



**Account Reconciliation**In Progress

Trigger: Bank statement uploaded

Latest Activity

View All

✓ Bank statement uploaded

Today, 9:14 AM

✓ Transactions matched

Today, 9:16 AM

✓ Discrepancies identified

Today, 9:18 AM

○ Reconciliation in progress

Today, 9:18 AM

Matches

Discrepancies

Unreconciled

352

7

\$12,430.00

**Customer Ticket Resolution**Open

Trigger: New support ticket received

Ticket #

TKT-2025-0523-0142

Customer

 Global Retail Inc.

Priority

High

Issue

Order #45091 delivery delay

Created On

May 23, 2025 8:47 AM

View Ticket

...

**Vendor Invoice Quotation**New

Trigger: Quote request received via email

Request Details

○ Vendor

TechSupply Solutions

☰ Items

5

💰 Total Amount

\$28,650.00

🕒 Requested On

May 23, 2025

Review Quote

Send to Vendor

 **alletec**

AI Agents Catalog

Empowering Frontier Firms with intelligent, autonomous workflows

AI is moving from assistance to autonomous execution

AI is now **embedded into business workflows**, not just interfaces. Organizations are shifting through three distinct phases of maturity:

1

Task Automation

Copilots assist users with discrete tasks

2

Process Orchestration

Systems connected across workflows

3

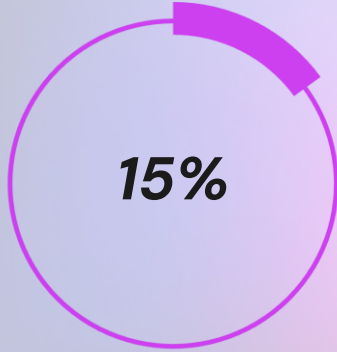
Autonomous Execution

Agents reason, decide, and act independently

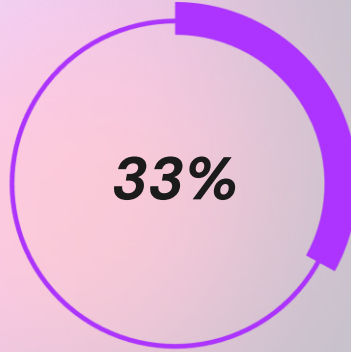
From **Copilots** → to **Agents** that reason, decide, and act

The Agentic AI Shift Is Already Underway

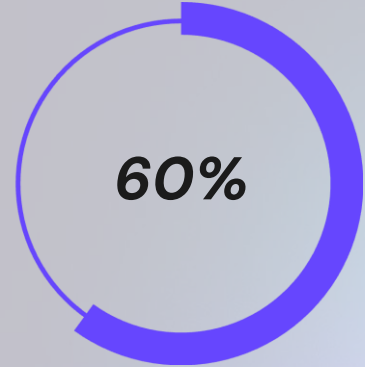
By 2028...



of day-to-day work decisions will be made autonomously by AI agents



of enterprise software will include agentic AI capabilities



will use agentic AI to facilitate streamlined one-to-one interactions

Organizations that delay agentic AI adoption risk falling behind — permanently.

Source: Gartner: [1](#) & [2](#), [3](#)

AI agents evolve in capability and business impact

Each stage of agent maturity unlocks a new tier of value, shaping how enterprise AI moves from isolated assistance to meaningful operational transformation. These stages help leaders align use cases, governance, and investment with the right level of autonomy at the right time. As organizations progress through the tiers, the business value compounds through greater speed, consistency, and decision quality across workflows.

Retrieval

Agents that **find and surface** relevant information from documents, databases, and knowledge bases on demand.

- Document Q&A
- Knowledge retrieval
- Data lookup & summarization

Impact Level: Low → Foundational

Task

Agents that **execute multi-step tasks** across connected systems, triggering actions and updating records autonomously.

- Form filling & approvals
- CRM / ERP updates
- Cross-system task execution

Impact Level: Medium → Operational

Autonomous

Agents that **reason, plan, and coordinate** with other agents to achieve complex business goals without human intervention.

