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**AI Automation
& Software Agency**

Featured AI Automation Products

Comprehensive Guide to Ready-to-Implement AI Automation Products from Dlogic Solutions

valid from
3rd October 2025

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Contents

Introduction

Dlogic AI Automation provides ready-made and customizable AI automation solutions that address common business challenges across acquisition, operations, support, and internal processes.

Our goal is to help organizations of all sizes improve efficiency, reduce manual effort, and achieve measurable ROI by introducing practical, proven AI systems.

This catalogue presents our current portfolio of automation products. Each product page is structured consistently for clarity, with details on suitability, typical pain points addressed, and indicative pricing.

For a deeper understanding of how these solutions are evaluated and implemented, see our companion document ***Dlogic AI Automation Audits Explained***, available on our website at https://dlogic.solutions, which outlines our phased approach to discovery, pilot projects, and full rollout.

Our Process (High-Level)

We follow a clear, structured approach to ensure every automation delivers measurable value:

1. **Discovery** – We identify workflows, challenges, and opportunities through guided discussions.

2. **Pilot** – A limited automation flow is deployed to validate impact in a real-world setting.

3. **Rollout** – Proven solutions are scaled across teams, with integrations, compliance checks, and support.

The most important thing to know about Dlogic: we don't just deliver AI automation and software development. Every solution is grounded in strong business analysis and a deep understanding of how organizations operate. By listening closely and mapping processes, we ensure our automations align with real business logic and deliver measurable value.

For full details of this methodology, see our companion document ***Dlogic AI Automation Audits Explained***, available on our website at https://dlogic.solutions.

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valid from 3rd October 2025

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Why Dlogic as Your AI Partner

While this catalogue presents our standardized AI automation products, our capabilities extend far beyond these pages. Dlogic is a full-stack technology partner, combining **in-depth audits, bespoke AI integrations, and custom software development** into a unified service offering. Find out more on our website at https://dlogic.solutions .

AI Automation Audits

We conduct structured audits to uncover automation opportunities across your business. These range from focused SME audits to enterprise-level deep dives. Each audit maps processes, identifies quick wins, and outlines advanced opportunities in a clear, actionable report. (See our companion document **Dlogic AI Automation Audits Explained** for details, available on our website at https://dlogic.solutions .)

Bespoke AI Automation & Integrations

Not every workflow fits into a pre-defined product. We design and implement tailored automation flows across CRMs, ERPs, e-commerce platforms, communication tools, and industry-specific SaaS. By combining AI models with robust integrations, we build solutions that directly fit your environment.

Custom Software Development

Dlogic has been delivering software across web and mobile platforms since 2012. Where off-the-shelf automations are not enough, we extend them with custom applications, APIs, and user interfaces. This ensures your AI automations are not only functional, but also scalable, secure, and aligned with your broader digital strategy.

Why This Matters

Choosing Dlogic means partnering with a team that understands both automation and software development. We don't just connect tools — we architect systems that grow with your business. Our combination of audits, bespoke AI, and software engineering makes us uniquely positioned to deliver solutions that are practical today and adaptable for tomorrow.

For more information, case studies, and insights, visit https://dlogic.solutions .

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valid from 3rd October 2025

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AI Automation
& Software Agency

Pricing Notes

o All prices listed in this document are **indicative** and may vary depending on scope, integrations, and support level.

o Prices are **valid from the date shown on the cover page** (and in header of each page). A new version of this document will be issued when updates occur.

o Ongoing support costs (Basic, Pro, PREMIUM) are billed separately, as noted per product.

o Deliverability estimates shown on each product page refer to working days or weeks **from the agreed project start date**. The start date is defined in the signed quote. Deposits must be paid before the scheduled start date. If payment is delayed beyond the due date, the project start may be postponed, as later client commitments may take priority.

o **SME pricing ranges are indicative.** The actual upper limit may be higher where custom automations involve greater complexity, integrations, or compliance requirements than the typical expected scope.

UK Clients

As a Netherlands-registered company, we do not add UK VAT to invoices. UK clients are billed net of VAT.

EU Clients (outside the Netherlands)

We do not charge VAT on invoices to EU business clients outside the Netherlands, provided a valid VAT ID is supplied. Under EU reverse-charge rules, the client is responsible for declaring VAT locally.

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valid from 3rd October 2025

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Support Levels

To ensure stability, compliance, and peace of mind an ongoing support is available through our tiered plans, for clients who choose to subscribe. Our support is delivered within the client's existing SaaS ecosystem (e.g., Make.com, CRMs, booking platforms) — we don't reinvent dashboards or build extra platforms unnecessarily. Reports are generated directly from the systems already in use.

We offer three tiers of support:

Basic   **£85–£170 / €95–€195 per flow/month**

For lighter automations and simpler flows (reminders, follow-ups, alerts, scheduling). Most small-business automations fall into this tier.

Pro   **£195–£395 / €225–€450 per flow/month**

For multi-step, API-heavy flows or multilingual logic. Provides proactive monitoring and quicker adjustments when needed.

PREMIUM   **£595–£1,295+ / €685–€1,485+ per flow/month**

For mission-critical, enterprise-level flows requiring enhanced monitoring, priority response, and compliance-sensitive support under agreed SLAs.

Choosing Support Tiers

Support is billed separately and forms an essential part of our service. For each automation flow or product, Dlogic will specify the **minimum applicable support tier** based on its complexity and criticality. While clients may choose higher tiers if desired, lower tiers may not be available where they would not adequately cover the delivered solution.

If a client opts not to subscribe to ongoing support, ad-hoc assistance is available as of 1st October 2025 at €80 or £70 per hour, subject to change in future versions of this document. This support is provided on an "as time allows" basis — without guaranteed response times — and is billed retrospectively for tracked time.

How to Read This Document

Each product page follows a standardized structure so that solutions can be compared side by side:

- o **Tags** – markers such as *Quick Win*, *Big Swing*, or *Popular*.
- o **Overview** – short explanation of what the automation does.
- o **Complexity Score** – estimated difficulty of implementation (range 1–10).
- o **ROI Potential** – expected return on investment (range 1–10).
- o **Suitable For** – company sizes and business types that benefit most.
- o **Common Pain Points** – challenges this automation is designed to solve.
- o **Pricing** – indicative SME and Enterprise ranges.
- o **Support Level** – typical support tier (Basic, Pro, Premium).
- o **Visual Aid** – simplified diagram of the automation flow.
- o **FAQs** – common questions with clear answers.

This structure ensures consistency, clarity, and transparency across all 32 products and 4 product categories.

The following pages present our portfolio of featured AI automation products.

After reviewing the products you're interested in, please contact us through our form at https://dlogic.solutions#contact .

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valid from 3rd October 2025

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Lead / Customer Acquisition Products

Winning new clients is the lifeblood of any business. These automation solutions focus on capturing, qualifying, and converting leads more effectively, while reducing manual effort and response times. Each product is designed to strengthen your acquisition pipeline, improve customer experience, and create measurable growth opportunities.

Tags of products in this category:

CA 01   CA 02   CA 03   CA 04   CA 05   CA 06   CA 07   CA 08   CA 09   CA 10

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valid from 3rd October 2025

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CA 01 AI Receptionist or Call Handling

Quick Win   **Popular**

Overview
AI-powered receptionist handles inbound calls with speech-to-text and text-to-speech. Routes calls, takes messages, schedules appointments, records/transcribes calls, and improves customer service availability.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Higher complexity due to telephony integration, voice AI tuning, compliance, and multi-language support.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong savings by reducing front-desk workload and improving responsiveness.

Deliverability Estimate
2–4 weeks (telephony + AI voice setup)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Any organization receiving regular inbound calls (clinics, trades, agencies, law firms, e-commerce). Especially relevant for customer service, booking-heavy businesses, or those needing after-hours availability..

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
o   Missed calls lead to lost clients or sales.
o   Staff tied up answering repetitive questions.
o   No transcripts or logs for customer interactions.
o   Limited after-hours coverage.

Pricing
SME: £3k-£7.4k or €3.5k-€8.5k one-off build
Enterprise: £11.8k+ or €13.5k+ one-off build

This product may require additional external SaaS subscriptions (requires telephony + voice AI service), depending on the client's chosen platforms.

Support Level

Basic	basic call routing, voicemail-to-email, single language
Pro	multi-language support, CRM/booking system integration, advanced menu routing
PREMIUM	enterprise-grade with compliance logging, multi-site integrations, analytics dashboards

Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA 01
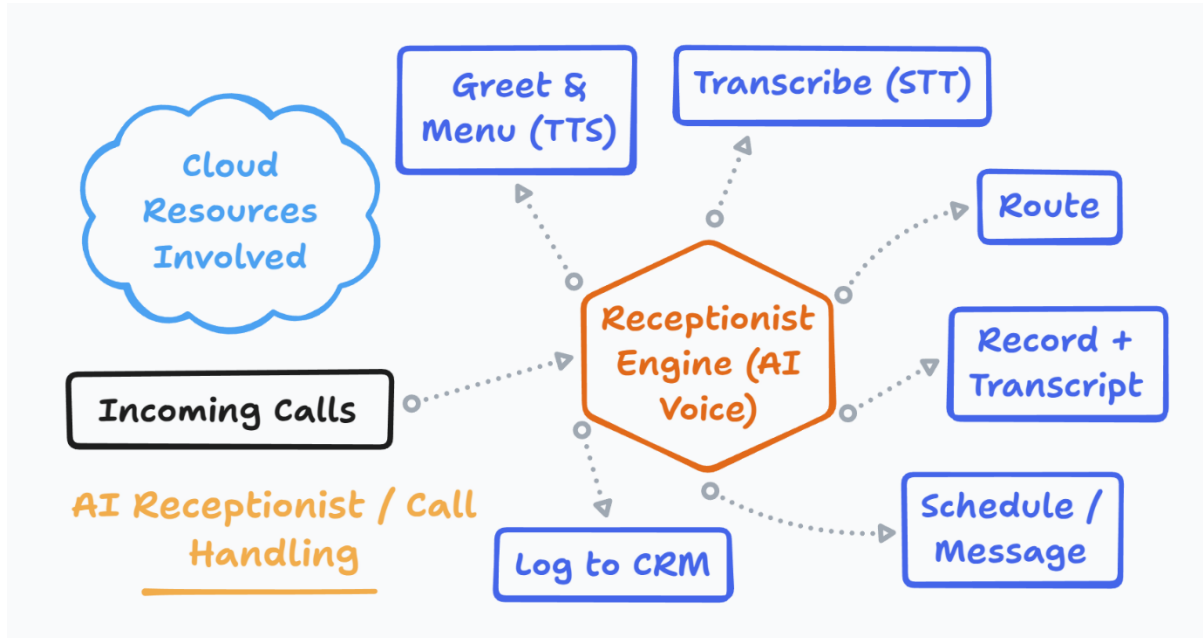
FAQs – Frequently Asked Questions

Question: *Can it replace a human receptionist completely?*
Answer: It covers repetitive tasks (routing, FAQs, scheduling). Complex or sensitive calls can still be escalated to human staff.

Question: *Which languages are supported?*
Answer: English and Dutch by default; additional languages can be added (subject to voice model quality).

Question: *How does scheduling integration work?*
Answer: Connects to booking platforms (Calendly, Google Calendar, Odoo, HL) via APIs to confirm/reschedule appointments.

Question: *Is call recording legal?*
Answer: Yes, when disclosed. System supports consent messages and GDPR-compliant storage.

Question: *Can it handle multiple phone numbers or branches?*
Answer: Yes, numbers can be routed to a unified AI receptionist, with department- or branch-specific menus.

Question: *What if the caller requests a callback?*
Answer: The system logs requests, notifies assigned staff, and can trigger automated callback reminders.

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CA 02 — Task Follow-Ups (PM tools)

`Big Swing` `Popular`

Overview
Automates monitoring of tasks in project management tools (ClickUp, Asana, Monday, Jira, others). Nudges assignees via email, Slack, WhatsApp, push notifications or SMS to prevent missed deadlines.

Complexity Score

1	2	3	4	**5**	**6**	**7**	8	9	10

Medium; varies by PM tool integration depth and multi-channel notifications.

ROI Potential

1	2	3	4	5	**6**	**7**	**8**	9	10

Improves project efficiency, reduces delays, boosts accountability.

Deliverability Estimate
1–2 weeks (PM tool + notifications)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Any organization relying on structured task/project management tools. Especially valuable for agencies, software teams, marketing departments, and professional services.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
- Deadlines frequently missed or tasks forgotten.
- Managers manually chasing team members.
- Poor visibility into overdue items.
- Lost productivity due to bottlenecks.

Pricing
SME: £2.2k-£5.4k or €2.5k-€6.2k one-off build
Enterprise: £8.3k+ or €9.5k+ one-off build

This product may require additional external SaaS subscriptions (possible PM tool subscription), depending on the client's chosen platforms.

