

# Dynamica AI Document Processing

User Guide

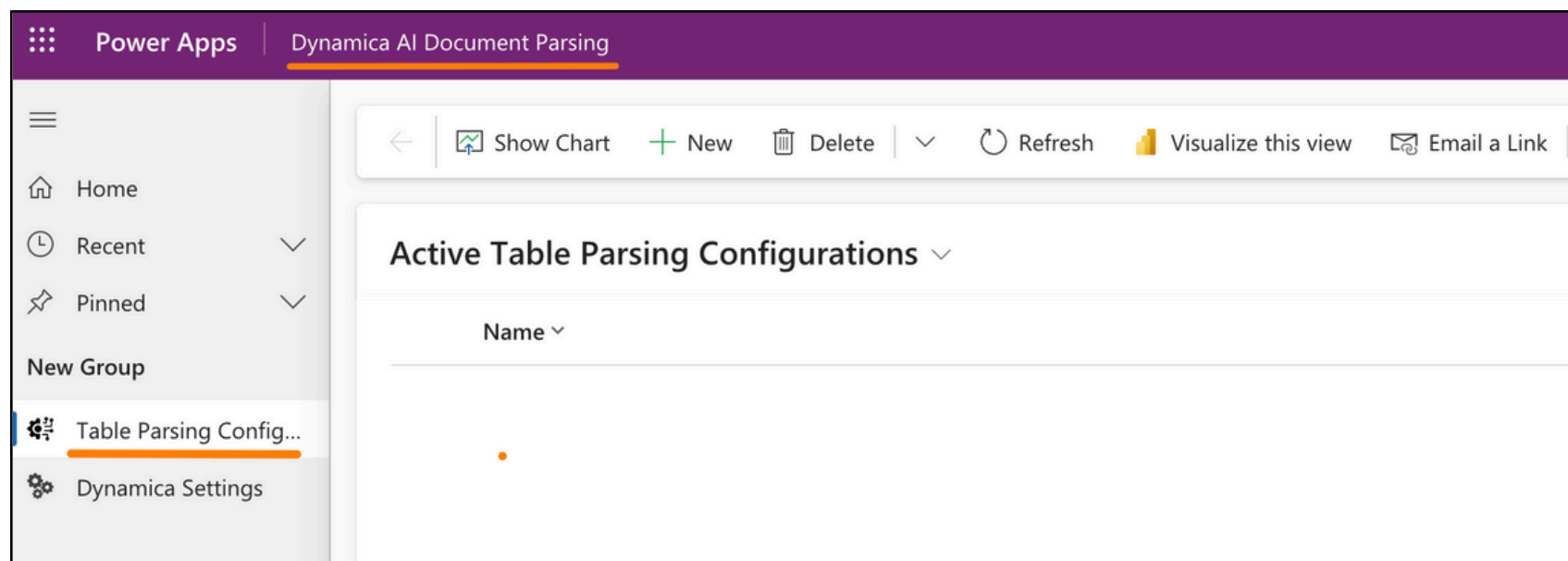
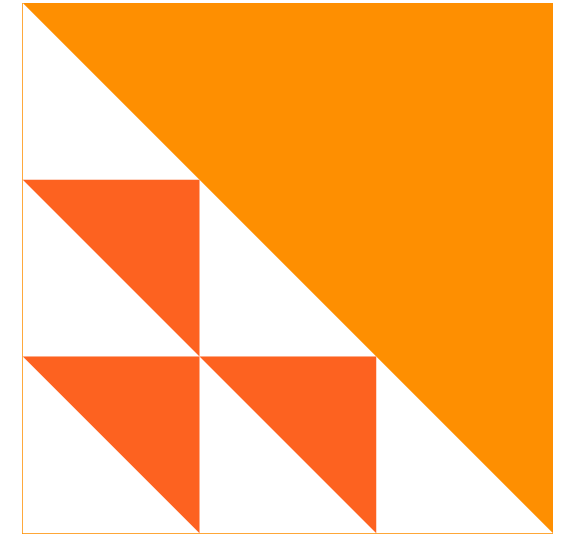
# Installation Steps

## Prerequisites

- Ensure you have a valid Dynamics 365 environment.
- Azure OpenAI service access is required.

