

CoPilot ERP Studio: Transforming Business Module Management with AI

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This function provides comprehensive support for creating, customizing, and managing the business modules in the ERP system. Using AI-driven tools, the CoPilot ERP Studio aids builders and stakeholders in developing blueprints, processes, and workflows tailored to the organization's needs.

The CoPilot ERP integrates with the Digital Brain and Knowledgebase to provide best practices, recommendations, and automated interactions. Virtual employees also play a role, guiding users and offering insights. Below is a detailed breakdown of the key features within this function.

The **Business Module Management** function leverages AI-driven tools through the CoPilot ERP and ERP Studio, facilitating a seamless integration with builders, stakeholders, end-users, and virtual employees to build and refine business processes efficiently.

The features are designed to support the creation, customization, and management of business modules while enhancing the ERP system's capabilities through intelligent communication, feedback collection, and workflow automation.

Main Features of Business Module Management:

Note: we do include all possible functions

1. Vertical Business Module Panels Management

- **Builder Functions:**

Module Creation: Allow builders to create and manage vertical panels for each business module, such as finance, HR, supply chain, etc.

- **Stakeholder Engagement:**

Enable the addition of stakeholders (e.g., ERP consultants, department heads) to each panel for collaborative input.

- **Role of CoPilot:**

Prompt Engineering: Guides stakeholders through the process of providing input and feedback using interactive prompts.

Real-Time Collaboration: Facilitates real-time sessions where stakeholders discuss and refine processes and workflows.

- Example:

Prompt: 'Please describe the current process for monthly financial reporting. What are the key steps and any specific compliance requirements?

Engagement: CoPilot interacts with stakeholders to document and refine the process.

2. AI-Driven Blueprint Creation

- Builder Functions:

Standard Process Setup: Provides pre-built standard processes and workflows for each business module based on the target country, customer segment, and industry best practices.

Custom Blueprint Creation: Enables builders to create custom blueprints using AI-driven suggestions and to modify them as per the organization's unique needs.

- Role of CoPilot:

Automated Workflow Building: Uses the CoPilot ERP to automatically generate standard processes and workflows, engaging builders in intelligent discussions to refine these blueprints.

Knowledgebase Integration: Communicates with the ERP Digital Brain and Knowledgebase to pull in relevant best practices and workflows for each business module.

Virtual Employee Assistance: Engages virtual employees to assist builders by suggesting modifications based on their profile and organizational needs.

- Example:

Prompt: 'The organization has a decentralized sales process. Would you like to use a custom workflow that aligns with this structure?

Engagement: CoPilot refines the blueprint based on builder feedback and integrates suggestions into the ERP Knowledgebase.

3. Intelligent Communication with Stakeholders

- Stakeholder Functions:

Feedback Gathering: Initiate direct communication with stakeholders to gather feedback, approvals, and sign-offs for customized business module processes and workflows.

Auto-Approval Prompts: Automatically prompt stakeholders with specific questions for sign-offs and requirements.

- Role of CoPilot:

Automated Interaction: Utilizes CoPilot ERP to automatically initiate chats with stakeholders and end-users, collecting feedback and feeding it into the ERP Knowledgebase and Digital Brain.

Virtual Employee Involvement: Virtual employees provide insights, guidance, and clarification to stakeholders during this communication.

- **Example:**

Prompt: 'Please review the new procurement workflow for your department. Does it meet your operational requirements?

Engagement: Stakeholders provide input, which CoPilot processes to refine workflows.

4. Organizational Profile Integration

- **Builder Functions:**

Profile Entry: Allows builders to input the organization's profile into the ERP system, specifying business module requirements.

Module-Specific Customization: Each builder targets their respective modules, enabling the CoPilot ERP to align the system to the company's unique processes.

- **Role of CoPilot:**

Automatic Profile Creation: Builds an intelligent profile for the organization and each builder as they engage with the system.

Custom Interaction: CoPilot ERP interacts with builders to suggest module-specific processes, guiding the customization using virtual employees for insights.

- **Example:**

Prompt: 'The company profile indicates a need for multi-currency financial transactions. Would you like to incorporate this into the finance module workflows?

Engagement: CoPilot automatically configures the system based on builder responses.

5. Virtual Employee Engagement

- **Builder and Stakeholder Functions:**

Support and Suggestions: Virtual employees provide real-time suggestions, feedback, and guidance based on builder interactions, assisting in workflow creation and modification.

Impact Analysis: Offer insights into how builder input will affect the overall process, recommending alternatives if necessary.

- **Role of CoPilot:**

AI-Driven Assistance: Engages virtual employees through the ERP Studio, facilitating discussions, offering guidance, and monitoring feedback.

Training the Digital Brain: Feeds all input and interactions into the Digital Brain and Knowledgebase for continuous improvement.

- Example:

Prompt: 'Based on your input, the current workflow may conflict with the inventory management process. Would you like to modify it?

Engagement: Virtual employees provide suggestions and help builders adapt workflows..

6. Process Sign-Off and Approval Management

- Builder and Stakeholder Functions:

Approval Workflow: Enables builders to collaborate with stakeholders to finalize and approve workflows for each business module.

Automatic Sign-Off Prompts: The CoPilot ERP automatically initiates approval workflows by engaging stakeholders.

- Role of CoPilot:

Automated Process Sign-Off: Uses AI prompts to guide stakeholders through the sign-off process, ensuring alignment with business needs.

Integration with Digital Brain: Incorporates feedback into the Digital Brain to refine processes and provide tailored recommendations.

- Example:

Prompt: 'The finance module workflow is ready for approval. Would you like to proceed with the sign-off, or do you require further modifications?

Engagement: CoPilot collects feedback, updates the Knowledgebase, and finalizes the workflow.