Support Level

Basic	single PM tool, basic reminder flows
Pro	multi-tool integration, multi-channel nudges, analytics dashboards
PREMIUM	enterprise-wide automation with compliance logging and advanced reporting

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valid from 3rd October 2025

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA
02
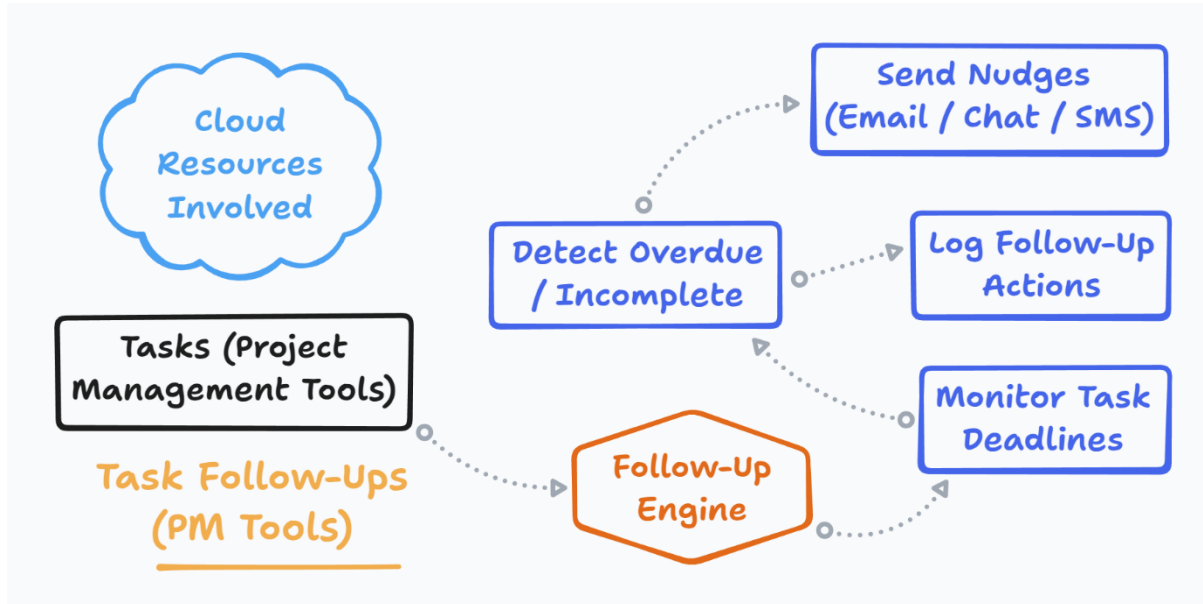
FAQs – Frequently Asked Questions

Question: *Which PM tools are supported?*
Answer: ClickUp, Asana, Monday, Jira, Trello, and custom via API/webhooks.

Question: *Can reminders be customized?*
Answer: Yes, frequency, channels, and message templates are fully configurable.

Question: *What channels are supported for nudges?*
Answer: Email, Slack, Teams, SMS, WhatsApp, and push notifications.

Question: *Can managers get summary reports?*
Answer: Yes, daily/weekly emails or dashboards highlight overdue tasks and bottlenecks.

Question: *Is there an approval step before nudges are sent?*
Answer: Optional: managers can approve or override reminders before dispatch.

CA 03 — Lead Capture & Nurturing

Quick Win **Popular**

Overview
Centralizes lead intake (forms, chat, socials), enriches data, scores leads, and launches sequenced email/SMS to increase conversions.

Complexity Score

1	2	3	4	5	6	7	8	9	10
				5	**6**	**7**			

Medium; varies by channel count, CRM, and sequencing depth.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**	**9**	

High ROI; higher conversion + faster speed-to-lead.

Deliverability Estimate
1–2 weeks (single channel); 2–3 weeks (multi-channel + scoring)

Suitable for (Company Size)
Small, SME, Enterprise.

Suitable for Business Types
Any business generating online leads via forms/chat/ads; especially agencies, SaaS, e-commerce, local services.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
- Leads lost or ignored after capture.
- Slow/manual follow-ups.
- Weak qualification and prioritization.
- Inconsistent messaging across channels.

Pricing
SME: £2.4k-£6.8k or €2.8k-€7.8k one-off build
Enterprise: £10k+ or €11.5k+ one-off build

This product may require additional external SaaS subscriptions (web forms/chat, CRM, email/SMS delivery, lead data provider like Apollo), depending on the client's chosen platforms.

Support Level

Basic	single intake channel + simple email/SMS sequence
Pro	multi-channel intake, CRM sync, scoring, branching sequences
PREMIUM	enterprise CRM, AI scoring, multi-language nurturing, analytics

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA
03
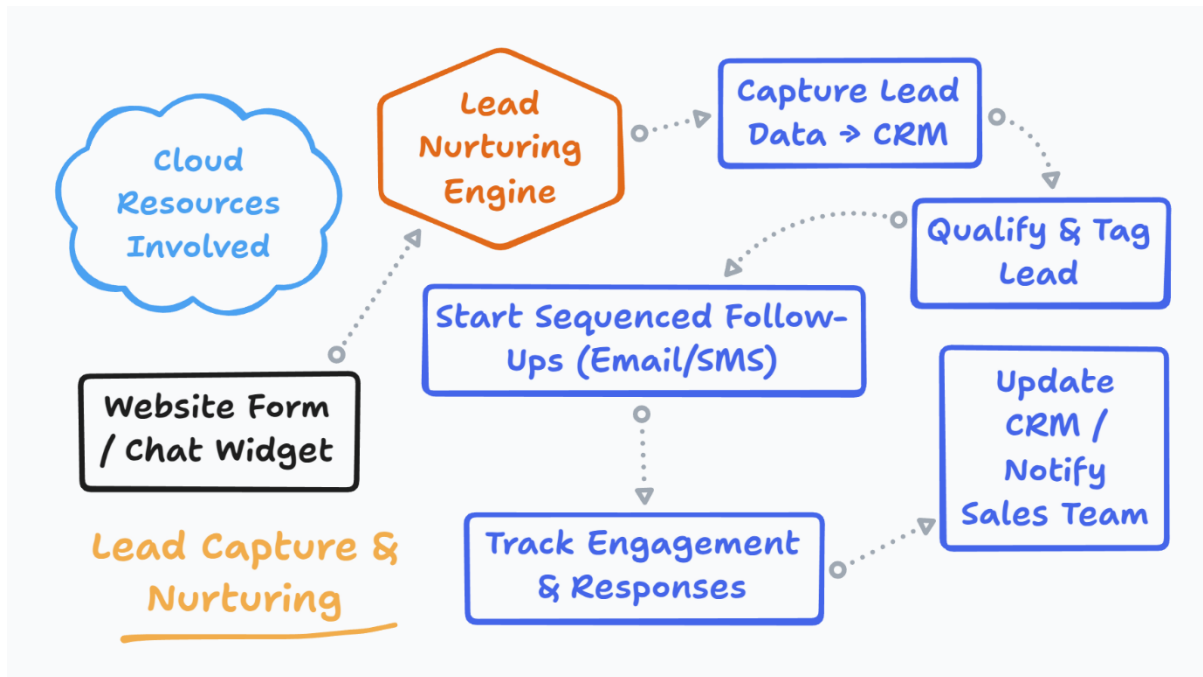
FAQs – Frequently Asked Questions

Question: *Which platforms are supported?*
Answer: Web forms, chat widgets, FB/IG/LinkedIn lead ads, email parsing, APIs.

Question: *How's nurturing personalized?*
Answer: By source, segment, behaviour, and stage.

Question: *How does the lead scoring work?*
Answer: Rule-based scoring assigns points for actions (e.g., form filled, email opened, website visit). AI scoring goes further by analysing firmographics (company size, industry, role) and intent signals (engagement, keywords, timing) to predict likelihood of conversion.

Question: *CRM integrations?*
Answer: HubSpot, Salesforce, Pipedrive, Zoho, Odoo, and others.

Question: *Is it GDPR-compliant?*
Answer: Yes - consent tracked; opt-outs respected; data minimized.

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CA 04 Booking Systems Automation

`Big Swing` `Popular`

Overview

Automates bookings from multiple channels (calls, SMS, WhatsApp, FB/IG messages) into a unified calendar. Manages confirmations, reminders, reschedules, and cancellations automatically.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Higher complexity due to multi-channel handling, calendar sync, and payment/deposit options.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; fewer no-shows, more bookings captured, reduced admin load.

Deliverability Estimate

2–3 weeks (multi-channel bookings, calendars)

Suitable for (Company Size)

Small, SME, Enterprise.

Suitable for Business Types

Any business reliant on scheduled appointments or reservations: clinics, salons, gyms, restaurants, consultants, service providers.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o Missed calls = missed bookings.
o Staff spending hours managing calendars.
o Frequent no-shows or last-minute cancellations.
o Customers frustrated by limited booking options.

Pricing

SME: £3k-£7.8k or €3.5k-€9k one-off build
Enterprise: £10.9k+ or €12.5k+ one-off build

This product may require additional external SaaS subscriptions (calendar + possibly SMS/telephony), depending on the client's chosen platforms.

Support Level

Basic	single-channel booking + reminders
Pro	multi-channel intake, deposits, advanced rules
PREMIUM	enterprise-wide, multi-location scheduling with analytics and compliance

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Visual Aid – Simplified Example Flow Diagram

CA 04

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.
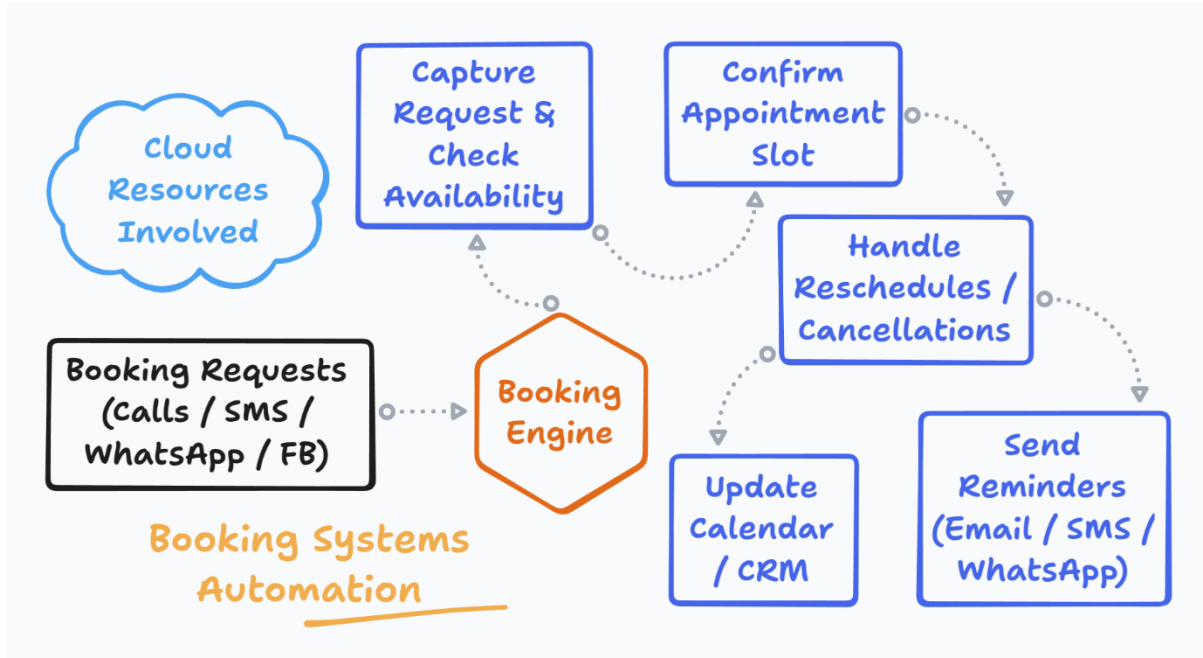
FAQs – Frequently Asked Questions

Question: *Which calendars does it integrate with?*
Answer: Google Calendar, Outlook, iCal, Odoo, HL, Microsoft 365 Calendar, Zoho Calendar, custom systems and others.

Question: *Can customers book via WhatsApp or SMS?*
Answer: Yes, conversational AI lets customers confirm/reschedule directly via chat.

Question: *How are no-shows reduced?*
Answer: Automated reminders via SMS/email/WhatsApp; optional deposits or prepayments.

Question: *Does it support multi-location businesses?*
Answer: Yes, calendars can be segmented per branch, service, or staff member.

Question: *Can staff override or manually adjust bookings?*
Answer: Absolutely — staff can edit, reschedule, or block timeslots as needed.

Question: *What about cancellations/refunds?*
Answer: Policies can be automated — deposits retained or refunded based on rules.

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CA 05 — Social Media Post Scheduling & Repurposing

Quick Win   Popular

Overview
Automates creation, scheduling, and repurposing of social media posts across platforms. AI generates captions, variants, and formats, while approval workflows keep brand voice consistent.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; complexity depends on channel mix, approval needs, and repurposing logic.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Good ROI; saves marketing hours, increases consistency, and boosts reach across channels.

Deliverability Estimate
1–2 weeks (channel APIs + content repurposing)

Suitable for (Company Size)
Small, SME, Enterprise.

Suitable for Business Types
Any business actively using social media for brand awareness, lead generation, or sales — especially agencies, e-commerce, SaaS, and local service providers.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
o   Inconsistent posting schedules.
o   Content not adapted per channel.
o   Marketing teams overloaded with repetitive tasks.
o   Lack of visibility into post performance.

Pricing
SME: £2.4k-£6.3k or €2.8k-€7.2k one-off build
Enterprise: £9.2k+ or €10.5k+ one-off build

This product may require additional external SaaS subscriptions (social platform APIs, publishing SaaS), depending on the client's chosen platforms.

