AIEX
App Handbook

Date: 18th July 2025

Version: V1.6

AIEX User Guide

Contents

App description

The purpose of this app is to provide a modern and comfortable way of extracting, storing, and reviewing data from documents such as legal contracts or paid invoices. The app provides a simple interface, including a file and folder hierarchy reminiscent of Windows File Explorer, an inspect screen giving the user valuable insight into the data that was extracted while also providing the file for easy checking. There is also an AI screen which provides the prompts that are being used to extract data with, they can be edited at any time for even more efficiency. Finally, there's a dashboard screen, allowing for a very quick birds eye view of all the most important data, it shows the value of contracts coming up in the future, as well as how many have already been done, a table at the bottom shows an overview of all the contracts put in and their current status. Similarly, an invoice dashboard also provides a great overview of all the invoices in the app, giving an overview of their status and value.

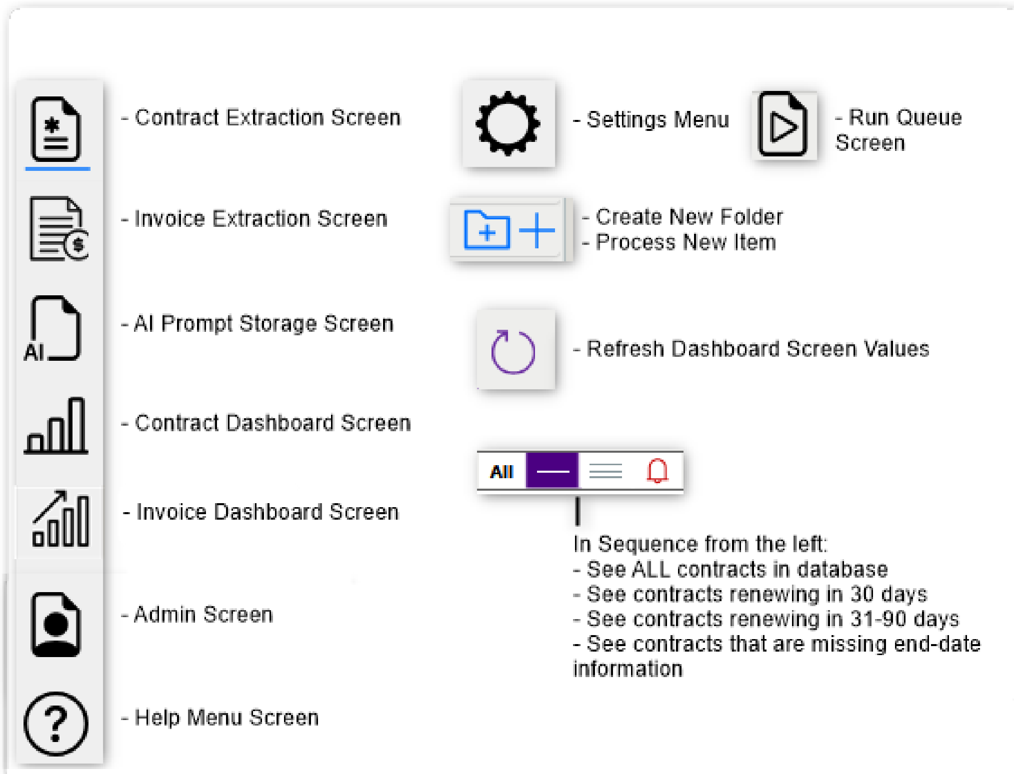
Common Issues & Solutions

This section will go over and give solutions for some known issues and problems a user may face.

Issue	Description of issue	Reason for error	Solution to error
Missing Property Error	In rare instances the user may experience an error with text similar to the following: "Variable [Some Variable here] doesn't have a property [Property name here]".	This error occurs because OpenAI has failed to follow the instructions provided in the prompt, the cause of this is usually that the AI was overloaded at that moment in time by other users using the service.	When this occurs, the user can simply re-run the automation for the particular document that was affected, and the issue should resolve.
Document item stuck in queue	An item can get stuck in the run-queue due to unforeseen consequences, being stuck as "queued" and never move along.	An error such as this can happen if the user's Environment changes / Power Automate Desktop is too out-of-date / Premium License runs out / Connection fails and there is no way to know precisely without a trial-and-error approach.	The user can delete the item from the run-queue screen by selecting the bin icon next to the item that needs to be removed.
Flow stuck running	If something goes wrong, a flow can become stuck in perpetual run-mode and only become unstuck after 3 hours (power platforms' fixed timeout time)	An error such as this can happen if the user's Environment changes / Power Automate Desktop is too out-of-date / Premium License runs out / Connection fails and there is no way to know precisely without a trial-and-error approach.	The user can cancel the running flow by going to the flow section on https://make.powerautomate.com/ selecting the flow named "AIEX – POWER APPS – Document Text Extractor" then, clicking on the offending perpetually running flow in the run-queue table below and selecting cancel in the top right corner of the flow editor.

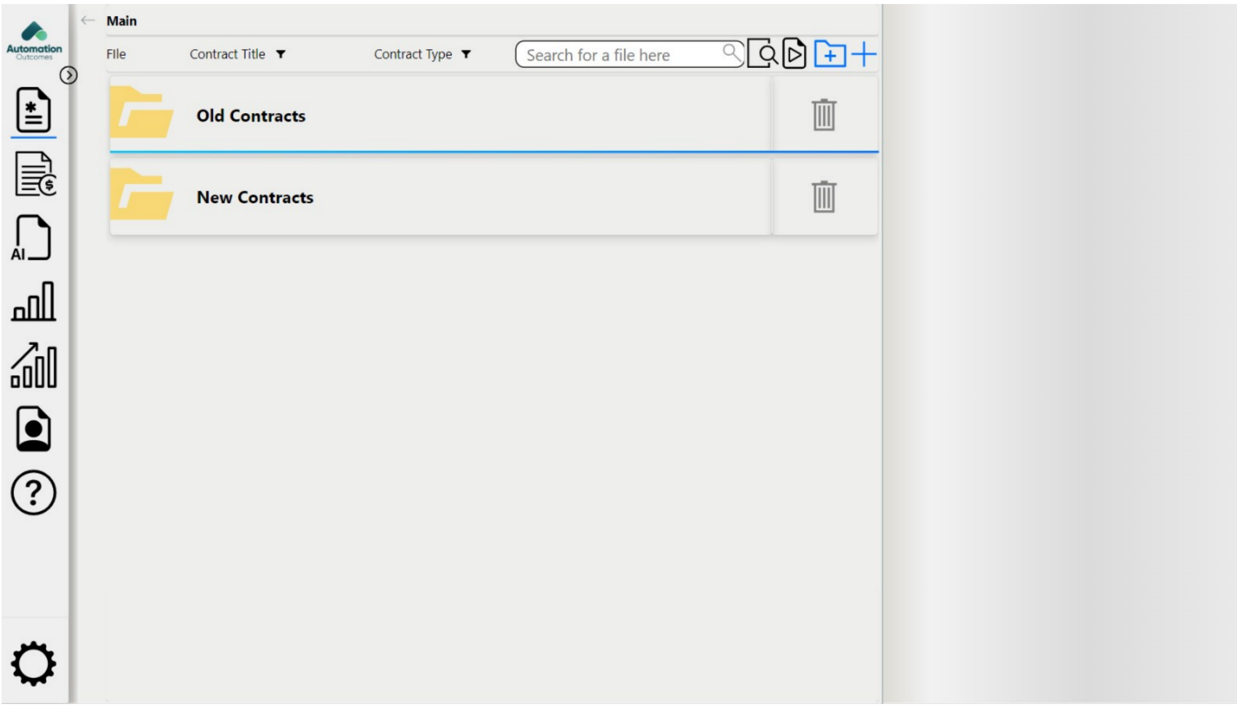
The following sections below will guide the user through the App, including its interface, functionality and usage.

Icon Legend



Screen Guide

Contracts Screen



The contracts screen is the first screen of the App, it contains an internal folder-hierarchy that a user can use to navigate through to any stored and analysed contracts. From here it is possible to navigate to other sections of the app or start the extracting process for a new contract.

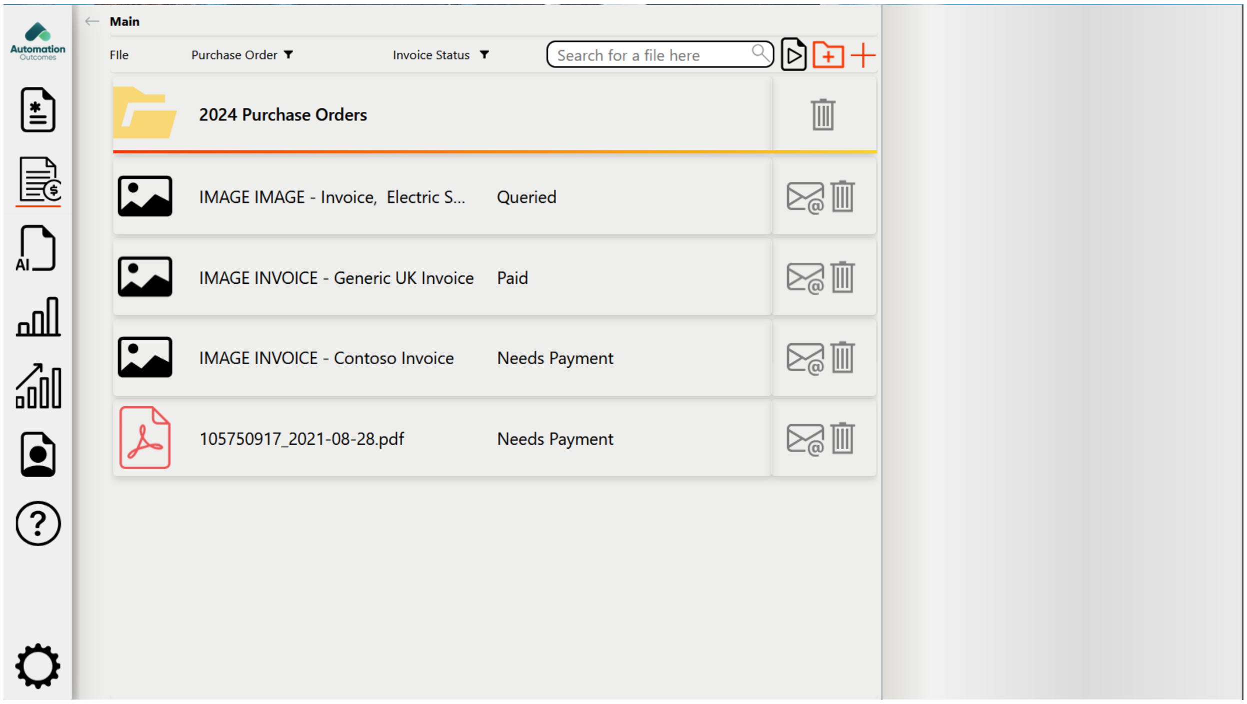
In this section Admins can:

- Create Folders
- Inspect Contracts
- Process Contracts
- Inspect the run-queue
- Process clauses for review
- Edit Notifications
- Delete Folders / Contracts

While Basic Users can only:

- Inspect Contracts
- Inspect the run-queue
- Inspect clauses

Invoices Screen



The invoices screen is the second screen of the App, it contains an internal folder-hierarchy like the contracts screen in which the user can use to navigate through to any stored and analysed invoices. From here it is possible to navigate to other sections of the app or start the extracting process for a new invoice.