## User Configuration: Add Security Roles

1. Assign for each user has a security role :
  - [Dynamica Document Parse With AI Security Role](#)
2. Ensure the [Dynamica AI Document Parsing](#) application and [Table Parsing Configuration](#) are available



# Installation Steps

## Set Up Azure OpenAI Keys

- Navigate to the Table Parsing Configuration table.
- Click New to create a configuration record.
- Create new Azure Open AI service if you don't have one.
- Open the Azure OpenAI service and copy [Endpoint](#) and [Key1](#).



Home > Azure AI services

### Azure AI services | Azure OpenAI

Azure AI services

Search

+ Create Manage deleted resources Manage view Refresh Export to CSV Open query Assign tags Delete

Filter for any field... Subscription equals Pay-As-You-Go Type equals all Resource group equals all Location equals all Add filter

Showing 1 to 1 of 1 records. No grouping List view

| Name        | Kind   | Location | Custom Domain Na... | Pricing tier | Status    | Created date         |
|-------------|--------|----------|---------------------|--------------|-----------|----------------------|
| DNL-ChatGPT | OpenAI | East US  | dnl-chatgpt         | S0           | Succeeded | 2023-08-21T12:54:12. |

Overview

All Azure AI services

Azure AI services

Azure AI services

**Azure OpenAI**

AI Search

Computer vision

Face API

Custom vision

Speech service

Language service

Translator

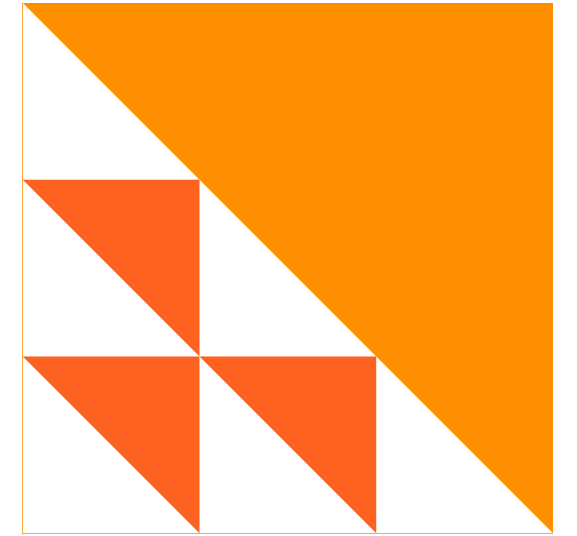
Document intelligence

# Installation Steps

## Configure the Dynamica Settings Table on the Dynamica AI Document Parsing MDA

In Dynamics 365, create two records in the Dynamica Settings table:

- Name – [OpenAIEndpoint](#), Encrypt – [Yes](#), Value – [Endpoint](#) from the Azure Open AI service
- Name – [OpenAPIKey](#), Encrypt – [Yes](#), Value – [Key1](#) from the Azure Open AI service



**OpenAIEndpoint** - Saved  
Dynamica Settings

General Related ▾

Name \* OpenAIEndpoint

Value \* [Redacted]

Description ---

**OpenAPIKey** - Saved  
Dynamica Settings

General Related ▾

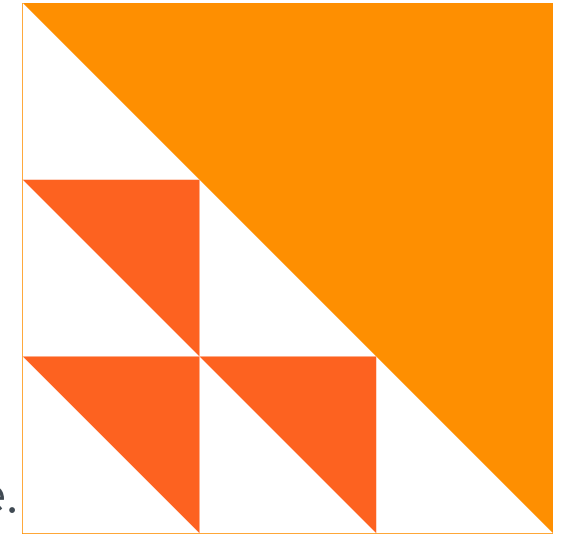
Name \* OpenAPIKey

Value \* [Redacted]