Support Level

Basic	basic scheduling + AI caption generation
Pro	multi-channel repurposing, approval workflows, analytics integration
PREMIUM	enterprise-wide scheduling, multi-language repurposing, compliance logging

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valid from 3rd October 2025

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Visual Aid – Simplified Example Flow Diagram

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CA 05
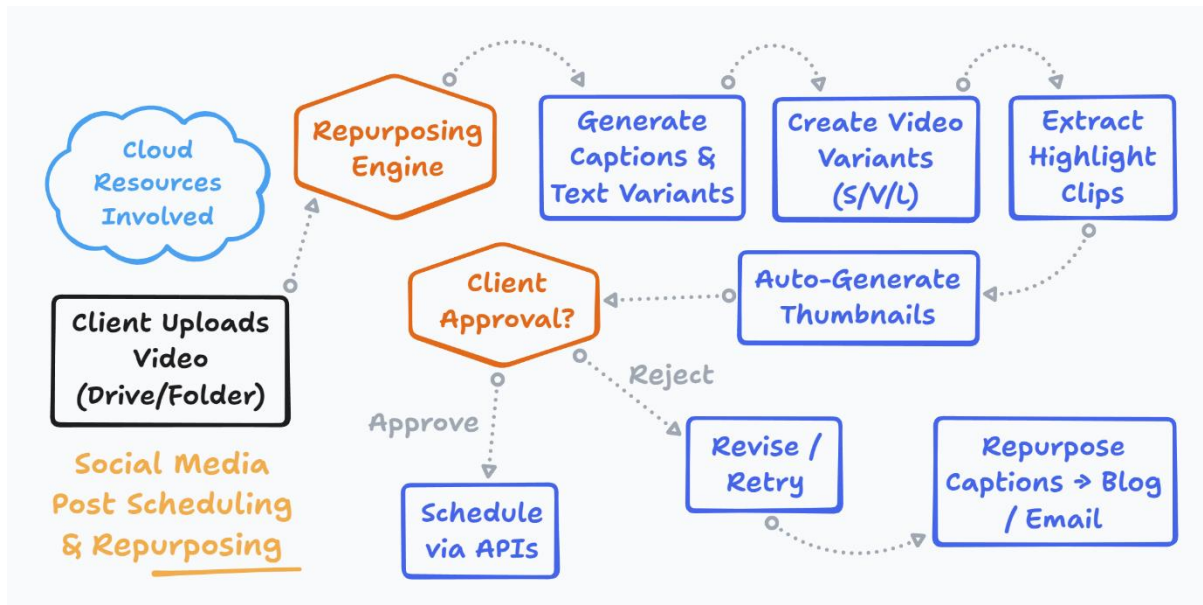
FAQs – Frequently Asked Questions

Question: *Which platforms are supported?*
Answer: Facebook, Instagram, LinkedIn, X/Twitter, TikTok, YouTube, and scheduling to blogs/newsletters.

Question: *Can AI adapt content for each platform?*
Answer: Yes, captions and visuals can be resized or rewritten for channel-specific styles.

Question: *Can posts require approval before publishing?*
Answer: Yes, human-in-the-loop workflows allow managers to approve/edit before going live.

Question: *Does it include performance tracking?*
Answer: Basic analytics (likes, comments, reach); advanced reporting possible via integrations.

Question: *Can it generate multiple language versions?*
Answer: Yes, AI can produce localized captions; useful for multilingual audiences.

Question: *How are media assets handled?*
Answer: Centralized library with tagging and reuse features.

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CA 06 — Reputation & PR Monitoring

Quick Win

Overview

Monitors online reviews, social mentions, and press coverage. AI classifies sentiment, highlights critical issues, and alerts teams to respond quickly and protect brand reputation.

Complexity Score

1	2	3	4	**5**	**6**	**7**	8	9	10

Medium; depends on number of monitored channels, languages, and escalation rules.

ROI Potential

1	2	3	4	5	6	**7**	**8**	**9**	10

High ROI; early detection of negative sentiment prevents churn, PR crises, and lost sales.

Deliverability Estimate

2–3 weeks (monitoring + sentiment analysis)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business with a public-facing brand presence: e-commerce, SaaS, hospitality, healthcare, and professional services. Especially valuable for brands with large social footprints or customer review exposure.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o Missed or late responses to negative reviews.
o No unified view of brand sentiment.
o Manual monitoring across dozens of platforms.
o Escalations not reaching the right teams.

Pricing

SME: £2.6k-£7.4k or €3k-€8.5k one-off build
Enterprise: £10k+ or €11.5k+ one-off build

This product may require additional external SaaS subscriptions (monitoring tools/APIs, sentiment analysis SaaS), depending on the client's chosen platforms.
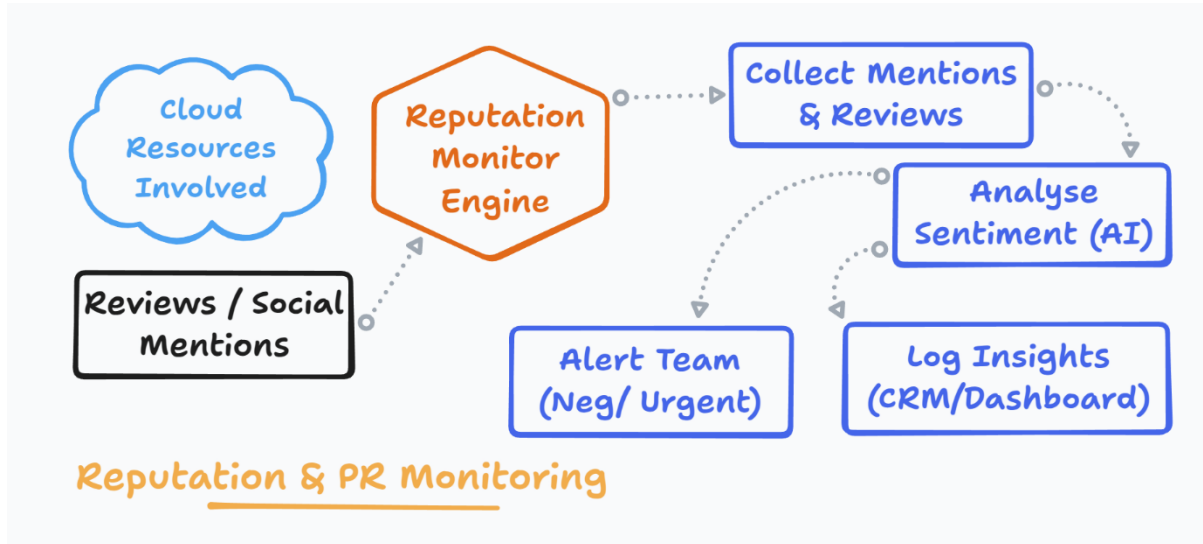
Support Level

Basic	review + social monitoring with basic sentiment alerts
Pro	multi-platform coverage, dashboards, escalation flows
PREMIUM	enterprise PR monitoring, multi-language sentiment, custom reporting

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA
06

Cloud Resources Involved

Reputation Monitor Engine

Collect Mentions & Reviews

Analyse Sentiment (AI)

Reviews / Social Mentions

Alert Team (Neg/ Urgent)

Log Insights (CRM/Dashboard)

Reputation & PR Monitoring

FAQs – Frequently Asked Questions

Question: *Which sources can be monitored?*
Answer: Google Reviews, Trustpilot, Facebook, Twitter/X, Instagram, Reddit, news sites, and niche platforms via APIs.

Question: *How accurate is the sentiment analysis?*
Answer: Typically 85–90%+ accuracy; improves with domain-specific tuning.

Question: *Can alerts be routed to specific teams?*
Answer: Yes, rules route issues to PR, support, or legal as required.

Question: *Does it handle multiple languages?*
Answer: Yes, major European and global languages are supported.

Question: *Can it produce reports for management?*
Answer: Weekly/monthly dashboards summarize sentiment trends, top issues, and response metrics.

Question: *Can it trigger immediate action?*
Answer: Yes, workflows can auto-acknowledge reviews or escalate urgent cases in real time.

CA 07 — Sales Pipeline Enrichment

Big Swing

Overview

Automatically enriches CRM pipelines with missing data: company details, contact info, firmographics, and news. AI adds lead scoring to help sales teams prioritize opportunities effectively.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	**7**			

Medium; depends on CRM, enrichment providers, and scoring model setup.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**	**9**	

Strong ROI; better-qualified pipelines boost close rates and shorten sales cycles.

Deliverability Estimate

2–3 weeks (CRM + enrichment APIs)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any sales-driven organization using a CRM. Especially valuable for B2B SaaS, agencies, recruiters, and enterprises with complex pipelines.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

- CRM records incomplete or outdated.
- Sales reps spending hours researching prospects.
- No clear lead prioritization.
- Missed opportunities due to poor data quality.

Pricing

SME: £2.6k-£7.4k or €3k-€8.5k one-off build
Enterprise: £9.6k+ or €11k+ one-off build

This product may require additional external SaaS subscriptions (CRM + data provider like Apollo), depending on the client's chosen platforms.

Support Level

Basic	basic enrichment (contact + firmographic data)
Pro	multi-source enrichment, AI lead scoring, CRM dashboards
PREMIUM	enterprise-scale enrichment with custom data sources, compliance logging, and advanced scoring

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valid from 3rd October 2025

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA
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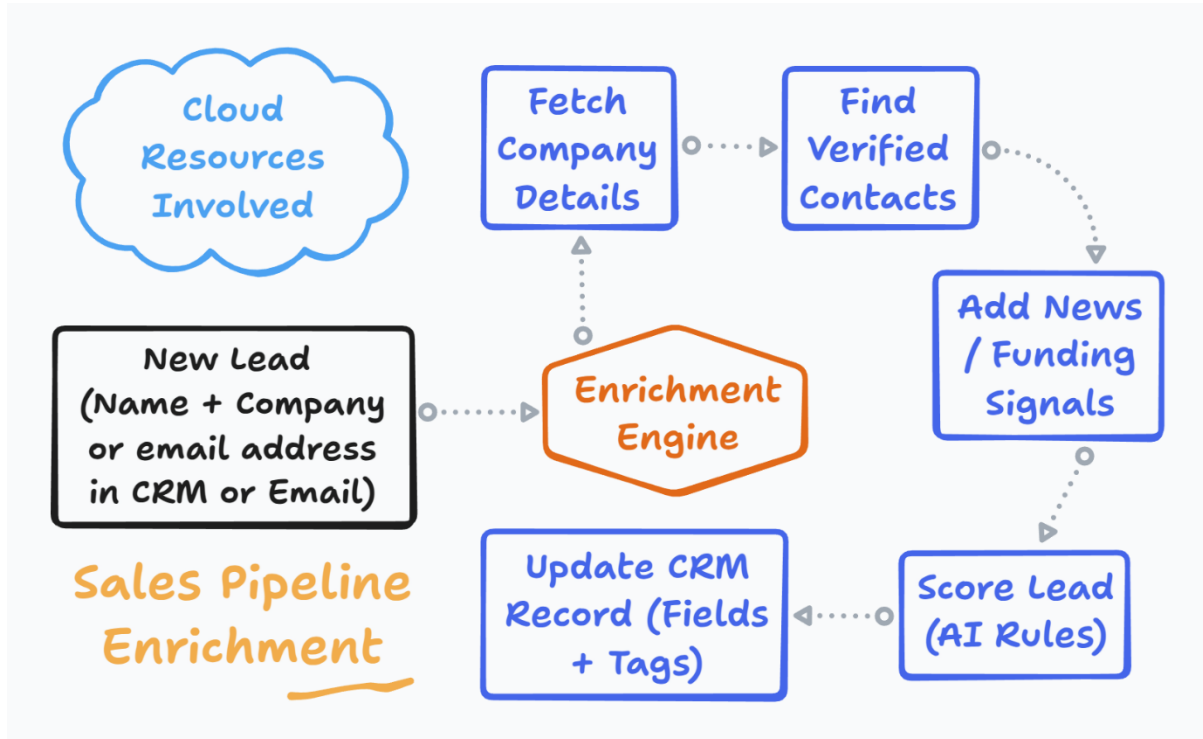
FAQs – Frequently Asked Questions

Question: *Which CRMs are supported?*
Answer: Salesforce, HubSpot, Pipedrive, Zoho, Odoo, HL, Agile, and custom CRMs via API.

Question: *Where does enrichment data come from?*
Answer: Data providers (ZoomInfo, Clearbit, Apollo), public records, and company news APIs.

Question: *How is lead scoring determined?*
Answer: AI models evaluate firmographics, engagement, and intent signals to assign priority.

Question: *Can sales reps override or adjust scores?*
Answer: Yes, reps can manually adjust, and the system learns from overrides.

Question: *Is data enrichment GDPR-compliant?*
Answer: Yes — only lawful sources are used; all enrichment is logged for compliance.

Question: *Does it support alerts?*
Answer: Yes, reps can receive alerts for high-value leads or new activity in real time.

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CA 08 Customer Feedback & Survey Analysis

Quick Win

Overview

Aggregates customer surveys, reviews, and feedback. AI analyzes sentiment, categorizes responses, and highlights recurring issues. Dashboards track trends and send alerts for negative signals.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; depends on feedback channels, languages, and reporting requirements.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Good ROI; helps businesses act on customer insights faster and improve retention.

Deliverability Estimate

1–2 weeks (survey tool + sentiment AI)

Suitable for (Company Size)

Small, SME, Enterprise.

Suitable for Business Types

Any business actively collecting feedback through surveys or reviews. Especially relevant for SaaS, e-commerce, hospitality, healthcare, and professional services.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o Customer feedback scattered across tools.
o Manual analysis too slow to spot patterns.
o No clear visibility into satisfaction trends.
o Negative signals missed until too late.

Pricing

SME: £2.2k-£5.7k or €2.5k-€6.5k one-off build
Enterprise: £8.3k+ or €9.5k+ one-off build

This product may require additional external SaaS subscriptions (survey tools, analytics APIs), depending on the client's chosen platforms.