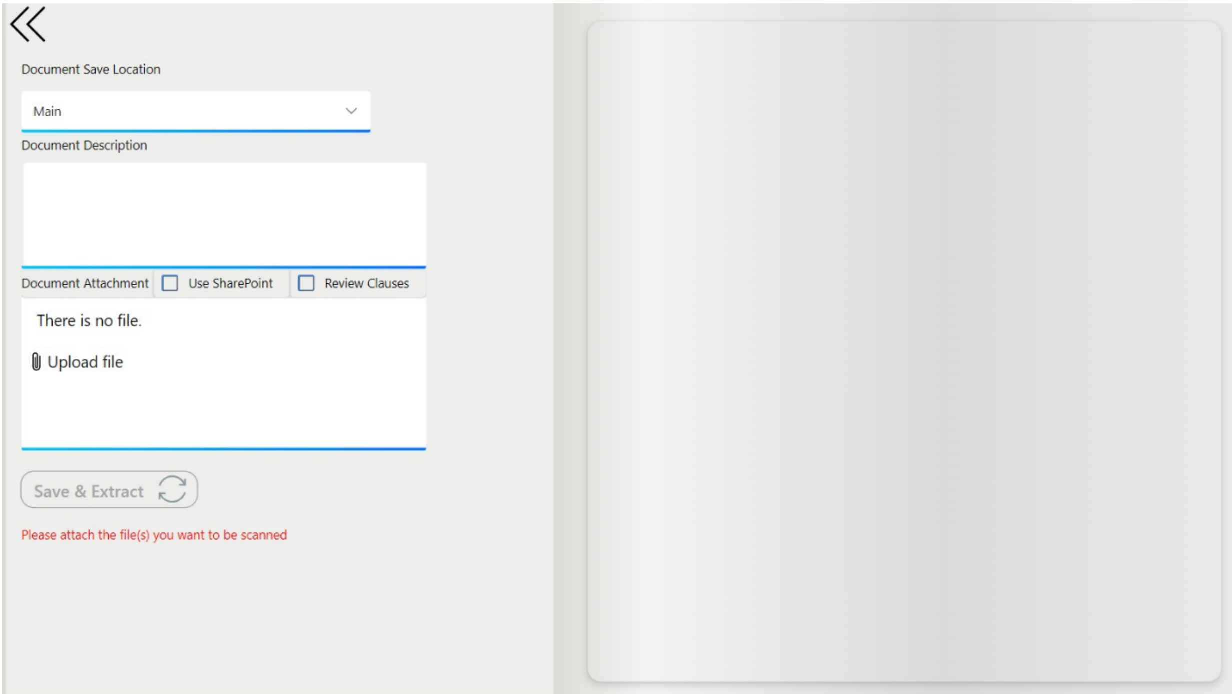
In this section Admins can:

- Create Folders
- Inspect Invoices
- Process Invoices
- Delete Folders / Invoices

While Basic Users can only:

- Inspect Invoices
- Inspect run-queue

New Analysis Screen

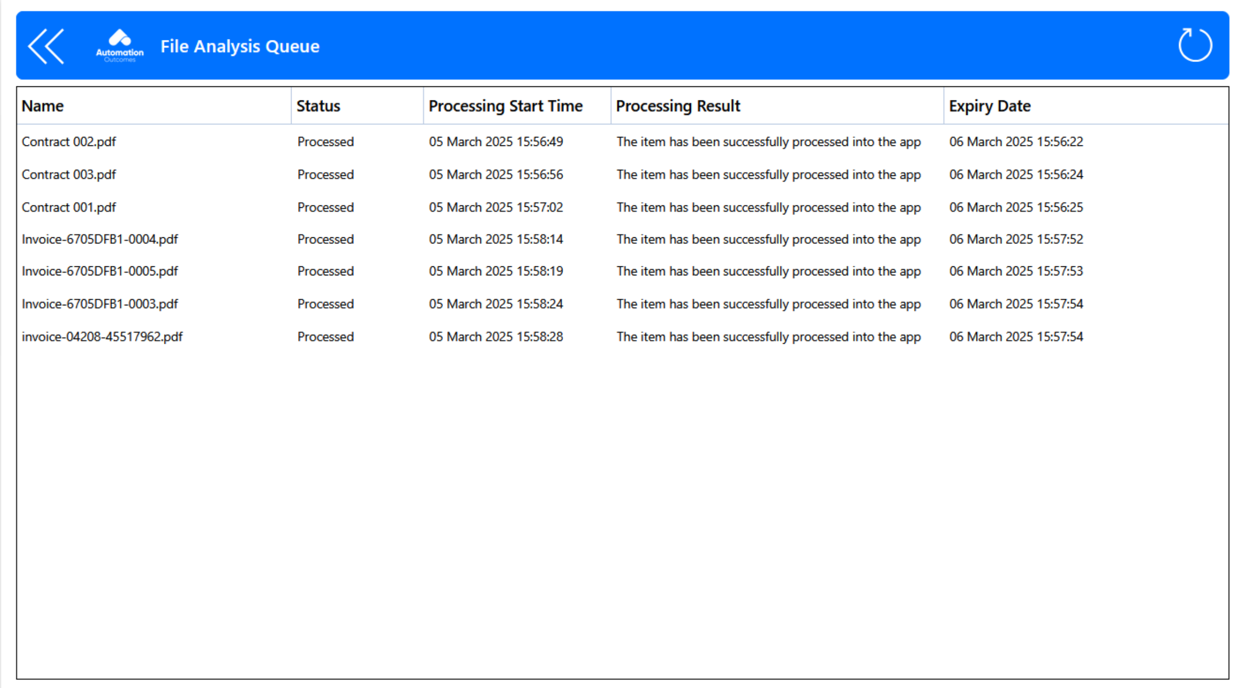


On this screen an admin can add and review a file to start an analysis process, once the "Save & Extract" button is selected, it cannot be stopped, a flow will start on a specified machine, extracting text out of the file and sending it to OpenAI's API for processing, the prompt for which can be edited on the AI screen in the app.

In this section Admins can:

- Select a folder to save the contract into.
- Enter a description for the file.
- Select a file or files to analyse, either on the user's machine or from SharePoint.
- Start the extraction process.
- Start the clause review process.

Run-Queue Screen



Name	Status	Processing Start Time	Processing Result	Expiry Date
Contract 002.pdf	Processed	05 March 2025 15:56:49	The item has been successfully processed into the app	06 March 2025 15:56:22
Contract 003.pdf	Processed	05 March 2025 15:56:56	The item has been successfully processed into the app	06 March 2025 15:56:24
Contract 001.pdf	Processed	05 March 2025 15:57:02	The item has been successfully processed into the app	06 March 2025 15:56:25
Invoice-6705DFB1-0004.pdf	Processed	05 March 2025 15:58:14	The item has been successfully processed into the app	06 March 2025 15:57:52
Invoice-6705DFB1-0005.pdf	Processed	05 March 2025 15:58:19	The item has been successfully processed into the app	06 March 2025 15:57:53
Invoice-6705DFB1-0003.pdf	Processed	05 March 2025 15:58:24	The item has been successfully processed into the app	06 March 2025 15:57:54
invoice-04208-45517962.pdf	Processed	05 March 2025 15:58:28	The item has been successfully processed into the app	06 March 2025 15:57:54

The run-queue screen lets the user see how the files or clauses are being processed once the analysis process has begun, it gives a status that displays whether they are queued, processing, have been processed, or have failed, while giving an appropriate message depending on that status.

Note that these expire after a day, causing them to not appear on the table again.

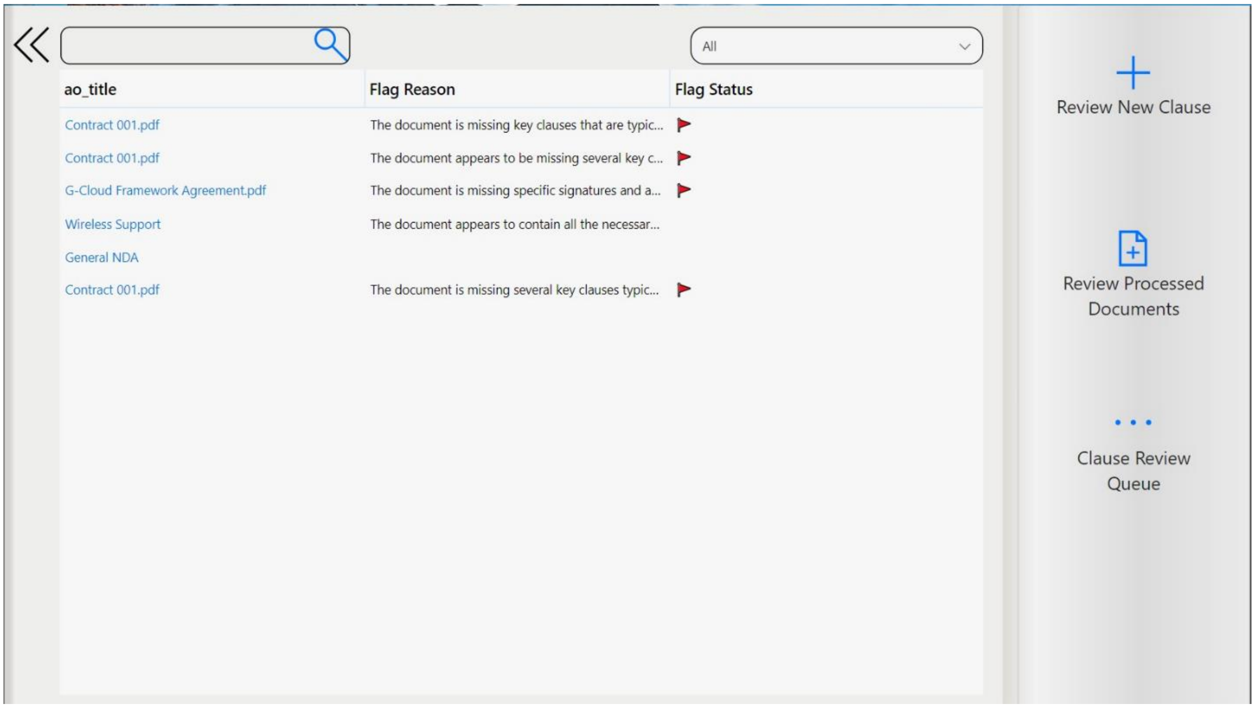
In this section Admins can:

- Inspect the status of an item being queued into the system.
- Delete items from history (WARNING – delete only if an item is processed or **stuck**).

While Basic Users can only:

- Inspect the status of an item being queued into the system.

Clause Review Screen



This screen allows the user to inspect, create or review clauses for any particular contract, the screen provides an overhead view of any missing clauses for contracts that were marked for review, if there are, it is flagged with a flag next to it and a reason is given to the user as to why. These can be opened and inspected further by pressing on the contract item.

Please note that this is also done via ChatGPT and will consume OpenAI API credits.

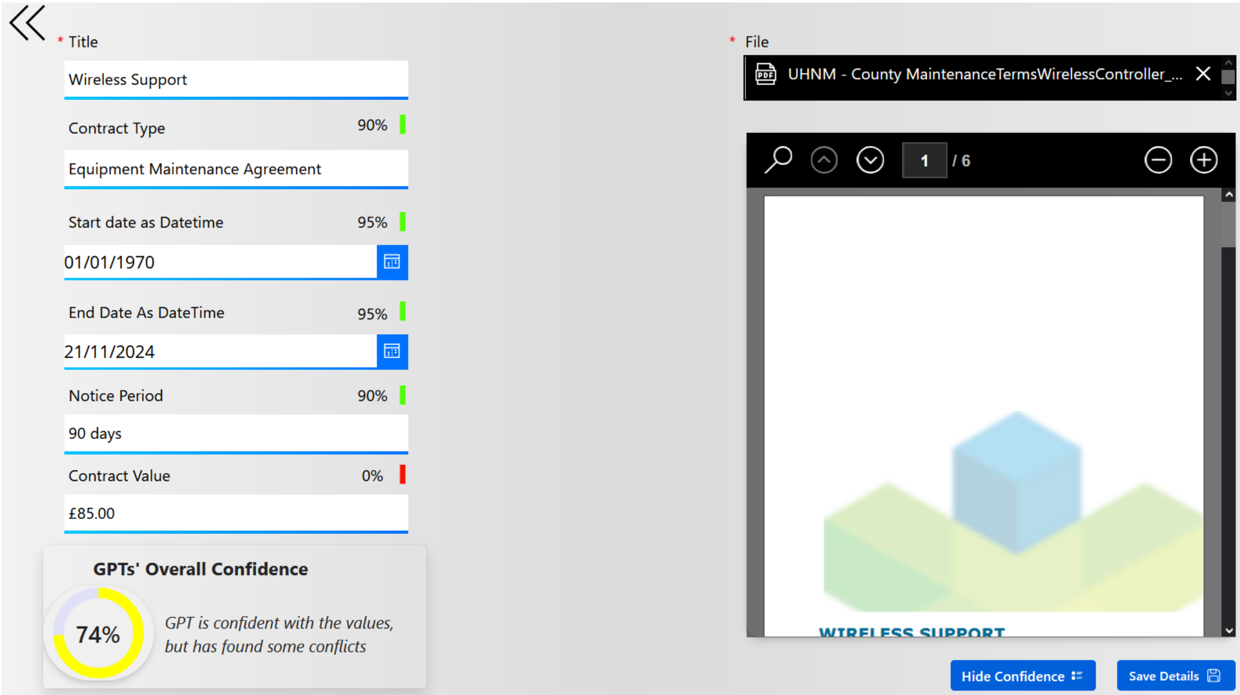
In this section admins can:

- Inspect and review any contract clause reviews.
- Generate new reviews for any contract on their Desktop.
- Generate new reviews from any files already in the App.

While Basic Users can only:

- Inspect and review any contract clauses.

Inspect Screen



The inspect screen gives the ability for a user to review and inspect the values the AI has extracted as well as review its performance. The file, if it is a pdf or an image, is shown on the right and can be interacted with. This file is also downloadable by selecting the file attached above it.