- Multi-agent orchestration
- Dynamic decision-making
- End-to-end process ownership

Impact Level: High → Transformational

AI agents deliver measurable impact across the enterprise



Revenue Growth

- Faster lead conversion
- Personalized engagement at scale



Operational Efficiency

- Automated end-to-end processes
- Reduced manual intervention



Employee Productivity

- AI handles repetitive tasks
- Employees focus on high-value work



Customer Experience

- 24/7 intelligent service agents
- Contextual, personalized responses

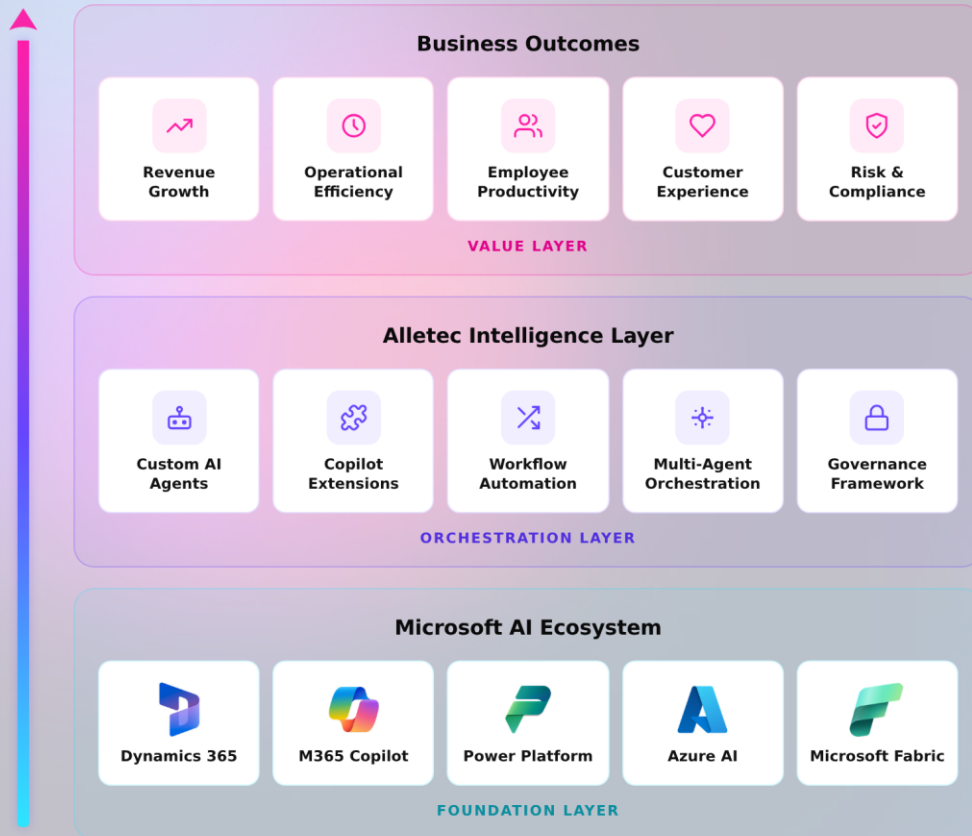


Risk & Compliance

- Automated audit trails
- Policy-aware agent governance

Alletec's approach to enterprise AI orchestration

Alletec's approach is structured as a **three-layer architecture** — connecting Microsoft's foundational ecosystem to intelligent orchestration to measurable business outcomes.





Agents Catalog

Alletec's portfolio of AI agents — built on the Microsoft ecosystem, spanning every major business function.

15 CUSTOM BUILT AGENTS

8 BUSINESS FUNCTIONS

AI Production Planning & Capacity Optimization Agent

MANUFACTURING



FUNCTION SUPPORTED:

**OPERATIONS (PRODUCTION
PLANNING & CAPACITY
MANAGEMENT)**

BUSINESS CHALLENGE SOLVED

Lack of unified capacity-load visibility across Hammer, Ring Rolling Mill, and Open Die Forging leads to bottlenecks, idle capacity, and reactive scheduling.