Support Level

Basic	single-channel analysis (e.g., survey tool) with basic dashboards
Pro	multi-channel aggregation, sentiment AI, and alerts
PREMIUM	enterprise-wide coverage, multilingual support, advanced analytics and reporting

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA
08

Cloud Resources Involved

Aggregate Responses

Analyse Sentiment

Post-Purchase Surveys (Typeform / Tally)

Feedback Analysis Engine

Customer Feedback & Survey Analysis

Generate Dashboard

Alert Team (Negative)
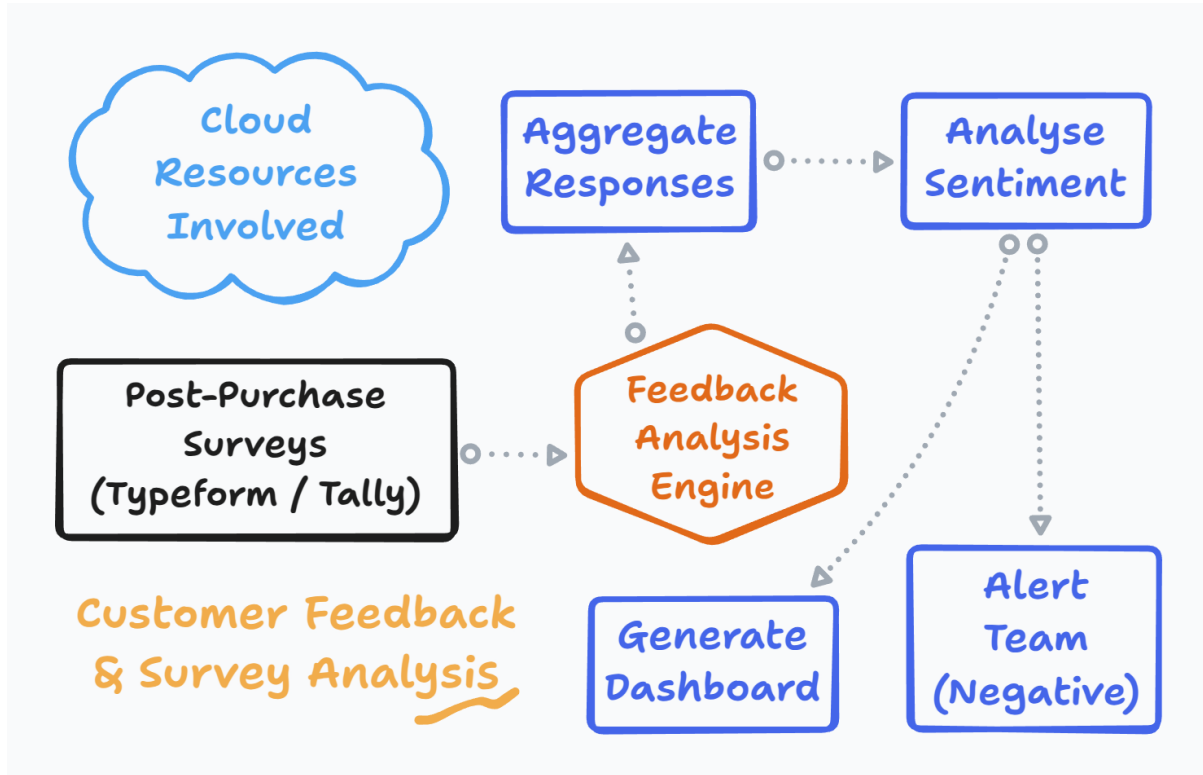
FAQs – Frequently Asked Questions

Question: *Which survey tools are supported?*
Answer: Google Forms, Typeform, SurveyMonkey, HubSpot, other SaaS, and custom survey platforms.

Question: *Can it analyze open-text responses?*
Answer: Yes, AI identifies sentiment, themes, and key phrases in free-text feedback.

Question: *Does it handle reviews and NPS scores?*
Answer: Yes, integrates with review sites and collects NPS for trend reporting.

Question: *Can alerts be triggered for low scores?*
Answer: Yes, real-time alerts notify managers of dissatisfied customers.

Question: *Is it multilingual?*
Answer: Yes, feedback can be analyzed in multiple languages with sentiment detection.

Question: *Can it generate executive reports?*
Answer: Yes, weekly/monthly reports summarize trends, themes, and recommended actions.

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CA 09 Customer Loyalty & Reward Program Automation

Big Swing

Overview

Automates customer loyalty schemes with points, tiers, rewards, and notifications. Integrates with CRM/e-commerce to encourage repeat purchases and long-term engagement.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on reward logic, system integrations, and multi-channel communication.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; increases repeat business and customer lifetime value.

Deliverability Estimate

2–4 weeks (reward logic, integrations)

Suitable for (Company Size)

Small, SME, Enterprise.

Suitable for Business Types

Retailers, e-commerce, SaaS, hospitality, fitness/gyms — any business relying on customer retention and repeat sales.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Low repeat purchase rates.
o   Manual or outdated loyalty programs.
o   Customers unaware of rewards.
o   Hard to track redemptions consistently.

Pricing

SME: £2.4k-£6.8k or €2.8k-€7.8k one-off build
Enterprise: £9.2k+ or €10.5k+ one-off build

This product may require additional external SaaS subscriptions (CRM/e-commerce platform), depending on the client's chosen platforms.

Support Level

Basic	points and simple rewards tracking
Pro	tiered programs, CRM/e-commerce integration, automated comms
PREMIUM	advanced segmentation, multi-channel, analytics dashboards

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA 09
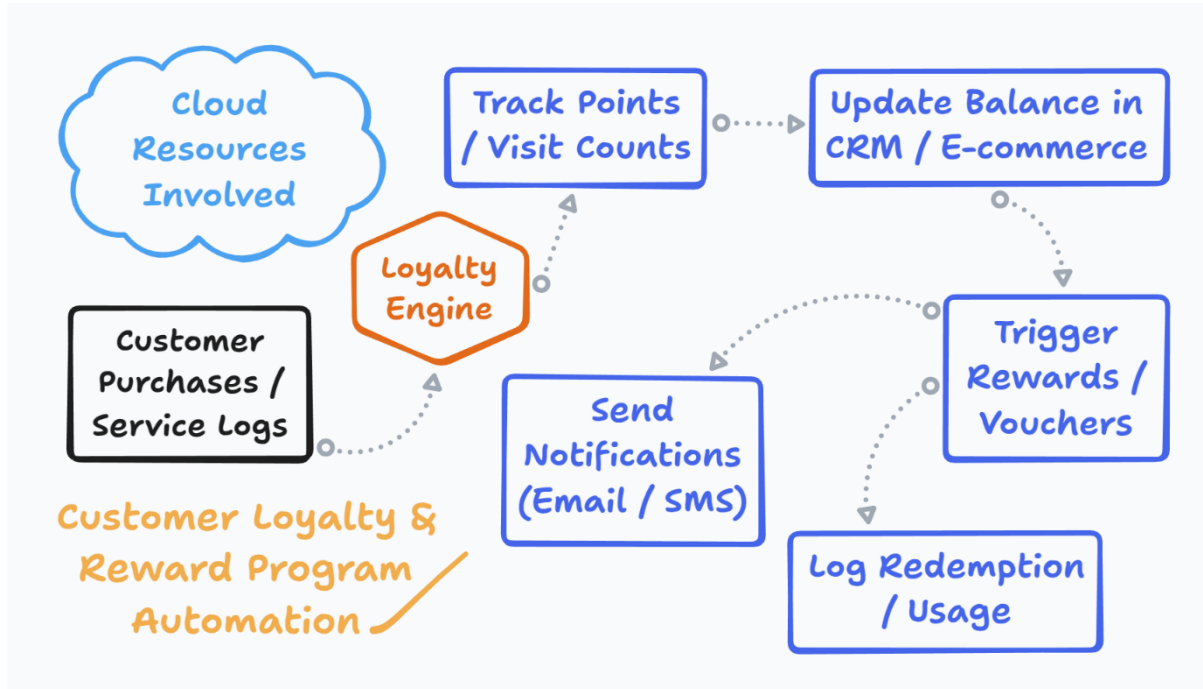
FAQs – Frequently Asked Questions

Question: *Can rewards be tailored per customer?*
Answer: Yes, personalization by spend level, purchase history, customer segment, or even customer preferences.

Question: *How are points tracked?*
Answer: Linked directly to CRM or e-commerce orders; balances visible to customers.

Question: *Can it integrate with existing loyalty apps?*
Answer: Yes, supports APIs of major platforms or builds custom flows.

Question: *What about fraud prevention?*
Answer: Logs redemptions, prevents duplicate use, and can flag anomalies.

Question: *Can communications be automated?*
Answer: Yes, notifications via email, SMS, Facebook, WhatsApp, or in-app.

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CA 10 Multi-Channel Lead Routing Automation

Quick Win **Popular**

Overview

Captures leads from all channels (web, email, socials, events), validates them, and routes them instantly to the correct salesperson or department.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; depends on validation rules, routing logic, and integrations.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; faster lead response times and higher conversion rates.

Deliverability Estimate

1–2 weeks (capture + routing rules)

Suitable for (Company Size)

Small, SME, Enterprise.

Suitable for Business Types

Any business with multiple lead sources and sales reps — especially agencies, SaaS, real estate, and B2B services.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …
o   Leads delayed or lost between systems.
o   Wrong reps handling wrong leads.
o   Manual assignment takes too long.
o   Lack of transparency in lead ownership.

Pricing

SME: £2.2k-£6.5k or €2.5k-€7.5k one-off build
Enterprise: £10.5k+ or €12k+ one-off build

This product may require additional external SaaS subscriptions (CRM + telephony/email/chat SaaS), depending on the client's chosen platforms.

Support Level

Basic	basic routing by region/team
Pro	advanced rules (industry, deal size), CRM sync
PREMIUM	enterprise routing engine with AI-based assignment, multi-language validation

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

CA 10
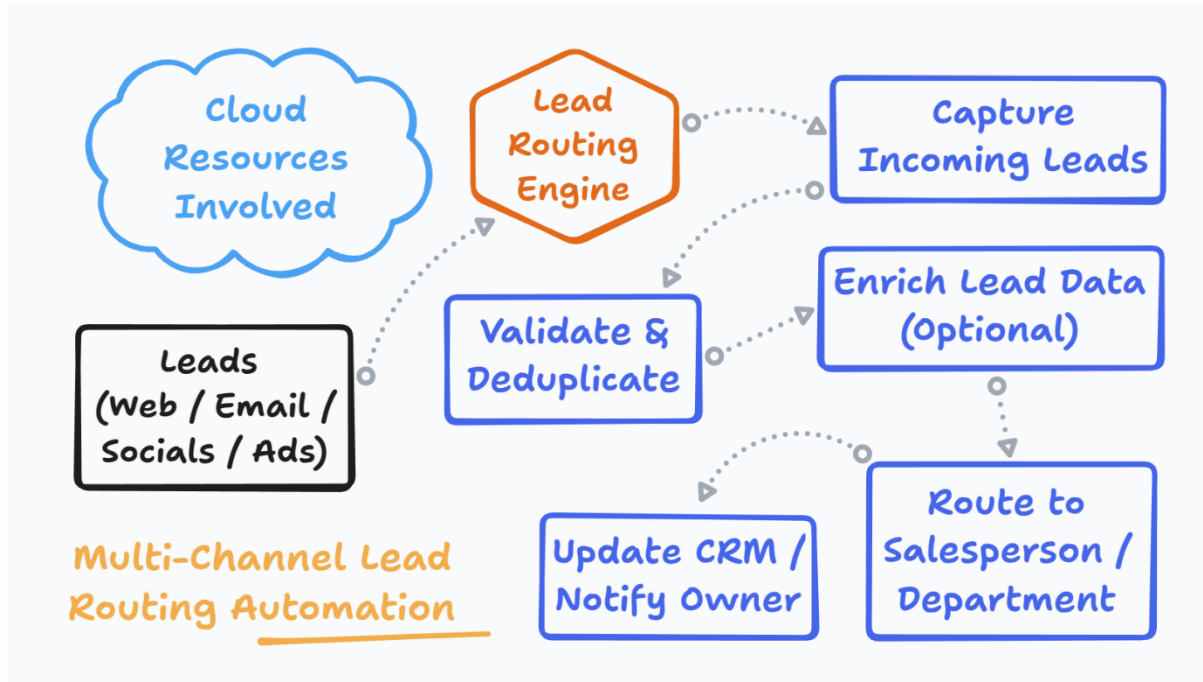
FAQs – Frequently Asked Questions

Question: *Which channels are supported?*
Answer: Web forms, chatbots, email parsing, social ads, event leads, CRM imports.

Question: *How is lead validation done?*
Answer: Email/phone verification, duplicate checks, and firmographic enrichment.

Question: *Can routing rules be customized?*
Answer: Yes, by geography, deal size, product line, or availability.

Question: *Does it integrate with CRMs?*
Answer: Yes, Salesforce, HubSpot, Pipedrive, Zoho, Odoo, HL, and others.

Question: *Can managers track performance?*
Answer: Yes, emails (or dashboards) show lead assignment speed, source breakdowns, and conversion.

Question: *What if no rep is available?*
Answer: Leads can be queued, assigned to backups, or auto-responded.

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Delivery / Operations Products

Efficient delivery and reliable operations are critical for sustainable growth. These automation products focus on streamlining workflows, reducing errors, and ensuring business processes run smoothly behind the scenes. By optimizing daily operations, they help organizations save time, cut costs, and deliver consistent value to clients.

