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SEPTEMBER 18–20, 2024 • Workshops: Sept 16, 17 & 21
MGM GRAND • Las Vegas, NV



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HARNESSING AI BUILDER AND POWER AUTOMATE DESKTOP FOR EFFICIENT INVOICE PROCESSING

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The guy in front of you

Agnius Bartninkas

COO and Co-Founder @ **Definra**

- Microsoft Business Applications MVP (Power Automate).
- The most experienced PAD (formerly Softomotive) user in Lithuania. Most other users were trained by me.
- Used to be the Excel guru of my office, but now am the grumpy guy telling everyone to stop using Excel.
- A “certified” beer expert. Now an aspiring cocktail maker.
- Author of the PADFramework.



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Agenda

Some theory:

- Different types of invoices to be processed
- Options for processing invoices in Power Automate
- AI Builder for extracting invoice data
- AI Builder licensing
- Cloud flows vs Desktop flows for invoice processing

Demos:

- Setting up and training AI Builder invoice processing models
- Integrating the models into Power Automate flows
- Using Desktop flows to automate legacy accounting software

Key takeaways

Q&A



Different Types of Invoices to be Processed

Invoices can come in various shapes and sizes:

- Digital (electronically generated)
- Requiring digitization (printed and scanned documents, handwritten documents, etc.)

Digital documents can also come in various formats:

- PDF (the most popular)
- Word documents or Excel spreadsheets (usually issued by small businesses or freelancers)
- Structured data files, like XML, JSON, etc. (usually provided in addition to a PDF document).

Scanned documents can also be formatted as images or PDF files.

Options for Processing Invoices in Power Automate

Digital invoices can be processed by reading their contents directly in a Power Automate flow.

But without intelligent tools, this will require building flows for each different invoice format/template.

This can work if the goal is to only automate some highest volume vendors.

Scanned documents require OCR which is not always accurate and depends on external factors, such as the scan quality.

Hand-written documents are difficult to digitize and automate, so it's best to persuade your vendors to switch to digital (or change them).

AI Builder for Extracting Invoice Data

AI Builder is a feature in the Power Platform that is specifically designed to enable users to create their own AI models for processing data and documents.

One of the most frequent use cases for it is document processing.

One of the most frequent documents to be processed via AI Builder are invoices.



AI Builder for Extracting Invoice Data

Using AI Builder for invoice processing makes the most sense when:

1. You want to automate all your invoices (or most of them)
2. You have more than a few vendors with different invoice formats/templates
3. Invoices include both digital and scanned documents

It has some pre-built solutions, but spinning up a custom model is also very simple and straightforward.



AI Builder Credits

Credits are consumed for each AI Builder operation we run. Different functionalities consume different amounts.

Currently, processing a single document page consumes 100 credits.

A single capacity add-on for AI Builder at \$500/month packs 1M credits (i.e. 10K pages).

But every single Power Automate (Premium or Process) license includes 5.000 credits (i.e. 50 pages) that can be pooled to up to 1M at tenant level.

So, if you need to process <1.650 pages per month, getting 33x PA Premium licenses is more cost effective than the add-on.



Cloud Flows for Invoice Processing

When an AI Builder model is set up, it needs to be used in a flow.

We normally use a Power Automate cloud flow to fetch the documents and send them over for parsing to the model. The cloud flow will almost always handle some major steps:

- An event trigger (e.g., an email arriving) or schedule (e.g., once a day)
- Picking up the document
- Some logic (e.g., identifying the vendor and picking the model to be used)
- Sending the document to the model
- Parsing the results



Cloud Flows vs Desktop Flows for Invoice Processing

However, once the document has been parsed, we also need to put the data somewhere (such as a database, an accounting system, an ERP software, etc.).

Cloud flows can only handle that for modern systems with direct integrations.

If we need to put the invoice into a legacy accounting software that does not have a proper connector, we will need to use Desktop flows.

The cloud flow then becomes the dispatcher and can then launch the desktop flow, while the desktop flow does the heavy lifting.



