

Customer Enquiry Management Process Skill

Richard Fishburn – Spectrum Digital

Version 1.0

23/05/2025

Version	Date	Description
Version 1.0	23/05/2025	Classifies emails and extracts order data to route requests to the right team.
Version 1.1	TBC	Adds special instruction extraction.
Version 1.2	TBC	Adds order line-item extraction from natural language in body text.

Credit given to Rahul Kapoor -

<https://www.abbyy.com/marketplace/contributors/team/Rahul-Kapoor/> for his contributions in the form of the OpenAI connector which can be found here - <https://www.abbyy.com/marketplace/assets/team/rahul-kapoor/connector/chatgpt/>

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About the Author

Richard Fishburn, Head of Technical Consulting at Spectrum Digital, has been designing, implementing, and supporting transactional document automation and business process change projects since 2006. In his current role, he leads the pre-sales function, focusing on process discovery, solution demonstrations, business case development, and proposal generation.

Executive Summary

This asset combines the strengths of Vantage IDP with the capabilities of AI to create a process skill that classifies incoming communications and extracts data from attached sales orders. By sending the email text to AI, we can determine the type of request while simultaneously processing and extracting data from the attached order.

This powers downstream business process management, ensuring that requests for quotes, delivery chases, and new orders are routed to the appropriate teams.

This results in:

- Faster request handling – Emails and attachments are automatically classified and processed.
- Improved accuracy – Reduces human error by consistently extracting key order details.
- Better team allocation – Routes requests (e.g. orders, quotes, chases) to the correct workstream.
- Enhanced customer service – Speeds up responses to enquiries and follow-ups.
- Scalable automation – Handles increasing volumes without additional manual effort.

System Requirements and Limitations

This asset is provided as an illustrative example of how a process skill might be applied to customer enquiry management. It is not production-ready and does not represent the approach Spectrum Digital or Richard Fishburn would take in a live or production environment.

You will require an ABBYY Vantage account, a valid subscription for ABBYY Vantage, and a Vantage user that is assigned the Skill Designer role to configure and to run your workflow.

You will also require a valid OpenAI API subscription with and an API key for such.

Setting Up the Process Skill

To set up the process skill, perform the following steps:

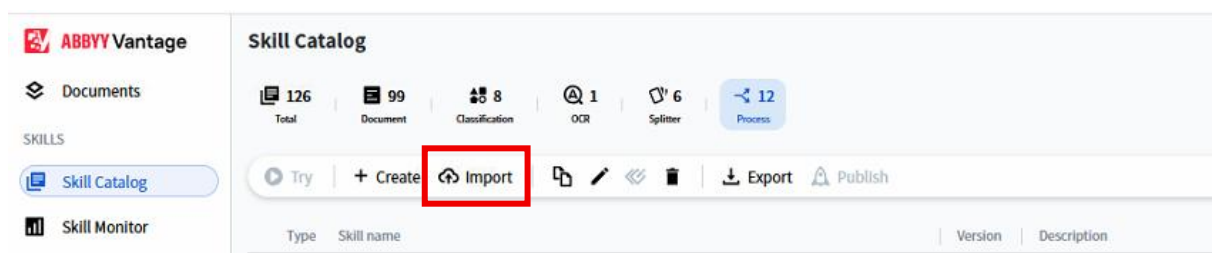
Importing the Package

The custom activity package (.zip file) includes a process skill which has the custom activity:

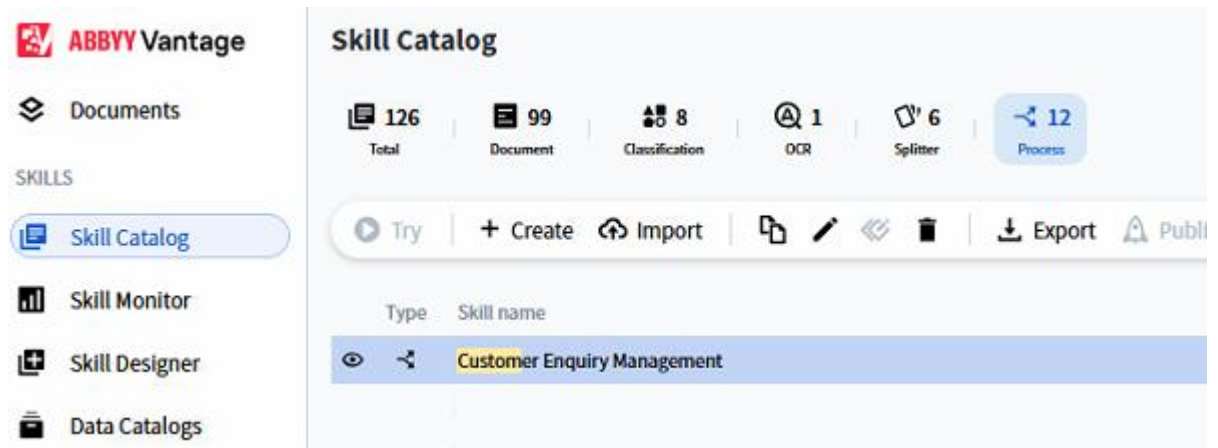
- Customer Enquiry Management.zip - Process skill to send email text to LLM and return enquiry classification.