Tags of products in this category:

DO 01   DO 02   DO 03   DO 04   DO 05   DO 06   DO 07   DO 08   DO 09
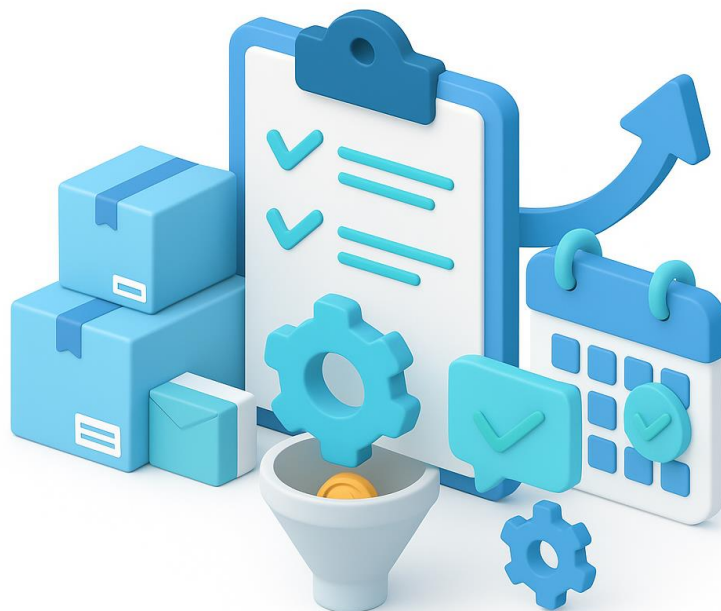
DO 01 Invoice & Payment Reminders

Quick Win   Popular

Overview
Automates the sending of invoice reminders via email, SMS, or other channels. Ensures faster client payments, improved cash flow, and reduced manual chasing.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Relatively simple; mostly integrations with CRM/accounting and message templates.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; faster payments directly improve cash flow and reduce admin time.

Deliverability Estimate
1–2 weeks (quick setup — mostly integrations + messaging templates)

Suitable for (Company Size)
Small, SME, Enterprise.

Suitable for Business Types
Any organization issuing frequent invoices via external SaaS/accounting platforms (e.g., Xero, QuickBooks, Odoo). Especially valuable where cash flow consistency is critical.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
o Clients frequently pay invoices late.
o Staff spend too much time sending reminders manually.
o Cash flow is unpredictable due to delays.
o No visibility into overdue payments until it's too late.

Pricing
SME: £1.6k-£4.5k or €1.8k-€5.2k one-off build
Enterprise: £6.5k+ or €7.5k+ one-off build

This product may require additional external SaaS subscriptions (CRM + email/SMS/telephony integration), depending on the client's chosen platforms.

Support Level

Basic	single accounting/CRM integration
Pro	multi-system integration or large invoice volumes
PREMIUM	enterprise-grade flows, compliance, global payment gateways

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

DO
01
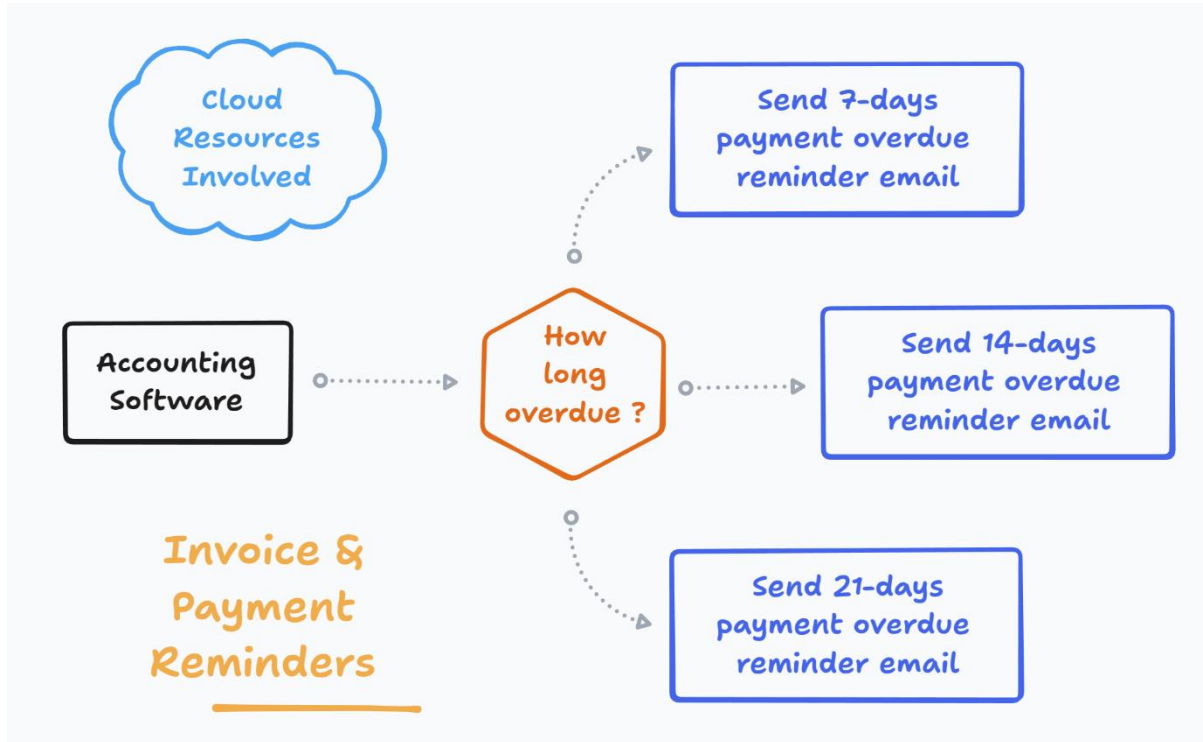
FAQs – Frequently Asked Questions

Question: *Does it work with my current CRM/accounting tool?*
Answer: Yes, supports Xero, QuickBooks, Odoo, Exact, HubSpot, HL, other CRM/accounting tools, and via custom APIs/webhooks.

Question: *Can staff approve reminders before they're sent?*
Answer: Optional "human-in-the-loop" approval allows queued reminders for review.

Question: *Which channels are supported (email, SMS, WhatsApp, IVR)?*
Answer: All major channels; choice depends on region, compliance, and budget.

Question: *Can reminders include direct payment links?*
Answer: Yes, via Stripe, Mollie, Adyen, or GoCardless integration.

Question: *Is it GDPR/PCI compliant?*
Answer: Yes, messages and payment links follow GDPR rules; payment handled by PCI-compliant gateways.

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DO 02 Data Syncing & Automated Reporting

Quick Win   **Big Swing**

(can be both depending on scope)

Overview

Automates the transfer of data between systems (e.g., CRM, ERP, accounting, spreadsheets) and generates scheduled reports. Ensures accurate, timely information without manual exports or errors.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; depends on number of systems, data volume, and reporting format requirements.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Solid ROI; saves staff hours, reduces errors, and improves decision-making with up-to-date reporting.

Deliverability Estimate

2–3 weeks (depends on system count and complexity of reporting)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business relying on multiple systems or needing frequent reporting. Especially valuable for e-commerce, agencies, finance, logistics, and manufacturing.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …
o   Manual CSV exports and imports between tools.
o   Reports take hours or days to prepare.
o   Data errors due to human input.
o   Lack of real-time visibility across systems.

Pricing

SME: £2.2k-£5.7k or €2.5k-€6.5k one-off build
Enterprise: £7.8k+ or €9k+ one-off build

This product may require additional external SaaS subscriptions (data connectors, BI/reporting tools, storage services), depending on the client's chosen platforms.

Support Level

Basic	simple sync between two systems + standard report
Pro	multi-system syncs, advanced validation, automated scheduled reports
PREMIUM	enterprise data flows, compliance logging, BI dashboards

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Visual Aid – Simplified Example Flow Diagram

DO
02

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.
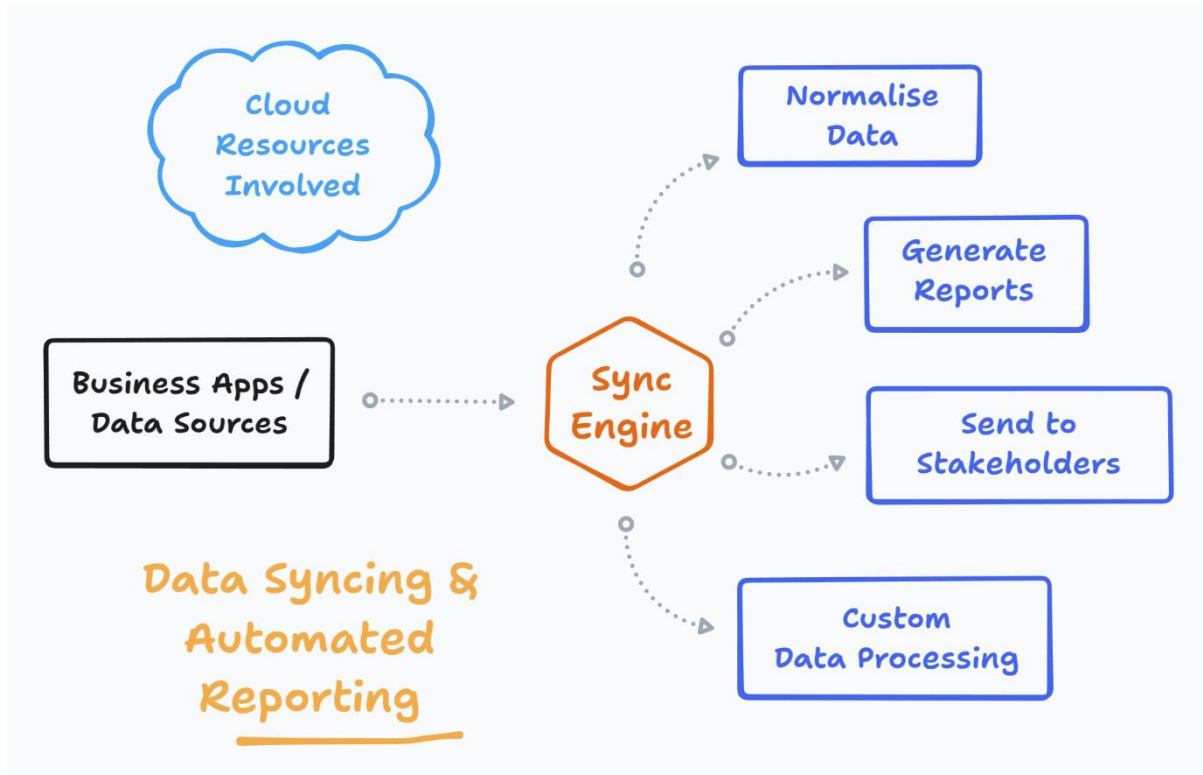
FAQs – Frequently Asked Questions

Question: *Which systems can be synced?*
Answer: CRMs, ERPs, accounting tools, e-commerce platforms, Google Sheets, BI tools, and custom APIs.

Question: *Can reports be customized?*
Answer: Yes, format, frequency, and delivery (email, Sheets, dashboards) can be tailored.

Question: *How is data accuracy ensured?*
Answer: Flows include validation rules, error handling, and audit logs.

Question: *Can it handle large datasets?*
Answer: Yes, scaled integrations (with batching) support large record volumes.

Question: *Is this GDPR compliant?*
Answer: Yes, all data transfers are secure and logged, with access restricted.

DO 03 — Document Processing Automation

`Big Swing` `Popular`

Overview

Automates the intake, parsing, validation, and routing of documents (e.g., contracts, invoices, PDFs). Reduces manual handling by extracting key data and forwarding it to the right system or team.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	**7**	**8**	9	10

Medium-to-high; depends on document types, languages, and validation rules.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**	**9**	10

Solid ROI; saves administrative time, reduces errors, and speeds up processing cycles.

Deliverability Estimate

2–4 weeks (depends on number of document types and complexity of validation)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business handling high volumes of structured or semi-structured documents. Especially relevant for finance, legal, logistics, healthcare, and enterprise back-office teams.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Manual retyping of invoices, contracts, or forms.
o   Lost or misfiled documents.
o   Human errors in extracting or entering data.
o   Long turnaround times for approvals or processing.

Pricing

SME: £3k-£7.8k or €3.5k-€9k one-off build
Enterprise: £10.5k+ or €12k+ one-off build

This product may require additional external SaaS subscriptions (OCR engines, storage services, document signing tools), depending on the client's chosen platforms.

Support Level

Basic	process one document type with extraction + routing
Pro	multi-document support, advanced validation, multi-language
PREMIUM	enterprise-scale automation with compliance logging and integrations to ERP/CRM

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.
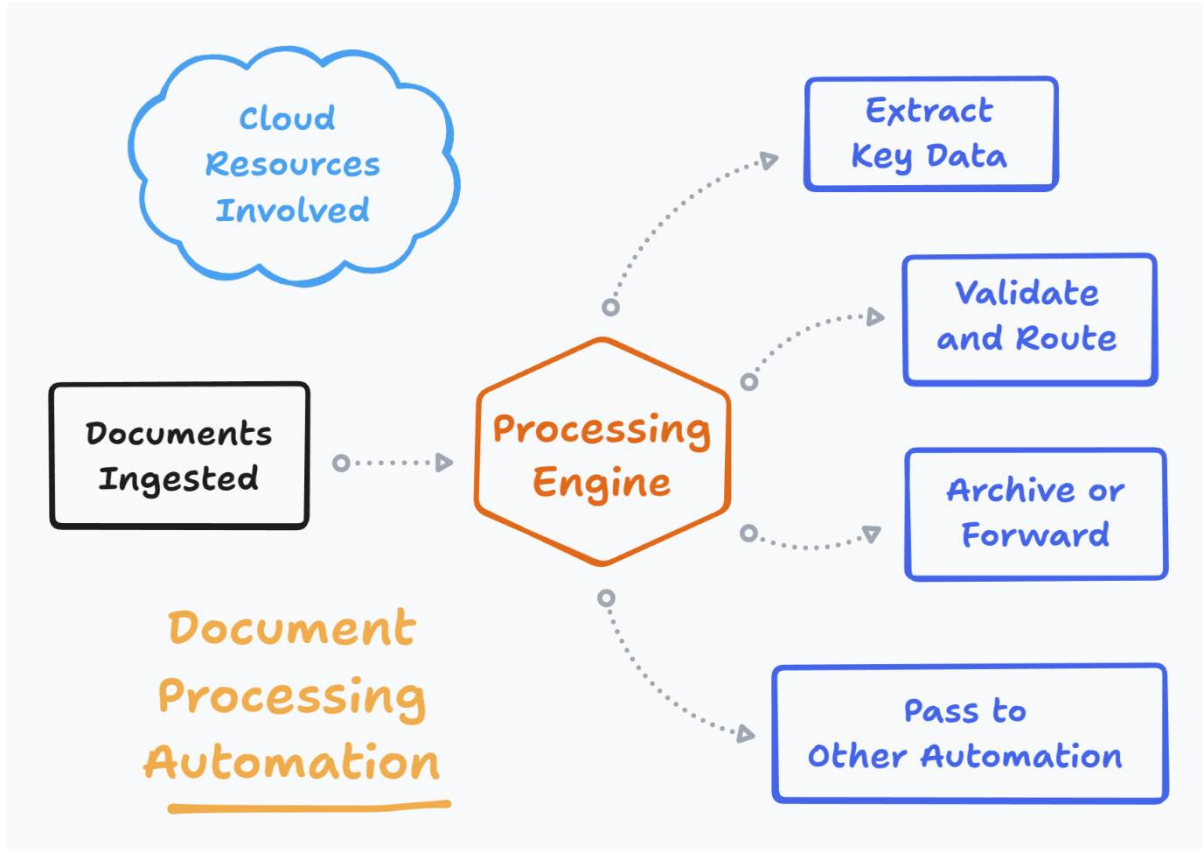
FAQs – Frequently Asked Questions

Question: *Which document formats are supported?*
Answer: PDF, DOCX, scanned images (OCR), structured spreadsheets, CSV, TXT, and more.

