Knowledge Base + AI

Performing AI operations using your own knowledge base

Using our application’s built-in Gemini AI integration, you can easily ask questions about documents or clients, based on the rules and requirements defined in your own set of internal documents (e.g. your knowledge base).

Concepts

Google Gemini Vertex AI

Vertex is the Google AI platform that allows using Gemini with your business storage folder. This in turns allows us to ask questions combining client documents and your own internal company documents.

Knowledge Base

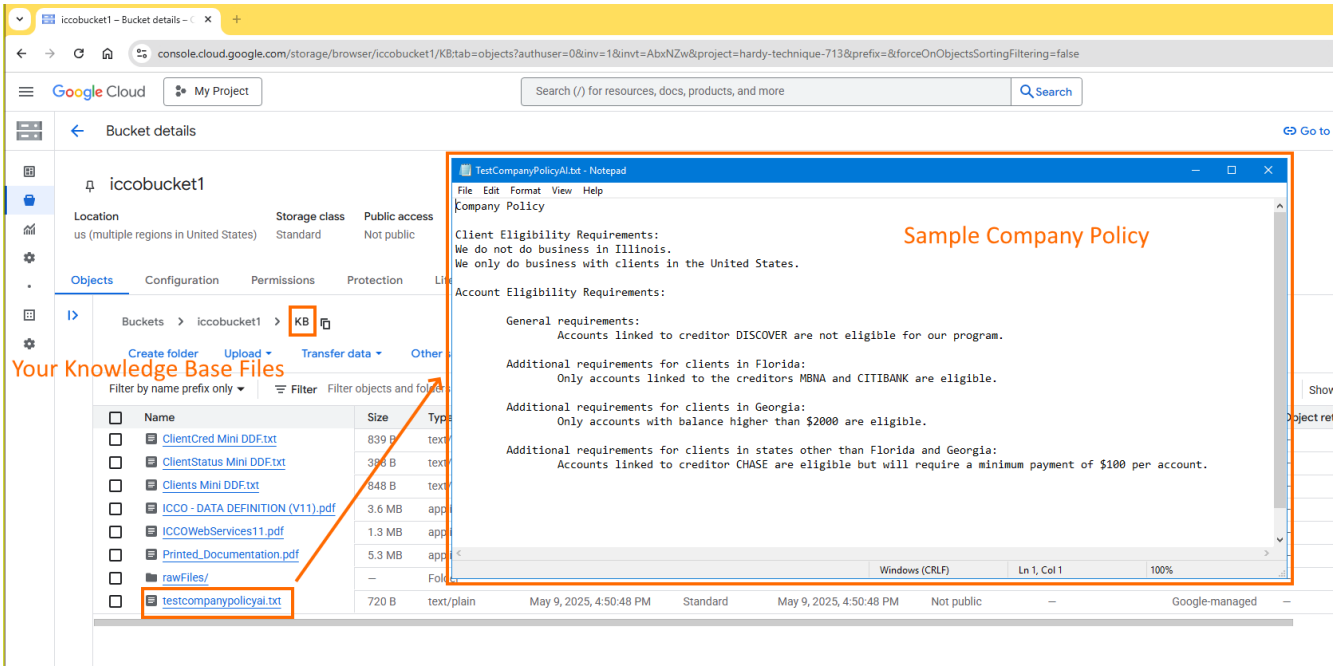
We define it as a set of internal company files that contain policies and procedures. They will be uploaded to the KB folder in the Google Storage bucket defined in the application AI Settings.

Example #1: Analyzing Client & Account Eligibility based on your Company Policy

We will create an AI operation that determines if the current client meets the eligibility requirements defined in your company policy. And in addition, which of the client's accounts also meet the specific account and creditor requirements.

