



Empowering Teams, Expanding Margins

**A Different Perspective
on AI for Distributors**

-

GOAL

**Experience the impact
GenAI can have on your
everyday work**





Agenda

1. Introductions
2. Composable Architecture
3. Implementing GenAI
4. Operational Efficiency Strategies
5. Use Cases Beyond the LLM)

Section 1 of 5

Introductions



10X Increase
in revenue over 5 years



25X Increase
Visibility & Efficiency



Reduced Recidivism
of drug offenders



Improved Patient Outcomes
and lives and communities



Composable Architecture



ProfitOptics

**Where do the
best ideas come
from?**

Anywhere

Ideas come to life with GenAI

Anyone Can Build Better Work

Every employee will find ways to increase productivity and efficiency when they start using GenAI tools

	Current Practice	Enhance with GenAI
Customer Service	Respond to Questions & Complaints	Begin with an AI Draft
Manage Inventory	Analyze Sales & Trend Data	Generate custom charts & graphs
Sales Support	Prepare for client meetings by manually compiling product & client info	Generate client-specific reports, talking points, & product recommendations
Marketing	Create generalized content	Generate high-volume ultra-specific content
Human Resources	Respond to Employee Questions	Custom GPTs can read company policies & answer questions

ERP Systems & Composable Architecture



ProfitOptics

Monolith vs Composable Architecture

Flexibility

Easily adapt and configure systems to meet changing business needs without full-scale overhauls.

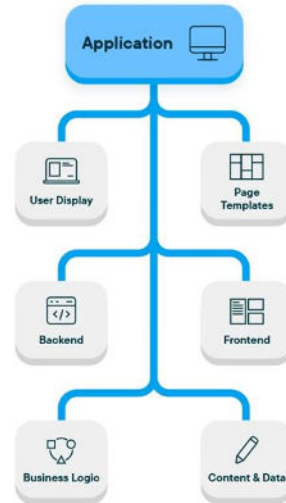
Scalability

Scale parts of the ERP system independently to respond to business growth or new functionalities.

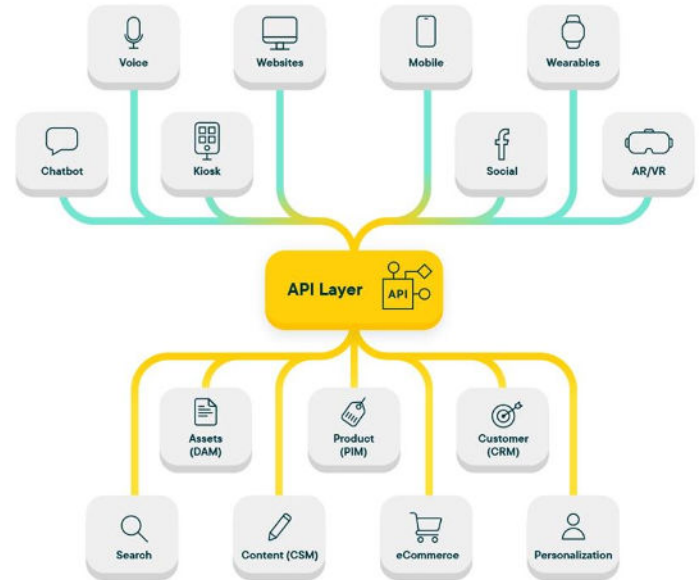
Speed of Innovation

Quickly integrate new technologies or processes, reducing the time to benefit from technological advancements.