Question: *Can it validate extracted data?*
Answer: Yes, against business rules (e.g., VAT number format, purchase order match).

Question: *How are errors handled?*
Answer: Exception handling routes flagged documents for human review.

Question: *Is it secure and compliant?*
Answer: Yes, encrypted storage and processing, GDPR-ready.

Question: *Can it integrate with existing systems?*
Answer: Yes, ERP, CRM, accounting, and cloud storage services.

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DO 04 — Contract & Document Approval Automation

`Big Swing` `Popular`

Overview
Automates multi-step contract and document approval processes, including e-signatures, version control, and secure storage. Ensures compliance while reducing delays caused by manual approvals.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	7	8		

Medium-to-high; depends on approval layers, signing tools, and compliance requirements.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	8	9	

Solid ROI; faster turnaround, reduced legal/admin workload, better compliance tracking.

Deliverability Estimate
2–3 weeks (depends on number of approval chains and signing integrations)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Organizations requiring frequent approvals of contracts, policies, or internal documentation. Especially relevant for legal, HR, procurement, finance, and professional services.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
o   Contracts delayed due to manual chasing.
o   Lack of version control causing confusion.
o   Missing or inconsistent approval logs.
o   Compliance issues from untracked sign-offs.

Pricing
SME: £2.6k-£7k or €3k-€8k one-off build
Enterprise: £8.7k+ or €10k+ one-off build

This product may require additional external SaaS subscriptions (e-sign tools, document storage, compliance systems), depending on the client's chosen platforms.
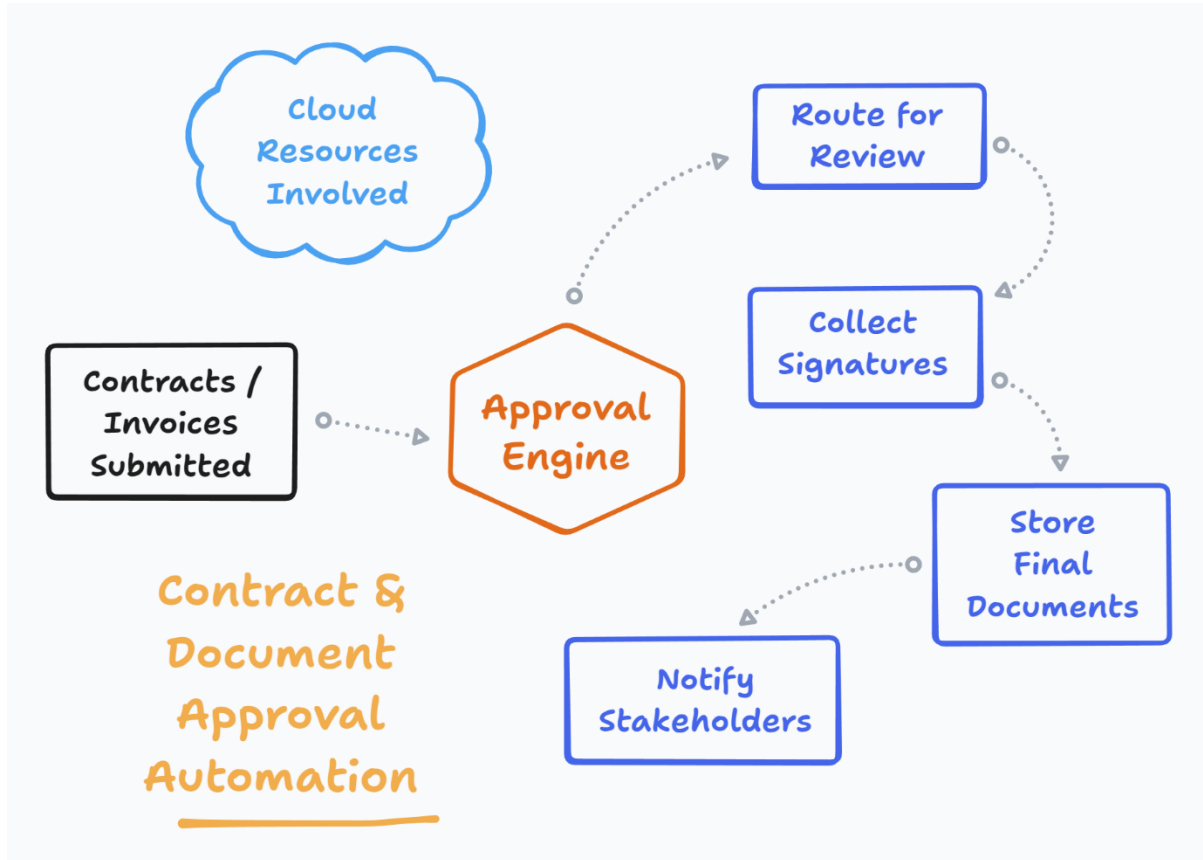
Support Level

Basic	single approval chain + standard e-sign
Pro	multi-branch approval, multi-tool integration
PREMIUM	enterprise-wide approval workflows with compliance audit trails

Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

DO 04

Cloud Resources Involved

Contracts / Invoices Submitted

Approval Engine

Route for Review

Collect Signatures

Store Final Documents

Notify Stakeholders

Contract & Document Approval Automation

FAQs – Frequently Asked Questions

Question: *Which e-sign tools can it integrate with?*
Answer: DocuSign, Adobe Sign, PandaDoc, Odoo Sign, and custom APIs.

Question: *Can approvals follow multiple paths?*
Answer: Yes, rules can branch by contract type, value, or department.

Question: *Is version control included?*
Answer: Yes, versions are tracked automatically with timestamps and approver logs.

Question: *Does it support reminders?*
Answer: Yes, automatic reminders are sent to approvers at set intervals.

Question: *How is compliance ensured?*
Answer: All actions are logged, with audit-ready trails for regulatory checks.

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DO 05 Inventory & Order Sync Automation

Big Swing   **Popular**

Overview

Automates syncing of inventory levels and order data across e-commerce platforms, POS systems, and accounting/ERP tools. Prevents overselling, stock mismatches, and manual data entry errors.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on number of systems, volume of SKUs, and sync frequency.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; reduces costly stock errors, increases customer satisfaction, and saves staff hours.

Deliverability Estimate

2–4 weeks (depends on number of platforms and SKU volume)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Retailers, wholesalers, e-commerce stores, or any business managing stock across multiple systems or sales channels.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Overselling due to delayed stock updates.
o   Staff re-entering order data into multiple systems.
o   Inventory discrepancies causing poor customer experience.
o   Lack of unified stock visibility across locations.

Pricing

SME: £2.6k-£7.8k or €3k-€9k one-off build
Enterprise: £10k+ or €11.5k+ one-off build

This product may require additional external SaaS subscriptions (e-commerce connectors, ERP modules, or inventory APIs), depending on the client's chosen platforms.

Support Level

Basic	single sync between two systems (e.g., e-commerce ↔ accounting)
Pro	multi-system, multi-location sync with advanced error handling
PREMIUM	enterprise-wide sync, global stock, compliance logging, reporting

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

DO
05
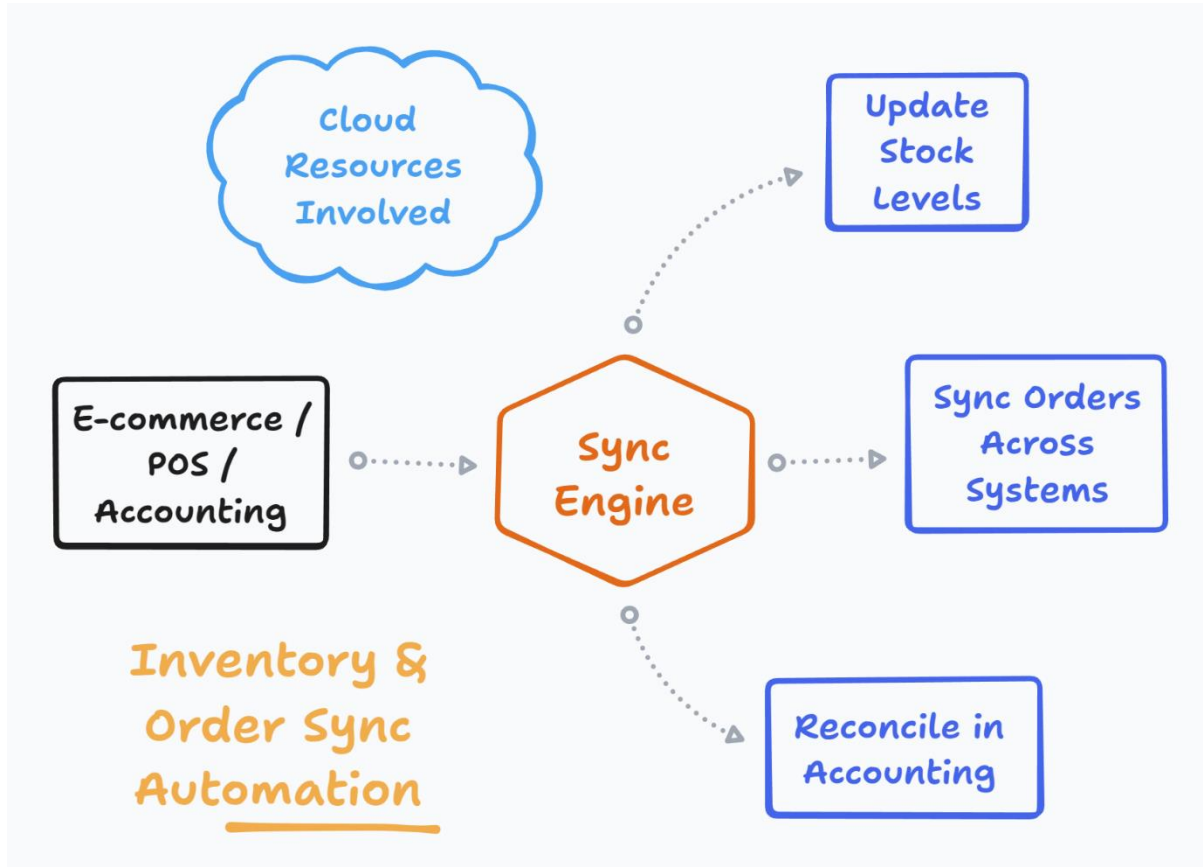
FAQs – Frequently Asked Questions

Question: *Which platforms can be integrated?*
Answer: Shopify, WooCommerce, Magento, Lightspeed, Square POS, Odoo, Xero, QuickBooks, and ERPs.

Question: *How often are updates synced?*
Answer: Real-time where APIs allow; otherwise scheduled intervals (every 5–15 minutes).

Question: *Can it handle multi-location warehouses?*
Answer: Yes, stock data is aggregated and synced across locations.

Question: *How are errors managed?*
Answer: Exceptions are flagged and routed to staff for correction, with alerts.

Question: *Is the solution scalable?*
Answer: Yes, supports thousands of SKUs and multi-region operations.

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DO 06 — Supplier & Purchase Order Management

Big Swing

Overview

Automates supplier communication and purchase order (PO) creation. Tracks low stock, generates POs, emails suppliers, and records transactions in ERP/accounting systems — reducing delays and manual admin.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on supplier diversity, PO rules, and system integrations.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Solid ROI; prevents stockouts, saves procurement/admin time, and streamlines supplier relationships.

Deliverability Estimate

2–3 weeks (depends on supplier count and approval workflows)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Retailers, wholesalers, manufacturers, hospitality — any business with recurring supply and purchasing needs.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o Staff spend hours drafting and sending POs.
o Missed or late orders cause stockouts.
o No centralized visibility of supplier communications.
o Manual logging of POs into accounting/ERP.

Pricing

SME: £2.6k-£7.4k or €3k-€8.5k one-off build
Enterprise: £9.6k+ or €11k+ one-off build

This product may require additional external SaaS subscriptions (ERP modules, supplier portals, EDI/API connectors), depending on the client's chosen platforms.