LET'S DO

A DEMO

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Key Takeaways

Let's sum up the key takeaways:

- Use it when it makes sense, don't use it just because you want to “do AI”.
- Check the right licensing / add-ons that make the most sense for your needs.
- Use as few models as possible with as many collections as needed / possible.
- Provide as many documents as you can to each collection for better accuracy.
- Use pre-configured document types and fields as much as you can.
- Go for >90% accuracy.
- Use desktop flows only for legacy apps. Push data via direct integrations in cloud flows when possible.
- Use work queues to pass document data from cloud to desktop.



Thank you!



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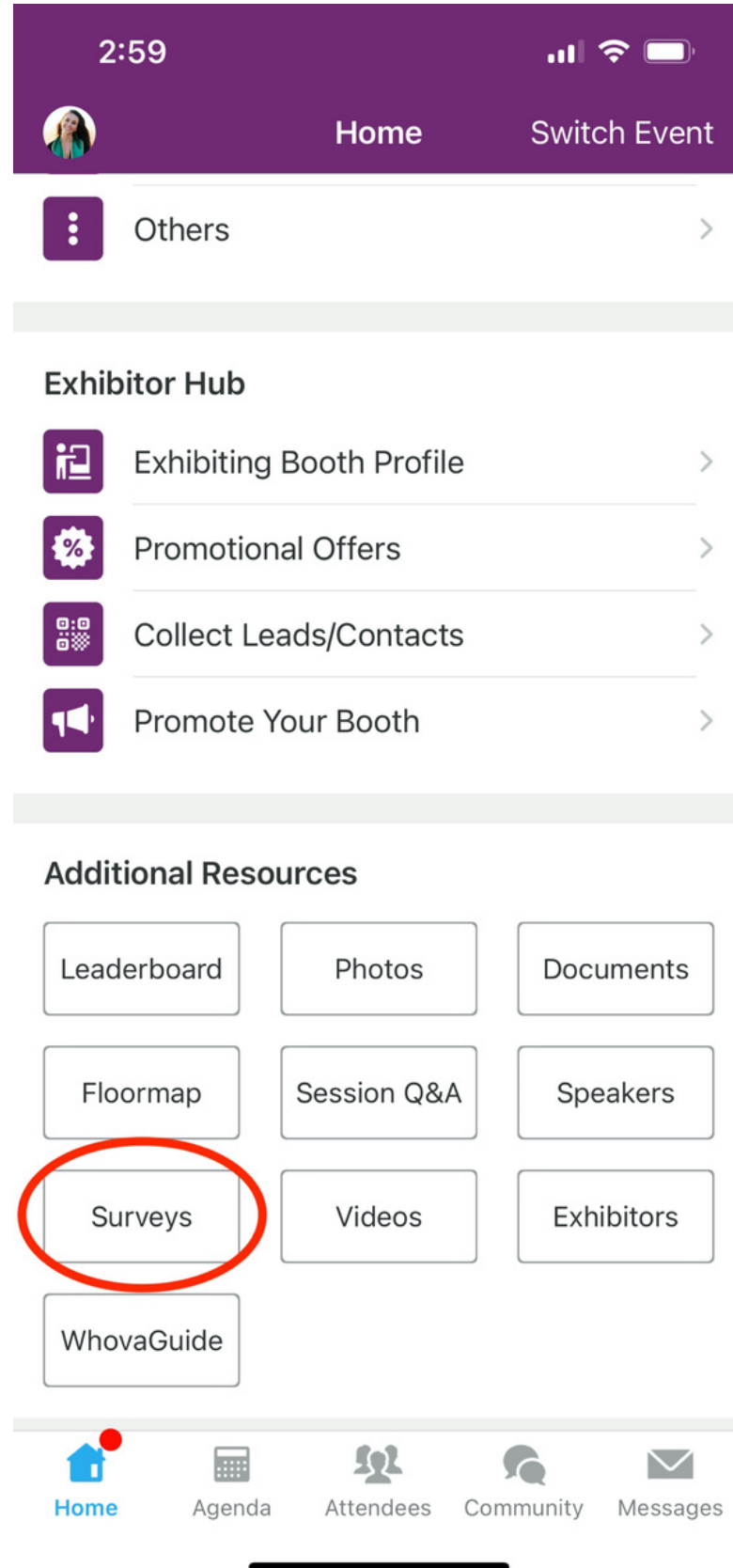


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