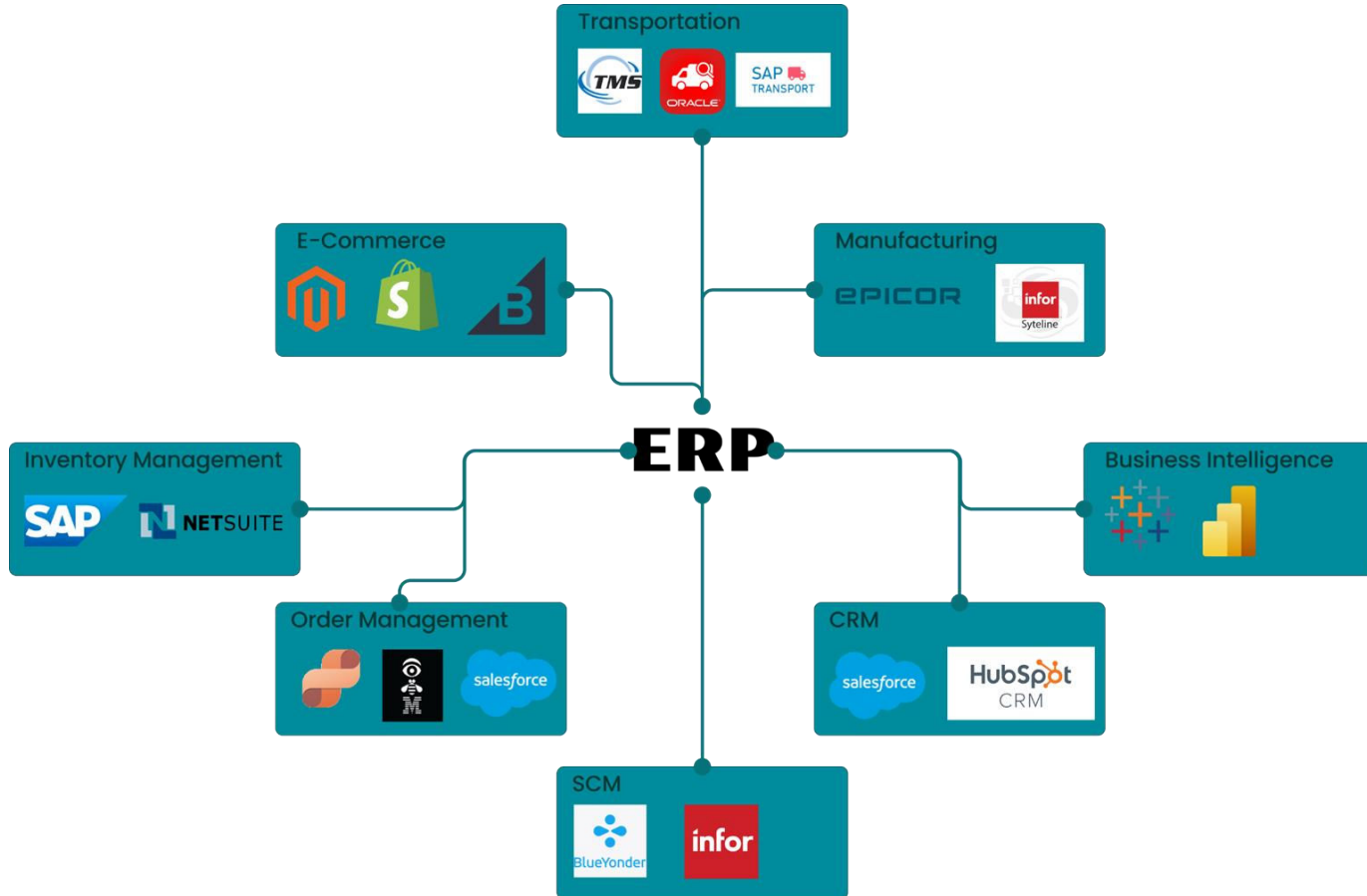
Monolithic approach



Headless approach



Connect, Update, Analyze



If your ERP can't

...look for a SaaS solution

If SaaS can't do it then go custom

Tailoring ERP to Business Needs

Customization

Select and integrate modules based on unique business requirements, allowing for a more tailored ERP solution.

Scalability

Easily add or update modules as your business grows or as needs change, without disrupting existing system functionality.

Cost-Effectiveness

Invest in only the modules you need, reducing unnecessary expenditure on unused features.





AI Fit

ProfitOptics

Consideration: Integration vs. Full Adoption

Integration of AI Features

Many organizations might benefit from integrating specific AI functionalities into their existing systems without committing to a full platform switch. This approach can be cost-effective and less disruptive.

Full Platform Adoption

For some businesses, especially those without legacy systems or those requiring comprehensive digital transformation, adopting a full AI-powered SaaS platform might be more beneficial.

Questions to Consider

1. Do the AI features align with your business needs and strategic goals?
2. What is the cost implication of integrating AI features versus adopting a full platform?
3. How will the integration impact your current workflows and systems? Is there a risk of disruption?
4. What are the long-term benefits and potential scalability offered by adopting the full AI platform?