Support Level

Level	Description
Basic	auto-generate POs for one supplier/system
Pro	multi-supplier workflows, rule-based approvals, ERP/accounting sync
PREMIUM	enterprise procurement flows with compliance logging, multi-region suppliers

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

DO 06
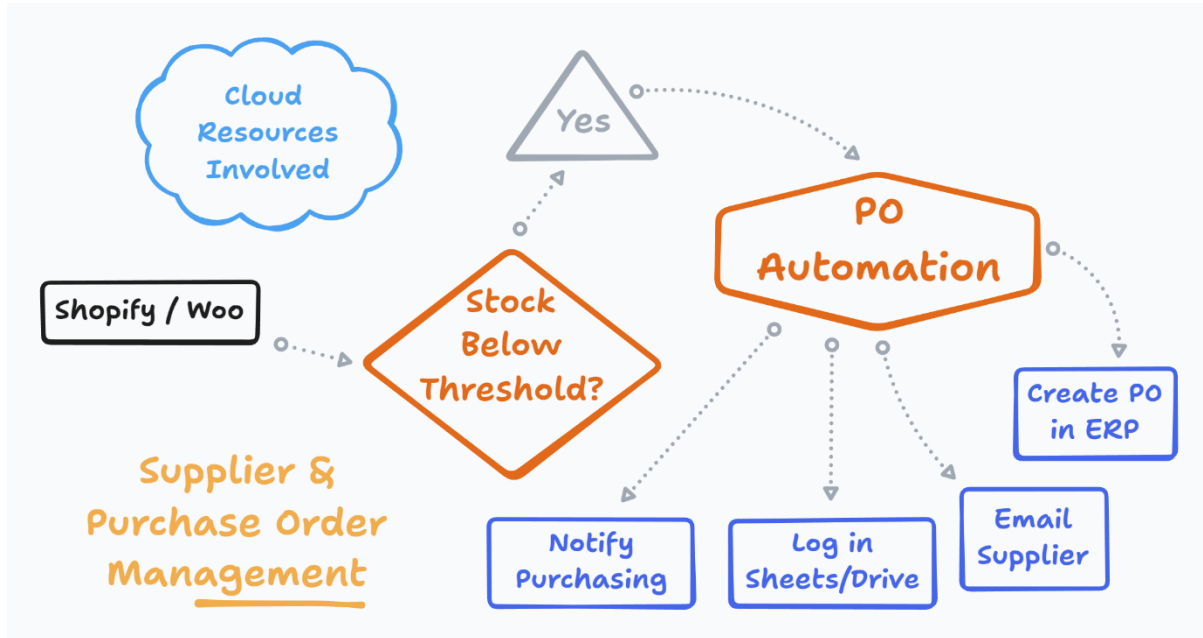
FAQs – Frequently Asked Questions

Question: *Can it handle multiple suppliers?*
Answer: Yes, POs can be auto-generated for many suppliers with rules per vendor.

Question: *How are low-stock levels detected?*
Answer: Integrated with inventory/ERP tools, triggers based on thresholds.

Question: *Can approvals be added before sending POs (Purchase Orders)?*
Answer: Yes, optional manager approval steps can be configured.

Question: *Can it send orders via email or EDI (Electronic Data Interchange)?*
Answer: Both — emails with PDF attachments or direct EDI/API integration.

Question: *Is it auditable for compliance?*
Answer: Yes, all POs and transactions are logged with timestamps.

DO 07 Quote-to-Cash Automation

`Big Swing` `Popular`

Overview

Automates the full cycle from generating quotes, converting them into invoices, tracking payments, and handling deposits, cancellations, or refunds. Streamlines sales-to-payment workflows while ensuring compliance and speed.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on sales systems, payment gateways, and refund/cancellation logic.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Solid ROI; accelerates cash collection, reduces admin, and improves customer experience.

Deliverability Estimate

2–3 weeks (depends on payment gateway integrations and refund logic)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business issuing quotes and invoices. Especially useful for agencies, SaaS, service firms, e-commerce with custom orders, and B2B suppliers.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Manual transfer from quotes to invoices.
o   Delays in deposit collection or payment tracking.
o   Inconsistent handling of refunds/cancellations.
o   Revenue leakage due to missing or late invoices.

Pricing

SME: £3.3k-£9.6k or €3.8k-€11k one-off build
Enterprise: £11.8k+ or €13.5k+ one-off build

This product may require additional external SaaS subscriptions (payment gateways, CRM/ERP modules, invoicing tools), depending on the client's chosen platforms.

Support Level

Basic	quotes to invoices + simple payment links
Pro	deposits, partial payments, cancellations, CRM/ERP sync
PREMIUM	enterprise workflows with multi-gateway, compliance, automated refund handling

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

DO
07

Cloud Resources Involved

CRM / CPQ Tool

Quote-to-Cash Engine

Generate Quotes

Route for Approval

Sync with ERP / Accounting

Convert to Invoices

Track Payments & Renewals

Quote-to-Cash Automation
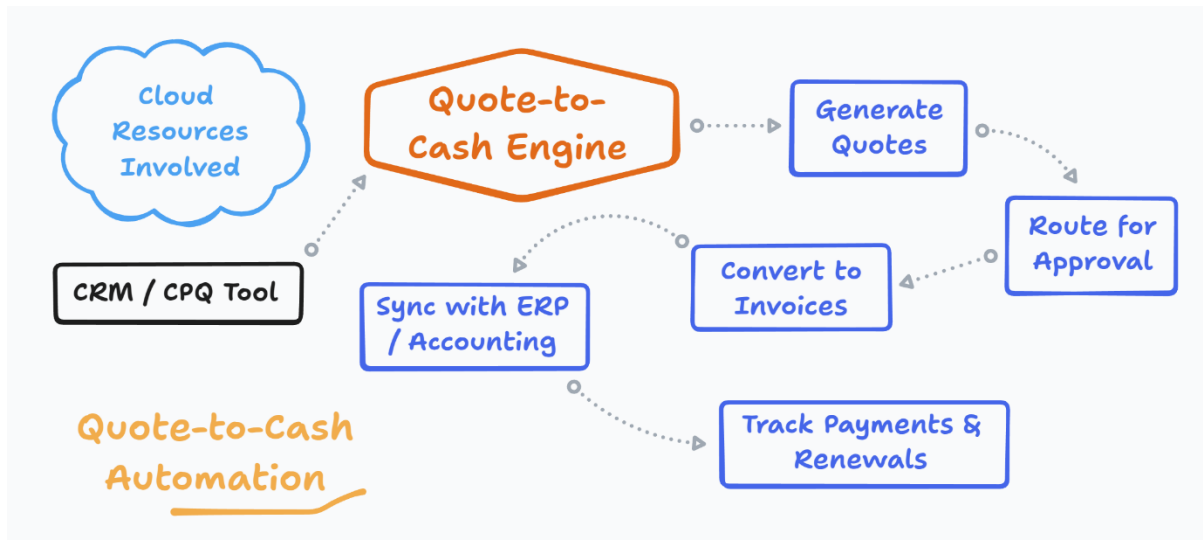
FAQs – Frequently Asked Questions

Question: *Which payment gateways are supported?*
Answer: Stripe, Mollie, Adyen, GoCardless, PayPal, and bank integrations via API.

Question: *Can deposits be tracked automatically?*
Answer: Yes, deposits are recorded against the quote/invoice and reconciled with the final invoice.

Question: *Does it handle refunds?*
Answer: Yes, refunds/cancellations are logged and reconciled in accounting/ERP systems.

Question: *Can it integrate with CRMs?*
Answer: Yes, HubSpot, Salesforce, Odoo, HL, and others.

Question: *Is it compliant?*
Answer: Yes, all payment flows follow GDPR and PCI compliance requirements.

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DO 08 — Expense Receipt Processing

Quick Win   **Popular**

Overview

Automates the capture, OCR (Optical Character Recognition, text recognition), validation, and posting of expense receipts into accounting systems. Removes manual data entry, reduces errors, and speeds up expense tracking.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; depends on number of sources (scans, emails, apps) and accounting integration.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Good ROI; significant time savings and fewer errors in financial records.

Deliverability Estimate

1–2 weeks (quick deployment — mainly OCR + accounting integration)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business where staff submit expenses or where large volumes of receipts must be processed — consultants, agencies, retail, hospitality, logistics.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Employees manually typing receipt details into spreadsheets.
o   Lost or missing receipts delaying reimbursements.
o   Frequent data entry errors in amounts or VAT.
o   Finance teams overwhelmed during month-end.

Pricing

SME: £1.7k-£6.1k or €2k-€7k one-off build
Enterprise: £7.8k+ or €9k+ one-off build

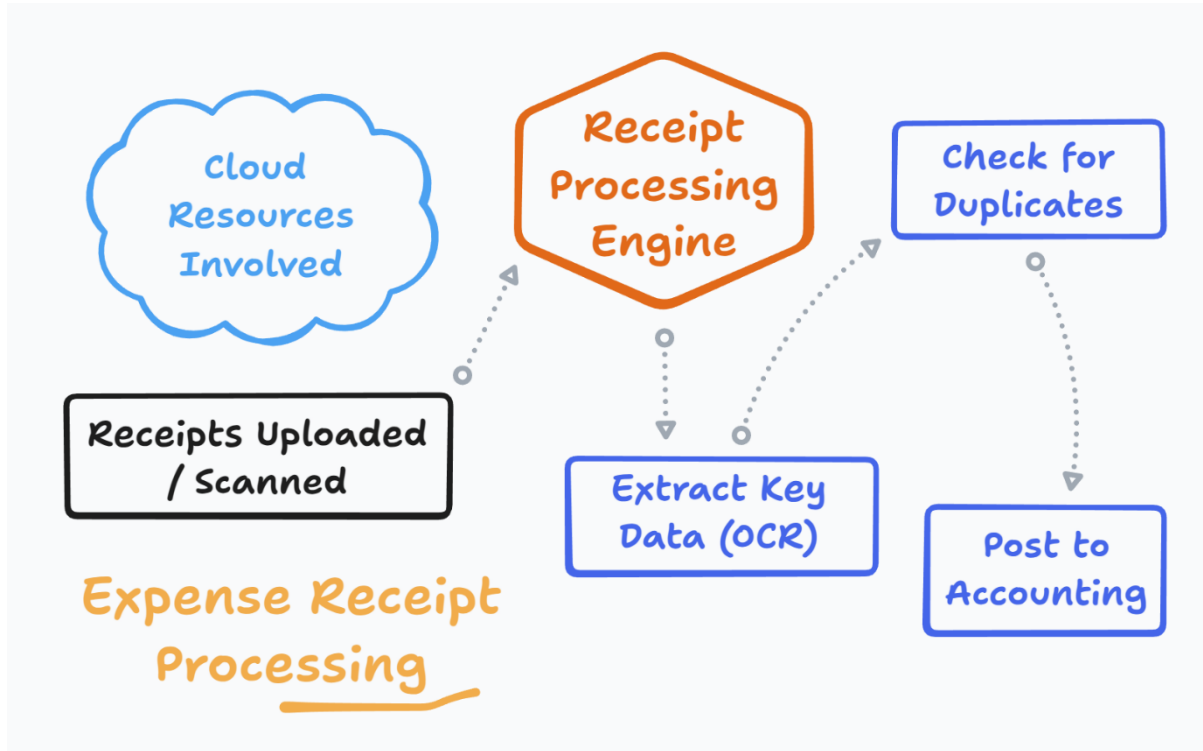This product may require additional external SaaS subscriptions (OCR engines, expense management apps, accounting connectors), depending on the client's chosen platforms.

Support Level

Basic	receipt OCR + single accounting system
Pro	multi-channel input (email/app upload), validation, multi-system sync
PREMIUM	enterprise-wide receipt processing with compliance logging and advanced rules

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Visual Aid – Simplified Example Flow Diagram

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DO
08

Expense Receipt Processing

Cloud Resources Involved → Receipts Uploaded / Scanned → Receipt Processing Engine → Extract Key Data (OCR) → Check for Duplicates → Post to Accounting

FAQs – Frequently Asked Questions

Question: *How are receipts captured?*
Answer: Via email, mobile app upload, or scanned receipts or PDFs.

Question: *Does it support OCR (Optical Character Recognition)?*
Answer: Yes, text is extracted automatically, including VAT, dates, and totals.

Question: *Can it validate expenses?*
Answer: Yes, rules (e.g., max amounts, VAT formats) flag outliers for review.

Question: *Which accounting tools are supported?*
Answer: Xero, QuickBooks, Odoo, SAP, NetSuite, and others.

Question: *Is it GDPR-compliant?*
Answer: Yes, all documents are stored and processed securely with audit trails.

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DO 09 — Supplier Invoice Processing

Big Swing **Popular**

Overview

Automates the intake, extraction, validation, and posting of supplier invoices. Matches invoices against purchase orders (POs) and payment records, reducing manual entry, errors, and delays in accounts payable.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on supplier volume, PO-matching rules, and accounting/ERP integrations.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; saves finance team hours, prevents duplicate/incorrect payments, and strengthens supplier relationships.

Deliverability Estimate

2–3 weeks (depends on PO-matching rules and accounting integrations)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business with frequent supplier invoices. Especially critical for retail, wholesale, manufacturing, logistics, and enterprises with multi-supplier procurement.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Manual keying of invoice data into accounting/ERP.
o   Lost or duplicate invoices.
o   Slow approval/payment cycles.
o   Inconsistent reconciliation with purchase orders.

Pricing

SME: £2.2k-£7.4k or €2.5k-€8.5k one-off build
Enterprise: £9.2k+ or €10.5k+ one-off build

This product may require additional external SaaS subscriptions (OCR engines, AP automation tools, ERP connectors), depending on the client's chosen platforms.

