

Smarter Automation Starts Here

Explore FlowForma's AI Suite

Now is the perfect time to unlock the potential of AI. With FlowForma's intelligent automation tools, organizations can digitize faster, work smarter, and empower everyone to automate.

How AI is Transforming Process Automation

- ✓ Build processes from ideas in minutes
- ✓ Scale automation with AI-powered tools
- ✓ Use conversational prompts to design workflows
- ✓ Automate unstructured and manual tasks
- ✓ Enhance compliance and audit readiness
- ✓ Unlock smarter insights with built-in analytics

Introducing FlowForma's AI Suite

1. FlowForma Copilot: Your Intelligent Process Builder

No technical skills needed. Just describe your process, FlowForma Copilot does the rest.

- Upload a form, diagram or simply type what you want to automate
- Watch Copilot instantly build your process structure
- Use natural language to prompt changes
- Add steps, rules, conditions, and logic through conversation
- Preview and test your workflow in real-time

Benefits:

- ✓ **Puts automation in everyone's hands**
- ✓ Cuts time from idea to live process
- ✓ Simplifies even complex workflows



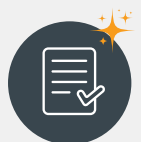
Copilot



Agent Rules



Smart Assistants



Summarization

From Ideas to Processes in Seconds

Transform your processes with smarter, faster automation.
Try our all-in-one platform below.

Ask me to automate any of your business processes — whether simple or complex...

Form/Process Diagram

1: Tell or show FlowForma Copilot what process you want to automate

I need a new employee onboarding process for my financial brokerage business based in Europe

New employee onboarding process for a financial brokerage business based in Europe

Review the process steps and questions to ensure all necessary information and compliance requirements specific to your financial brokerage business are covered. Customize as needed to fit the unique needs of your organization.

AI Generated Content

Modify step...

Welcome and Intro...
Step 1

Compliance and Legal
Step 2

IT and Systems Access
Step 3

Training and Develo...
Step 4

Review and Feedback
Step 5

Employee Full Name

Position

Start Date

Department

Manager

2: Watch your process get automated in seconds

2. AI Agent Rule: Your Personal AI Assistant

The AI Agent Rule lets you automate intelligent actions, such as:

- Reading uploaded documents
- Extracting structured data
- Validating and formatting content
- Returning results to forms or systems

It acts as your AI-powered assistant, executing predefined actions based on your instructions.

For Example: Invoice Processing

- Instruction: *"You are an invoice processing agent. Extract supplier name and total"*
- Output: The AI Agent extracts the supplier name for e.g. 'ACME CORP' and invoice total '\$1,050.75'

Benefits:

- ✓ Automate document processing
- ✓ Define custom instructions for AI processing
- ✓ Configurable output destinations for processed data

3: Smart Assistants: Empowering your Builders and Users

For Flow Builders:

- Guided setup (*"How do I configure a rule?"*)
- AI-generated to-do lists post-build
- Auto-suggestions to streamline configuration

For Process Users:

- Natural language actions (for e.g. *"I want to make an insurance claim"*)
- AI-led form filling and workflow triggering
- Zero training needed to engage with complex processes

"I uploaded a process diagram into FlowForma's Copilot, and it rapidly built my process. I'm really impressed with this innovation."

Tim Driscoll
HSEQ Manager
Gallagher Group



4. AI Summarization: Your Real-Time Process Snapshot

With FlowForma's AI Summarization Agent, you can trigger summarization at any stage in your process to receive:

- A natural language summary of completed steps
- Highlights of key decisions, blockers, and unusual activity
- Links, comments, and relevant data

Benefits:

- ✓ **Easy-to-digest process updates**
- ✓ Improved auditing and stakeholder visibility
- ✓ Clearer handovers across teams

Let FlowForma AI do the Heavy Lifting

FlowForma is built to make automation accessible to everyone. Whether you're replacing legacy systems, streamlining workflows, or scaling process digitization, FlowForma AI delivers the power, flexibility, and simplicity to get there faster.

About FlowForma Process Automation

FlowForma Process Automation is an AI-powered platform that unites forms, workflows, and insights in one intuitive solution. Designed for all your process needs, it empowers business users to digitize and automate at speed. Trusted by mid-size and enterprise organizations worldwide, FlowForma helps teams streamline operations, boost productivity, and drive digital transformation with confidence.

Ready to Try FlowForma AI?

New to FlowForma? Book a demo at www.flowforma.com/demo

Already a customer? Contact your Account Manager for access and pricing