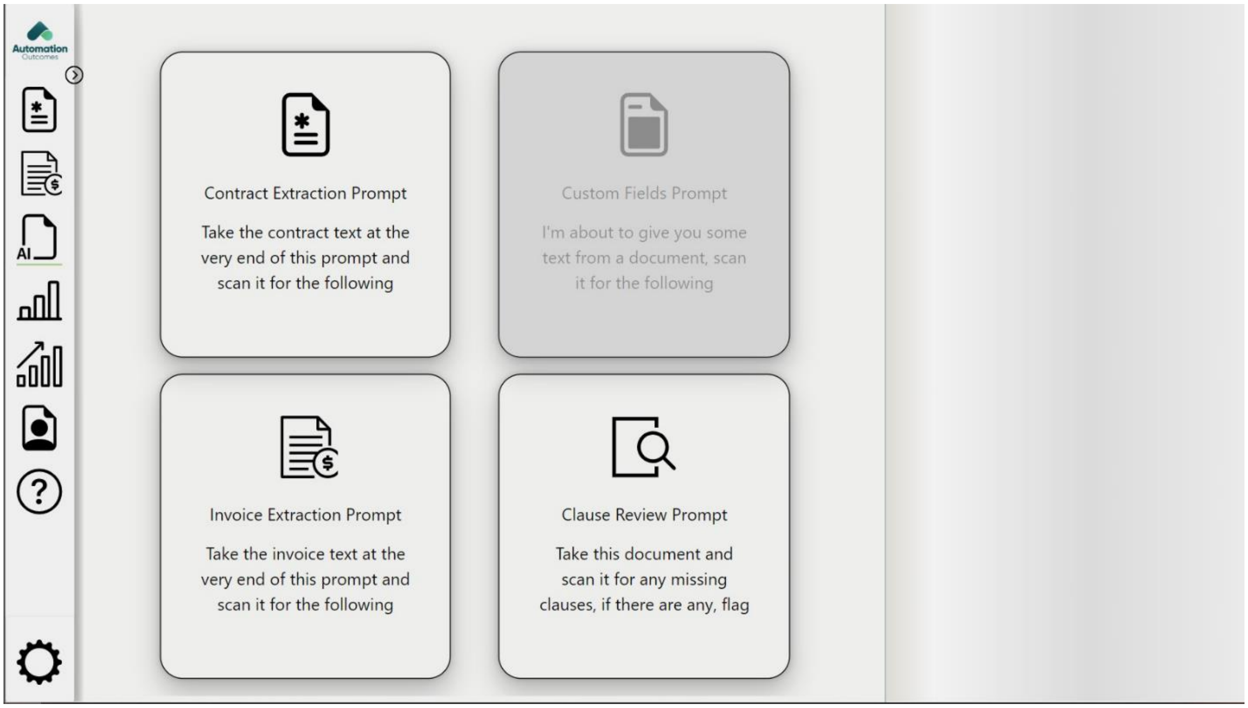
In this section Admins can:

- Review, interact with, and change the extracted data.
- Save any changed details.
- Download the file directly from the file field.

While Basic Users can only:

- Review and interact with the extracted data.
- Download the file directly from the file field.

AI Screen



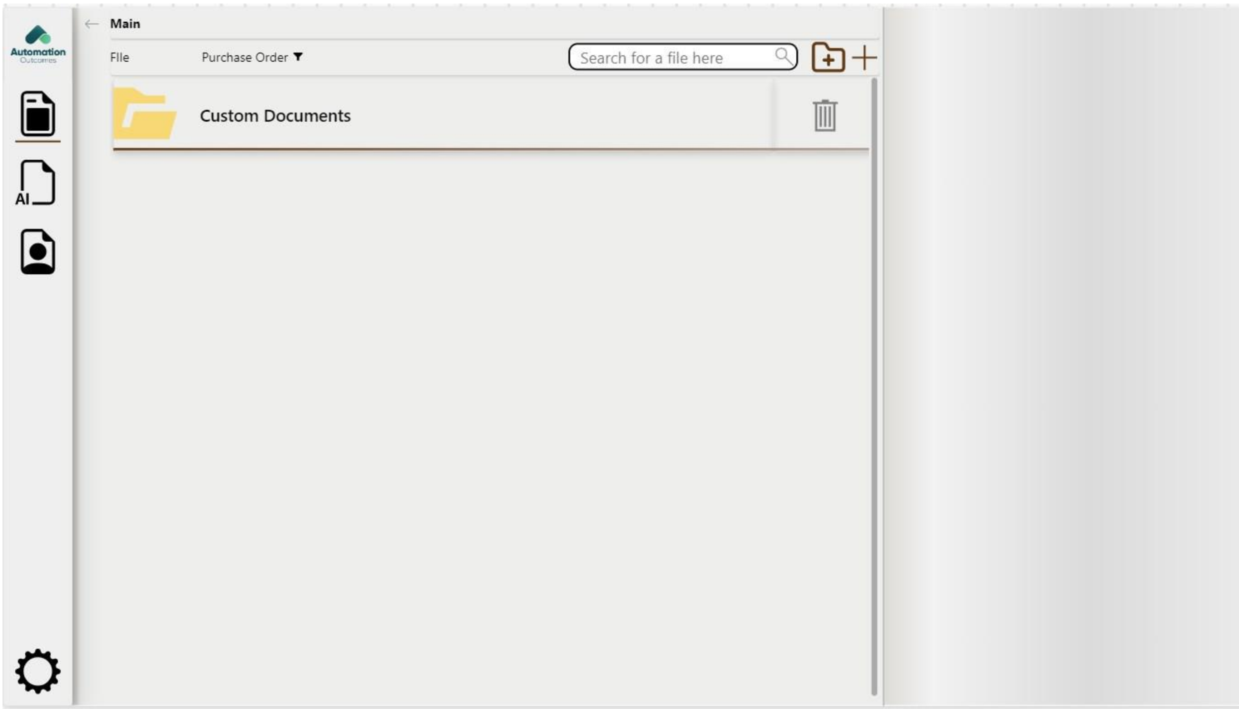
On this screen the admin user can select a prompt responsible for its respective function and change it as needed. This will be useful if the provided already built in prompt is not sufficient for managing the documents the user provides, however please note the following:

- The JSON return structure of the contract and invoice prompts cannot be changed unless the user is aware of how to change it inside the flow and app, if it is changed incorrectly the flow will stop functioning.
- The type of fields that are returned cannot be easily changed and will not be automatically reflected upon in the apps inspect screen if a custom field is required use the prototype custom field setting (more on this in a section below).
- We recommend only changing anything generic, e.g., specifying what to ignore in a document or changing the system prompt for better performance.

In this section Admins can:

- Review and change the System Prompt for contract and invoice sections.
- Review and change the Extracting Prompt for contract and invoice sections.
- Save any changes made to the prompt.

Custom Fields Screen



The custom fields screen is a special setting screen that can be accessed via the settings menu icon  in the bottom left-hand corner of the app. Once enabled it will replace the contract and invoice sections with a custom fields section, as they are redundant. This functionality enables a user to extract any type of text / field from any of the following file types - .pdf, docx. .txt, images, with a completely custom prompt.

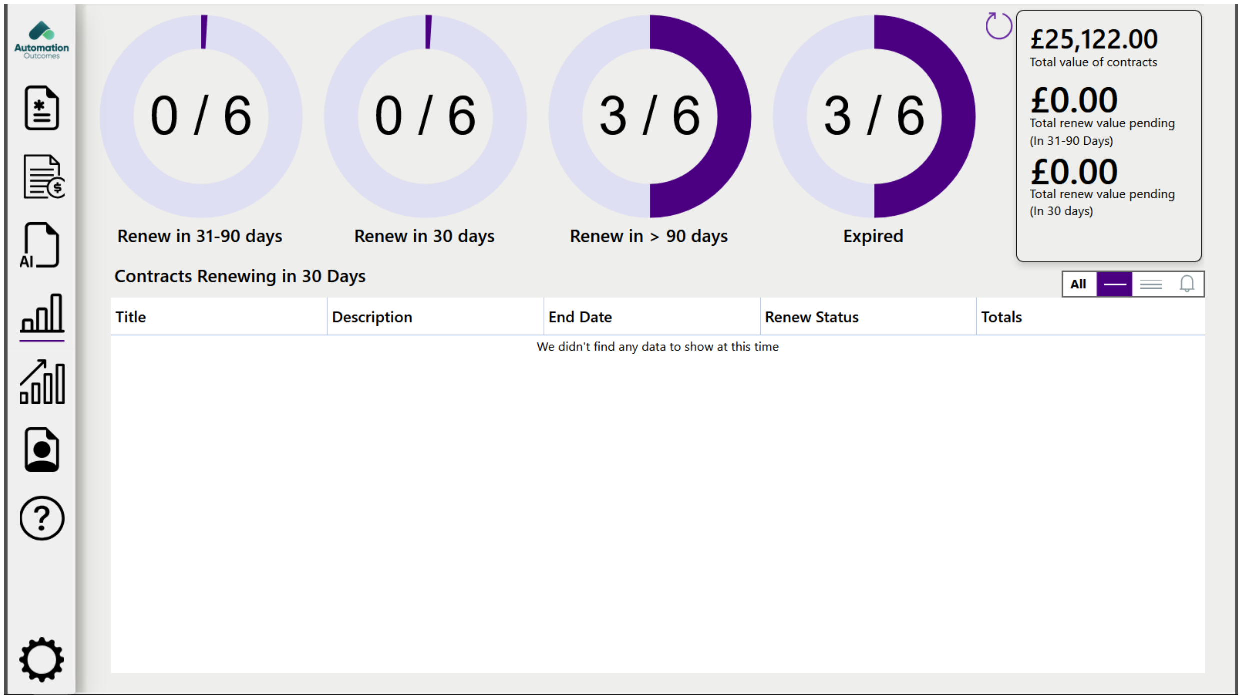
In this section Admins can:

- Create Folders
- Inspect Invoices
- Process Invoices
- Delete Folders / Invoices

While Basic Users can only:

- Inspect Invoices
- Inspect run-queue

Contract Dashboard Screen



The contract dashboard screen is responsible for showing the top-level view of all contract-related data gathered by the AI (or edited in by a human), it provides a way for any user to see important data quickly and make clear decisions on what to focus on next.

The table provided below can show either:

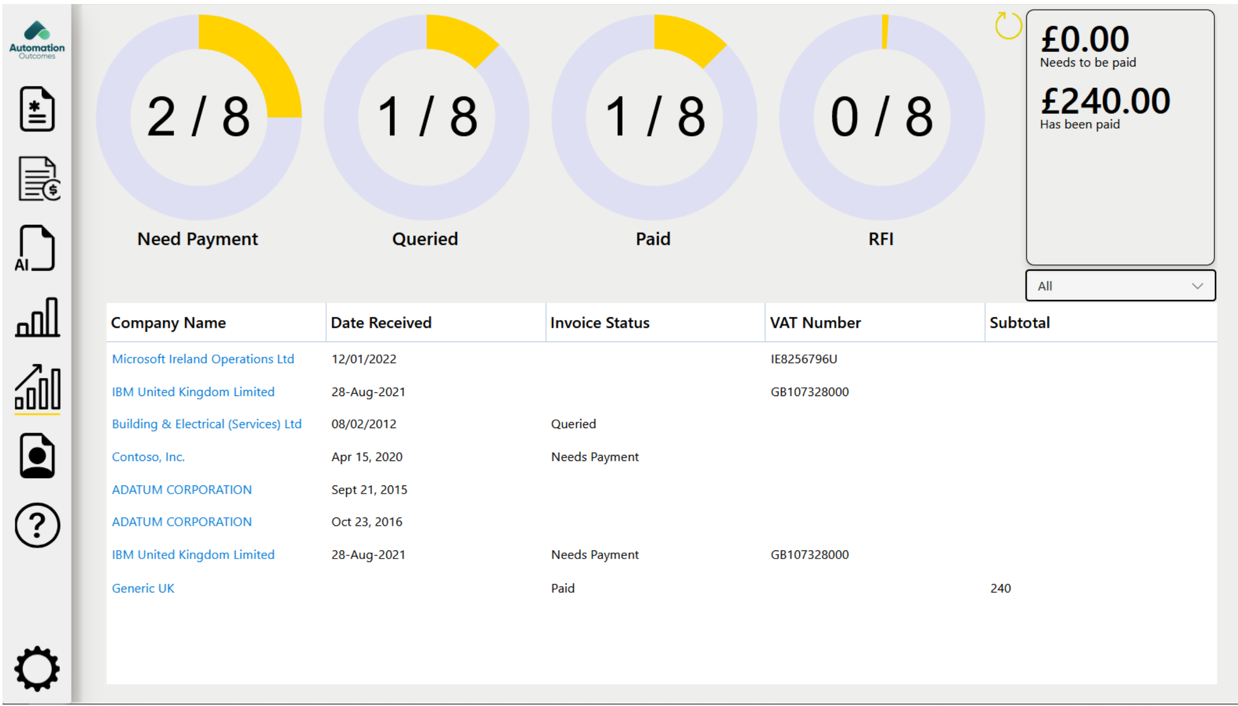
- All contracts in the system
- Contracts that are expiring in less than 31 days.
- Contracts that are expiring in less than 91 but more than 31 days.
- Contracts that require immediate attention as they lack an end date. (bell icon)

The card on the top right gives a quick view of the monetary values of contracts.