Step 1 – Add your Company Policy document to the Knowledge Base

Two ways to do this:
a) Directly upload it to the KB folder in your Google Storage bucket defined in Settings
b) Skip this step, and define it in Settings when we configure the AI operation. There you can just add the document from a shared network folder in Windows, and the application will automatically upload it to the KB folder the first time you perform the AI operation.




```
Company Policy

Client Eligibility Requirements:
We do not do business in Illinois.
We only do business with clients in the United States.

Account Eligibility Requirements:

        General requirements:
                Accounts linked to creditor DISCOVER are not eligible for our program.

        Additional requirements for clients in Florida:
                Only accounts linked to the creditors MBNA and CITIBANK are eligible.

        Additional requirements for clients in Georgia:
                Only accounts with balance higher than $2000 are eligible.

        Additional requirements for clients in states other than Florida and Georgia:
                Accounts linked to creditor CHASE are eligible but will require a minimum payment of $100 per account.
```

Step 2 – Configure the AI operation

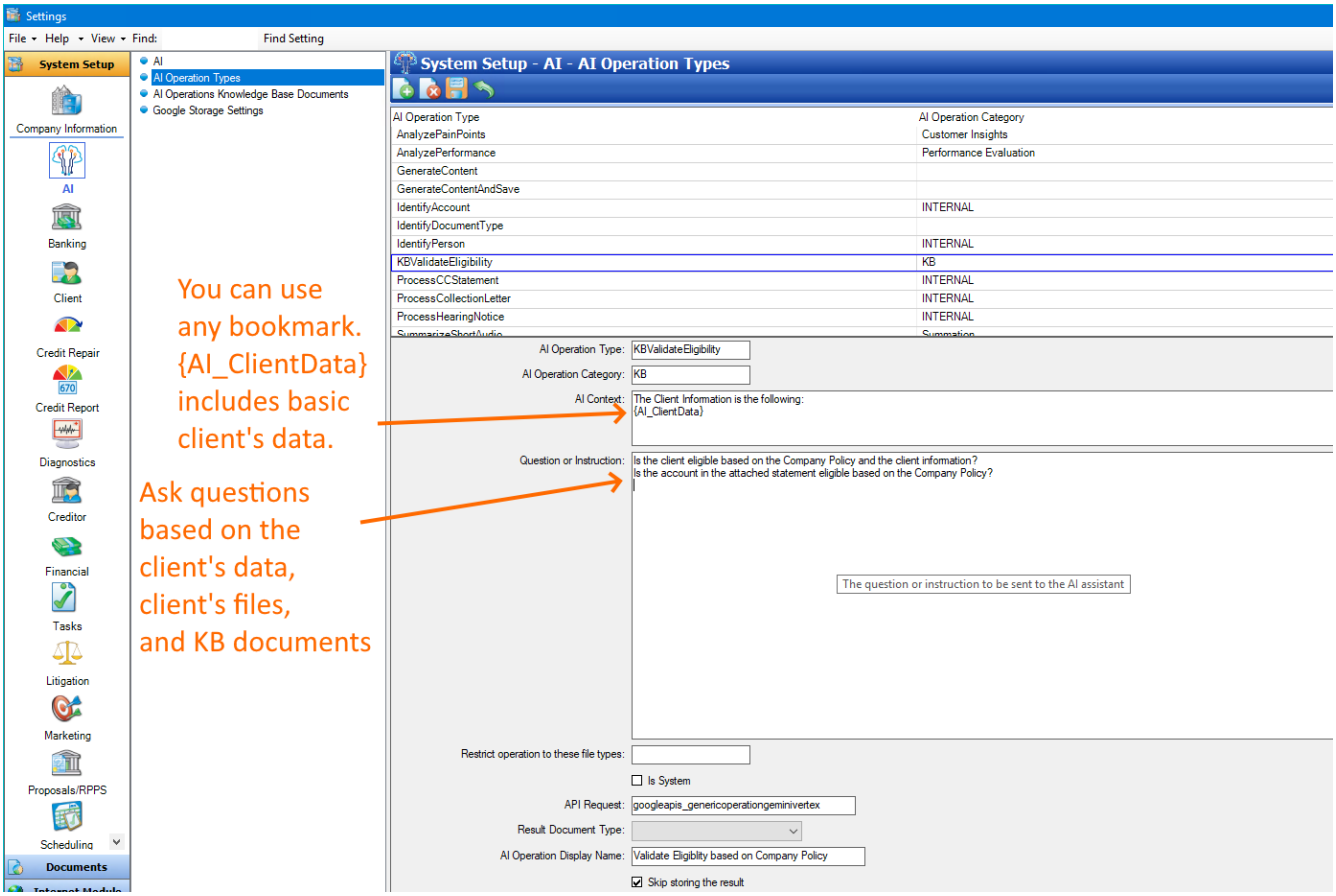
We create an AI operation in Settings that will ask the following:

Is the client eligible based on the Company Policy and the client information?
Are the client accounts eligible based on the Company Policy?