Description ---

## Set Up Table Parsing Configuration

- Navigate to the Table Parsing Configuration table.
- Click New to create a configuration record.
- Define the following fields:
  - Entity: The table where parsed data will be stored.
  - Columns: The attributes to extract from PDF documents.
  - Field Descriptions (Prompts): Write short descriptions to help Azure OpenAI understand each attribute.
  - Use the Generate Prompts feature to automatically create field descriptions using Azure OpenAI.
  - Review and edit generated prompts as needed.
  - Save your configuration



← Save Save & Close + New Quick Parse With AI Deactivate Delete Refresh Check Access Assign Flow Word Templates Run Report Share

**Contact** - Saved  
Table Parsing Configuration

General Related

Name \* Contact Table contact

Owner \* Include Explanations No

Configuration

Entity  
Contact

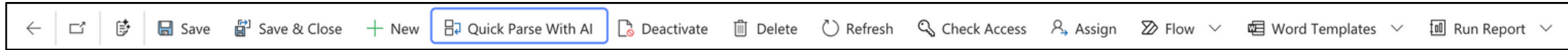
| Column            | Prompt   |
|-------------------|--|
| First Name        | Refers to the given name of an individual in a contact record. This is typically the name that a person is commonly known by and is used to address them in a personal or informal setting.                          |
| Email             | Refers to the 'Email' attribute in a contact record, which is the email address associated with a specific person or organization. This attribute is used to send and receive electronic messages, allowing for cor  |
| Mobile Phone      | Refers to the mobile phone number associated with a contact. This is the number you would use to call or send a text message to the person directly on their mobile device.  |
| Last Name         | Refers to the family name or surname of a person listed in the contact record. This attribute is used to identify and organize individuals by their last name, which is typically shared with other family membe     |
| Address 1: City   | Refers to the 'Address 1: City' attribute, which indicates the name of the city where the contact's primary address is located. This information helps identify the specific city within the contact's address, prov |
| Address 1: County | Refers to the 'Address 1: County' attribute, which indicates the specific county where a contact's primary address is located. A county is a geographical region within a state or country, often used for admin     |
| Birthday          | Refers to the 'Birthday' attribute in a contact record, which indicates the date and time when a person was born. This information is stored in a format that includes both the date and the time, but it can als    |
| Job Title         | Refers to the specific position or role that a person holds within a company or organization. This attribute provides information about the individual's professional responsibilities and level of authority, help  |