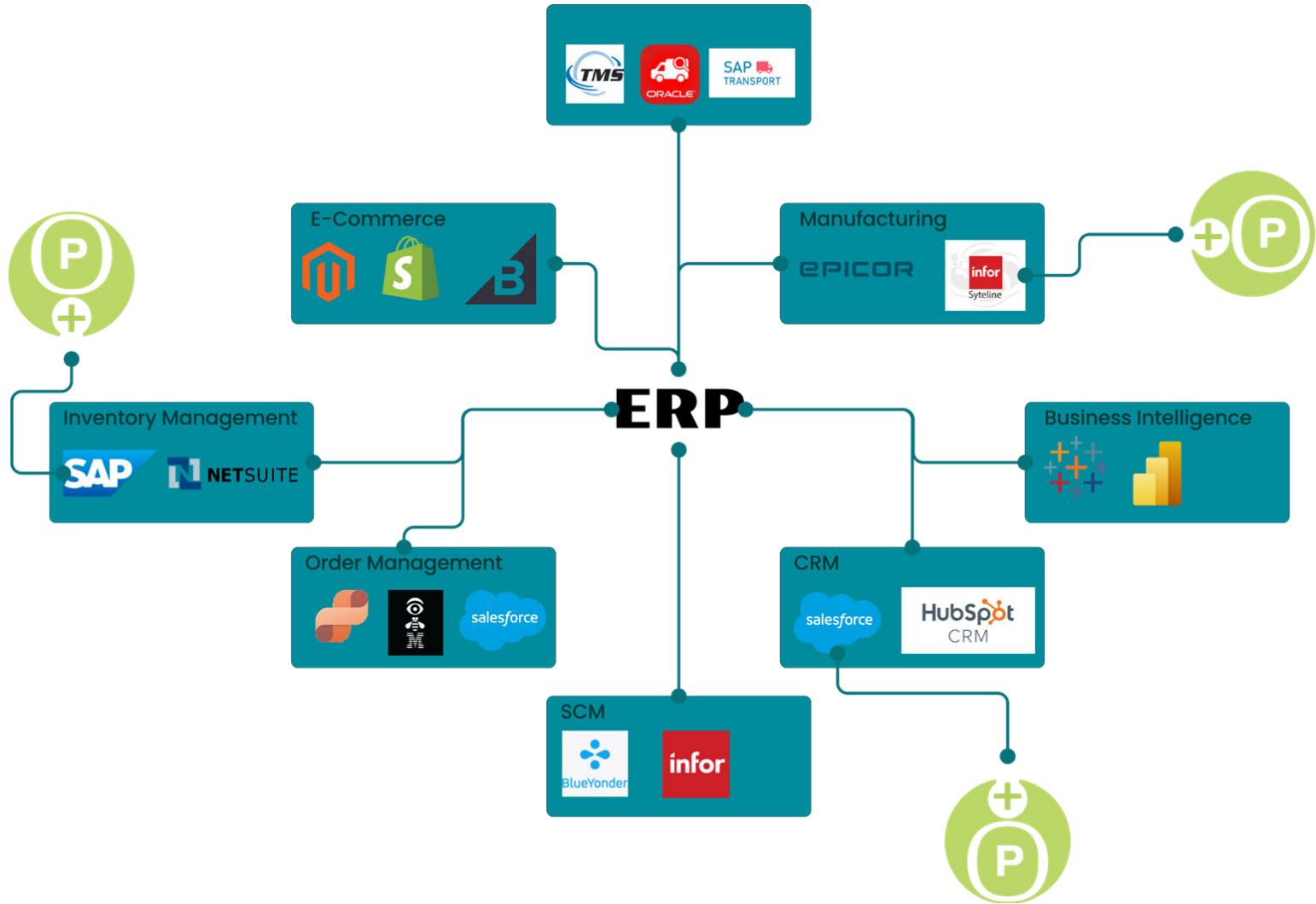
Where to Start



AI workshop

- 2 - 4 hour in-person or virtual
- Participants leave with an understanding of
 - Generative AI fundamentals
 - Prompt Engineering
 - Best Practices
 - Implementation Strategies
 - Custom GPT's
 - How to use ChatGPT in your day-to-day
- Hands-on Workshop
- Do it yourself or hire us!





Widgets that Expand and Expound



APPLICATIONS WE'VE BUILT

- WalletShare
- Alternate Items
- Customer Business Review
- Bidding System
- Order Manager

Universal Margin Analyzer

Integration

Connects to different ERP's in different countries

Analysis

Sifts through millions of records to find margin opportunities based on highly customized parameters

Results

Millions of dollars are produced every quarter

The screenshot displays the ProfitOptics Universal Margin Analyzer interface. At the top, there is a search bar and navigation links for Dashboard, Playbook, Help, and Support. The main section is titled 'Margin Express' and includes a 'Project Settings' button and a 'SAVE PROJECT' button.

Project Name

Universe	Sales	# of Items	Affected Ship To's	Territories	Sales Plans	Total Gross Profit
Starting	\$4,455,339	300,499	567	1,499	3,499	\$455,339
Addressable	\$4,455,339	300,499	567	1,499	3,499	\$455,339

Period: Previous 3 months

Customer Parameters

Division: Include Exclude
 Category: Exclude Include
 Subcategory: Include Exclude
 Entity: Include Exclude
 Vendor: Include Exclude

Item: Include Exclude
 Qty Shipped:
 Market Price Variance: %

Item Parameters

Division: Include Exclude
 Category: Exclude Include
 Subcategory: Include Exclude
 Entity: Include Exclude
 Vendor: Include Exclude

Item: Include Exclude
 Qty Shipped:
 Market Price Variance: %

Optimal Gross Profit Percentile

Floor: %
 Target: %
 Stretch: %

Price Criteria

Gross Profit Floor: %
 Gross Profit Cap: %
 Min Price Increase: %
 Max Price Increase: %
 Min Increase/Market:
 Max Increase/Market:
 Pricing Record Last Impact Date:

Bill Pay

Integration

Accepts data from different customers with different systems using different formats

Processing

Consolidates payments and calculates pay for various markets, employees and contractors

Results

What used to take weeks now takes hours resulting in hundreds of hours in reduced workload for employees

Settlements < WE 06/28/2021 > [Review Errors \(15\)](#)

502 Driver Days Worked **502** Total Stops **\$502.00** Total Gross Pay **\$300,050.12** Total Net Pay

Search:

Name	PROs	Deductions	Gross Pay	Net Pay
Sabot Transportation	12	\$19.00	\$19.00	\$19.00
Sabot Transportation	23	\$19.00	\$19.00	\$19.00
Sabot Transportation Petrovic	54	\$19.00	\$19.00	\$19.00
BB Contractors	356	\$19.00	\$19.00	\$19.00
Jozef Aimes	356	\$19.00	\$19.00	\$19.00
Frdward Ramirez	356	\$19.00	\$19.00	\$19.00
Mark Kovalski	356	\$19.00	\$19.00	\$19.00
Sabot Transportation	356	\$19.00	\$19.00	\$19.00
Sabot Transportation	356	\$19.00	\$19.00	\$19.00
Sabot Transportation	356	\$19.00	\$19.00	\$19.00
Doleworth LLC	232	\$19.00	\$19.00	\$19.00
Sabot Transportation	2	\$19.00	\$19.00	\$19.00

