FINBYZ TECH PVT LTD

STEER YOUR VISION

EMAIL CLASSIFICATION
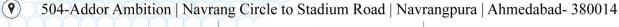
Overview

This AI-driven workflow automates email inquiry handling by classifying intent, extracting key details, checking ERP records, and auto-creating leads, ensuring faster responses, accurate data capture, and seamless ERPNext integration.

Workflow

Email Classification

AI Reads Emails
Scans and understands inquiry emails

Classifies Inquiries
Categores intent automatiially.

Extracts Key Details
Captures name, phone, company, address

Checks ERP Records
Searches existing Leads/Customers

Creates Lead if Missing
Auto-creates lead with captured details

Adds Contacts & Addresses
Stores structured info in ERPNext

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Features

- **AI-Powered Email Reading** – Automatically scans and understands inquiry emails.
- **Smart Classification** – Categorizes inquiries by intent without manual sorting.
- **Detail Extraction** – Captures key fields like name, phone, company, and address.
- **ERPNext Integration** – Cross-checks with existing leads and customers.
- **Lead Auto-Creation** – Generates new leads if they don't exist.
- **Contact & Address Management** – Stores structured contact details directly in ERPNext.
- **End-to-End Automation** – Reduces manual data entry and error risks.

Benefits

- **Saves Time & Effort** – Eliminates manual sorting and data entry.
- **Faster Response to Inquiries** – Leads are created instantly, improving follow-up speed.
- **Improved Accuracy** – AI reduces human error in classification and data capture.
- **Better Lead Management** – Ensures no potential lead or inquiry is missed.
- **Seamless ERP Integration** – All data is stored in one place for easy access.
- **Enhanced Productivity** – Teams focus on closing deals instead of administrative work.
- **Scalable Process** – Handles high volumes of inquiries effortlessly.