+ Add Setting

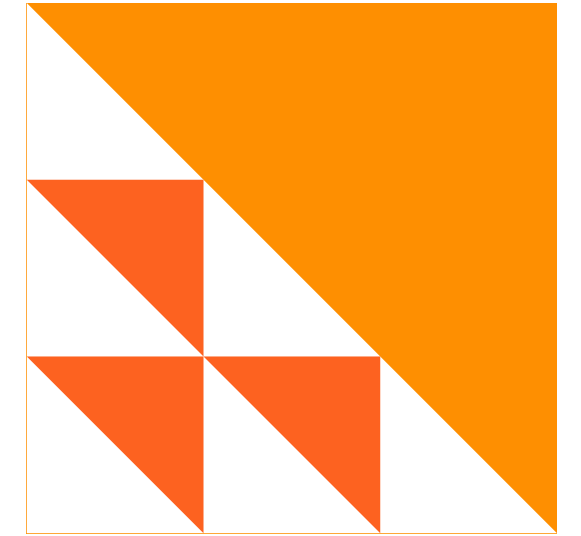
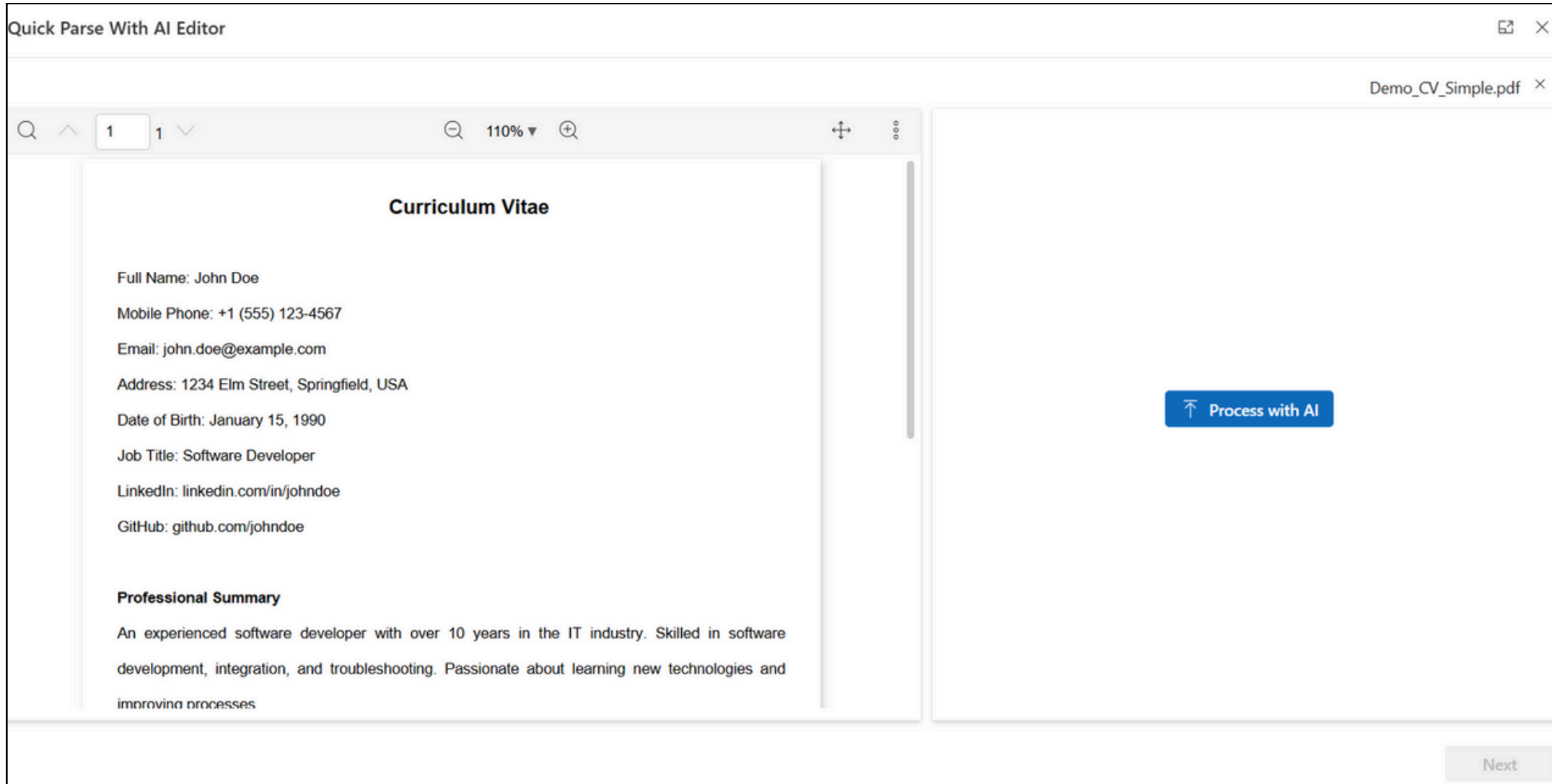
Save