In this section Admins and Users can:

- Review all data.
- Refresh data in case it's out-of-date.
- Select an item in a table to instantly go into inspect-mode for that item.

Invoice Dashboard Screen



Finally, the Invoice dashboard screen is responsible for showing the top-level view of all invoice-related data gathered by the AI (or edited in by a human), it provides a way for any user to see important data quickly and make clear decisions on what to focus on next.

The table provided below can show:

- All invoices that need payment
- All queried invoices
- All invoices paid
- Invoices that require further information

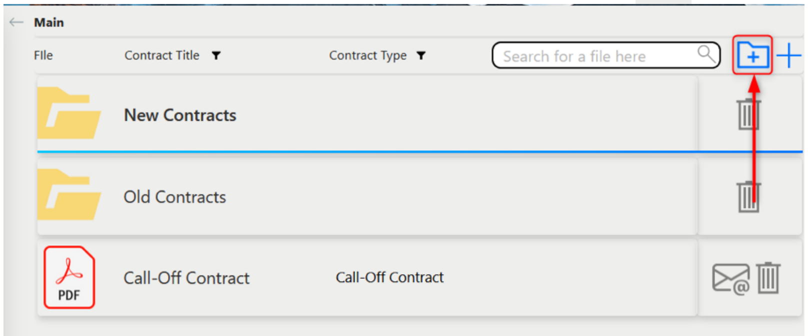
The card on the top right gives a quick view of the monetary values of invoies.

In this section Admins and Users can:

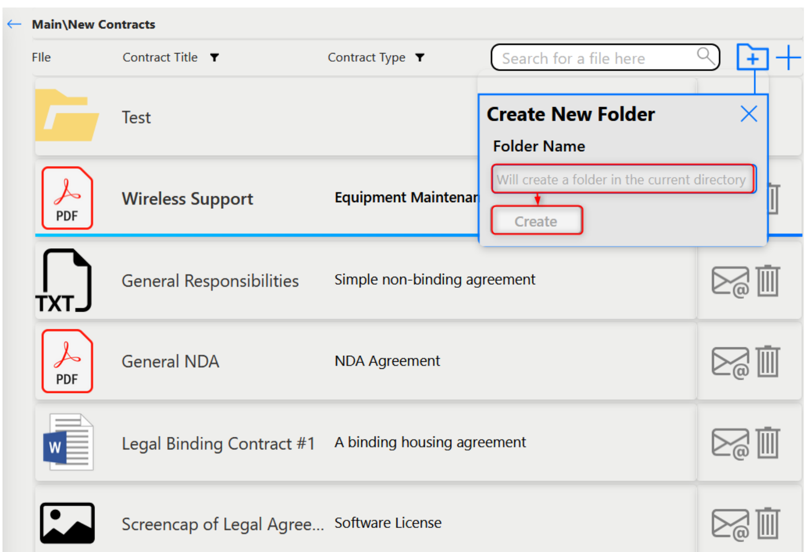
- Review all data.
- Refresh data in case it's out-of-date.
- Select an item in a table to instantly go into inspect-mode for that item.

How to create a new folder (Admin only)

To create a new folder, select the folder icon  in the top right corner.

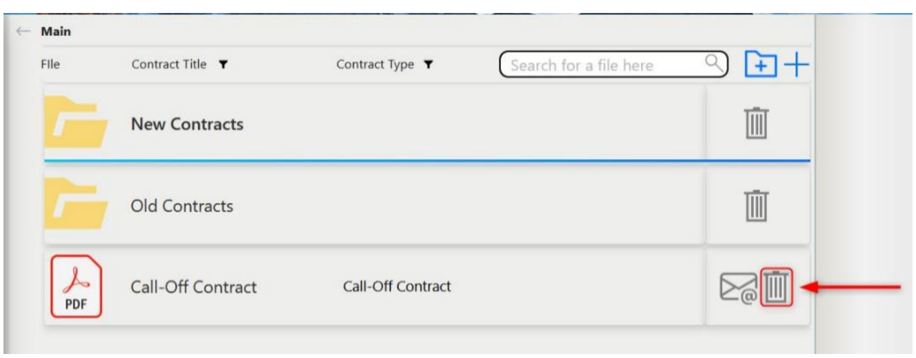


A popup window prompting the user to name and create the folder will appear, name the folder, and select the create button to create a folder in the current directory.

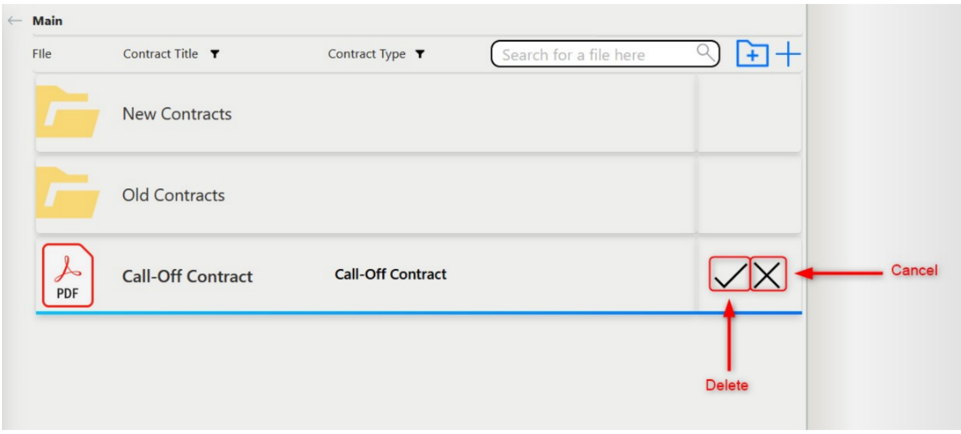


How to delete an existing file / folder (Admins only)

To delete a prompt, select the bin icon on a file / folder item as shown below.



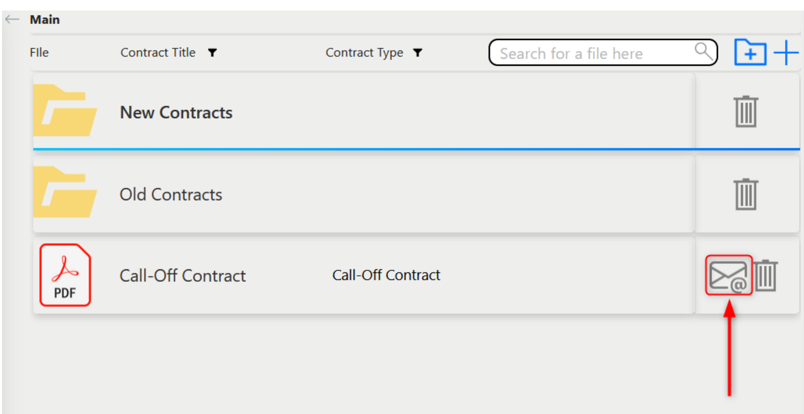
The deletion is not instantaneous, two new buttons will appear when selected, one for confirming the deletion and the other for cancelling the deletion as shown below:



How to set notifications (For contracts and by admins only)

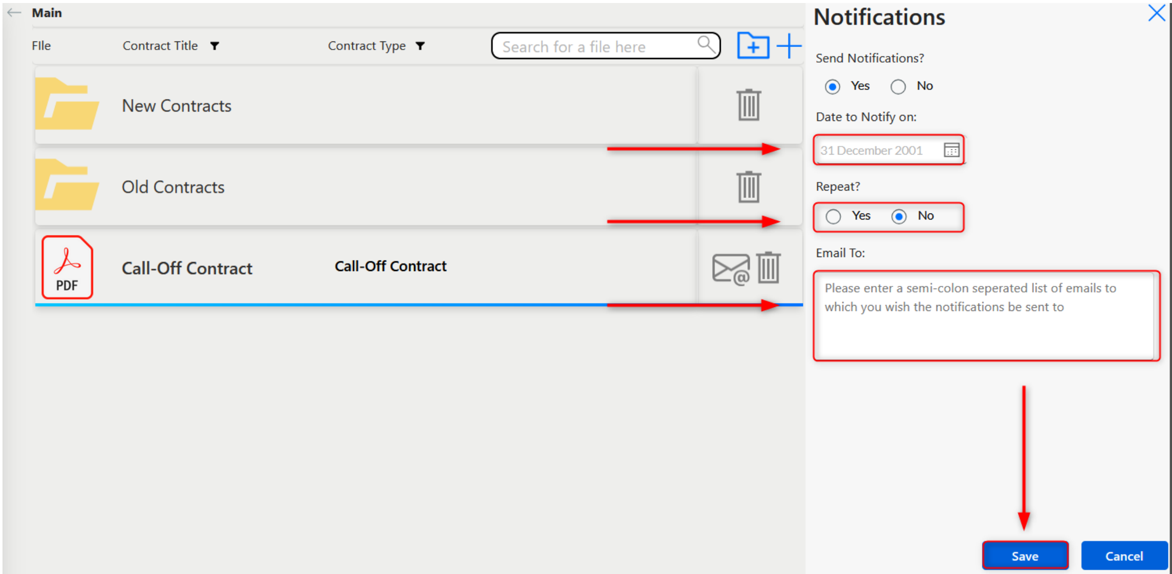
Before we begin, please note how the notification system works: At the current moment, the notification system works via a scheduled flow, this flow runs once every day in the morning, this behavior can be changed via the schedule trigger in the flow. Once the automation runs, it will send an email on the requested date and to the requested emails provided. Finally, please note that the email that will be used to send emails from will be the email credentials of the user whom the outlook connector is connected to (more in pre-requisites guide).

In order to set up a notification, select the email-like button next to a contract item in the hierarchy:

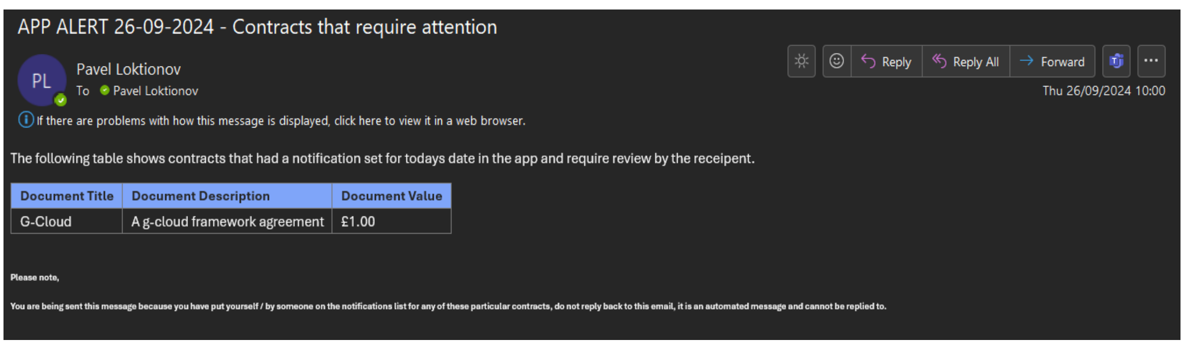


Once selected, a popup requesting the admin user to enter valid details will appear:

- A valid date to notify the user on
- Whether to repeat this notification in a specified amount of time
- The email addresses to send emails to



Once satisfied with the details provided, select save to save the notification, the system will now wait until the specified date to send an email notification that will look similar to the following:

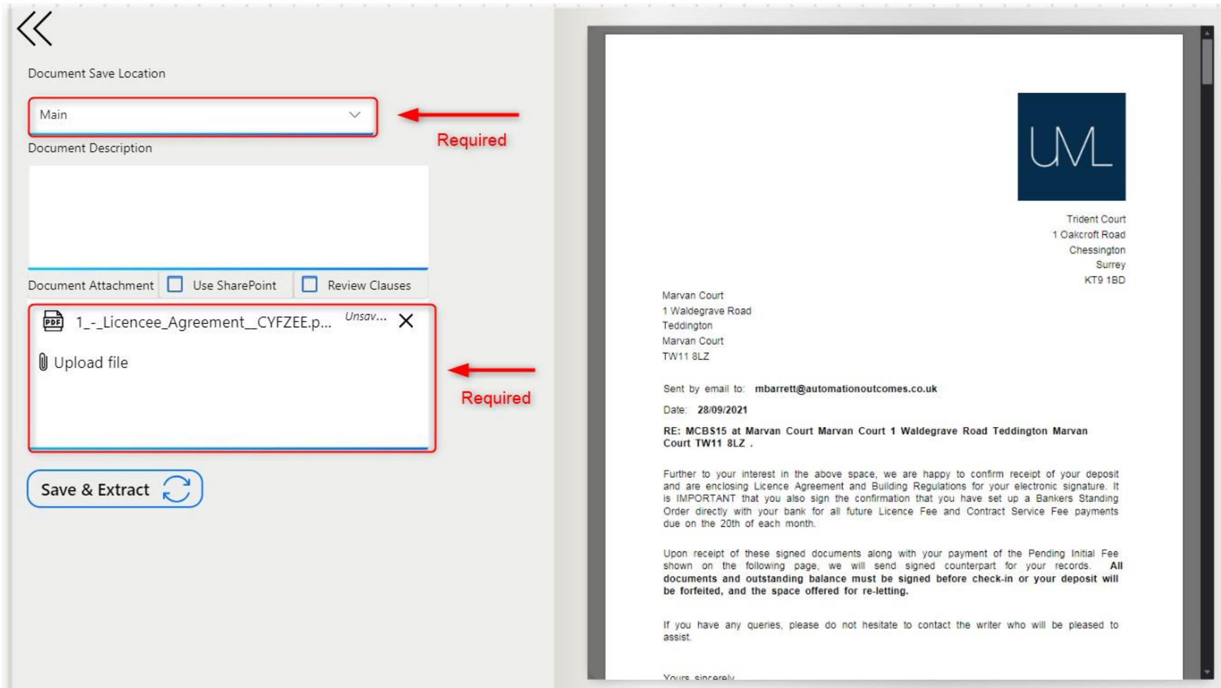


The invoice notification works in an identical way.

