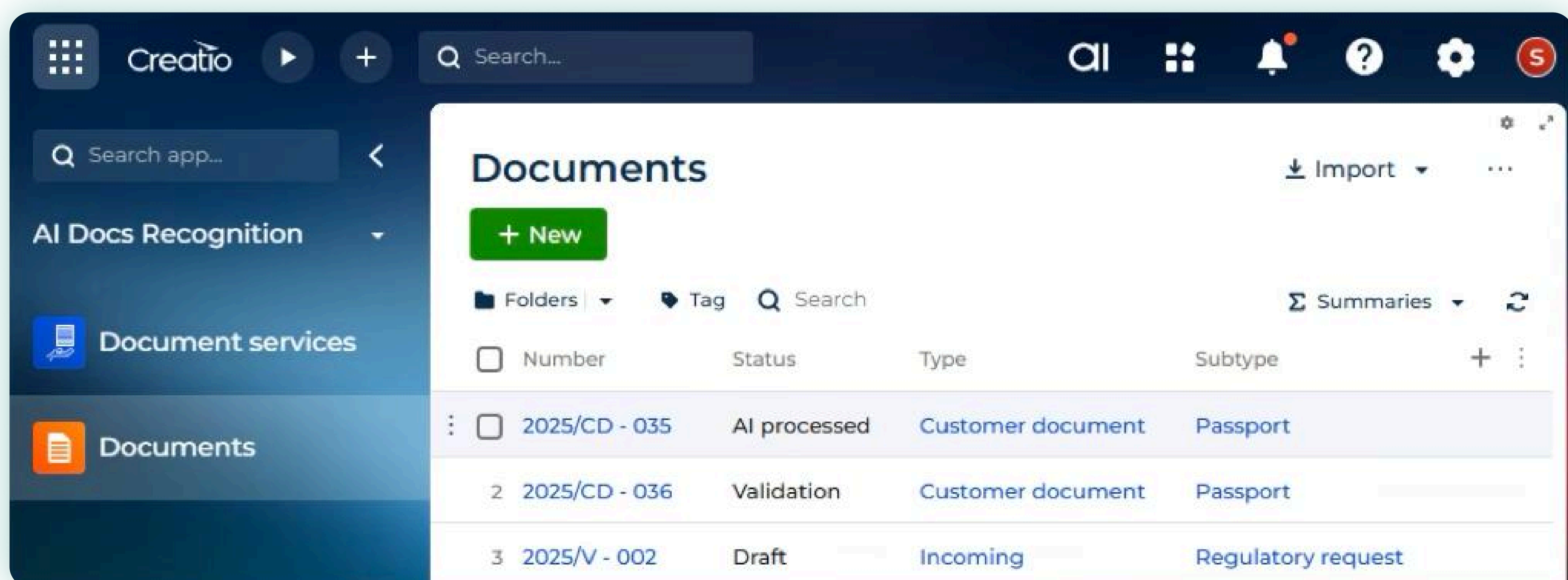
## Tab Audit

Field	Description
Created by	Author of the entry Value from lookup Contact Generated by the system automatically upon initially saving the card Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the card Read only Value from calendar
Modified by	Last person who modified the entry Value from lookup Contact Generated by the system automatically each time upon saving the card Read only
Modified on	Date and time the entry was last modified Value from calendar Generated by the system automatically each time upon saving the card Read only

# Documents

This section has a standard structure and does not differ from the basic version.

The standard registry view of this section is shown below:



**Document** card contains a set of fields with general data, and several tabs. In order to create new entry, user should click button **+ New** and fill in the fields on the page.

List and description of fields are provided below:

## Profile Fields

Field	Description
Number	Full document number Generated automatically by the system Read only
External number	Text field Filled in automatically if AI processed
Type*	Document type Value from lookup Document type Filled in automatically if AI processed
Subtype	Document subtype Value from lookup Document subtype
Method of obtaining the document	Value from lookup Method of obtaining the document Filled in automatically if AI processed = Received by email, AI processed
Obtaining date*	Date of Obtaining the document Auto-populate with current date with possibility to change

## Profile Fields

Field	Description
Document date	Document date
Status	Filled in automatically Value from lookup Status Filled in automatically if AI processed = Validation
Valid to	Document expiration date Read only if document is Termless
Termless	Checkbox
Account	Select from section Account
Contact	Select from section Contact

## Tab General Information

Field	Description
Risk document name	Document name Text field
Description	Document description Text field
Attachments	Attachments (Detail) File from e-mail Can be added by clicking +
AI processing result	Generated by the system automatically Read only Processed successfully – checkbox AI processing error
Document properties	Generated by the system automatically

## Tab Activities

Field	Description
Activities	Activities (detail) Shows all activities related to the document Can create new activity by filling in card Task
Email	Email (detail) Shows all emails related to this document

## Tab Audit

Field	Description
Created by	Author of the entry Value from lookup Contact Generated by the system automatically upon initially saving the card Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the card Read only Value from calendar
Modified by	Last person who modified the entry Value from lookup Contact Generated by the system automatically each time upon saving the card Read only
Modified on	Date and time the entry was last modified Value from calendar Generated by the system automatically each time upon saving the card Read only



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Expertise  
that powers

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