## Start Parsing documents

- Click [Quick Parse with AI](#) on the ribbon

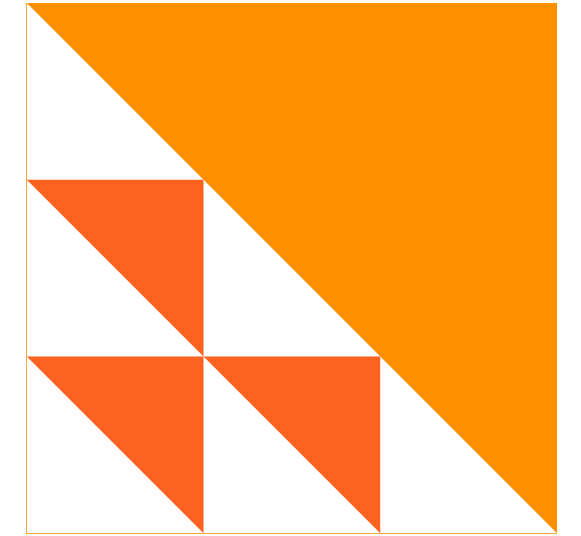


- Select the file for processing
- Click [Process with AI](#)



## Validate Parsed Results

- Click “Next” to validate results
- Use the Designer View to manually edit field values.
- Click Create to save the record
- Go to the target table configured in [Table Parsing Configuration](#)
- Verify the record created for the uploaded PDF



Quick Parse With AI Editor



Demo\_CV\_Simple.pdf

1 1 110%

### Curriculum Vitae

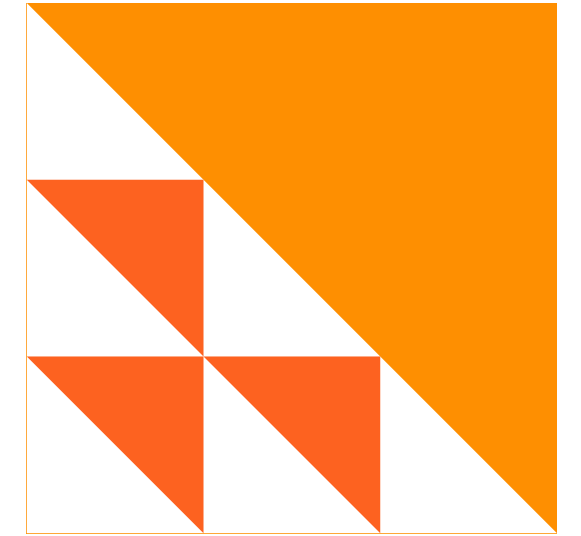
Full Name: John Doe  
Mobile Phone: +1 (555) 123-4567  
Email: john.doe@example.com  
Address: 1234 Elm Street, Springfield, USA  
Date of Birth: January 15, 1990  
Job Title: Software Developer  
LinkedIn: linkedin.com/in/johndoe  
GitHub: github.com/johndoe

**Professional Summary**  
An experienced software developer with over 10 years in the IT industry. Skilled in software development, integration, and troubleshooting. Passionate about learning new technologies and solving complex problems.

|                   |                      |                      |
|-------------------|----------------------|----------------------|
| First Name        | John                 | John                 |
| Email             | john.doe@example.com | john.doe@example.com |
| Mobile Phone      | +1 (555) 123-4567    | +1 (555) 123-4567    |
| Last Name         | Doe                  | Doe                  |
| Address 1: City   | Springfield          | Springfield          |
| Address 1: County |                      | ---                  |
| Birthday          | 1/15/1990            | 1/15/1990            |
| Job Title         | Software Developer   | Software Developer   |

Create

# Tips and Best Practices



## Best practises

- [Refine Prompts](#): Provide clear and concise descriptions for each field to improve AI accuracy.
- [Validate Results](#): Always review parsed data to ensure correctness.
- [Leverage AI Features](#): Use automatic prompt generation to save time and enhance efficiency..
- [Collaborate](#): Share configuration settings with your team to maintain consistency across documents.