Email-to-Incident Automation

An intelligent ServiceNow solution powered by ABBYY Vantage

Developed By: Tanvi Sharma

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About Email-to-Incident Automation Solution

The Email-to-Incident Automation solution acts as an intelligent bridge between ABBYY Vantage and ServiceNow, transforming invoice-related emails into structured, actionable incidents. Powered by ABBYY Vantage's Document AI, invoice data such as invoice number, date, amount and vendor details are extracted and validated with high accuracy, while ServiceNow automatically creates and tracks related tasks to ensure every request is managed and tracked at each stage.

In case manual review is required in ABBYY Vantage, the workflow seamlessly pauses until the operator completes validation. Once approved, the solution automatically retrieves the finalized data and updates the corresponding records in ServiceNow.

This solution eliminates repetitive steps, accelerates invoice handling and enhances operational transparency. It also improves task visibility and resource allocation, allowing teams to focus on resolving exceptions and delivering faster, more reliable outcomes.

Why Email-to-Incident Automation Solution is Needed

Manual handling of invoice-related emails slows down processing, increases the risk of errors and reduces team productivity. The Email-to-Incident Automation solution streamlines this workflow by integrating ServiceNow with ABBYY Vantage to automatically capture emails, extract invoice data and trigger the right tasks without manual effort. Powered by ABBYY Vantage (Document AI) key invoice details such as invoice number, date, amount and vendor information are extracted and validated seamlessly and with high accuracy. Once reviewed and approved, the data is seamlessly synchronized with ServiceNow, ensuring every incident is logged, tracked and resolved efficiently.

This automation reduces manual intervention, accelerates invoice handling, improves accuracy and enhances visibility into task allocation and resource utilization—delivering a faster, more reliable and transparent workflow.

Email-to-Incident Automation Solution Flow

- **Initiation:** The process starts when an invoice-related email arrives in the shared inbox. As soon as email is received, ServiceNow automatically check for attachment and creates a new task so that the request is properly logged, visible to the team and ready for processing.

- **Authentication & Document Processing:** After authentication, the attached invoice is securely sent to ABBYY Vantage (Document AI) for processing. Vantage reads the document, identifies key details like the invoice number, date, amount and vendor information and extracts the data with high accuracy. This ensures that the information entering ServiceNow is clean and reliable.

- **Manual Review (when needed):** If document contains some certain fields, it is routed for manual review in Abbyy Vantage. The process waits until the operator verifies or corrects the data before moving forward.

- **Data Retrieval & Sync**: Once the review is finished, the system automatically pulls the approved data from Vantage and updates the corresponding records in ServiceNow.

- **Task Management & Allocation:** ServiceNow then assigns follow-up tasks to the right teams based on predefined rules - ensuring workloads are distributed evenly. This improves task visibility and resource utilization across departments.

- **Monitoring & Visibility:** Each step - email receipt, document review, data sync and task completion - can be tracked for transparency.

- **Completion:** As flow completes the processing all invoice data extracted by Abbyy Vantage is fetched and updated in ServiceNow table along with the incident.

Solution Benefits

- **Reduced Manual Effort :** Automatically handles email intake, data extraction, and task creation - reducing manual work.

- **Faster Invoice Processing :** Accelerates the entire invoice workflow by extracting and syncing data between ABBYY Vantage and ServiceNow in real time.

- **Higher Data Accuracy :** Captures and validates invoice details with improved accuracy and efficiency, reducing errors and rework.

- **Seamless Integration :** Brings ABBYY Vantage and ServiceNow together into one smooth, automated process for continuous data flow.

- **Improved Visibility and Control :** Gives a clear view of every step - from email to completion enabling smooth tracking of progress.

- **Improved Resource Allocation :** Automatically assigns and monitors tasks to balance workloads and boost team efficiency.

System Requirements

To deploy and run the Email-to-Incident Automation Solution effectively, ensure the following system and infrastructure prerequisites are met:

➤ **Platforms & Accounts**

- **ABBYY Vantage (Document AI)**

  - Active Vantage account with rights to create/deploy Document Skills

  - API access enabled (OAuth2) and environment base URL (e.g., https://vantage-*.abbyy.com)

- **ServiceNow**

  - Active account with access to ServiceNow Studio and Workflow Studio

  - Integration Hub plugin installed

 - Accounts and Group (for team) created in ServiceNow

➢ **API Credentials & Configuration ServiceNow**

- Vantage: VANTAGE_BASE_URL, VANTAGE_CLIENT_ID, VANTAGE_CLIENT_SECRET, VANTAGE_TENANT_ID

- ServiceNow: Accounts with email id and Group configured

Setup & Customization Guide

1. ABBYY Vantage(Document AI) Setup

- Create or access an active **Vantage account** with API access enabled by creating Public API Client.