How to begin processing a new file (Admin only)

To begin the process of extracting data out of a file, begin by first selecting the plus icon in the top right-hand corner of the middle section on the screen.

Once selected the user will be navigated to the analysis screen, here, enter a location to save the file into, a description, and attach file(s) from the currently being used machine or SharePoint, please note that a location and at least one file are required to start the process.



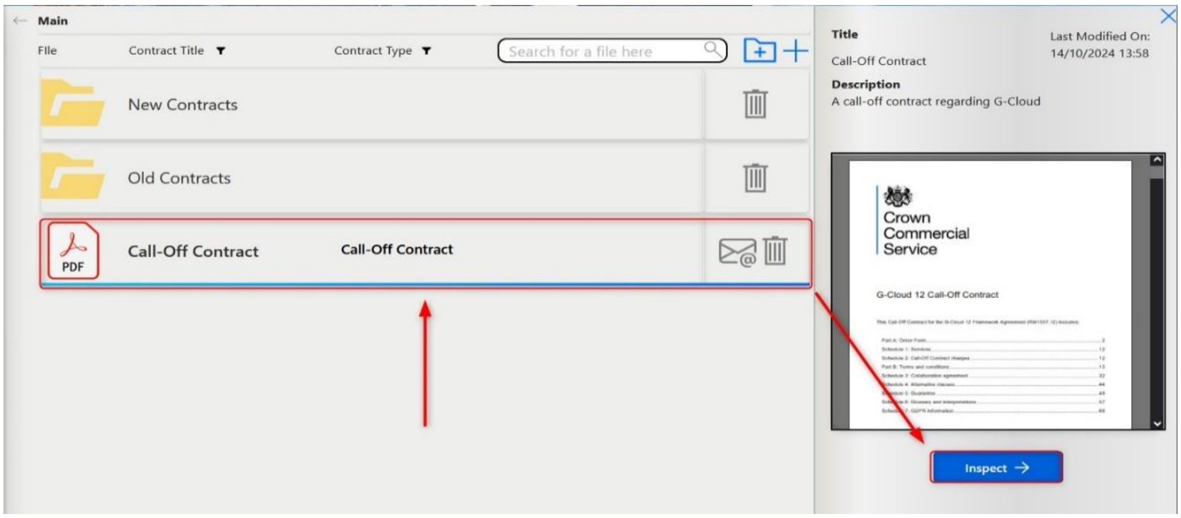
Once filled in, select the "Save & Extract" button, it will begin the extraction process via a flow. The flow can take approximately 10 seconds to complete depending on the file provided, please note a 10mb file limit is put in and only 100 files are permitted at a time otherwise the process will fail if exceeded. The process will automatically navigate the user back to the main screen and notify via the run-queue screen when it is done.

The clause review process can also be started from this screen.

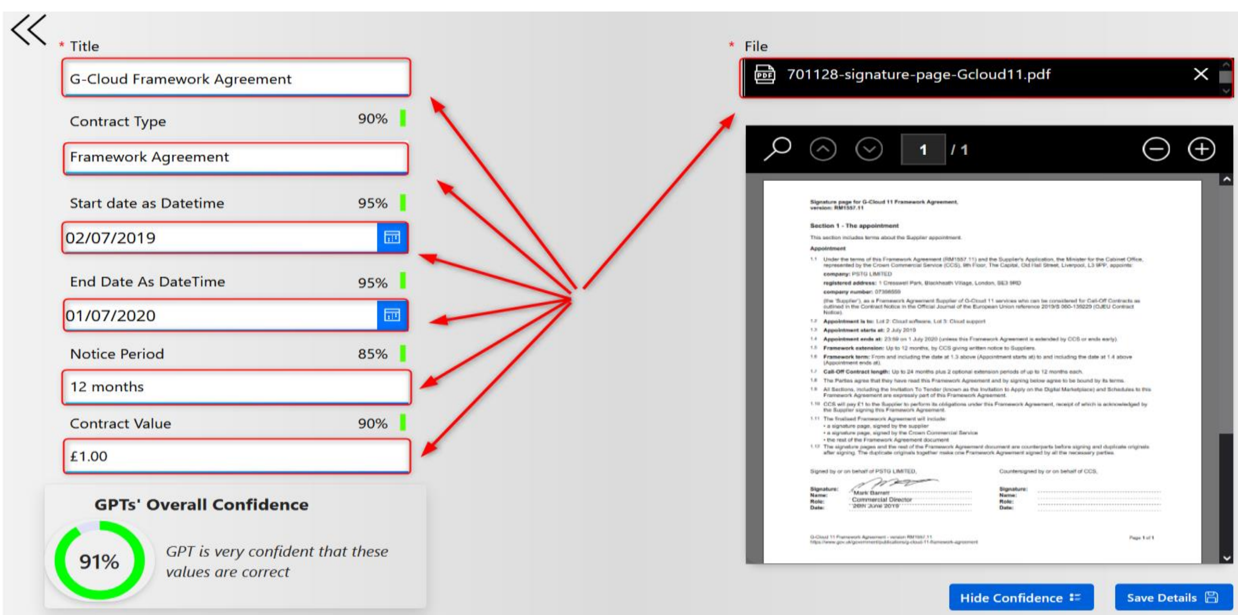
One last thing to note is that if too many files are uploaded or a file takes too long to process, the process will time out and throw an error, however the file might still be uploaded after a bit of time, take note of this if an issue occurs and check the flow run logs on Power Automate when encountered to know what is happening.

How to inspect a contract or invoice item

Once a file has been uploaded it is possible to inspect its details. To inspect any contract or invoice item, select their row, a new pop-up window will appear from the right, confirming what file the user has selected and wants to inspect. Select the inspect button to proceed onto the inspection screen.

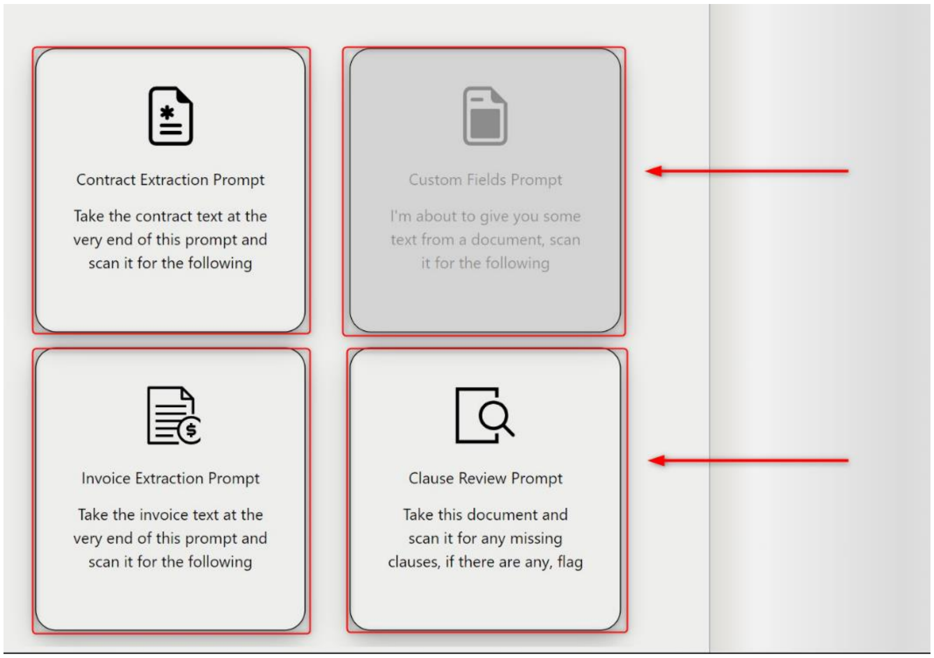


From here it is possible (if you are an admin) to change and save any field as required. When selecting a field, the app will try to force the pdf search function to find the text that the AI has extracted, check the information thoroughly when inspecting and reviewing a newly processed item as there are no guarantees on its accuracy as with all AI tools.

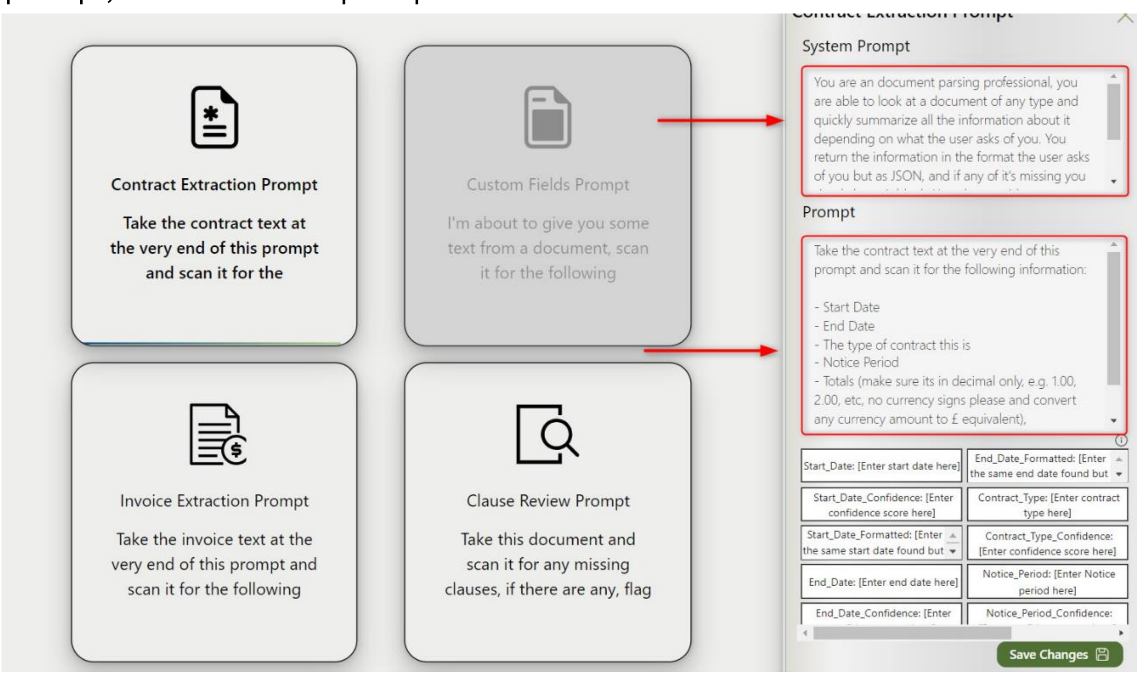


How to change the extraction prompts (Admin only)

To change the prompt of the model being used to extract information, select one of either prompt items in the AI Gallery.



Once selected, a popup will appear on the right-hand-side that contains both, the system prompt, which is responsible for telling the AI what it is and its purpose and the extraction prompt, that is the main prompt the AI will use to understand what the user wants it to do.



Once the user is satisfied with the prompt, they can save their progress via the save changes button. Please note that under most circumstances the JSON structure part of the prompt should not be edited as otherwise the flow responsible for using it is going to fail.

