ETRM Project Requirements on AI side:

1. Extrication engine
2. Matching engine: Full match, partial match, abbreviation match

we need to work on below as priority and integrate with new Instance of Doc AI for ETRM.

1. Extracting All fields from few sample BOLs & Displaying in DocAI UI
2. Mapping Key fields (Products, Origin, Destination, Shipper) with Excel data and fetching similar records & displaying in UI

Meetings:

KGR Explaining ETRM Process Meeting [Recap: ETRM Daily sync : 03 July](https://teams.microsoft.com/l/meetingrecap?driveId=b%21fVVmuBX3-UKMGiA0gQ67MJW4iKBHcj9KoZaQo0H5F4uAQupWugUCT66TszvtL_h6&driveItemId=01U43DH6WIUYY5XGHIRFB37GGKKFE2MXE2&sitePath=https%3A%2F%2Fairtcom-my.sharepoint.com%2F%3Av%3A%2Fg%2Fpersonal%2Fsnaresh_randomtrees_com%2FEcimMduY6IlDv5jKUUmmXJoBII8-nG0zrQmdF_W1KdWYpQ&fileUrl=https%3A%2F%2Fairtcom-my.sharepoint.com%2Fpersonal%2Fsnaresh_randomtrees_com%2FDocuments%2FRecordings%2FETRM%2520Daily%2520sync%2520-20250703_120403-Meeting%2520Recording.mp4%3Fweb%3D1&iCalUid=040000008200E00074C5B7101A82E00807E9070398AC75665BEBDB010000000000000000100000006849CC120702D648AEE89DDF7417B817&masterICalUid=040000008200E00074C5B7101A82E0080000000098AC75665BEBDB010000000000000000100000006849CC120702D648AEE89DDF7417B817&threadId=19%3Ameeting_MGYzYWNlMmUtODI0Ny00YzRjLTllOTktY2JmOTc0MjdkOWE0%40thread.v2&organizerId=80b72a3c-7e93-4448-9cdc-d80a81c3888c&tenantId=ff8e607e-dc6b-4adf-9138-3565a0f38817&callId=f2f1c3af-ff95-42bd-835b-9fe472aea15a&threadType=Meeting&meetingType=Recurring&subType=RecapSharingLink_RecapCore)

[Recap: ETRM Daily sync : 07 July](https://teams.microsoft.com/l/meetingrecap?driveId=b%21fVVmuBX3-UKMGiA0gQ67MJW4iKBHcj9KoZaQo0H5F4uAQupWugUCT66TszvtL_h6&driveItemId=01U43DH6QOLN42IZLK5JFINLAE3HZCHRBY&sitePath=https%3A%2F%2Fairtcom-my.sharepoint.com%2F%3Av%3A%2Fg%2Fpersonal%2Fsnaresh_randomtrees_com%2FEQ5beaRlaupKhqwE2fIjxDgBfzFtbi2AXtZTRrXhlTO4Sg&fileUrl=https%3A%2F%2Fairtcom-my.sharepoint.com%2Fpersonal%2Fsnaresh_randomtrees_com%2FDocuments%2FRecordings%2FETRM%2520Daily%2520sync%2520-20250707_121220-Meeting%2520Recording.mp4%3Fweb%3D1&iCalUid=040000008200E00074C5B7101A82E00807E9070798AC75665BEBDB010000000000000000100000006849CC120702D648AEE89DDF7417B817&masterICalUid=040000008200E00074C5B7101A82E0080000000098AC75665BEBDB010000000000000000100000006849CC120702D648AEE89DDF7417B817&threadId=19%3Ameeting_MGYzYWNlMmUtODI0Ny00YzRjLTllOTktY2JmOTc0MjdkOWE0%40thread.v2&organizerId=80b72a3c-7e93-4448-9cdc-d80a81c3888c&tenantId=ff8e607e-dc6b-4adf-9138-3565a0f38817&callId=11b33ed4-1df5-482d-ae9d-c77f74913ec9&threadType=Meeting&meetingType=Recurring&subType=RecapSharingLink_RecapCore)

