

AI Features — Requires Dataverse AI Helper

Unlock intelligent email processing, AI-generated replies, and AI-assisted composition by installing the **Dataverse AI Helper** app. These features use Azure OpenAI under the hood.



AI features require the **Dataverse AI Helper** app (paid). Once installed, set `dis_enabledataverseaihelper` to **Yes** on your Mail Client Setting record to activate AI capabilities.



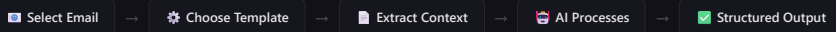
AI Process

Process email content and attachments with document processing templates

DOCUMENT AI

AI Process lets you extract structured data from emails and their attachments using configurable document processing templates. This is ideal for processing invoices, purchase orders, support tickets, or any structured documents that arrive via email.

How it works:



The control extracts email metadata (subject, sender, recipients, date, body) into a context payload. If the email has attachments, each attachment is sent individually to the `dis_parseDocumentHandler` custom action along with the email context. If there are no attachments, the email body itself is processed.

You can optionally select a **Document Processing Template** (`dis_documentprocessingsettings`) to guide the AI on what to extract — field names, data types, and validation rules are all defined in the template. Templates available to users are controlled by the `dis_aitemplatestouse` field on the Mail Client Setting record.



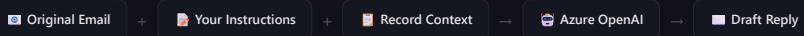
AI Reply

Generate contextual reply drafts using AI

GENERATIVE AI

AI Reply generates a draft reply to the selected email based on your instructions and optional CRM context. Instead of typing the reply from scratch, describe what you want to say and let the AI craft a professional response.

How it works:



When you click **AI Reply**, a dialog opens where you can:

- **Write instructions** — describe the tone, content, and key points of your reply (e.g. "Thank them for the inquiry and schedule a call for next week").
- **Add context records** — use the Record Picker to search and select Dataverse records (Accounts, Contacts, Opportunities, etc.) whose data should inform the reply. The control fetches these records and includes their field values as context for the AI.

The AI generates an HTML reply that is inserted directly into the compose editor. You can review, edit, and send it — or regenerate with different instructions.



AI Compose

Draft entirely new emails from natural language instructions

GENERATIVE AI

AI Compose works like AI Reply, but creates a brand-new email instead of responding to an existing one. It's accessible from the toolbar and is perfect for drafting outreach emails, follow-ups, or any email where you want AI assistance.

How it works:



Provide instructions like "Write a follow-up email to the customer about their pending order, include the delivery timeline", add the relevant Account and Order records as context, and the AI will generate a complete email draft with proper formatting and tone.

The generated email body appears in a new compose window. Add recipients, adjust the subject, make any final edits, and send.

The Record Picker — Context for AI

Both AI Reply and AI Compose feature a **Record Picker** that lets you pull in Dataverse record data as context for the AI. This is what makes the AI responses relevant to your business — instead of generic text, the AI incorporates real CRM data.

The Record Picker supports:

- **Entity type selection** — choose which table to search (Account, Contact, Opportunity, Case, or any custom table).
- **Field-based search** — search by any field on the entity, with support for text, lookup, picklist, boolean, and numeric filters.
- **Multi-record context** — add multiple records from different tables to give the AI a comprehensive picture.