James Gourney Net Pay: **\$7,757.00**

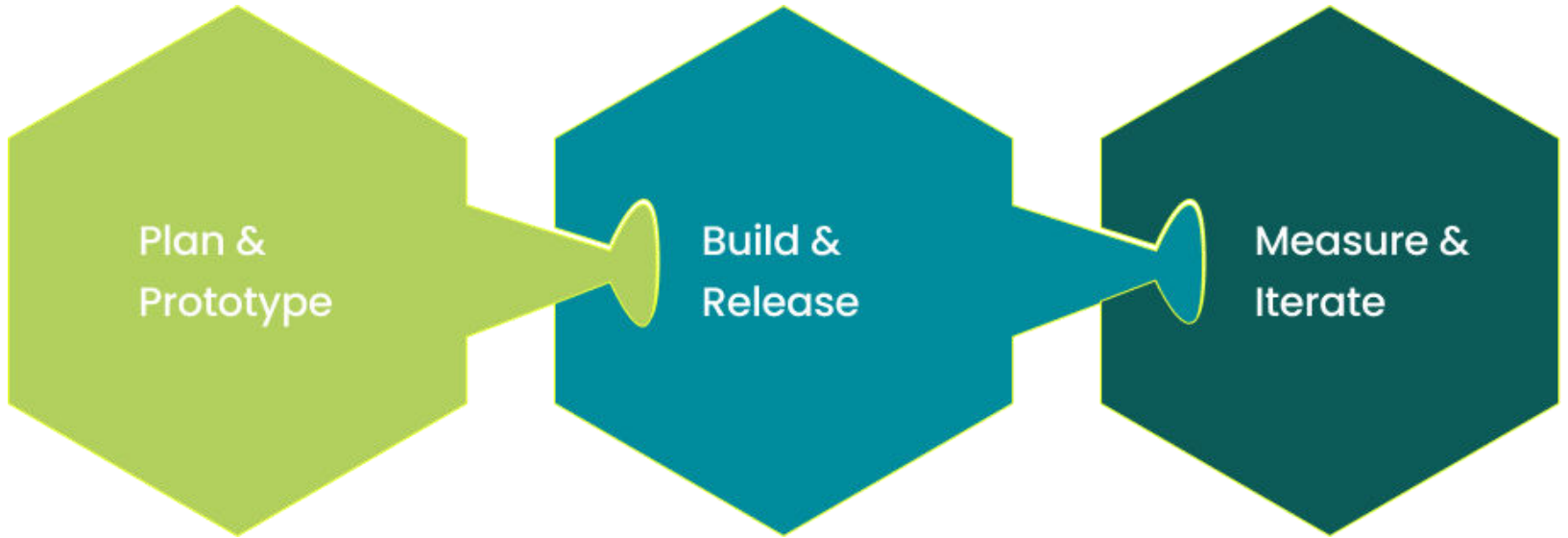
14 Stops **\$1,800** Daily **\$9,890.00** FSC **\$9,800.00** Gross Pay **\$7.57** Deductions **\$7.57** Adjustments

Orders | Deductions | Adjustments | Fuel | Additional Purchases

Search Order Number: [Add new](#)

Shp Date	Fulfillment	Customer	Billable Stop	Total Miles (\$)
5/6/2021	245	234-0012345	200.00	400.00
5/6/2021	245	234-0012345	150.00	200.00
5/6/2021	245	234-0012345	225.00	300.00
5/6/2021	245	234-0012345	225.00	300.00
5/6/2021	245	234-0012345	225.00	300.00
5/6/2021	245	234-0012345	225.00	300.00
5/6/2021	245	234-0012345	225.00	300.00
5/6/2021	245	234-0012345	225.00	300.00
5/6/2021	245	234-0012345	225.00	300.00

PO Process



Transitioning to an AI-First Strategy

AI-first does not simply mean adopting more technology; it means rethinking processes, products, and strategies through the lens of AI capabilities to create competitive advantages.

Assess Current Capabilities

Define AI Vision & Objectives

Develop AI Talent & Culture

Implement with focus on ROI

AI Fit in Your Organization

1. How is your organization currently using AI? Is AI deployed in core operations, customer interactions, or in supporting roles?
2. What percentage of your processes are currently automated or enhanced by AI? This can include everything from data analysis and customer service to inventory management and forecasting.
3. How are AI implementations affecting your business? Are you seeing measurable improvements in efficiency, customer satisfaction, or revenue growth?
4. Is AI part of your daily business operations? If AI isn't woven into the day-to-day activities of your staff, you might not be leveraging it to its full potential.

Where is the greatest value?

Content Generation & Summarization

- Sales & Marketing
- Training
- Documentation
- Communications

Customer Service/Support

- Documentation
- Communications

Inventory Management

- Reporting
- Planning
- Visualization
- Analysis

Logistics

- Route Optimization
- Load planning
- Stock Management

AI Use Cases

CARE & ADAPT



ProfitOptics



CUSTOMER ASSISTED RESPONSE ENGINE

GENERAL SHARED INBOX CUSTOMER SUPPORT

1. Customer

Sends email to the general support inbox



"Where is my order?"



"What are your support hours?"



"Can I still purchase this?"



Spam



"Follow-up on case from last week..."

2. CSR

Assigns email from Support Inbox



Support Inbox

3. CSR

Researches answers to customer request (average 10 minutes)

Composes email response to customer (average 5-10 minutes)

"Your order was shipped..."

"Support hours are..."