If you have changed the prompt and it has failed but you do not have a backup, here is the original text to reset to defaults:

Contracts:

System Prompt:

You are a document parsing professional, you are able to look at a document of any type and quickly summarize all the information about it depending on what the user asks of you. You return the information in the format the user asks of you but as JSON, and if any of its missing you simply leave it blank. You also provide your own confidence score in float format for each value for how confident you are that the information is what the user has asked for.

Prompt:

Take the contract text at the very end of this prompt and scan it for the following information:

- Start Date
- End Date
- The type of contract this is
- Notice Period
- Totals (make sure it's in decimal only, e.g. 1.00, 2.00, etc, no currency signs please and convert any currency amount to £ equivalent),

Here's the format:

Invoices

System Prompt:

You are an invoice parsing professional, you are able to look at an invoice of any type and quickly summarize all the information about it depending on what the user asks of you. You return the information in the format the user asks of you but as JSON, and if any of its missing you simply leave it blank. You also provide your own confidence score in float format for each value for how confident you are that the information is what the user has asked for.

Prompt:

Take the invoice text at the very end of this prompt and scan it for the following information:

- Who this invoice is from, ignore Automation Outcomes that is the receiver,
- VAT Number of who the invoice is from
- Subtotal
- Date Received
- Purchased Items with their names.

Here's the format:

Custom Fields

System Prompt:

You are a document parsing professional, you are able to look at a document of any type and quickly summarize all the information about it depending on what the user asks of you. You always return it in the following format [Name of information: Value found for information] for each value the user asks you to find. You also always separate each final answer with a comma and if you find any information being asked for is missing after the colon, you simply leave it blank

Prompt:

I'm about to give you some text from a document, scan it for the following information -

Clause Review Prompt

System prompt:

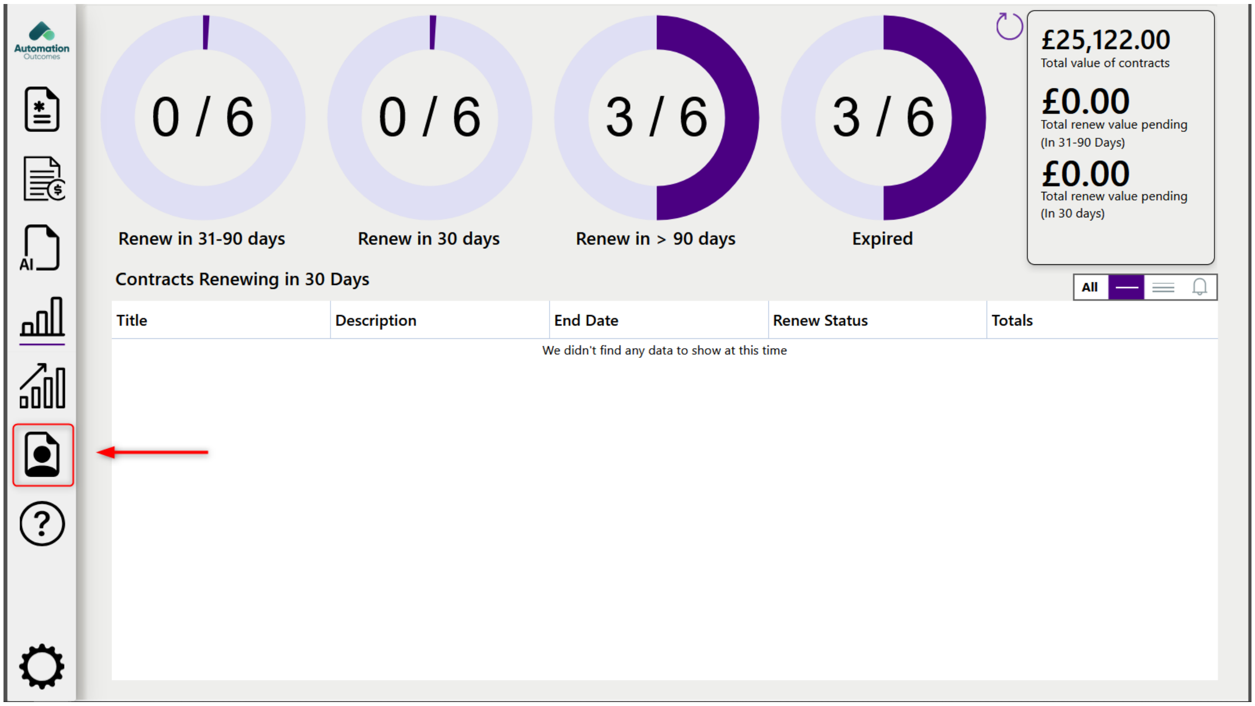
You are an document parsing professional, you are able to look at a document of any type and quickly summarize all the information about it depending on what the user asks of you. You return the information in the format the user asks of you but as JSON, and if any of it's missing you simply leave it blank.

Prompt:

Take this document and scan it for any missing clauses, if there are any, flag it as true otherwise false, when you've done this, reply to me in the following format:

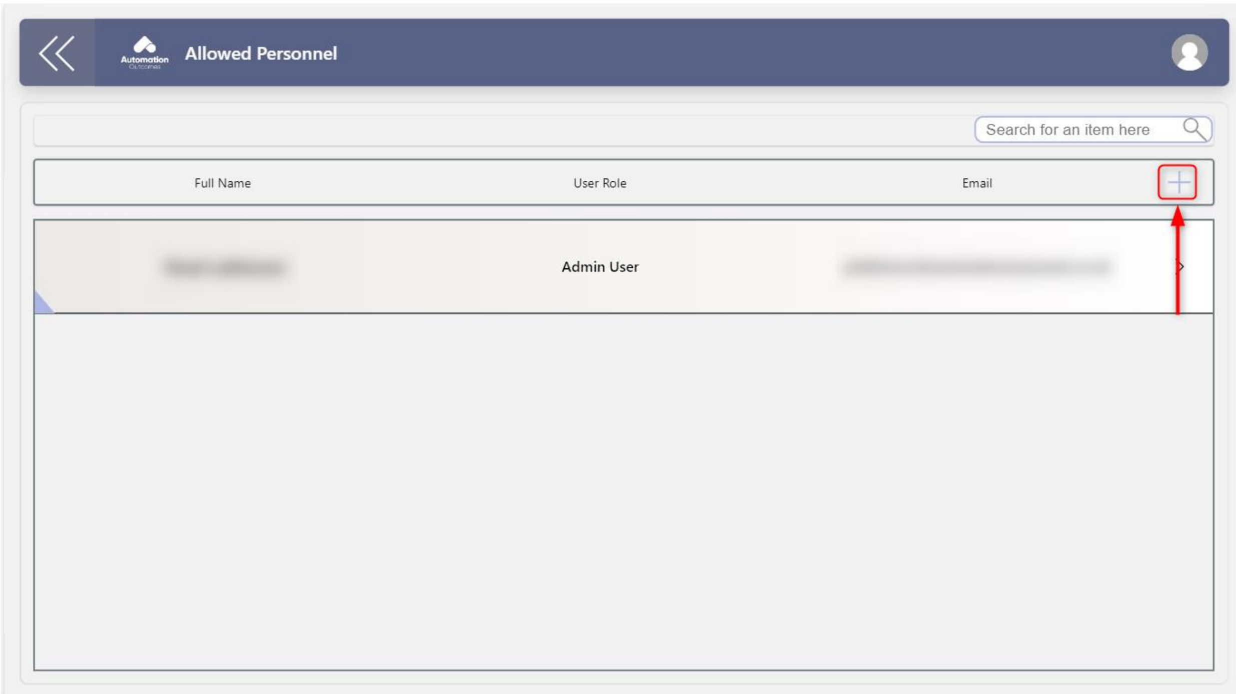
How to assign roles to personnel (Admin only)

An admin can add other admins into the app, as well as have access to editing features, able to delete, edit and extract information. To set a new admin, select the personnel screen by selecting the personnel icon as seen below:

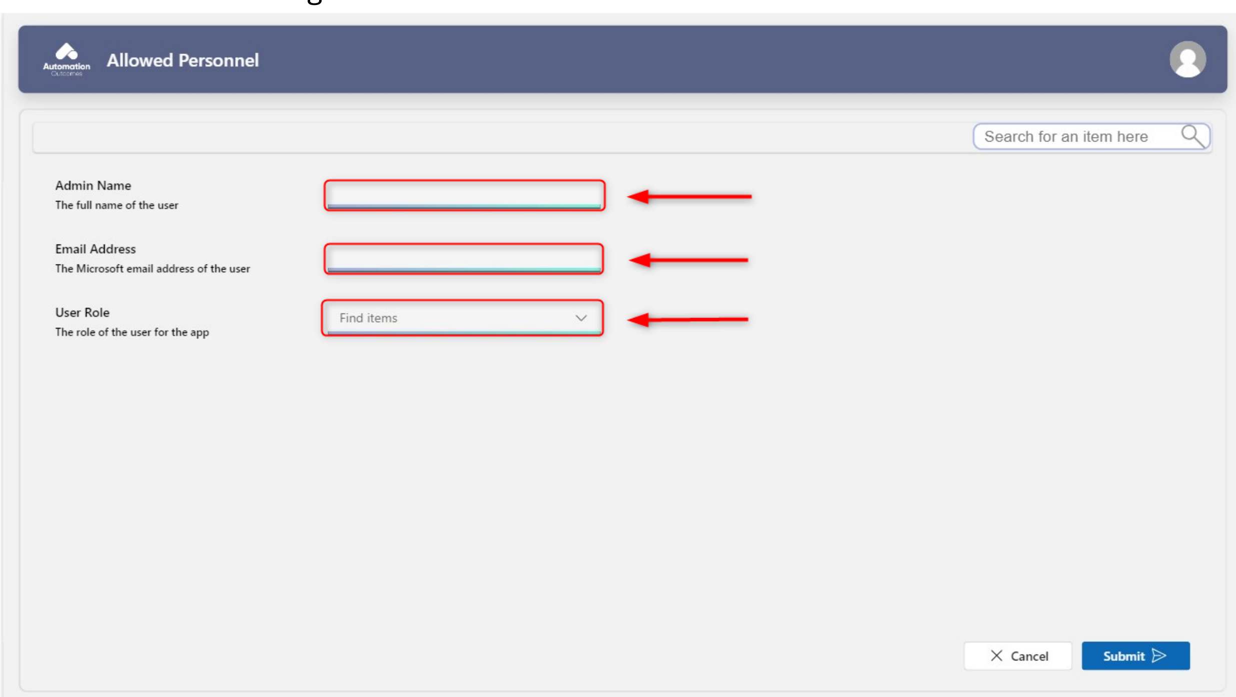


To assign the first admin, a user must be added into the “**Admin Security**” Dataverse table that comes with the app and has the “User Role” column set to “Admin User.” Note that only users with a specific security role inside the power platform environment can access this table, this role is “Admin Personnel” and comes with the app pre-packaged, a system admin or an environment maker can then set this for themselves or other users.

The admin can give admin roles to other users, to create and set roles for a new user, select the "+" icon on the top right.



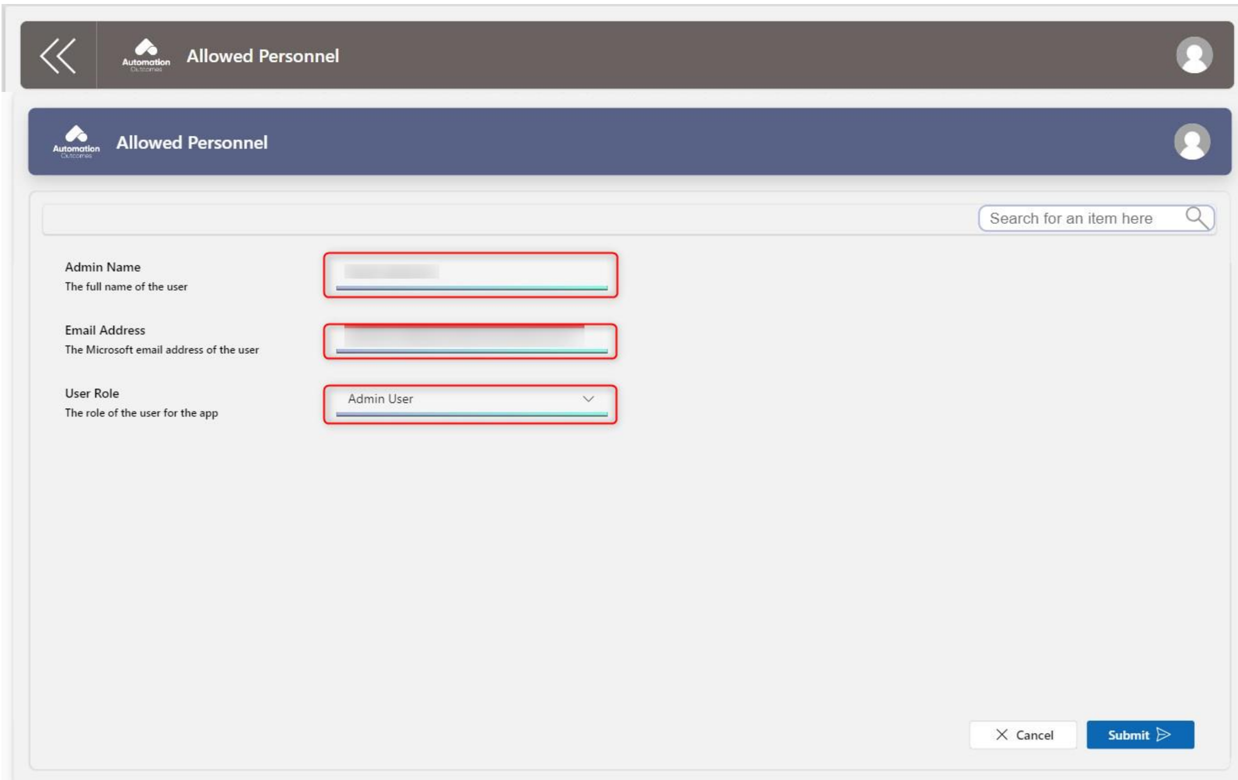
Then fill in the following fields:



Each user must have:

- A username.
- An Email that is used by the user to sign into the power platform.
- A user role set.