[Recap: ETRM Daily sync : 10 July](https://teams.microsoft.com/l/meetingrecap?driveId=b%21fVVmuBX3-UKMGiA0gQ67MJW4iKBHcj9KoZaQo0H5F4uAQupWugUCT66TszvtL_h6&driveItemId=01U43DH6XWDSZEMSGYUBFZA4OZVKN7S2YW&sitePath=https%3A%2F%2Fairtcom-my.sharepoint.com%2F%3Av%3A%2Fg%2Fpersonal%2Fsnaresh_randomtrees_com%2FEfYcskZI2KBLkHHZqpv5axYBADNbtt0kBr2GY6Zlkkt2BQ&fileUrl=https%3A%2F%2Fairtcom-my.sharepoint.com%2Fpersonal%2Fsnaresh_randomtrees_com%2FDocuments%2FRecordings%2FETRM%2520Daily%2520sync%2520-20250710_121808-Meeting%2520Recording.mp4%3Fweb%3D1&iCalUid=040000008200E00074C5B7101A82E00807E9070A98AC75665BEBDB010000000000000000100000006849CC120702D648AEE89DDF7417B817&masterICalUid=040000008200E00074C5B7101A82E0080000000098AC75665BEBDB010000000000000000100000006849CC120702D648AEE89DDF7417B817&threadId=19%3Ameeting_MGYzYWNlMmUtODI0Ny00YzRjLTllOTktY2JmOTc0MjdkOWE0%40thread.v2&organizerId=80b72a3c-7e93-4448-9cdc-d80a81c3888c&tenantId=ff8e607e-dc6b-4adf-9138-3565a0f38817&callId=300df810-0bbc-442e-baf6-845bac8dfe3e&threadType=Meeting&meetingType=Recurring&subType=RecapSharingLink_RecapCore)

[Recap: Meeting in BOL - ETRM 09 July](https://teams.microsoft.com/l/meetingrecap?driveId=b%21do-nKPwa-kmSvMpA4wy2WCBX4EJbnbhIgF0Z-TwI32rJZMGDftjMQ45I6qXD0S6C&driveItemId=01L6KCRXFKBZL3D7SIRBFICWSOBQHPB7IH&sitePath=https%3A%2F%2Fairtcom-my.sharepoint.com%2F%3Av%3A%2Fg%2Fpersonal%2Frbaldania_randomtrees_com%2FEaoOV7H-SIhKgVpODA7w_QcBUI7GalQz8XwEgNPva-F7iA&fileUrl=https%3A%2F%2Fairtcom-my.sharepoint.com%2Fpersonal%2Frbaldania_randomtrees_com%2FDocuments%2FRecordings%2FMeeting%2520in%2520BOL%2520-%2520ETRM-20250709_203713-Meeting%2520Recording.mp4%3Fweb%3D1&threadId=19%3Aedc49e851c5643a3a600ebfb8eb0dff4%40thread.v2&callId=9d8c3268-ae0f-41ae-aa71-b12e1ce9e141&threadType=GroupChat&meetingType=Unknown&subType=RecapSharingLink_RecapCore)

Sowmya explained about pdf extraction current version : [Recap: ETRM Access and Discussion 10 July](https://teams.microsoft.com/l/meetingrecap?driveId=b%21do-nKPwa-kmSvMpA4wy2WCBX4EJbnbhIgF0Z-TwI32rJZMGDftjMQ45I6qXD0S6C&driveItemId=01L6KCRXBTPW3B7GBG5NHILUR7KCLTKCIM&sitePath=https%3A%2F%2Fairtcom-my.sharepoint.com%2F%3Av%3A%2Fg%2Fpersonal%2Frbaldania_randomtrees_com%2FETN9th-YJutOhdI_UJc1CQwBILdzPJvhoDwfHxUQvmyVGw&fileUrl=https%3A%2F%2Fairtcom-my.sharepoint.com%2Fpersonal%2Frbaldania_randomtrees_com%2FDocuments%2FRecordings%2FETRM%2520Access%2520and%2520Discussion-20250710_150335-Meeting%2520Recording.mp4%3Fweb%3D1&iCalUid=040000008200e00074c5b7101a82e00800000000499906e96cf1db01000000000000000010000000fbee94ca8cea2b4da88a8f0b2540baac&threadId=19%3Ameeting_MTc2NDQ4OTEtZjNlZC00OTI0LTllNjUtMWZiOTg4NzAzOGFi%40thread.v2&organizerId=a2908c5f-5308-4cb7-9e26-e3e4dc05ba6b&tenantId=ff8e607e-dc6b-4adf-9138-3565a0f38817&callId=528824b0-0c0f-4109-ab87-dcd3ab789474&threadType=Meeting&meetingType=Scheduled&subType=RecapSharingLink_RecapCore)  
Sowmya explained about matching information : [Recap: ETRM Access and Discussion 10 July](https://teams.microsoft.com/l/meetingrecap?driveId=b%21do-nKPwa-kmSvMpA4wy2WCBX4EJbnbhIgF0Z-TwI32rJZMGDftjMQ45I6qXD0S6C&driveItemId=01L6KCRXAHFMINOCLTQJFIMIQ5TCWGL4GH&sitePath=https%3A%2F%2Fairtcom-my.sharepoint.com%2F%3Av%3A%2Fg%2Fpersonal%2Frbaldania_randomtrees_com%2FEQcrENcJc4JKhiIdmKxl8McBzmY6oy_Le4_Wv9uft3fwZg&fileUrl=https%3A%2F%2Fairtcom-my.sharepoint.com%2Fpersonal%2Frbaldania_randomtrees_com%2FDocuments%2FRecordings%2FETRM%2520Access%2520and%2520Discussion-20250710_154135-Meeting%2520Recording.mp4%3Fweb%3D1&iCalUid=040000008200e00074c5b7101a82e00800000000499906e96cf1db01000000000000000010000000fbee94ca8cea2b4da88a8f0b2540baac&threadId=19%3Ameeting_MTc2NDQ4OTEtZjNlZC00OTI0LTllNjUtMWZiOTg4NzAzOGFi%40thread.v2&organizerId=a2908c5f-5308-4cb7-9e26-e3e4dc05ba6b&tenantId=ff8e607e-dc6b-4adf-9138-3565a0f38817&callId=528824b0-0c0f-4109-ab87-dcd3ab789474&threadType=Meeting&meetingType=Scheduled&subType=RecapSharingLink_RecapCore)  
Last friday ETRM demo & Feedback from Clients sent by KGR: [KGR GuruRaj Kaliyappan Gurusamy: Recap: ETRM - Agents follow up & Demo  04 July | ETRM Daily sync : | Microsoft Teams](https://teams.microsoft.com/l/message/19:meeting_MGYzYWNlMmUtODI0Ny00YzRjLTllOTktY2JmOTc0MjdkOWE0@thread.v2/1751870034898?context=%7B%22contextType%22%3A%22chat%22%7D)