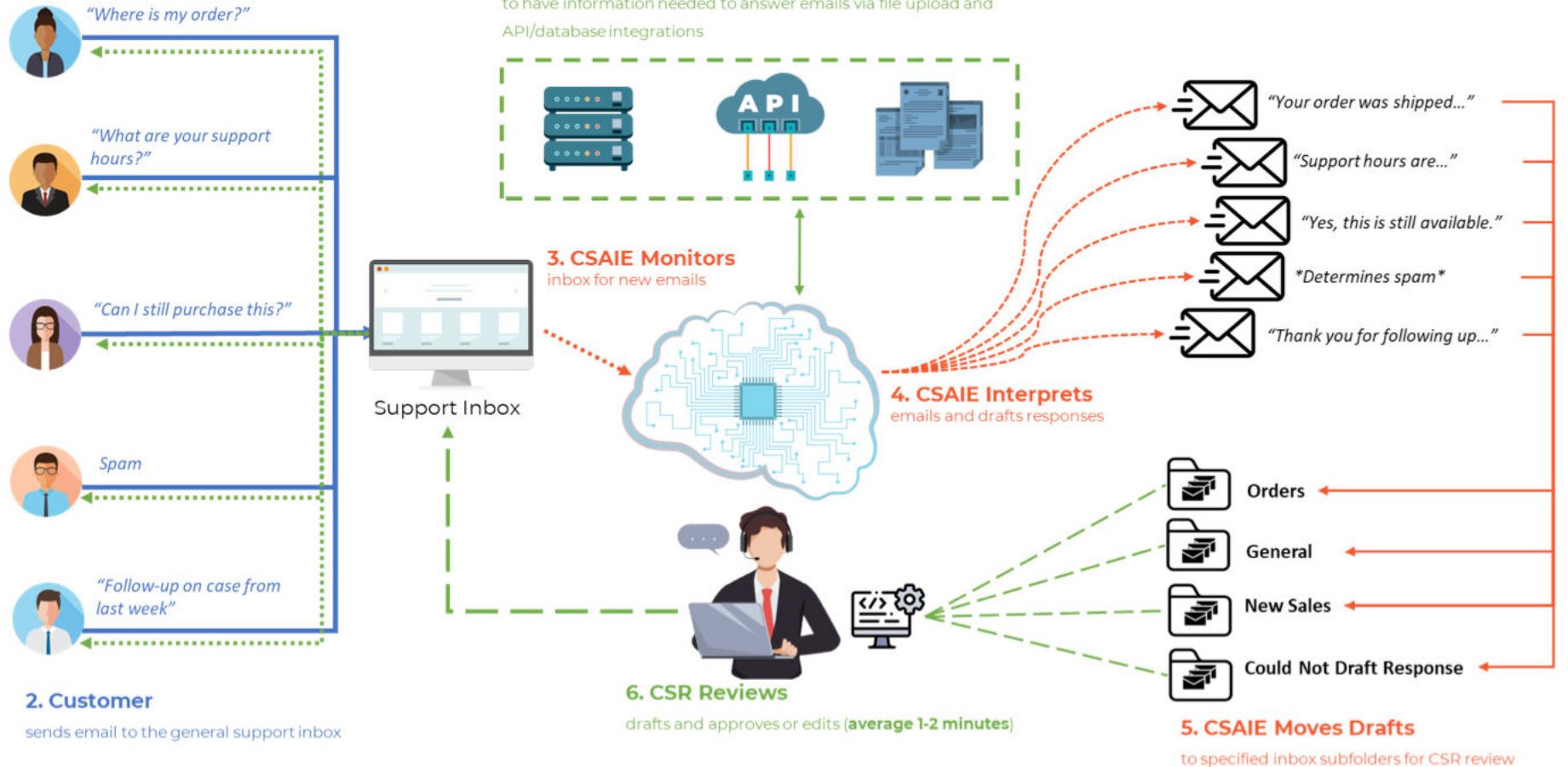
"Yes, this is still available."

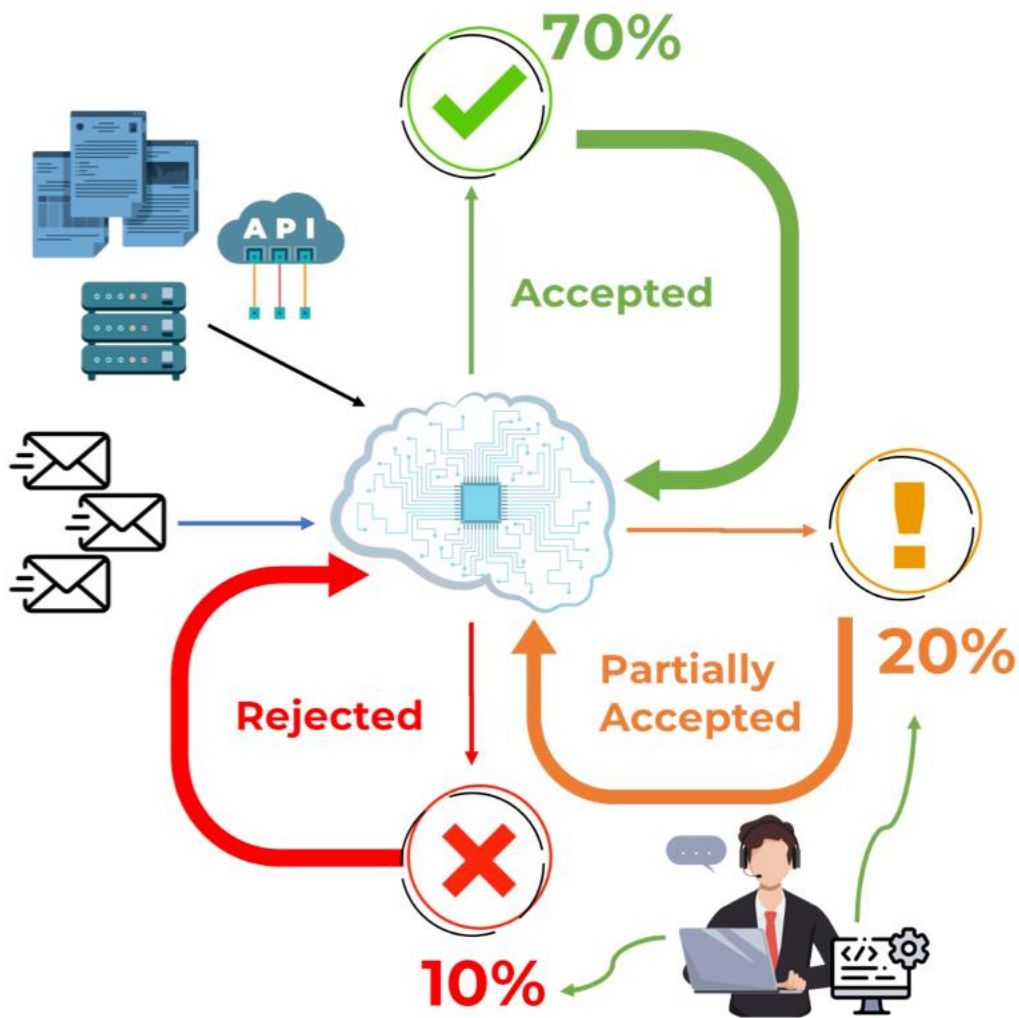
"*Determines spam and deletes*"

"Thank you for following up..."



