



conexiom

Getting the Most Out of Conexiom AI: Seven Essentials

Quick Guide





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1. How Conexiom AI Learns

Conexiom AI learns from **editing and approving documents**.

To provide feedback to the system:

1. If required, edit any field directly in the **right-hand panel**, including standard fields and **UDFs**.
2. **Approve the document** after making your changes.

Once the document is approved, Conexiom captures your edits and uses them to improve future extractions. No updates are required on the left panel—the key action is simply correcting values in the right panel and approving the document.



2. Start Right with the First Document

The first document processed for a trading partner plays an important role in setting up strong feedback learning. Starting with a well-aligned initial document helps Conexiom AI learn quickly and deliver consistent results.

Why this matters:

- A solid first document creates a strong learning foundation for future transactions.
- Clear, accurate setup supports consistency across users and documents.
- Investing care upfront helps streamline processing and reduce follow up adjustments over time.

Select a document you consider a “perfect example”—one that reflects real world variations, common scenarios, and the details you expect to see moving forward. Using a representative first document helps ensure the AI learns from the right patterns from the very beginning.

3. Use Confidence Scores to Accelerate Safe, Smart Automation

Our AI is built to be reliable and easy to trust. Confidence scores help you understand how sure the system is about each extracted value, based on how well it has handled similar information in the past.

When a field is consistently processed correctly, confidence naturally increases. When results have been less consistent, confidence scores simply suggest when a quick human check might be helpful—so you can move faster while still keeping accuracy high.

Best practices:

- ✓ Use the **Express Settings page** to configure confidence thresholds that determine when **review is required**
- ✓ Apply **stricter thresholds for mandatory fields** and more flexible thresholds for non-mandatory fields to reduce unnecessary interruptions
- ✓ **Keep human review for lower-confidence fields**, ensuring accuracy while the system continues to learn
- ✓ **Increase automation gradually** using the automation levels in Express Settings as accuracy is confirmed and confidence grows



Sidebar: Getting Comfortable Using Confidence Scores

Confidence scores show how sure the AI is about the information it extracts. A low score doesn't mean the result is wrong, it just suggests that a quick check may be helpful.

Accuracy shows how often the AI gets a field right over time. When a value is extracted correctly and doesn't need changes, it counts as accurate. As more documents are processed for the same trading partner, accuracy builds for each field and drives higher confidence, helping guide safe automation.

Confidence scores use that accuracy history to indicate how much automation is safe right now. As accuracy improves, confidence scores increase as well. Together, accuracy and confidence help you decide what can move through automatically and where a closer look adds value so you can work faster without giving up accuracy.

Why They're Valuable

They help you:

- Focus attention exactly where it's needed
- Automate confidently and responsibly
- Tailor rules for mandatory vs. optional fields
- Boost learning through purposeful corrections

How to Leverage Them

Set thresholds that match your comfort level

- Auto-approve high-confidence fields
- Route medium-confidence fields to hybrid review
- Review critical fields with lower confidence

Customize thresholds by field type

- **Mandatory fields** - Higher threshold for precision
- **Non-mandatory fields** - Lower threshold for efficiency



Align automation modes with your workflow

- **Auto Pilot Mode:** Maximum automation for stable documents- all documents will be auto approved
- **Hybrid Mode:** Review only what needs attention
- **Copilot:** Full visibility. All documents will need your review

Use scores to guide optimization

- Review lower-confidence fields first for maximum training impact
- Watch patterns to see where layouts or quality affect clarity
- Expect steady improvement as corrections accumulate

Scale automation with confidence

- ✓ Start moderately
- ✓ Train through early interactions
- ✓ Increase automation as the system grows more precise

4. Train the AI Through High-Quality Corrections

Every correction strengthens the model.

Do:

- ✓ Review fields thoughtfully
- ✓ Apply consistent corrections for repeated cases

Avoid:

- x Approving values without checking
- x Skipping review on the first few times you send in documents from new buyers or formats

With predictable inputs, the AI adapts faster, leading to smoother processing and increasingly accurate outcomes over time.



5. AI Improves Faster Through Clear, Consistent Inputs

Conexiom AI performs at its best when documents follow recognizable patterns. You'll see stronger results when:

- Common field positions remain familiar
- Key information appears in expected areas

With predictable inputs, the AI adapts faster, leading to smoother processing and increasingly accurate outcomes over time.

6. Keep Business Logic in Workflows, Let AI Handle Extraction

Keep the extraction simple and let your workflows handle the logic. Here's how to split the work for the best results.

Use AI learning for:

- Visual values on the document
- Literal text and numerical extraction

Use business rules and validations in Conexiom for:

- Auto-generated values
- System-calculated data
- Conditional logic
- Workflow-driven decisions

This division ensures maximum speed, accuracy, and transparency.

7. Powerful AI Performance on Scans & Handwriting

Conexiom AI is engineered to handle a wide range of document types—including scans, photos, and handwritten inputs. These formats simply provide different levels of clarity.



What you'll experience:

- Strong extraction performance across image-based files
- Confidence scores that help guide your review focus
- Natural refinement as you provide corrections

Note: Only information that is visible and extracted from the document can be learned by the AI. Fields that are typed in manually (for example, values that don't appear on the document, such as a missing Ship-To address on handwritten orders) are used to complete the order but are not learned by the system.

 **Tip:**

Even though the AI performs well on scans and handwriting, results can vary based on the quality of the source. Blurry images, low-resolution scans, or hard-to-read handwriting may require extra review to ensure accuracy.



Summary: Do's and Don'ts

✔ DO	✖ DON'T
For each new trading partner, start with a representative document that includes the nuances and variations you want the AI to learn.	Start with any document and rely on major learning changes later.
Give consistent corrections. Early ones matter most.	Skip corrections. Even small fixes improve accuracy.
Keep layouts consistent when you can. It helps the AI learn even faster.	Make large or frequent layout changes when it can be avoided. Smaller, minimal changes help the AI stay on track.
Use confidence scores to guide quick vs. careful review.	Try to automate everything at once. Instead take it step by step.
Use AI to extract what's on the document and let workflows handle business rules and decisions.	Use AI extraction for calculations, conditional logic, or workflow-driven decisions.
Expect some variation on scanned or image-based docs.	Assume every scan or image will look identical- image quality and clarity can vary.