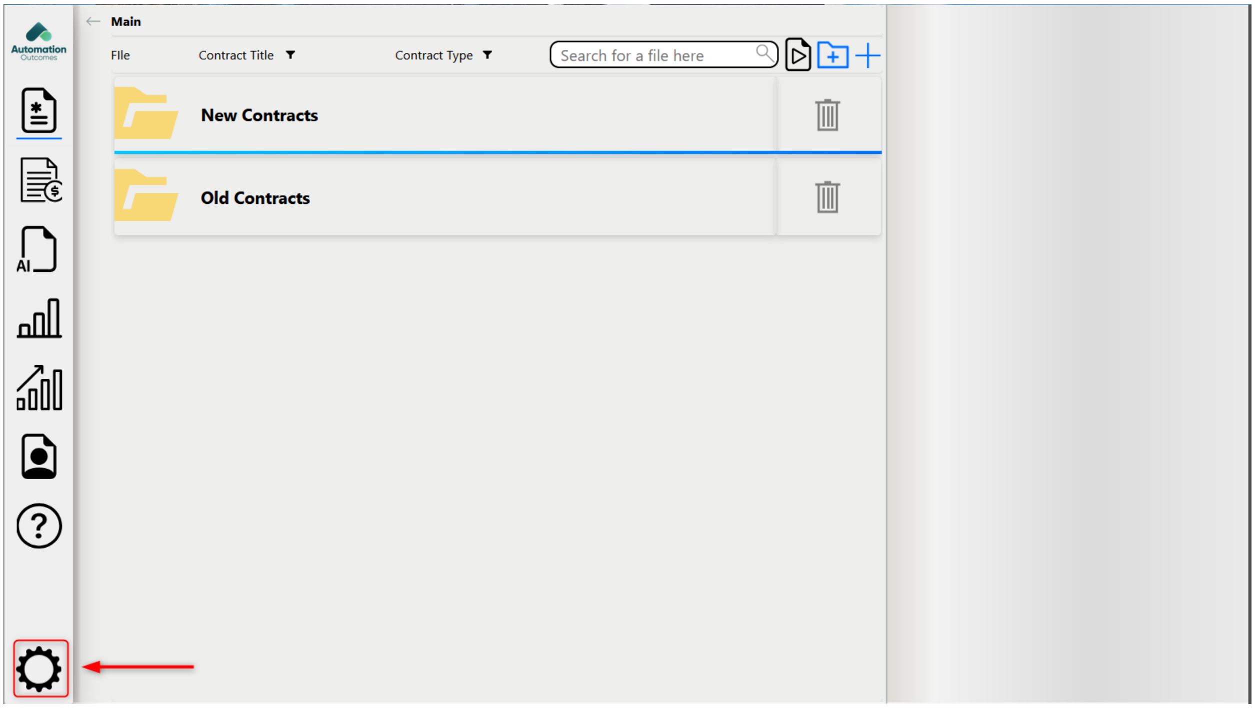
Once filled in, select submit to save the new user or cancel to stop creating a new user. To edit a users' details, select the user from the list.



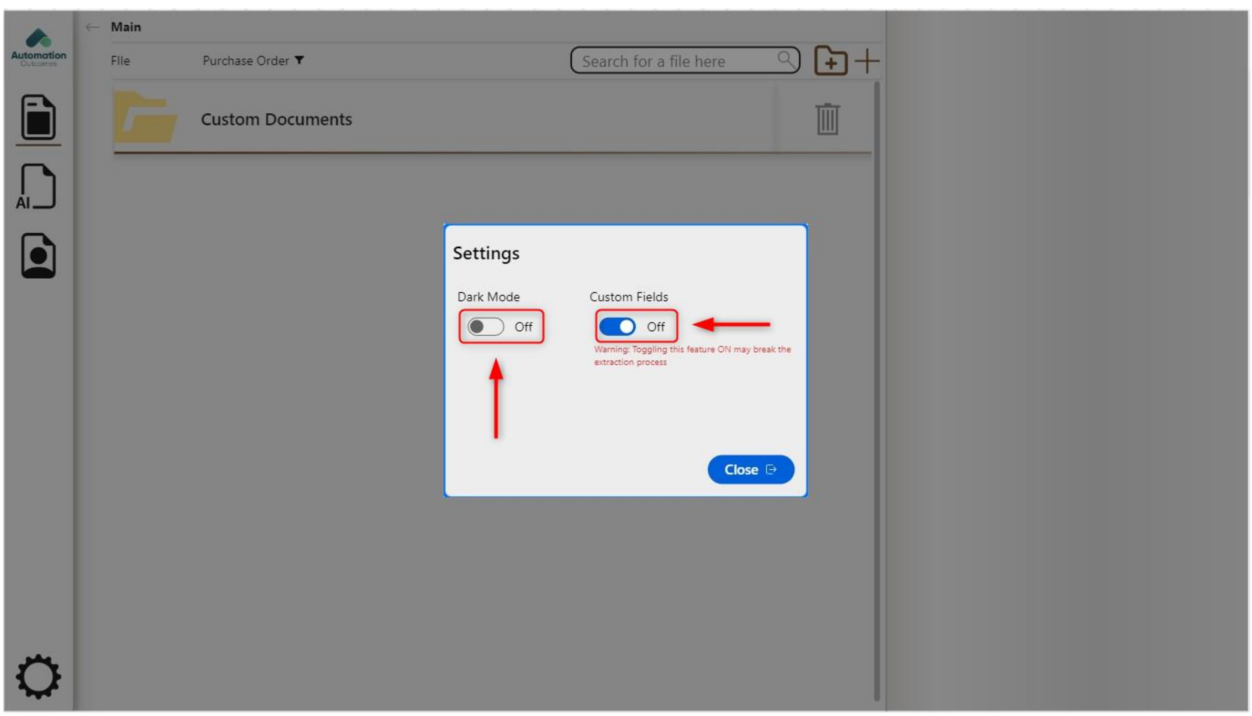
And edit the users' details, as necessary. Once done, select the submit button save any changes made, or cancel to cancel them.

How to enable Dark Mode and Custom Fields Mode

To enable either the prototype custom fields mode or dark mode for the app, select the settings cog in the bottom left-hand corner of the app.

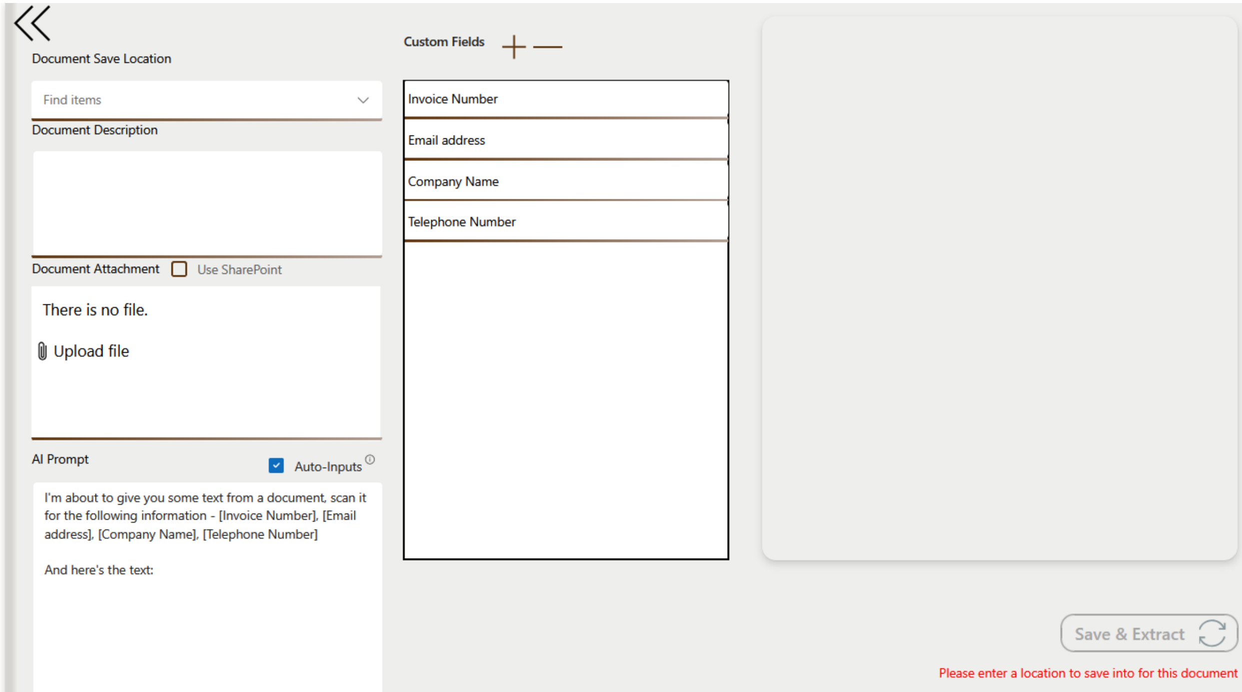


Once selected, a pop-up will appear. Inside this pop-up, are two toggles with their respective modes, select them and the app will automatically update.



How to start a new custom field analysis process

When the custom fields setting is enabled, a user can start the custom field extracting process by selecting the plus icon just as usual. Once selected, the user will be taken to a familiar yet different processing screen.



On this screen there are two very noteworthy additions, the AI Prompts field, and the Custom Fields gallery.

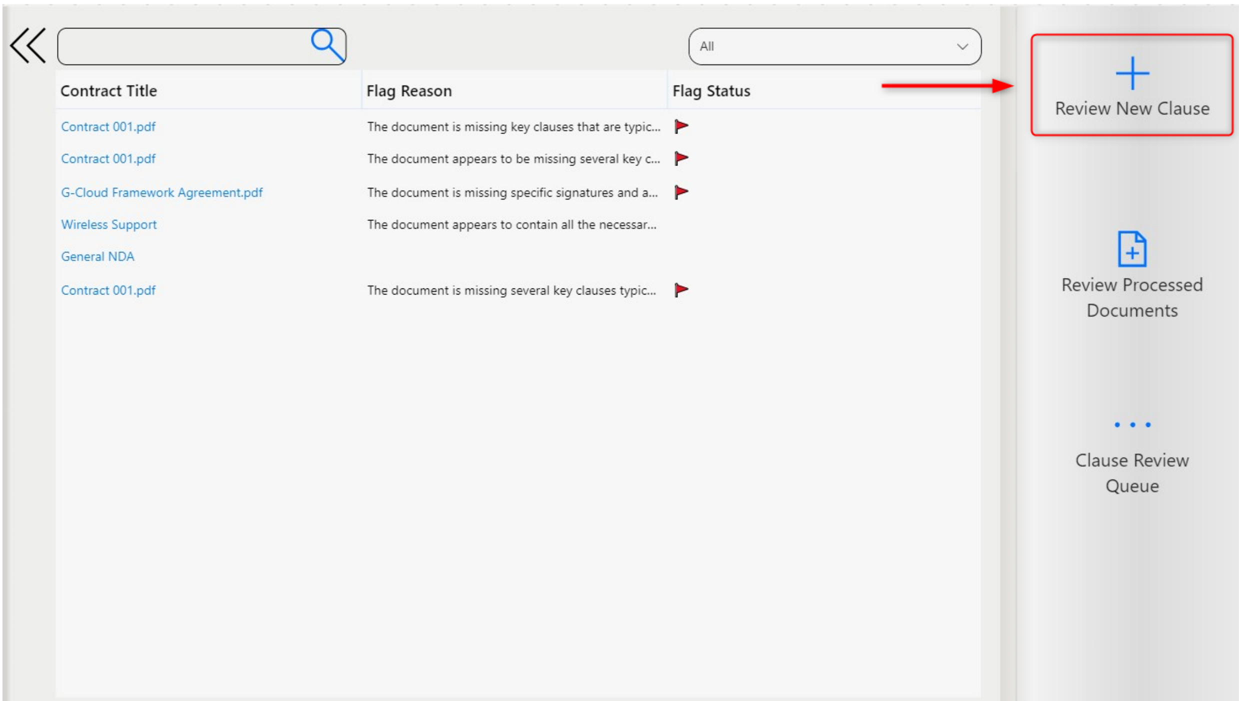
For these two fields the user can enter their own custom information, the custom field gallery is a Dataverse separate instance that will hold any new custom fields put into it in memory, a user can add a new field by selecting the plus icon or remove it from memory with the minus icon on-top of the gallery.