CUSTOMER SERVICE AI ENGINE SUPPORT





- The **CSAIE** has the ability to learn from its mistakes.

- Answers are marked as **"Accepted"**, **"Partially Accepted"**, or **"Rejected"** based upon the CSR agent's interactions with the draft.

- Drafts sent without edit are marked **Accepted**, **Partially Accepted** drafts are marked as so, and drafts that are completely discarded or significantly rewritten are marked as **rejected**.

- This information is fed back to the platform from itself to learn and improve responses

- CSR** leadership can also review the non-Accepted answers in the **CSAIE** platform to find gaps in training data.

- For example, perhaps we notice questions about a specific department are not up-to-par and determine we forgot to upload that department's information to our assistant's source list.

The screenshot shows a web browser window with the URL `test-chatbot.profitoptics.com/chatgpt/admin/assistant/details?id=9df09a04-6c28-4728-e92f-08dbbb8831e8`. The page title is "Customer Service Assistant". On the left is a sidebar with "Dashboard" and sub-items: "AI Assistants", "Conversation Logs", and "Email Logs". The main content area is divided into "General Settings" and "Email Server Settings".

General Settings

- Name: Active
- API Endpoint:
- Model: Max Tokens:
- Temperature Value:
- Order Information Source: EPICOR PROPHET21 PROFITOPTICS TEST DATA NONE

System Prompt

You are to play the role of a customer support representative for a medical supplies distribution customer.

You will be receiving some prompts that are information that you should use to answer questions for customers, who will also be asking you questions (also via prompts).

Email Server Settings

Email Account:

Draft Mode Use Embeddings

Buttons: RESET, CHAT, SAVE

ProfitOptics

test-chatbot.profitoptics.com/chatgpt/admin/aiassistant

PROFIT OPTICS
















Dashboard

- AI Assistants
- Conversation Logs
- Email Logs

AI Assistants

Add New AI Assistant

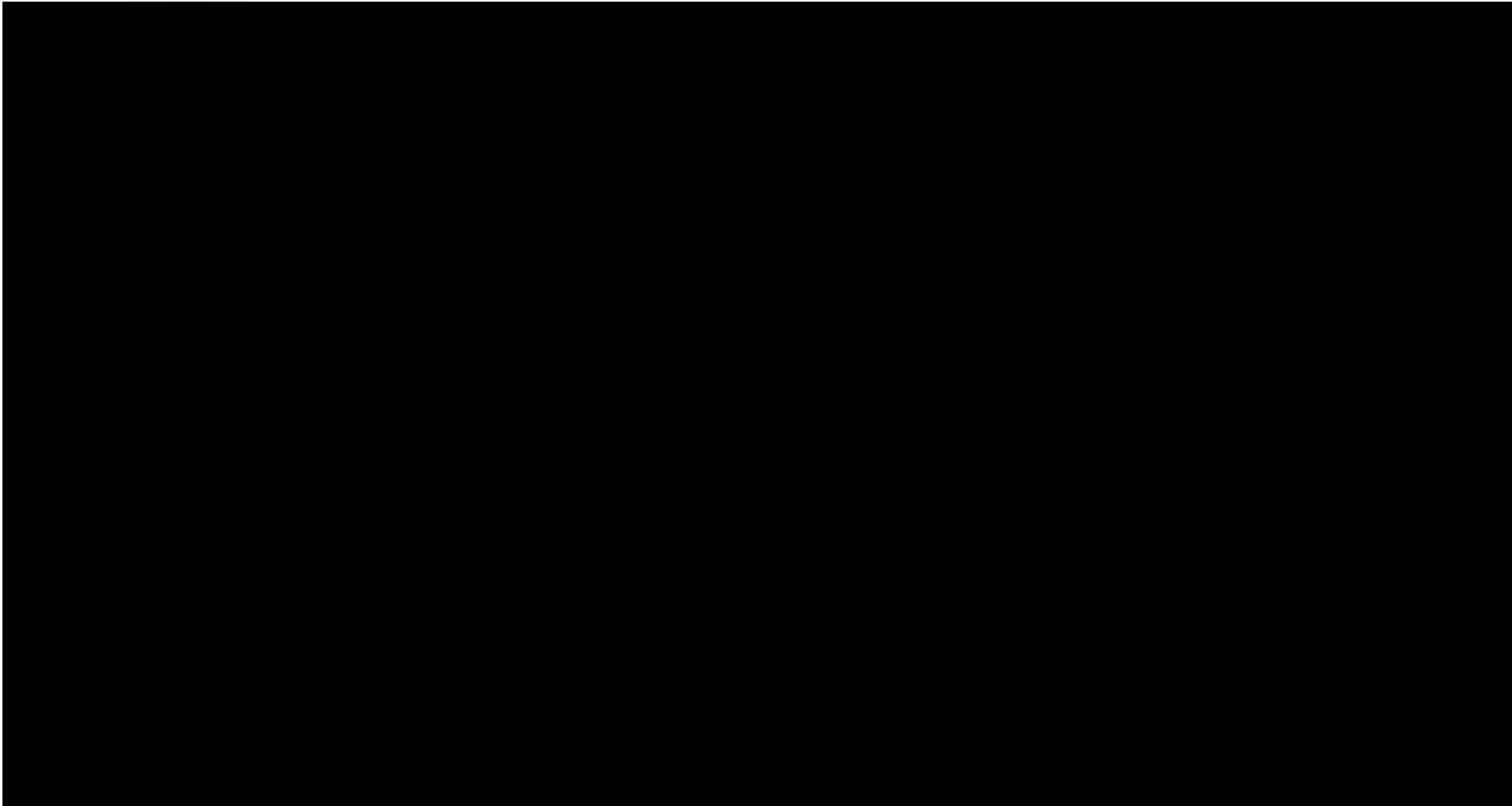
Search

Actions	Name	Connected Email	Model	Max Tokens	Temperature	Creation Date	Last Modified ↓
  	[DP] CS Assistant GPT 4	dejanpopovic	gpt-4	2048	0.2	09/18/2023 07:46 am	09/25/2023 10:04 am
  	[DP] Internal Test Assistant	dejan.popovic.test@gmail.com	gpt-3.5-turbo	2048	0.2	09/21/2023 08:57 am	09/25/2023 10:04 am
  	Sales Knowledge		gpt-3.5-turbo	2048	0.2	09/20/2023 07:43 am	09/25/2023 10:03 am
  	Customer Service Assistant		gpt-3.5-turbo	2048	0.2	09/22/2023 12:23 pm	09/22/2023 02:20 pm
  	Lakewood Assistant		gpt-3.5-turbo-0301	1024	0.2	07/14/2023 05:37 am	09/20/2023 11:14 am