BUSINESS OUTCOME



Higher
asset utilization



Reduced
overbooking



Improved
on-time delivery



Proactive
identification of bottleneck shops

WHAT THE AGENT DOES



Builds a consolidated capacity-load view across Hammer, RRM, and ODF lines



Optimizes production scheduling against confirmed orders and routing



Monitors finish-machining workload to detect spare capacity vs. overbooking



Recommends proactive rebalancing of resources across shops



Surfaces forward-looking load forecasts via Power BI dashboards

Maintenance Advisor Agent

MANUFACTURING



FUNCTION SUPPORTED:
**OPERATIONS (PLANT
MAINTENANCE, ASSET
MANAGEMENT)**

BUSINESS CHALLENGE SOLVED

Reactive breakdown handling and lack of intelligent diagnostics lead to longer downtime, repeat failures, and inefficient technician deployment.

BUSINESS OUTCOME



Faster
mean time-to-repair



Reduced
unplanned downtime



Better
technician deployment



Proactive
maintenance posture

WHAT THE AGENT DOES



Proactive: IoT sensors detect abnormal readings; the agent analyses historical data, machine manuals and web sources



Reactive: Ingests breakdown slips and identifies machine ID, symptoms and error codes



Auto-populates the maintenance work order with all diagnostic insights



Sends automated diagnostic email to the shift engineer and auto-creates a pre-populated breakdown work order



Suggests probable failure causes, required tools, technician skills, and repair duration

Intelligent Costing & Quotation Copilot

MANUFACTURING



FUNCTION SUPPORTED:
SALES

BUSINESS CHALLENGE SOLVED

Manual quotation, charge-weight calculation, and customer PO-offer reconciliation lead to pricing errors, missed deviations, and lost margin visibility on production jobs.

BUSINESS OUTCOME



Faster and Accurate
quotations



Reduced
pricing leakage



Data-Driven
customer profitability visibility



Fewer Mismatches
in PO-offer reaching production

WHAT THE AGENT DOES



Verifies customer enquiries against grade-wise standardized checklists (credit days, throughput time)



Cross-checks PO vs. issued offer and flags deviations in quantity, price, delivery or terms



Scans engineering drawings to extract dimensions and auto-calculates theoretical charge weight using density and feed-weight tables



Flags high-difficulty material grades for risk-adjusted pricing



Generates top-10 profit/loss customer reports and Estimate vs. Actual cost variance analysis

Digital Insurance Advisor

INSURANCE



FUNCTION SUPPORTED:
CUSTOMER SERVICE, SALES

BUSINESS CHALLENGE SOLVED

Policyholders and prospective customers often struggle to quickly access policy information, claims guidance, coverage details, and service support, resulting in high call-center dependency, slower resolution times, and inconsistent customer experience.

BUSINESS OUTCOME



24x7 Self-Service

support for policyholders and prospects



Reduced Workload

for customer service teams



Accelerated

policy issuance and claims resolution



Enhanced CX

with response consistency

WHAT THE AGENT DOES



Identifies the user type (prospect, existing policyholder, or university admin) and routes conversations intelligently



Retrieves policy summaries, renewal dates, payment history, and proof-of-coverage documents securely from backend systems



Escalates to human advisors or triggers workflow actions such as email notifications, CRM updates, or policy servicing requests



Answers insurance product, coverage, eligibility, exclusions, premium, and FAQ queries using enterprise knowledge sources



Assists users with claim filing, claim status tracking, premium receipts, and document retrieval workflows

Elevate CX – Contact Center Quality Inspector

BFSI

TELECOM

RETAIL

HEALTHCARE

TRAVEL & HOSPITALITY

UTILITIES

BPO



FUNCTION SUPPORTED:
CUSTOMER SERVICE

BUSINESS CHALLENGE SOLVED

Manual call quality audits require supervisors to listen to large volumes of call recordings, creating delays, inconsistent scoring, and high operational overhead in customer service operations.

BUSINESS OUTCOME



Up to 80% Lower
manual QA efforts



Real-Time Scoring
of call quality



Improved Productivity
of service supervisors



Accelerated
agent coaching cycles

WHAT THE AGENT DOES



Connects with contact center platforms and automatically retrieves call recordings and transcripts



Analyzes customer-agent conversations for predefined QA parameters such as politeness, issue resolution, empathy, and call closures



Generates sentiment scores, quality ratings, and concise rationale for each assessment



Presents summarized audit insights directly within the supervisor dashboard without manual call review



Identifies coaching opportunities, behavioral trends, and training needs across teams

Quote Comparison Agent

ALL INDUSTRIES



FUNCTION SUPPORTED:
PROCUREMENT

BUSINESS CHALLENGE SOLVED

Procurement teams receive multiple vendor quotations in different formats (PDF, Excel, Word, Email), making manual comparison time-consuming and error-prone. Delays in evaluation impact procurement cycle time and vendor selection quality.