The AI Prompts field holds the default value of the main extraction prompt which can be changed in the **AI Prompts** screen as usual, however here it can be separately changed and edited but will not be saved once processing has been completed. This field also comes with an Auto-Inputs option, a very handy tool that will automatically take any items from the custom fields gallery and put them into a structured input format at the end of the prompt, we recommend using this option instead of creating your own input format, as while any format is compatible, the final text might not be formatted correctly and look off.

One final aspect regarding custom fields is that we **DO NOT RECOMMEND** you change its **system prompt**, as this can break the established Power Automate Flow, unless you know exactly what you are doing, leave this part alone.

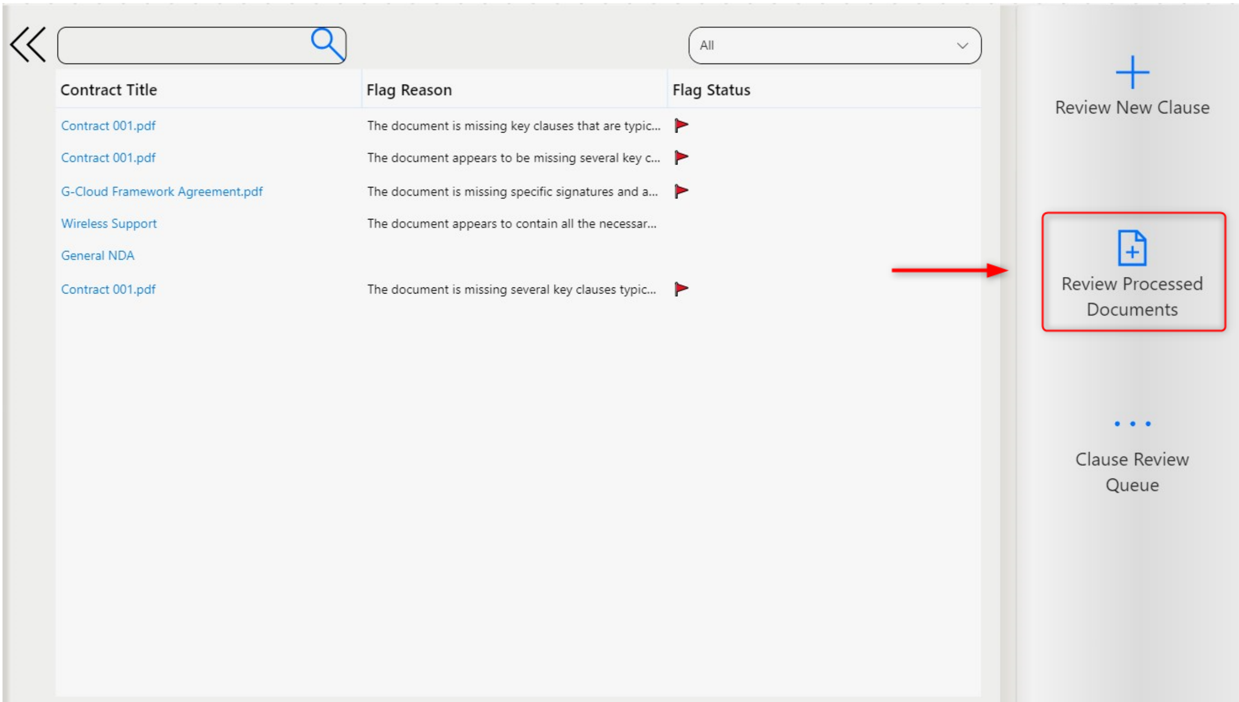
How to start the review of old or new clauses process

When trying to review clauses the user has 3 different options for starting the process, one of them is to tick the "Review Clauses" checkbox when inserting a new file for extraction and the file will automatically be reviewed for clauses. Another option is to select "Review New Clause" button from the Clause Review screen

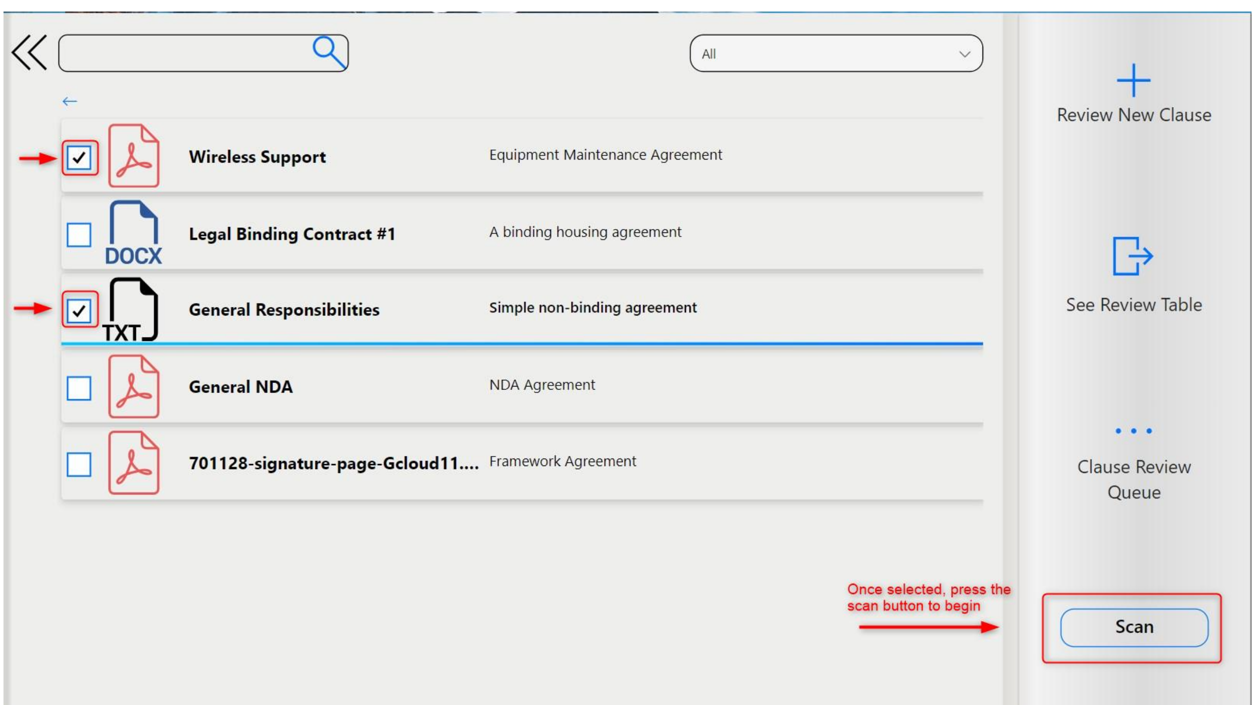


Once selected the user will be presented with a very familiar interface that functions exactly like when processing a document as normal, this however will only review a document for a clause, no further data extraction is made, and no file is saved.

Last but not least, if the file required for review is already in the system, the user can select "Review Processed Documents" button.



This will switch the user into a gallery configuration where the files required for review can be selected via a checkbox, once done, the user can select "Scan", and the files will be scanned for clauses and put into the system.



Power Automate Flow – Document Text Extractor

The following flow is responsible for saving responses from OpenAI in the inspect screen:
AIEX - POWER APPS - Document Text Extractor

The inside of the flow is especially important as it is responsible for extracting the data from documents.

If there is any trouble with this flow or the reader wants to change its code in any-way, contact us on support@automationoutcomes.co.uk and we'll get back to you to set up a discussion for changes as soon as possible

Power Automate Flow – Clause Reviewer

Clauser reviewer is the flow that runs whenever the user uses the clause extraction function of the app, its primary function is to review clauses and send back the info the app.

It is also very similar to the flow mentioned above.

Thus, once again, If there is any trouble with this flow or the reader wants to change its code in any-way, contact us on support@automationoutcomes.co.uk and we'll get back to you to set up a discussion for changes as soon as possible

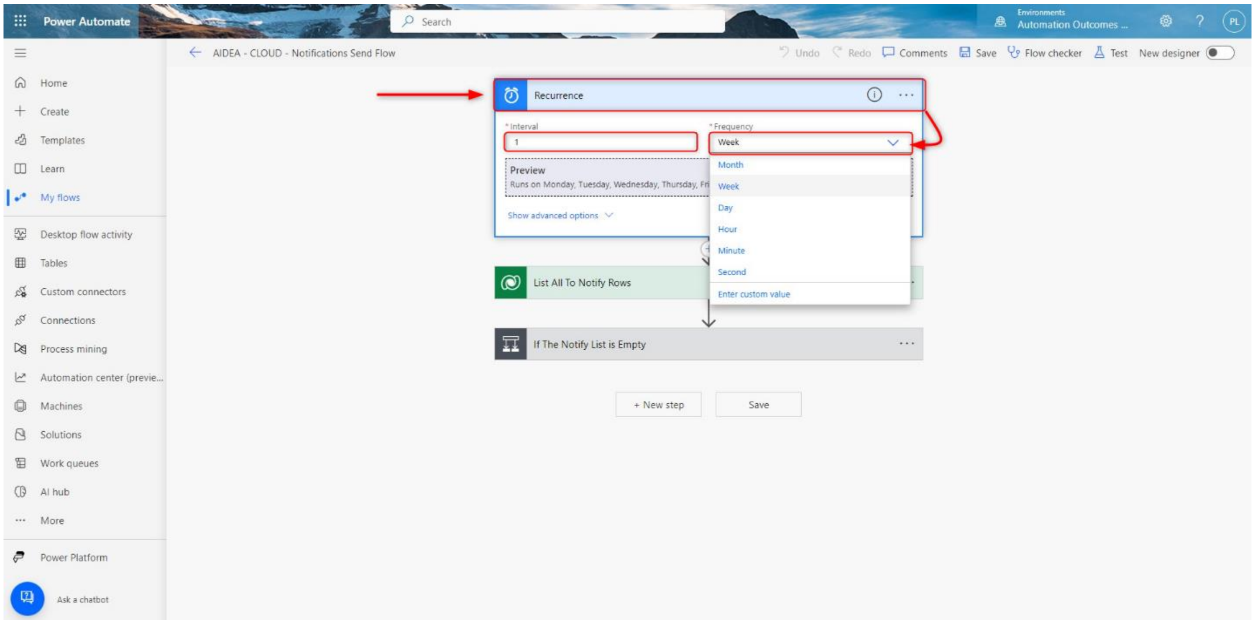
Power Automate Flow – Dashboard Calculator

This flow can be safely left alone as its sole purpose is to calculate the total values in the Dataverse data table for the dashboard screen of the app.

Power Automate Flow – Notifications Send Flow

This flow is responsible for sending out notifications for files that have been set for, if the scheduled time at which the flow should run needs to be changed from every day in the morning, then, to do so, do the following:

- Go into the default solution in the solutions tab
- Find the "AIEX – CLOUD – Notifications Send Flow" flow and select it
- Go into edit mode for this flow
- Select the "Recurrence" trigger at the very top of the flow
- Select Edit
- Change as required, the trigger is quite intuitive to work with.



Make sure to save / publish once finished editing the trigger.

Power Automate Flow – Set OpenAI API Key

This flow is responsible for setting the OpenAI API Key environmental variable, running it is the quickest way to change the environmental variable provided with the solution, please use it if a new API key is required.

Power Automate Flow – Get SharePoint Folders

As the name suggests, this flow gets the folders from SharePoint that was connected with the app. The flow can be safely ignored by the user, it simply gets the folders from the connector, this is done so that a user can select files to analyse from SharePoint.

Power Automate Flow – Get SharePoint Files

And finally, the final flow is a co-contributor to the flow above, it gets the files from the folder the user selects and gives them back to the app, this flow can be ignored, as it does not need user input.