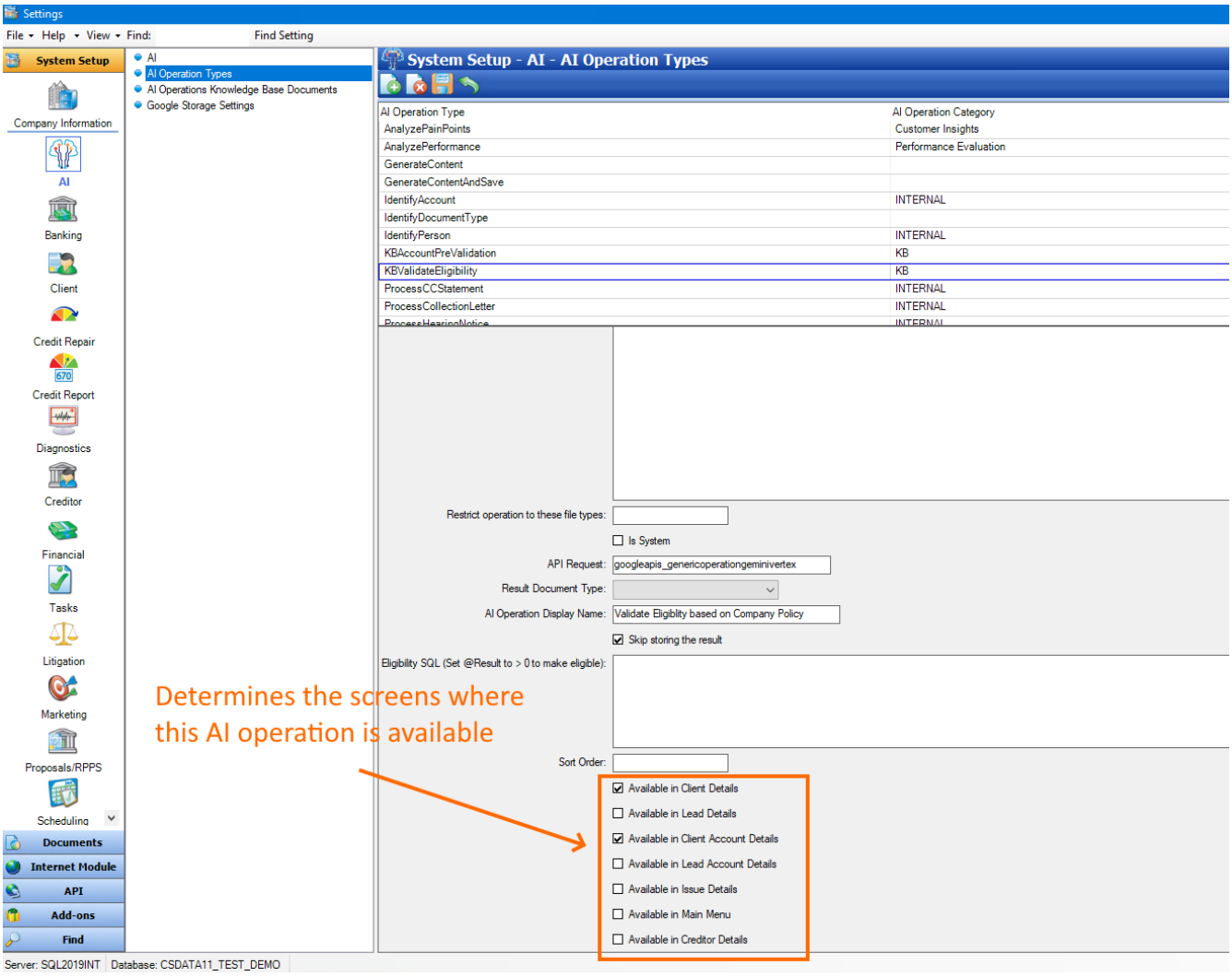
In addition, we will feed the basic client data (such as State, DOB, etc…) to the context using the bookmark {AI_ClientData}:

The Client Information is the following:
{AI_ClientData}

In the API Request field use: googleapis_genericoperationgeminivertex



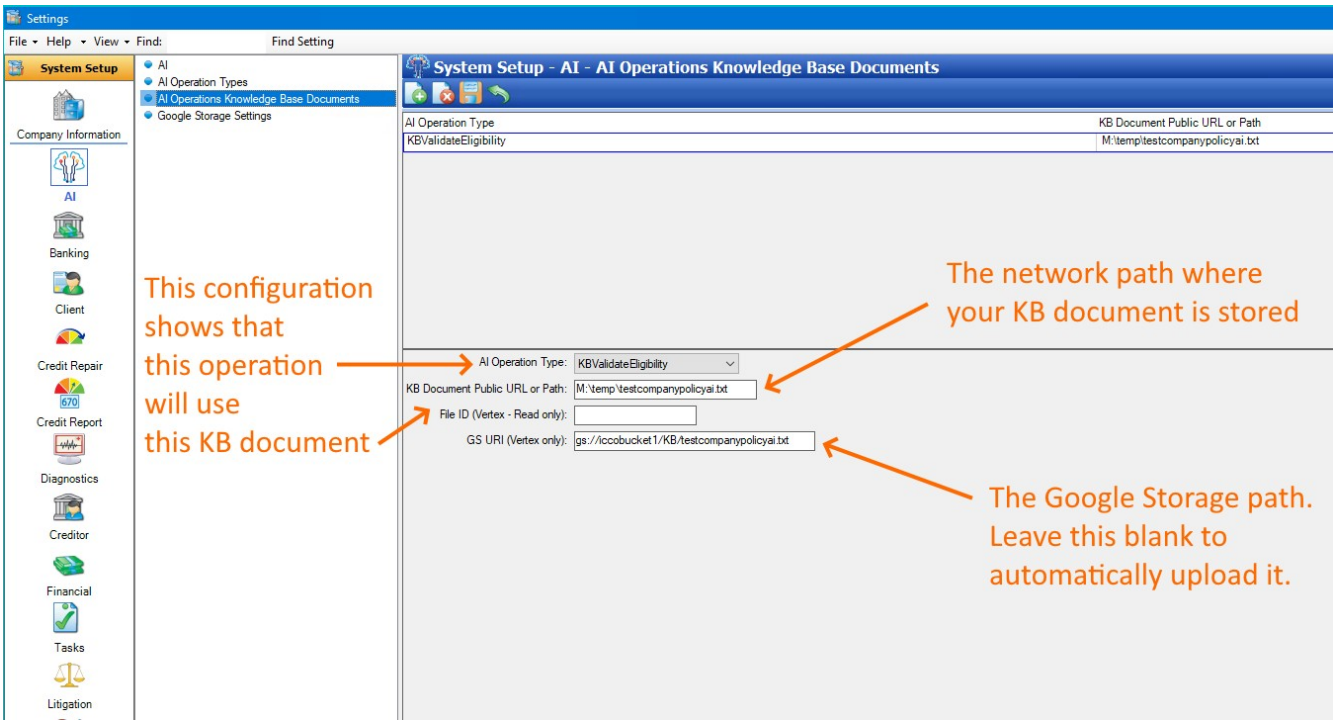
Make sure the rule is available in the Client and Lead screen (or whatever screen you will test it from).



Step 3 – Configure which internal Knowledge Base documents the AI operation will use