BUSINESS OUTCOME



70% Reduction

in manual effort in quotation analysis



Improved Decision Accuracy

in procurement



Faster Process

for vendor selection



Centralized Management

of vendor comparison documents

WHAT THE AGENT DOES



Collects vendor quotations from SharePoint or uploaded documents.



Extracts key commercial and technical details using AI.



Compares quotations across parameters like price, delivery timeline, payment terms, warranty, and compliance.



Generates summarized comparison reports and recommendations.



Assists procurement teams in faster and more accurate vendor decision-making

Automated Dunning Agent

ALL INDUSTRIES



FUNCTION SUPPORTED:

**FINANCE (ACCOUNTS
RECEIVABLE)**

BUSINESS CHALLENGE SOLVED

Organizations struggle to manage timely renewals of client authorizations and consistently apply late fees when payments are delayed. Manual tracking leads to missed renewals, revenue leakage, inconsistent late-fee charges, and administrative inefficiency.

BUSINESS OUTCOME



Improved Cash Flow

through faster collections



Reduced

overdue receivables



Lower Manual Effort

and operational cost



Better CX

with timely renewal reminders

WHAT THE AGENT DOES



Automated detection of upcoming renewals



Auto-creation of renewal sales orders



Smart payment handling



Automated late-fee application

Decision Intelligence Agent

ALL INDUSTRIES



FUNCTION SUPPORTED:
**STRATEGY & INSIGHTS (BUSINESS
INTELLIGENCE & DECISION
SUPPORT)**

BUSINESS CHALLENGE SOLVED

Business leaders often depend on analysts, finance teams, or BI specialists to consolidate data from multiple systems before critical decisions can be made, causing delays, fragmented visibility, and missed business opportunities.

BUSINESS OUTCOME



Reduced Dependency

on analysts and manual MIS preparation for business insights



Improved Visibility

into profitability and operational risks



Faster Decision Making

for strategic business issues



Empowered Leadership

with real-time fact-based decision intelligence

WHAT THE AGENT DOES



Connects to enterprise data across finance, sales, inventory, procurement, customer, and operational systems through a unified data model



Delivers real-time answers to strategic questions such as margin leakage, customer profitability, inventory exposure, order fulfillment risks, and business trends



Eliminates dependency on manual data extraction, spreadsheet analysis, and delayed MIS reporting cycles



Enables CXOs and business leaders to ask natural language questions directly from Microsoft Teams



Generates business insights, anomalies, risk indicators, and decision recommendations using semantic and contextual understanding

DocInsight Copilot Agent

ALL INDUSTRIES



FUNCTION SUPPORTED:
**FINANCE (ACCOUNTS
PAYABLE)**

BUSINESS CHALLENGE SOLVED

Organizations accumulate large volumes of invoices, statements, and contracts in SharePoint — manually searching and extracting key information delays AP cycles, increases errors, and slows finance decisions.

BUSINESS OUTCOME



Faster Access
to data



Reduced Manual Effort
in document review



Improved
accuracy



Better
decision making

WHAT THE AGENT DOES



Reads and indexes PDF documents (invoices, contracts, statements) stored in Microsoft SharePoint



Extracts structured fields — invoice number, vendor, amount, due dates, PO references



Answers natural language queries from Finance users via Microsoft Teams or Copilot Chat



Delivers structured summaries and decision-ready insights in seconds

Reconciliation Agent

ALL INDUSTRIES



FUNCTION SUPPORTED:
FINANCE & ACCOUNTS

BUSINESS CHALLENGE SOLVED

Finance teams can spend significant time and manual effort reconciling vendor and customer ledger entries against general ledger. Without automation, period-end close cycles are prolonged and probability of errors is high— directly impacting financial reporting accuracy and operational efficiency.