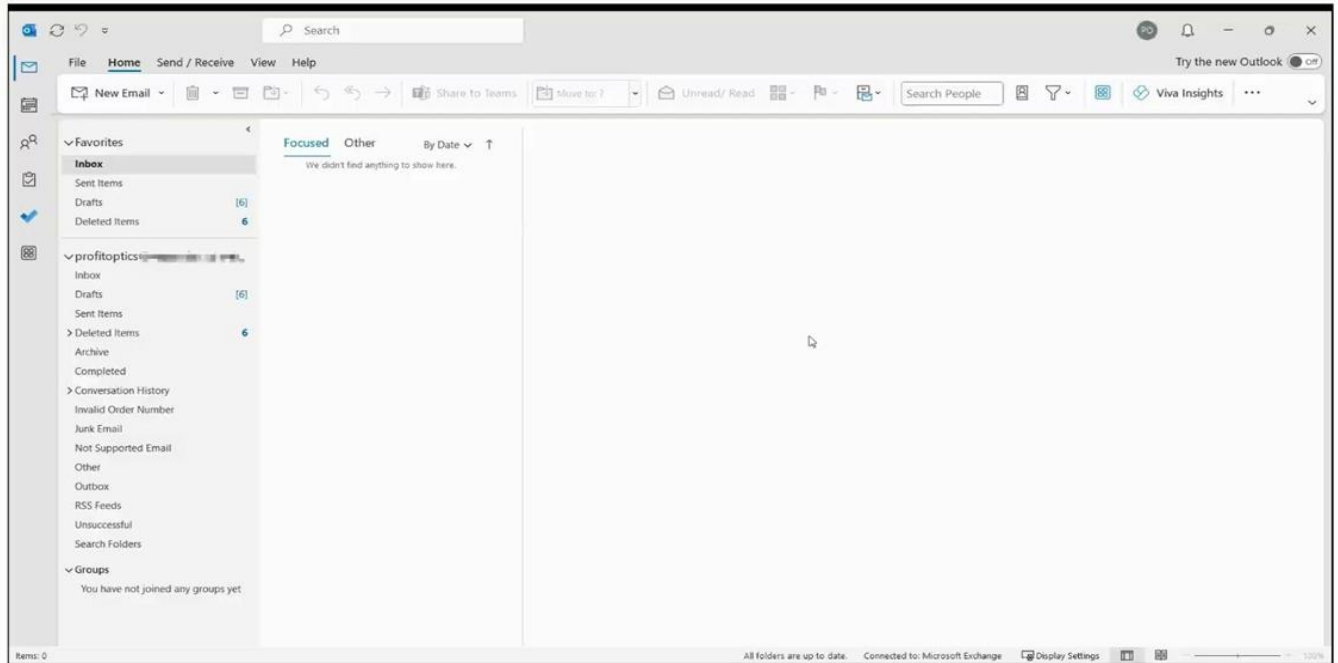
Rows per page: 10 1-5 of 5

Copyright © 2023, ProfitOptics Inc. All rights reserved. Licenses

App Version: 1.0.151, UI version: 1.0.151, Framework Version: 1.9.0

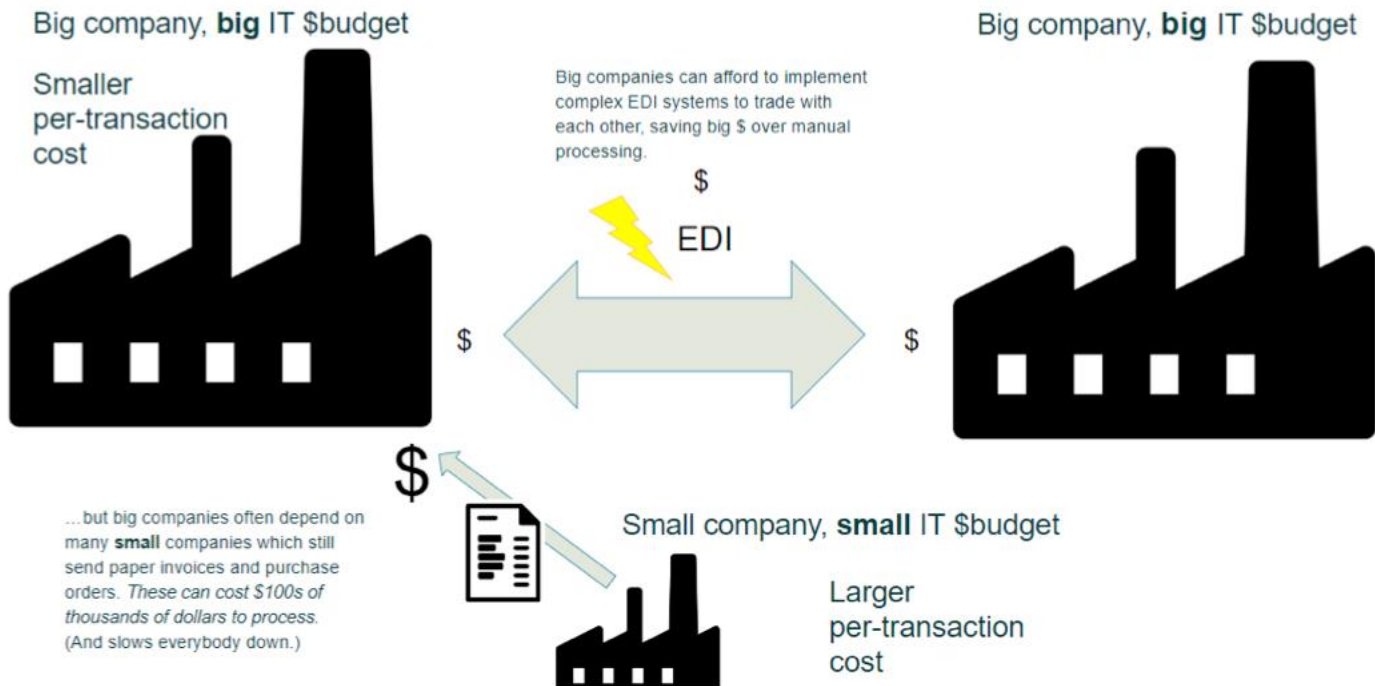


ProfitOptics





AUTOMATED DOCUMENT PARSING



Per-transaction cost

By hand

A clerk hand-keys each document.

Can take up to 40 minutes of clerk time **per document**.

(For thousands of documents per month.)



Traditional OCR

Hire a programmer to program **each** document from **each** counterparty, and **re-program** it when it inevitably changes.

Can take 4-8 hours of programmer time **per unique document**, plus ongoing maintenance.

(For thousands of unique documents.)



Leverage AI

The pre-trained model can read **99%** of common documents out-of-the-box; easy to train on your specific documents.

Puts the power back in the hands of the **front-line experts**, but with a small fraction of the effort of hand-keying.



Document AI

Document Queue

My Queue

Admin

Users

Audit Log

Routing Policies

Validations

EDI Connections

Help

Log Out

Review Invoice #399GT62 from Stepford Repairing and Heating

step

Filter Show empty labels

invoice_date	09/11/21
line_item	(Toto sink 1 40.00 40.00)
line_item/amount	40.00
line_item/description	Toto sink
line_item	(2 340.00 170.00 Sink basin)
line_item/amount	340.00
line_item/description	Sink basin
line_item	(1 Smart Thermostat 800.00 800.00)
line_item/amount	800.00
line_item/description	Smart Thermostat
line_item	(2 540.00 270.00 Magnetic filter)
line_item/amount	540.00
line_item/description	Magnetic filter
line_item	(2 Greenstar 30 3900.00 1900.00)
line_item/amount	3900.00
line_item/description	Greenstar 30
receiver_address	45 Lightning Road Arizona, AZ 86776

Stepford Repairing and Heating

617 Malibu Drive, Shon, WI 75282

www.stepford.com

321-642-5727

INVOICE

FH

BILL TO

PRICE REE

45 Lightning Road

Arizona, AZ 86776

priceoptics@priceo.com

321-321-1234

Invoice No: #399GT62

Invoice Date: 09/11/21

Due Date: 07/01/22

DESCRIPTION	QTY/HR	UNIT PRICE	TOTAL
Toto sink	1	40.00	40.00
Sink basin	2	170.00	340.00
Smart Thermostat	1	800.00	800.00
Magnetic filter	2	270.00	540.00
Greenstar 30	2	1900.00	3800.00
			SUBTOTAL 5520.00
			DISCOUNT 70.00
			SUBTOTAL LESS DISCOUNT 5450.00
			TAX RATE 7.00%
			TOTAL TAX 381.50
			BALANCE DUE \$5831.50


Terms & Instructions

Please pay within 15 days by check () or within 10 days by credit card ()

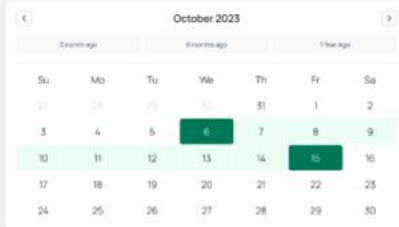
Includes 2 years warranty

Cancel
Save Edits
Export

-  Document AI
-  Document Queue
-  My Queue

-  Admin
- Users
- Audit Log
- Routing Policies
- Validations
- EDI Connections

-  Help
-  Log Out



RECEIVED -	FROM	VENDOR	INVOICE N...	AMOUNT	TOTAL ITEMS	STATUS
2/19/21	ar@smallbiz.net	Smallbiz, Inc.	514684654...	\$831.21	3	Ready for Approval
5/7/16	ar@microserv.com	Microserv, Inc.	546731946...	\$623.50	10	Ready for Approval
9/18/16	accounting@minimal.com	Minimal	134570594...			Review Required
2/11/12	ar@petit.com	Petit Enterprises	544075497...	\$217.77	1	Ready for Approval
9/18/16	ar@pequeno.com	Pequeno Partners	124346798...	\$208.05	2	Approved
1/28/17	ar@klein.com	Klein Bottles, Inc.	845413464...	\$13,500	90	Approved
5/27/15	ar@baixo.com	Baixo Boxes	213016404...	\$196.52	2	Approved
8/2/19	AR@tiny.com	Tiny Instruments	043910464...	\$516.92	1	Approved

< 1 2 3 ... 98 >

Questions?