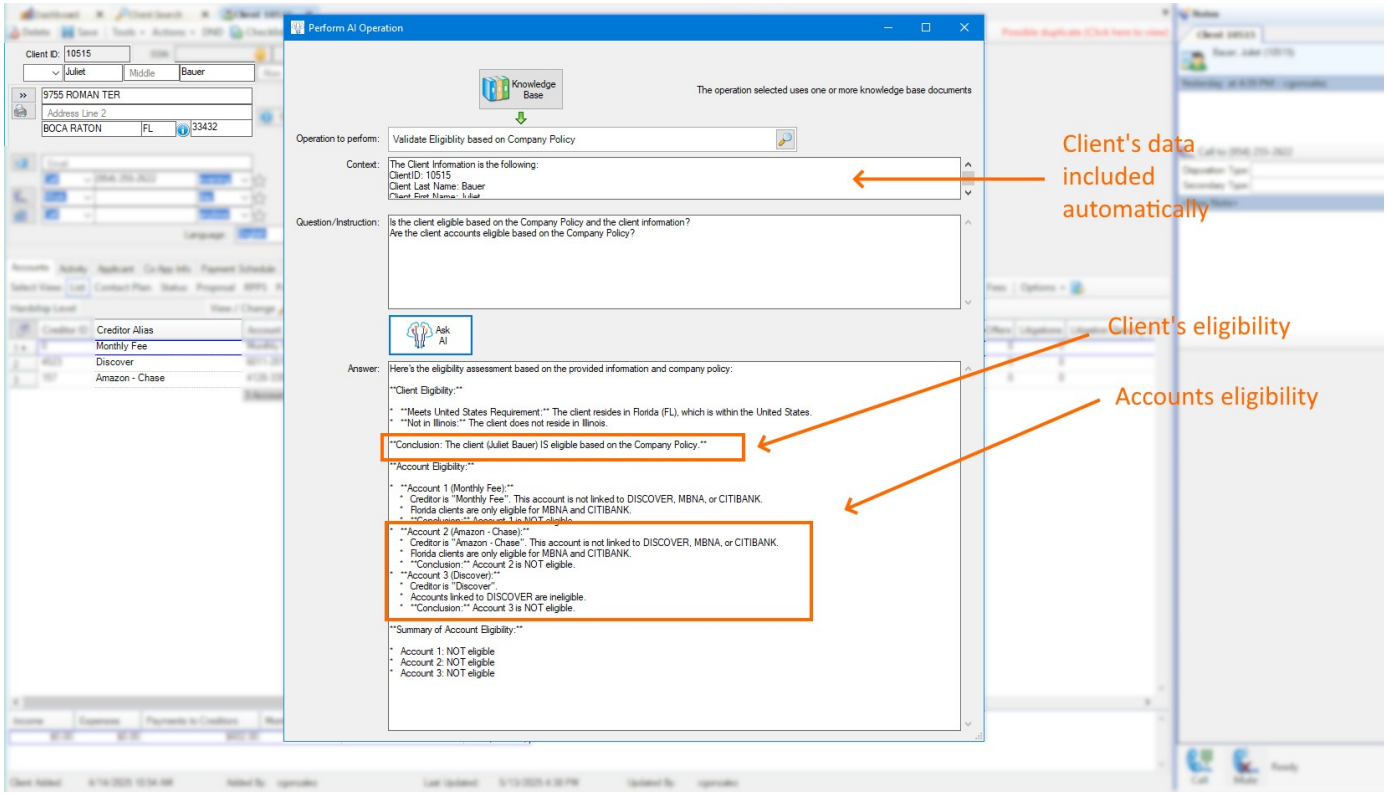
Click on the AI Operations Knowledge Base Documents and link the AI operation to your company policy. You can configure multiple KB documents per AI operation.

In this example, we link the KBValidateEligibility operation to our Company Policy.



Step 4 – Test it on a lead or client

Open a lead or client screen.
Click Tools and choose Perform AI Operation.
Click Send to AI.