BUSINESS OUTCOME



Faster Closing

at the end of financial periods



Reduced Manual Effort

in reconciliation



Improved Accuracy

of sub-ledger-GL matching



Clearer

audit trail

WHAT THE AGENT DOES



Automates periodic reconciliation of customer & vendor sub-ledgers against the General Ledger



Surfaces mismatches to F&A team for review and resolution



Generates exception reports highlighting mismatches



Visualises reconciliation status and exception trends in dashboards

PO Approval Advisor Agent

ALL INDUSTRIES



FUNCTION SUPPORTED:
PROCUREMENT

BUSINESS CHALLENGE SOLVED

Manual PO vetting against budgets, vendor policies, taxation, and stock/demand creates 2-3 day approval cycles, low compliance, and high rush-purchase volumes.

BUSINESS OUTCOME



70% Faster
PO approval cycles



98% Compliance
accuracy



3x Reduction
in rushed purchases



80% Reduction
In review time

WHAT THE AGENT DOES



Auto-vets every PO for compliance (budget, vendor selection, tax policy)



Validates PO against stock levels and demand forecast before approval.



Routes only true exceptions to managerial review



Automates approval workflow

Buy Smart AI

ALL INDUSTRIES



FUNCTION SUPPORTED:
**PROCUREMENT &
VENDOR MANAGEMENT**

BUSINESS CHALLENGE SOLVED

Manual procurement processes cause delays, compliance gaps, and heavy vendor communication overhead — especially during onboarding and RFQ cycles.

BUSINESS OUTCOME



Faster
procurement cycle



Automated
vendor onboarding with KYC compliance



Elimination of Manual Follow-Ups
through AI-powered WhatsApp/email reminders

WHAT THE AGENT DOES



Initiates and manages Purchase Orders directly in ERP



Sends RFQs to vendors and collects/compares responses



Onboards new vendors with KYC form and AI-powered document verification



Syncs invoice and payment status in real time



Sends reminders, confirmations, and status updates via WhatsApp and Email

D365 BC-Heath Checkup

ALL INDUSTRIES



FUNCTION SUPPORTED:
**IT OPERATIONS / SYSTEM
ADMINISTRATION**

BUSINESS CHALLENGE SOLVED

Admins lack real-time visibility into Business Central environment health, leading to undetected performance issues, failed jobs, and security risks.

BUSINESS OUTCOME



Proactive Detection
of issues



Reduced
system downtime



Simplified Monitoring
of Business Central health for non-technical
admins

WHAT THE AGENT DOES



Monitors cost schedule compliance and report performance using Application Insights telemetry



Tracks job queue health and integration sync status



Answers natural-language health queries — no KQL knowledge required



Flags SUPER permission assignments and security risks



Surfaces weekly performance trends and error summaries

Employee Genie

ALL INDUSTRIES



FUNCTION SUPPORTED:
HR / EMPLOYEE EXPERIENCE

BUSINESS CHALLENGE SOLVED

Employees waste time searching through lengthy HR policy documents for answers on leaves, holidays, and company policies

BUSINESS OUTCOME



Faster Resolution
of HR queries



Reduced Load
on HR teams



24x7 Self-Service Access
to policy information for employees

WHAT THE AGENT DOES



Reads and understands HR policy documents (leave, holiday, benefits, etc.)



Answers employee queries in natural language



Provides instant, accurate policy responses without HR team involvement



Accessible via mobile (React Native) for on-the-go queries



Stores and retrieves structured data from Azure SQL

Sales Insight Copilot

ALL INDUSTRIES



FUNCTION SUPPORTED:
**SALES (ANALYTICS &
REPORTING)**

BUSINESS CHALLENGE SOLVED

Non-technical sales teams struggle to extract meaningful insights from large sales datasets without running manual reports or writing queries.

BUSINESS OUTCOME



Self-Service Sales Analytics
for non-technical users



Faster Data-Driven
decision making



Elimination
of manual reporting

WHAT THE AGENT DOES



Enables natural language queries on sales register data



Provides division-wise and fiscal year comparisons



Formats results as clean summaries, tables, and recommendations



Supports JSON and Adaptive Card output for further integration



Accessible directly within Microsoft Teams



USA | Canada | UAE | Kenya | India

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