To import the process skill, perform the following steps in Vantage:

1. Download the Customer Enquiry Management.zip package.
2. Click Import and select the previously downloaded package.



3. Once the Skill is imported, the Customer Enquiry Management process skill is available under the Process tab.



Using the Process Skill

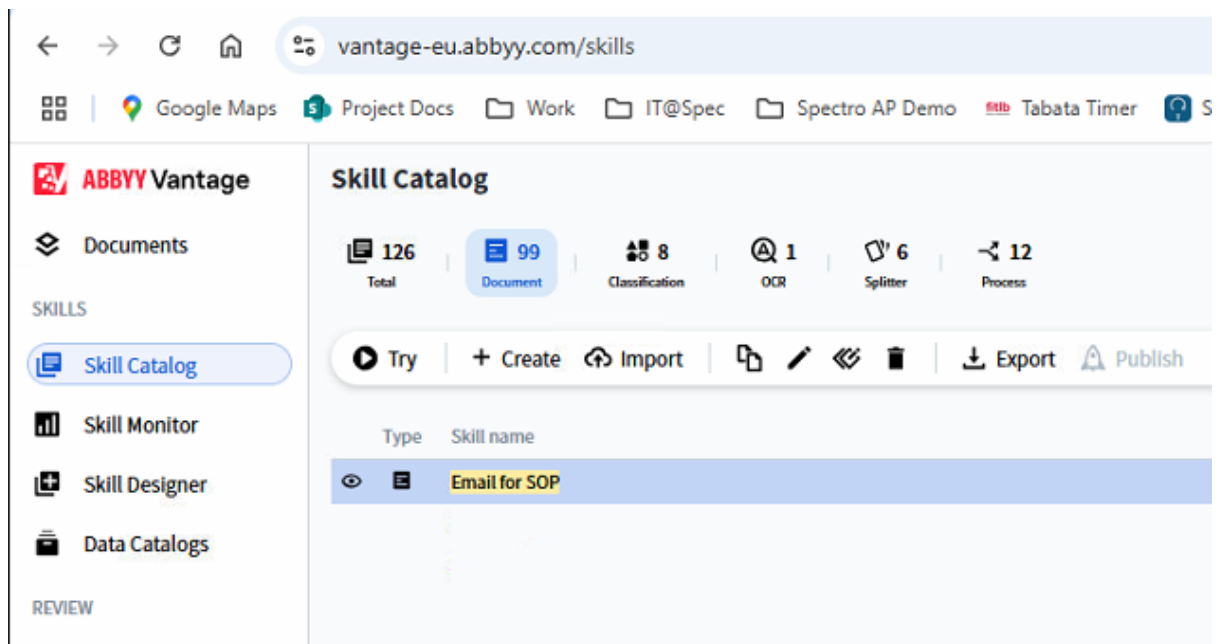
To use the process skill the below steps can be followed:

1. Open the 'Customer Enquiry Management' skill.
2. Edit the 'Receive Email' activity to connect your email account.
3. Edit the 'LLM' activity to add your API key.

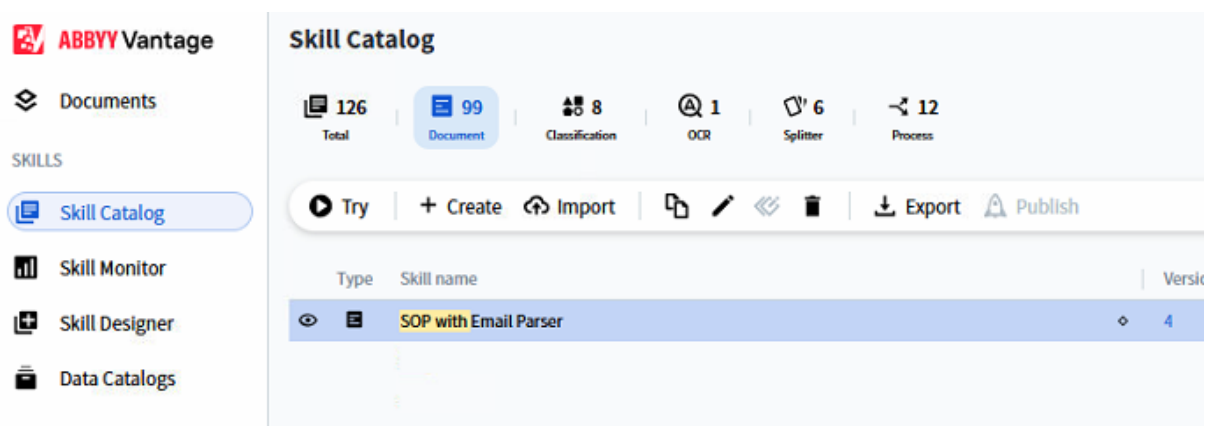
```
// GPT parameters
const apiKey = ""; // API key from OpenAI
const model = "gpt-3.5-turbo";
const maximumTokens = 4096; // Token reference: https://help.openai.com/en/articles/4936856-what-is-the-token-limit-for-gpt-3-5-turbo
const temperature = 0.2; // Governs randomness and creativity

const fromFieldObject = document.GetField(fromField);
const fromFieldText = fromFieldObject.Text;
if (fromFieldText == '')
{
  // ...
}
```