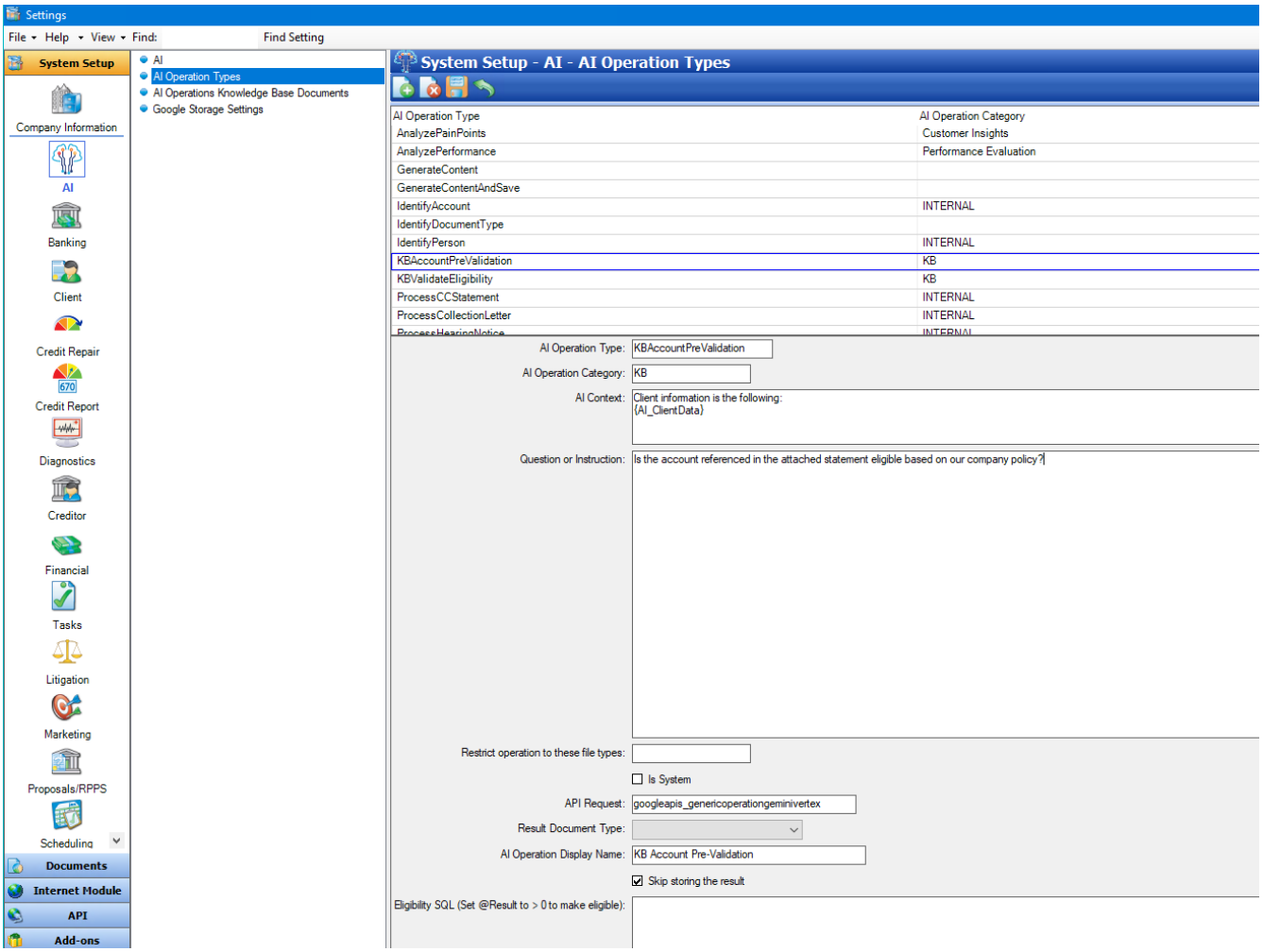
Example 2 – Account validation based on a CC statement

This example will show how to perform an operation that uses a credit card statement document and your knowledge base, to figure out account eligibility before adding the account.

It's an example of how our AI integration can use both client documents, client data, and your own internal documents to answer questions.

Step 1 – Create the AI Operation and link the KB document to it

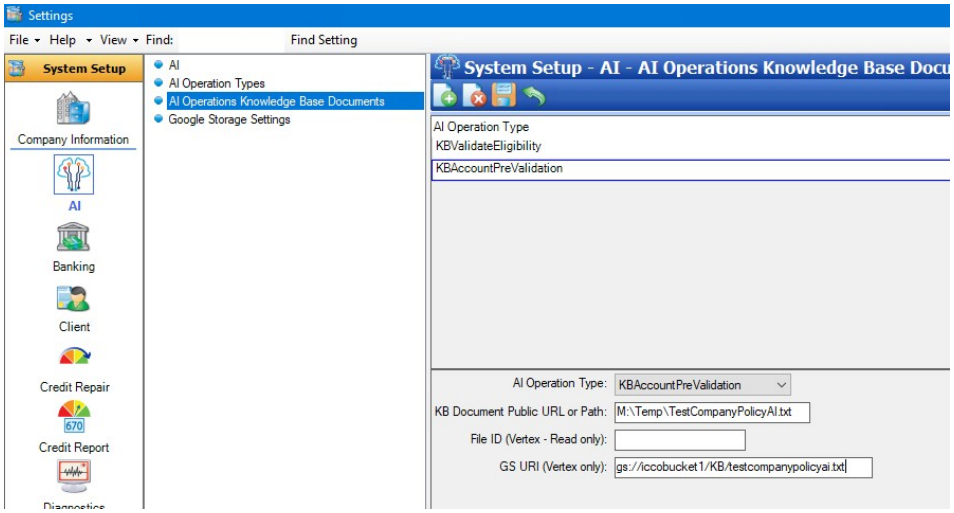
We will follow similar steps as before to create our AI operation.