Dataset:  
1. [Valid BOLs](https://airtcom-my.sharepoint.com/:f:/g/personal/kgurusamy_randomtrees_com/Et-k14HpP3dKkXBzllVdmkkBWVv_LUuzDyWGOYeLaXmAAQ?e=OMdymc)  or [KGR GuruRaj Kaliyappan Gurusamy: Valid BOLs       Rachana Baldania | ETRM Daily sync : | Microsoft Teams](https://teams.microsoft.com/l/message/19:meeting_MGYzYWNlMmUtODI0Ny00YzRjLTllOTktY2JmOTc0MjdkOWE0@thread.v2/1752045764433?context=%7B%22contextType%22%3A%22chat%22%7D)

Good folder used for development as of now

Matching excel : BOL-BETRM Matching

Manual Test by kGR team [BOL - ETRM datasets.xlsx](https://airtcom-my.sharepoint.com/:x:/g/personal/svaradharajan_randomtrees_com/EXj0Jg5oes9Ck6kRid-PsKQBg1qLse6BOS2zBSJ39TuroA?e=Hob2vL)

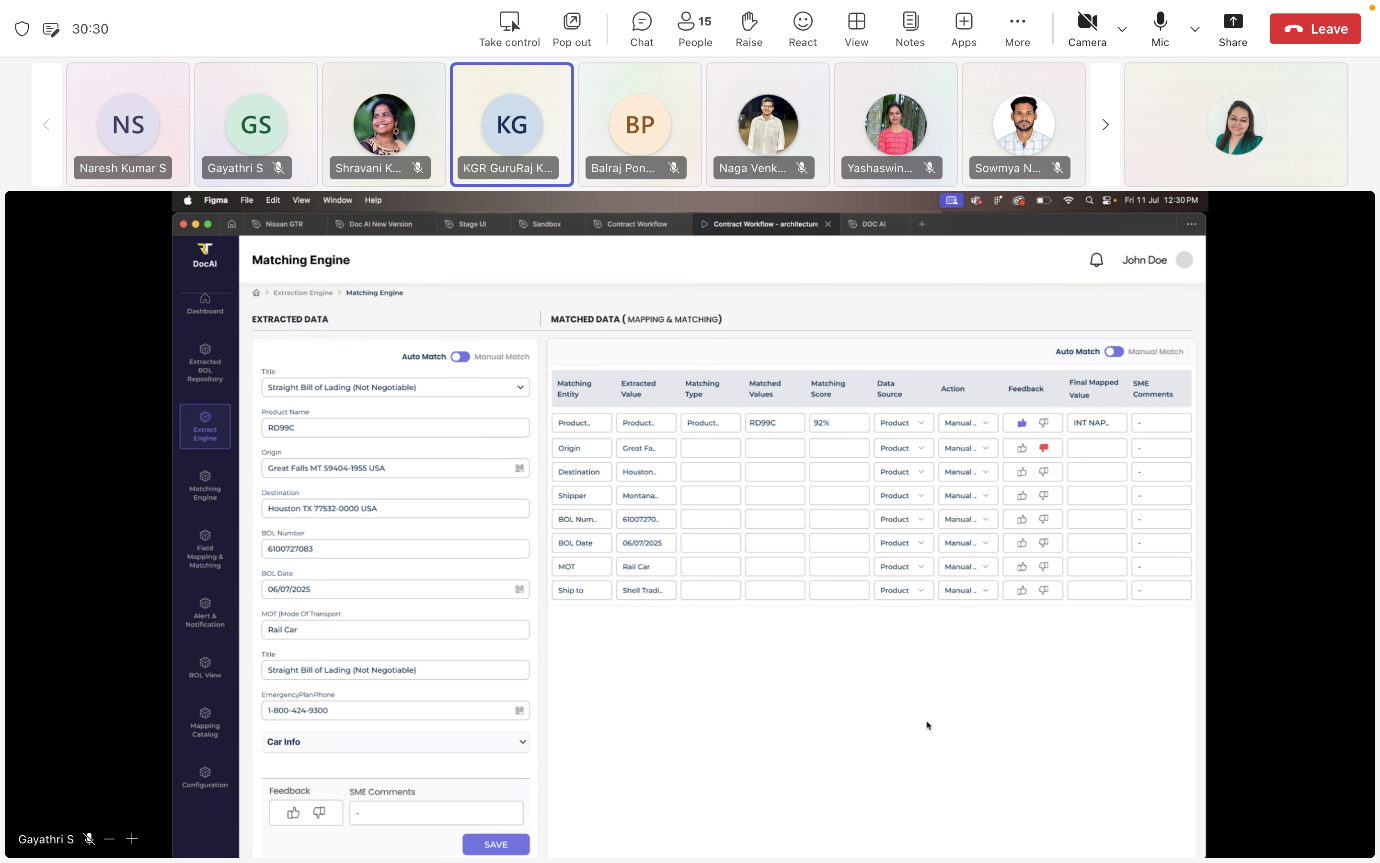
Manual Test by Annanya:   
project requirement: [Agentic\_Ai\_BOL\_UX\_Spec.docx](https://airtcom-my.sharepoint.com/:w:/g/personal/svaradharajan_randomtrees_com/Ef-e_1EIoy9Fkw0Ug4VeOBcBLpHLcLZ4FEJuJV_ckjWbzw?e=16UN4v)

[Screen Layout for BOL Processing (1) 1.xlsx](https://airtcom-my.sharepoint.com/:x:/g/personal/svaradharajan_randomtrees_com/EUdzz-F2FcpJnZOktExrJ1ABhQz7J9eEtfQ6p51Y1NiR5A?e=Fb3ANK)