- Build or duplicate the Invoice Skill to extract required fields (invoice number, invoice date or vendor/business unit details)

- Publish the skills and note the skill id from the URL.

- To use the solution, you need the Vantage Skill ID. You can find it in the Skill URL. When you open a Skill in ABBYY Vantage, the URL will look like this: https://<your-vantage-url>/skills/<skill-id>. The Skill ID is the part after /skills/. Example:

  o URL: https://vantage-au.abbyy.com/skill-editor/Processing/4eefb3e8-5c67-4ff6-ba3a-d8e9339ebb5c

  o Skill ID: 4eefb3e8-5c67-4ff6-ba3a-d8e9339ebb5c

  o Copy this ID and provide this to the "Vantage Skill ID" variable when setting up the solution.
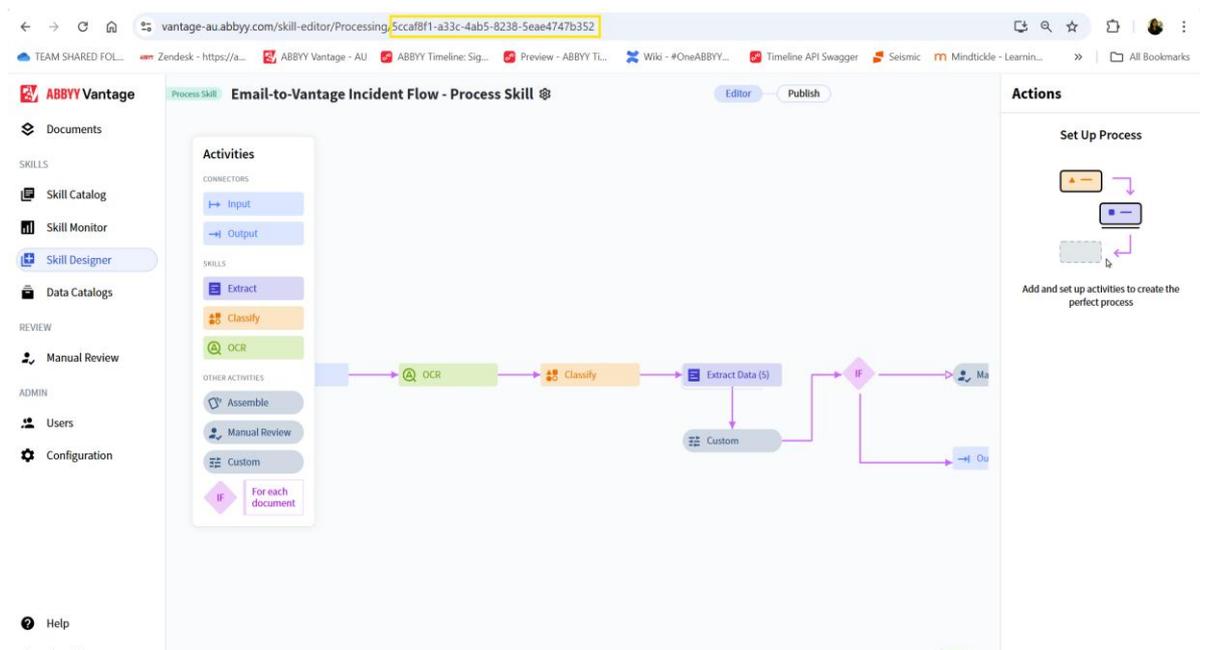
Email-to-Incident Automation Solution

- ABBYY Vantage Public API Client: To integrate ABBYY Vantage with the connector, create a Public API Client by following these steps:

  - Go to Admin and Configuration in your ABBYY Vantage tenant.
  - Navigate to Public API Client and create a new client.
  - Save the Client ID and Client Secret generated, as they will be used as input parameters in the connector.
  - Assign the role Skill User to the client and enable the Client Credentials flow in the OAuth 2.0 Flow Settings.
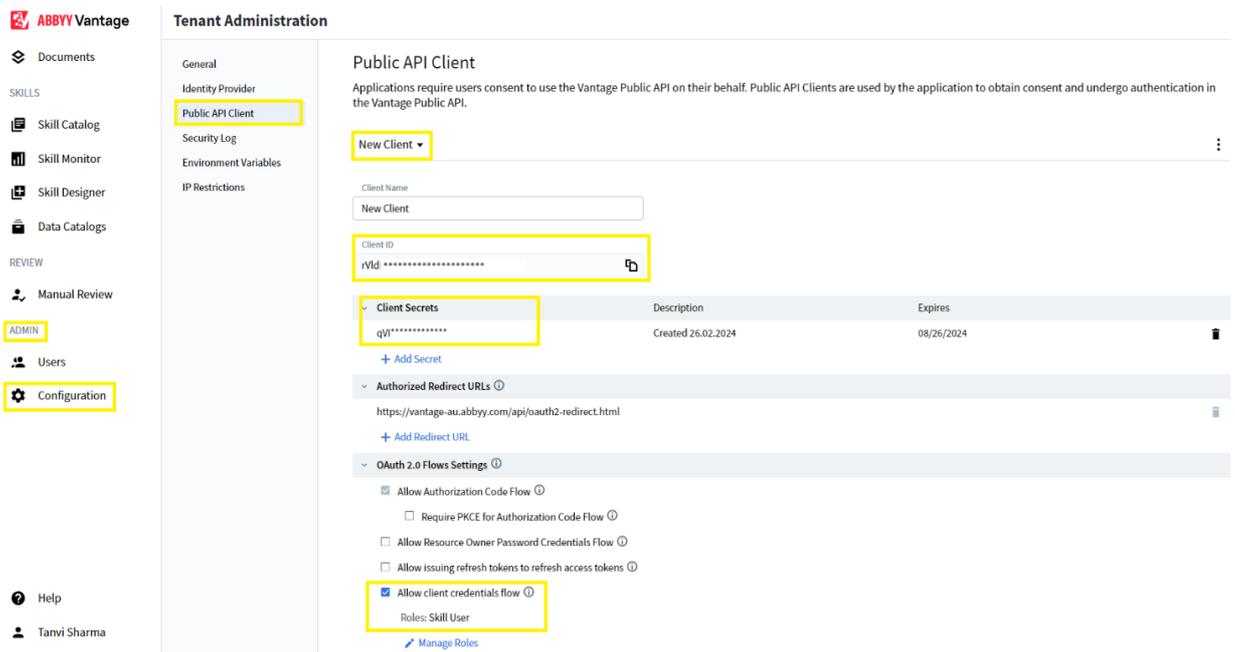

- Once configured save the below values:
  - VANTAGE_BASE_URL (e.g., https://vantage-au.abbyy.com)
  - VANTAGE_CLIENT_ID and VANTAGE_CLIENT_SECRET (from API credentials)
  - VANTAGE_TENANT_ID
 - VANTAGE_SKILL_ID

2. ServiceNow Setup

- Access **ServiceNow Studio and Workflow Studio**.
- Activate your instance.
- Add connections, accounts and group who will handling Abbyy Vantage manual review operator tasks.

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- In ServiceNow, configure the following flow