We include {AI_ClientData} in our context again.
This is important in our example because our sample Company Policy determines account eligibility based on the client's state.

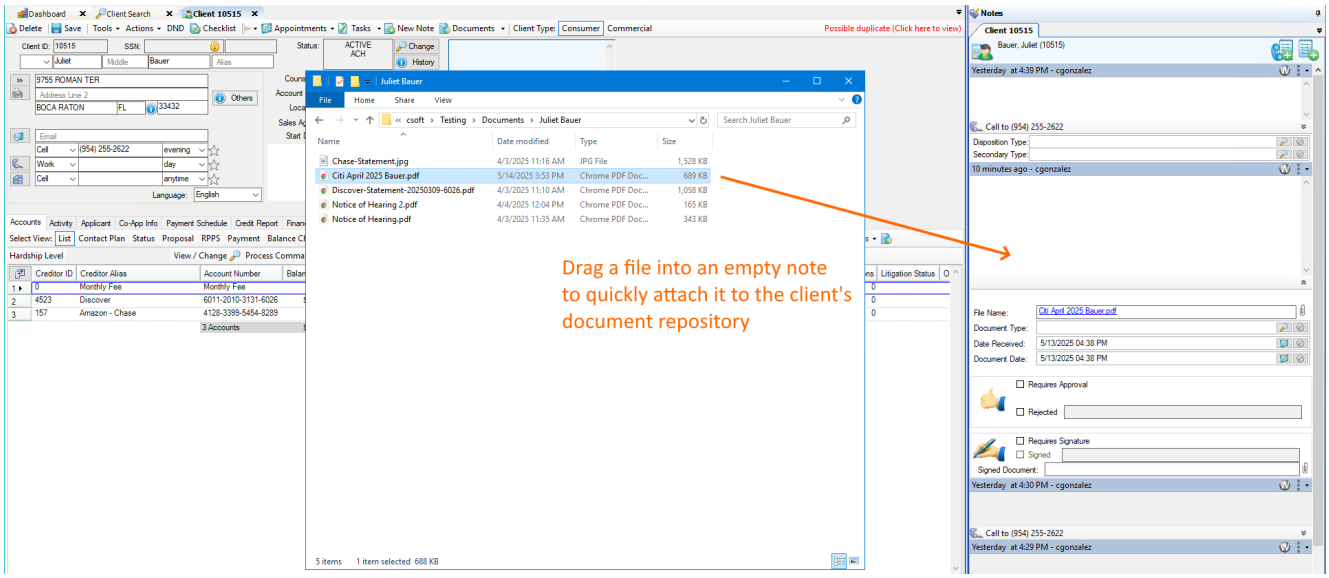
Remember to check the Availability in Client Details or Availability in Lead Details.

Link the Company Policy KB document to the AI Operation Type:


Settings
File
Help
View
Find:
Find Setting
System Setup
Company Information
AI
Banking
Client
Credit Repair
Credit Report
AI
AI Operation Types
AI Operations Knowledge Base Documents
Google Storage Settings
System Setup - AI - AI Operations Knowledge Base Docu
AI Operation Type
KBValidateEligibility
KBAccountPreValidation
AI Operation Type:
KBAccountPreValidation
KB Document Public URL or Path:
M:\Temp\TestCompanyPolicyAI.txt
File ID (Vertex - Read only):
GS URI (Vertex only):
gs://iccobucket1/KB/testcompanypolicyai.txt

Step 2 – Import a credit card statement

If you don’t have a statement already imported, import the statement file (a PDF or scanned JPG) by attaching the file to a client note, or using the Import Documents option.

