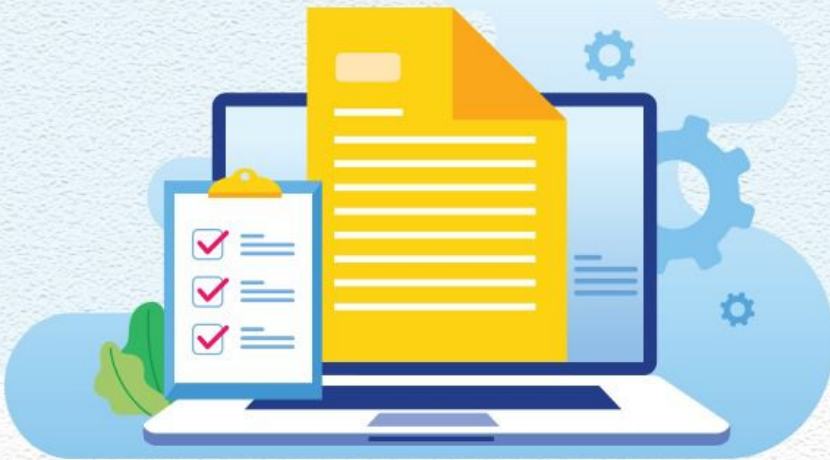


CASE STUDY: **DOCUMENT PROCESSING** USING **AI CAPABILITIES**



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PROJECT NAME

Automate Invoice Data using
Power Automate with AI Builder



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PROBLEM STATEMENT

Extracting specific Invoice data from Invoices into SharePoint using **Power Automate** and **AI Builder**



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BUSINESS USE CASE IMPLEMENTATION STEPS

1

INVOICE (PDF) AS A SOURCE

A time-stamped commercial document (Invoice) containing Various fields needs to be used as a source.



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BUSINESS USE CASE IMPLEMENTATION STEPS

2

INSIGHTS OF FINAL TRANSACTIONS

The information from Invoice generated has to be converted into Power BI Reporting to get insights of final transactions between a buyer and a seller.



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BUSINESS USE CASE IMPLEMENTATION STEPS

3

AUTOMATE THE SOLUTION

To Automate the process of extracting specific fields from pdf and updating the records in table to be used as source.



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CASE STUDY

TOOLS USED: POWER AUTOMATE, AI BUILDER, SHAREPOINT

- A consumer finance having hundreds of invoices processing every month.
- Wanted to report the amount of revenue generated by selling their product and also cost involved in purchasing.
 - The solution was automated using power automate and ai builder.
 - Created a sharepoint site and a document library with the columns/fields to be automated from the invoice.
 - With the help of “form processing extract custom information from documents” feature available in AI builder, automated data extraction.

- Document processing model in power apps and power automate.
- Once the document processing model is published, used it in a flow. Using AI builder action in power automate to automate the whole process.
- Automated as many as 500 invoices by just uploading them into sharepoint folder.



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