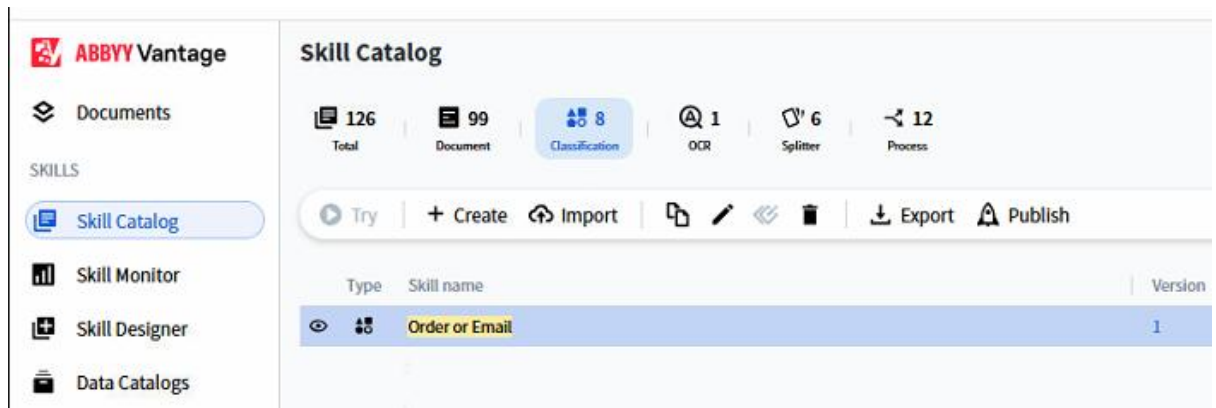
4. Edit the 'Output' activity if you require an export to another location other than API.
5. Publish the skill and move suitable test emails into the relevant import folder of your mailbox.
6. Monitor results using Skill Monitor and Manual Review.
7. Document skill 'Email for SOP' may need changes to be suitable for your document set. – Please note, it would be more advantageous to access the email body text programmatically, this skill is provided as is purely for demonstration purposes.



8. Document skill 'SOP with Email Parser' may need changes to be suitable for your document set. – Please note, it would be more advantageous to increase the data capture requirements to include fields such as line items and add data catalogue for entity recognition in a production setting.



9. Classification skill 'Order or Email' may need changes to be suitable for your document set. – Please note, it would be more advantageous to route documents based on metadata rather than content, this skill is provided as is purely for demonstration purposes.



About Spectrum Digital

Spectrum Digital, based in Hull, East Yorkshire, is a pioneer in digital automation, driving innovation for over 15 years.

Our Expertise

We specialise in delivering personalised automation solutions tailored to the unique needs of our clients. Our offerings encompass a wide range of services, including:

- **Business Process Management:** Optimising business processes to enhance productivity and efficiency.
- **Intelligent Document Processing:** Implementing machine-learning and AI based capture technology to extract and manage information from various sources.
- **Robotic Process Automation (RPA):** Automating repetitive tasks to improve efficiency and reduce operational costs.
- **Multimodal AI Solutions:** rapid development, evaluation, and deployment of multimodal AI solutions across various data types, including imaging, video, text, audio, and structured data.
- **Business Intelligence:** Utilising advanced analytics to provide real-time data insights, enabling informed decision-making.
- **Document Management:** Providing systems that allow for the secure capture, tracking, storage, and retrieval of electronic documents.
- **Integration Services:** Developing connectors across various Enterprise Resource Planning (ERP) platforms, including prof.ITPlus, P4, SAP, Sage, Microsoft Dynamics, Syteline, QuickBooks, NetSuite, iScala and Xero.

Industry Applications

Our solutions cater to a diverse array of industries, such as:

- **Finance:** Automating activities within finance and accounts departments, improving every step of the end-to-end process.
- **Sales:** Utilising automation to remove repetitive tasks, allowing sales teams to focus on revenue-generating activities.
- **Logistics:** Enhancing efficiency in warehouses and distribution centres through automation processes.
- **Wholesale & Distribution:** Optimising supply chain processes, invoice processing, and document handling.
- **Construction:** Managing subcontractor invoices, CIS compliance, and complex procurement workflows.

Client Success

Our commitment to excellence is reflected in the success of our clients.

<https://spectrumdigital.tech/case-studies/>

Why Choose Spectrum Digital?

- **Proven Experience:** Over a decade of innovation and successful project delivery.
- **Tailored Solutions:** Customised services designed to meet the specific needs of each client.
- **Comprehensive Support:** From consultation to implementation and beyond, we provide end-to-end support.