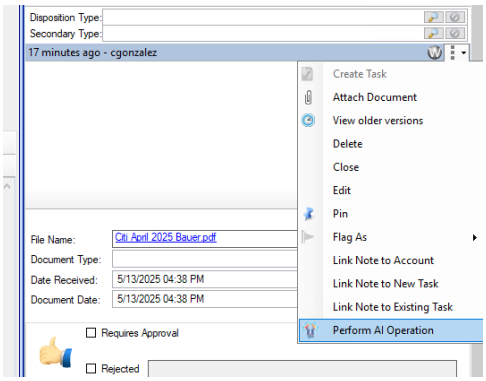


Step 3 – Test the AI Operation on it

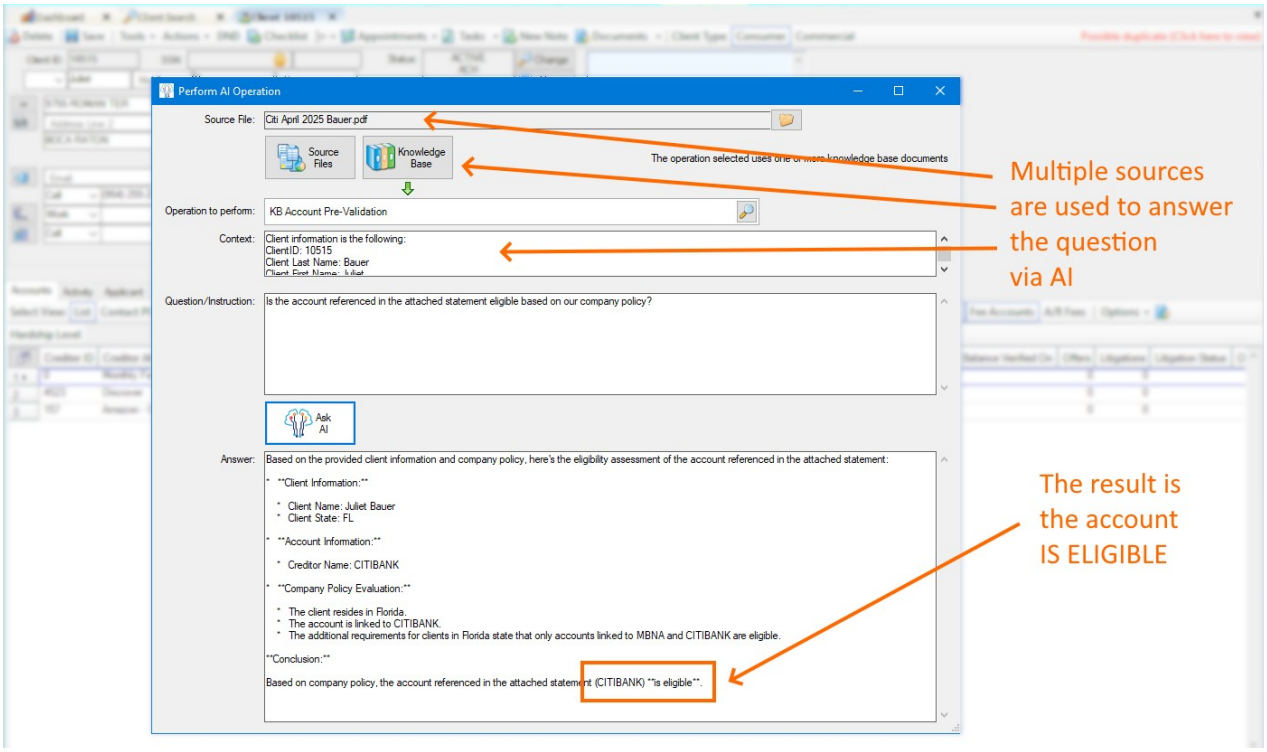
Two ways to do this:

a) From the client Document Repository, right-click on the statement and select Perform AI Operation.

b) From the client notes, click on the 3 dots on the right and select Perform AI Operation.



Below is the result of the operation after clicking Ask AI



Gemini AI not only answers the question using your company policy, but it also justifies it by quoting the rules from the policy that it used to provide its answer.

Conclusion

Our application has a deep integration with Gemini AI that allows you to perform AI operations using:

- Client documents
- Knowledge base internal documents
- Client summary data (customizable)
- Custom bookmarks in the context and question to pre-fill those fields

Not shown in this example are the following features:

- You can use multiple knowledge base files
- You can use multiple client documents on the same operation
- Custom actions can be performed on the AI results after the AI call such as
  - Adding a lead
  - Updating fields such as the address
  - Adding an account
  - Updating an account balance or payment
  - Changing the account status
  - etc...
- Actions can be performed on a schedule on multiple clients
- Documents can be processed by AI automatically after importing them