[BOL Extraction-30JUN2025.xlsx](https://airtcom-my.sharepoint.com/:x:/g/personal/kgurusamy_randomtrees_com/EQalfbOhgn5Poh5RbEGbVOcB9OWx7KKGcbDAin86np1wiA?e=jJjWzm)

Product Cateloge:

[ETRM\_Data.xlsx](https://airtcom-my.sharepoint.com/:x:/g/personal/kgurusamy_randomtrees_com/EbGBXgMJCadGr9KoePptqCgBTkpzC0hy2TKaqtOcmFM-BQ?e=ZgShtR)



For extraction all matching entities 10 cols

For matching entities we focus on first 4 cols

Access Information:   
  
  
Extraction: <https://github.com/RT-Innovations/bol-client-backend.git>  
  
FAST API for extraction: http://4.248.12.40:8061/docs  
Mango DB:  
mongo\_client = MongoClient("mongodb://mongodb:password@mongodb:27017/")

# mongo\_client = MongoClient("mongodb://mongodb:password@mongodb:27017/")

mongo\_db = mongo\_client["rtdcapdev"]

bol\_collection = mongo\_db["bol\_documents"]

UI:  
Figma: <https://www.figma.com/design/0cTyHdlZ82RGv4xqEBkirQ/DOC-AI?node-id=10-11178&t=ITvSnTYkEaCOQmL3-0>  
  
UI Link: <http://4.248.12.40:3001/login>  
example@gmail.com

[Abc@123](mailto:Abc@123)