THE COMPLETED SHEET: TWO TASKS, TWO CHOICES

An example with a fictitious company that has two tasks to automate and runs them through the sheet.

THE TWO TASKS

Task A	Copying a customer’s orders from their portal into the business software every morning. The portal always has the same fields.
Answers, task A	Always the same format; all rules; no text to understand; no outside contact. Choice: RPA, with spot checks.
Task B	Reading quote requests arriving by email, each written in its own way, and preparing the offer.
Answers, task B	Different format every time; the text has to be understood; the reply goes to a customer. Choice: AI agent, with a person approving every offer before it goes out.

Sheet built by Itria. The difference between RPA and an AI agent, explained: itria.io/en/rpa-o-agente-ai

Sheet built by Itria, to use as a first filter: the final choice depends on your systems and your data.

If the tasks to automate involve reading text that changes every time, an AI system can prepare them and leave them for a person to approve. A couple of lines on WhatsApp to +39 350 574 3578 or an email to info@itria.io. How it works: itria.io/en/servizi