    o Email-to-Vantage Incident Flow - Triggered when an email with an invoice attachment is received. It uploads the document to ABBYY Vantage via API and creates a corresponding task in ServiceNow. Update the flow values with the Vantage details.
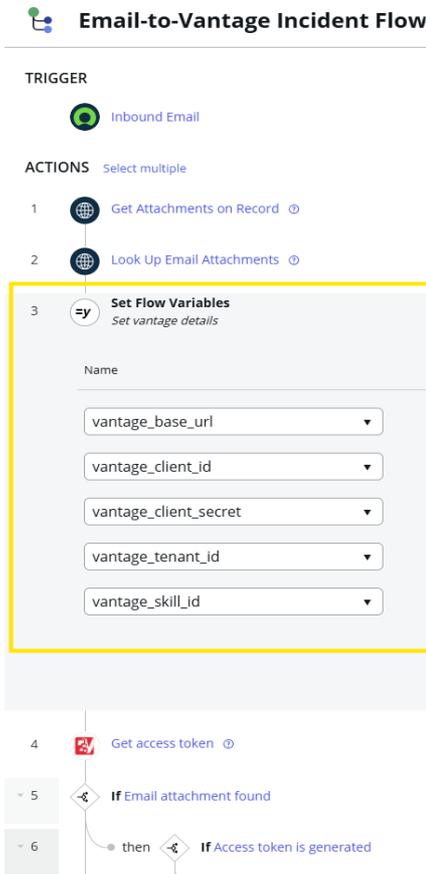
    o ABBYY Vantage Review Completion Flow - Triggered when an operator completes a manual review in ABBYY Vantage. It updates the corresponding task in ServiceNow. Update the flow values with the details.
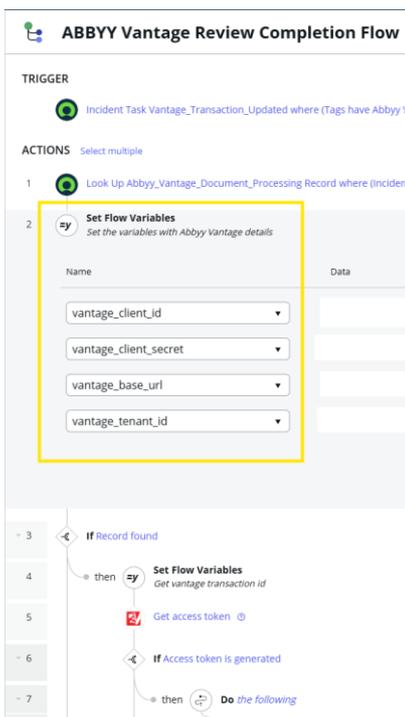
3. Customization Options

- The flow can be duplicated and modified to suit different use cases.

- Additional steps or conditions can be added as needed such as custom notifications, validation checks or routing logic.

- Field mappings, API parameters and task update rules can be customized based on business requirements.

Customizing the Solution

The application is built for flexibility and can be tailored to specific business needs. You can:

- Duplicate and extend existing flows for different use cases.

- Add steps like notifications, validations, or routing.

- Since ABBYY Vantage actions such as authentication and create transaction are available, these can also be used in other ServiceNow solutions.
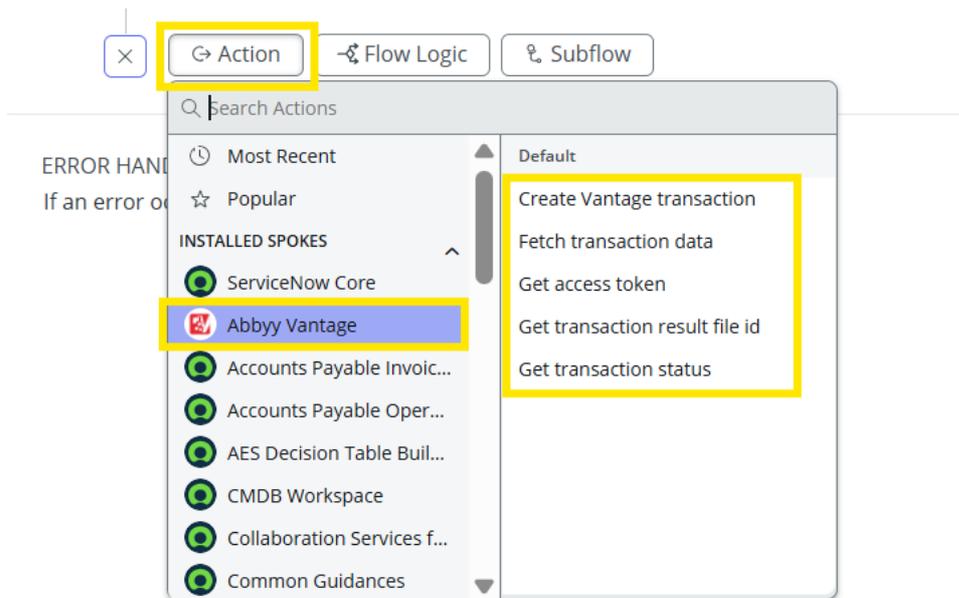
- Add or modify triggers, workflows, and apply conditional logic.