Support Level

Basic	extract + post invoices into one accounting tool
Pro	PO-matching, multi-system sync, exception handling
PREMIUM	enterprise-scale AP automation with compliance, multi-language invoices, advanced approvals

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This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

DO
09
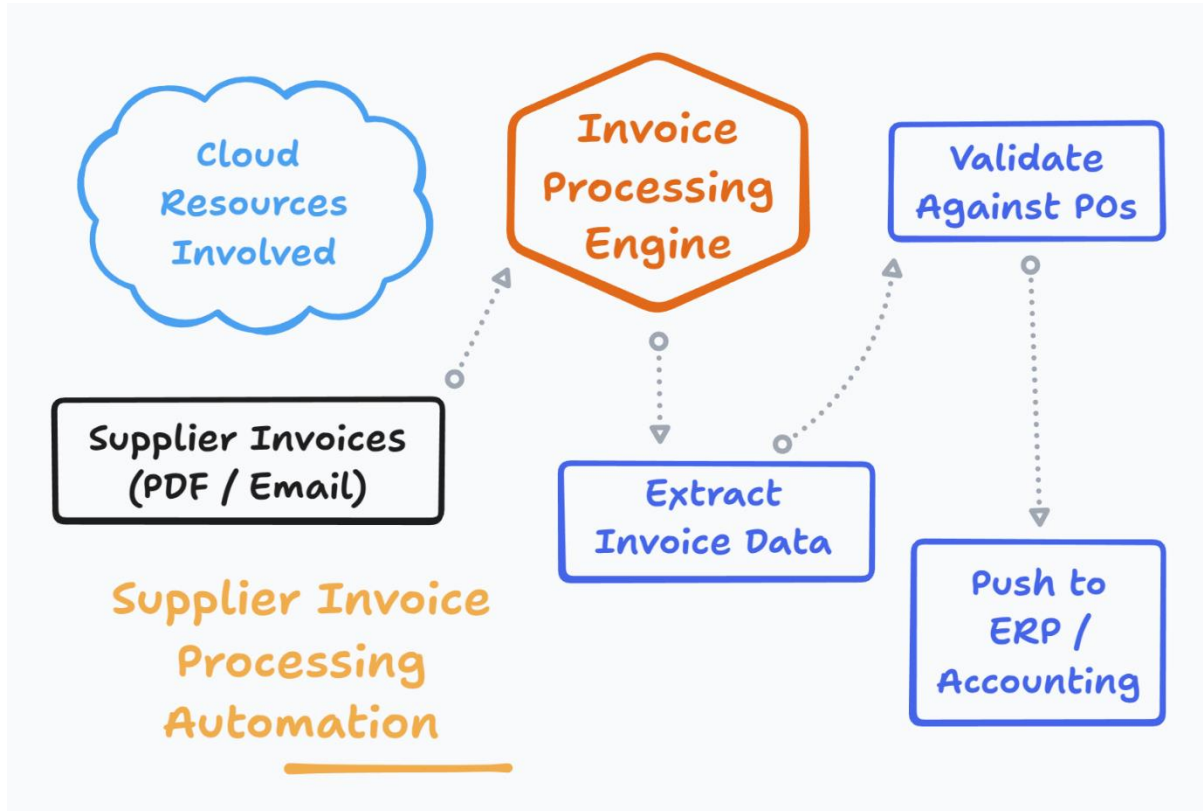
FAQs – Frequently Asked Questions

Question: *How are supplier invoices captured?*
Answer: Via email, upload, or direct supplier portals.

Question: *Can it match invoices to POs (Purchase Orders)?*
Answer: Yes, invoices are checked against existing POs to ensure accuracy.

Question: *What happens with duplicates?*
Answer: The system detects duplicates and flags them for review.

Question: *Which systems does it integrate with?*
Answer: Xero, QuickBooks, Odoo, SAP, NetSuite, Oracle, and more.

Question: *Is compliance supported?*
Answer: Yes, all invoices are logged with timestamps, and VAT/tax rules are applied.

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Post-Sale Support & Client Retention

Securing a customer is only the beginning — retaining them is where long-term growth is built. These automation products focus on strengthening customer relationships, improving support experiences, and encouraging repeat business. By reducing response times, personalizing interactions, and proactively addressing client needs, they help businesses increase loyalty, lower churn, and maximize customer lifetime value.

Tags of products in this category:

PS 01 PS 02 PS 03 PS 04 PS 05 PS 06 PS 07

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PS 01 Customer Support Triage (tickets, chats, emails)

Quick Win   **Big Swing**

(can be both depending on scope)

Overview
Automates the classification, prioritization, and routing of incoming support requests (tickets, chats, emails). Reduces response times and ensures each case reaches the right agent or department.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	**7**			

Medium; depends on the number of channels, languages, and routing rules.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**	**9**	

Strong ROI; faster responses improve customer satisfaction, reduce churn, and lower support costs.

Deliverability Estimate
2–3 weeks (depends on channel count and routing logic)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Any organization providing customer service via multiple channels. Especially relevant for SaaS, e-commerce, telecom, and enterprises with dedicated support teams.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
- Slow response times due to manual triage.
- Tickets routed to the wrong department.
- No prioritization of urgent or VIP requests.
- Agents overloaded with repetitive inquiries.

Pricing
SME: £2.2k-£7.8k or €2.5k-€9k one-off build
Enterprise: £10k+ or €11.5k+ one-off build

This product may require additional external SaaS subscriptions (ticketing platforms, chat systems, AI classification APIs), depending on the client's chosen platforms.

Support Level

Basic	triage rules on one channel (e.g., email)
Pro	multi-channel intake, language detection, escalation rules
PREMIUM	enterprise-scale triage with AI classification, SLAs, and compliance logging

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

PS 01
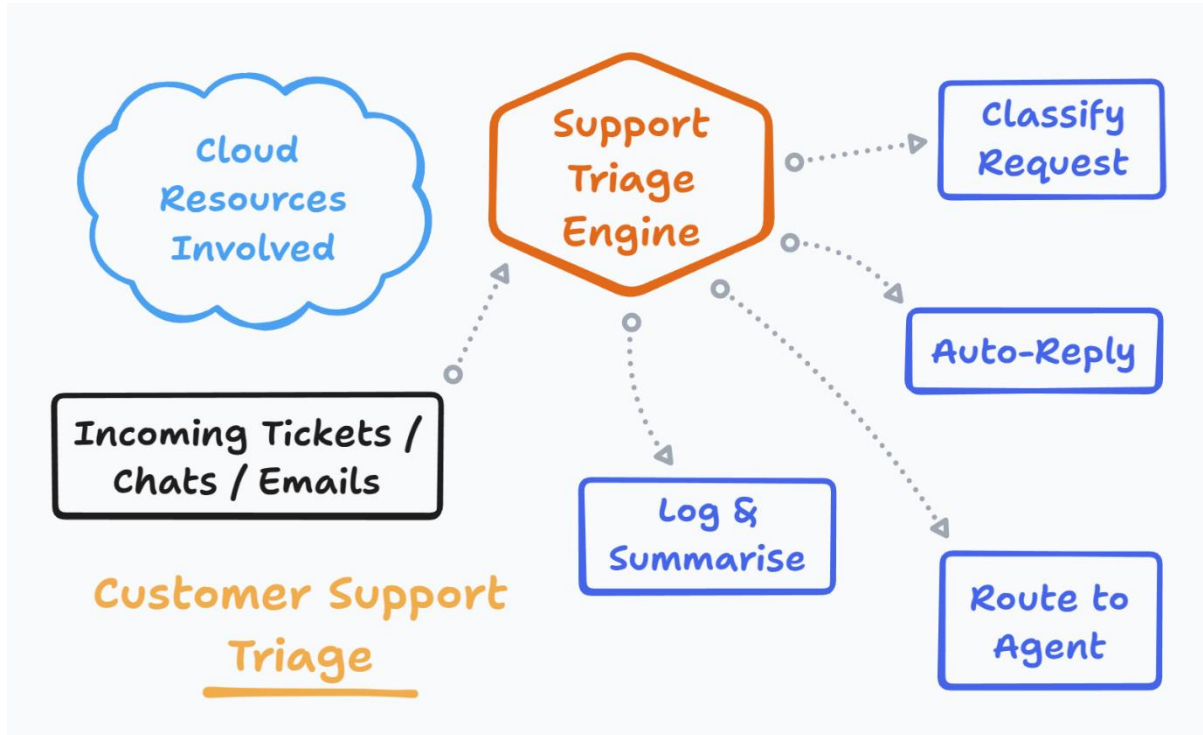
FAQs – Frequently Asked Questions

Question: *Which support platforms are supported?*
Answer: Zendesk, Freshdesk, Intercom, HubSpot, Odoo, custom ticketing systems.

Question: *Can it detect language and urgency?*
Answer: Yes, AI models classify by language, sentiment, and keywords to prioritize correctly.

Question: *How does escalation work?*
Answer: Urgent tickets can be auto-routed to senior agents or managers with alerts.

Question: *Can repetitive inquiries be auto-answered?*
Answer: Yes, FAQs can trigger automated replies or chatbot responses.

Question: *Is it GDPR compliant?*
Answer: Yes, all requests are logged and stored securely with role-based access.

PS 02 — Knowledge Base Auto-Build

Big Swing   **Popular**

Overview
Automatically builds and updates a knowledge base from existing documents, emails, and support tickets. Makes information searchable and accessible, reducing repetitive support queries.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	**7**			

Medium; depends on content sources, languages, and categorization rules.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**		

Good ROI; reduces agent workload and empowers customers with self-service.

Deliverability Estimate
2–3 weeks (depends on source system count and KB complexity)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Any business with recurring customer questions or large volumes of documentation. Especially valuable for SaaS, e-commerce, and enterprises with complex products.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution ...
o   Agents repeatedly answering the same questions.
o   No centralized knowledge base for staff or customers.
o   Existing documentation outdated or scattered.
o   Customers frustrated with slow answers.

Pricing
SME: £2.4k-£6.8k or €2.8k-€7.8k one-off build
Enterprise: £9.2k+ or €10.5k+ one-off build

This product may require additional external SaaS subscriptions (KB platforms, AI indexing/search tools), depending on the client's chosen platforms.

Support Level

Basic	auto-import docs into a searchable KB
Pro	ticket/email mining, categorization, updates
PREMIUM	enterprise KB with AI-powered search, multi-language support, media embedding

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

PS
02
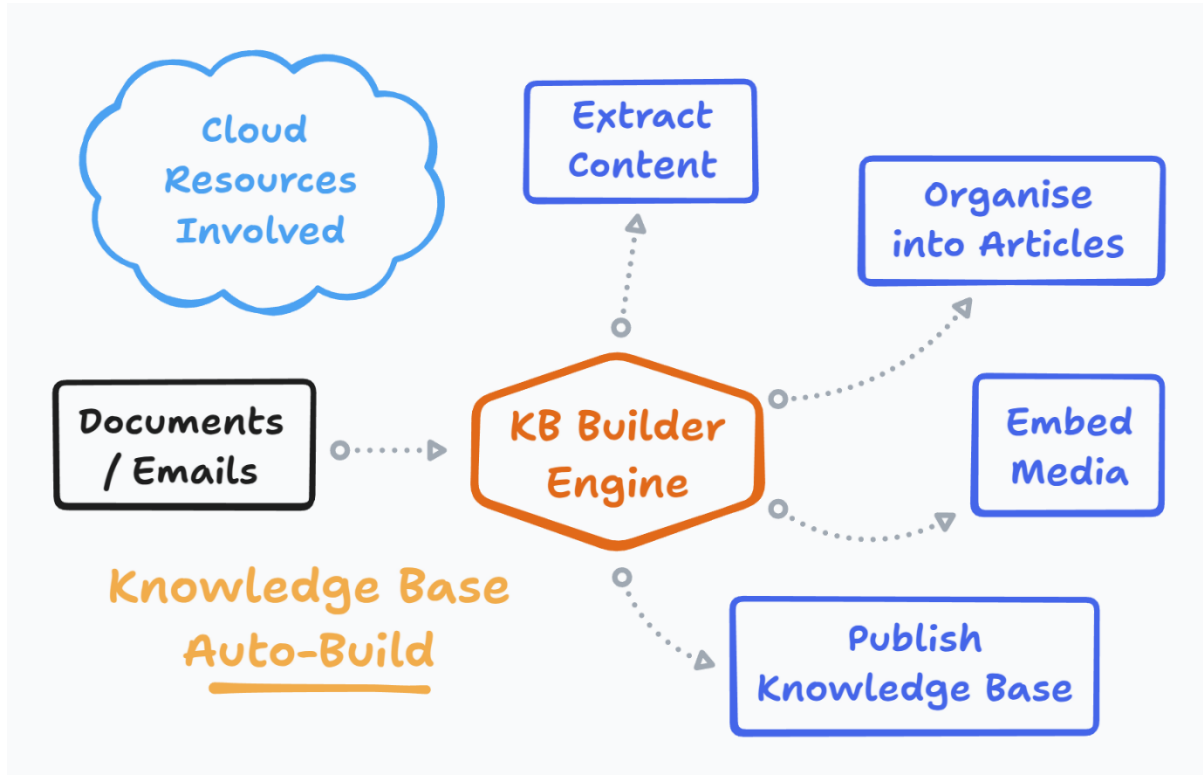
FAQs – Frequently Asked Questions

Question: *Which platforms can the KB be built on?*
Answer: Zendesk Guide, Freshdesk, Confluence, Notion, Odoo, or custom portals.

Question: *Can the system suggest updates automatically?*
Answer: Yes, it monitors new support queries and suggests KB entries.

Question: *Can multimedia (images, videos) be included?*
Answer: Yes, KB entries can embed visuals, recordings, or walkthroughs.

Question: *Is it multilingual?*
Answer: Yes, translations can be generated or imported for global audiences.

Question: *Can staff approve entries before publishing?*
Answer: Yes, approval workflows are supported.

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PS 03 Helpdesk SLA Monitoring & Escalation

Quick Win   Big Swing

(can be both depending on scope)

Overview
Monitors helpdesk tickets against agreed Service Level Agreements (SLAs). Automatically escalates overdue or high-priority cases, ensuring commitments to response and resolution times are consistently met.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; depends on helpdesk platform, SLA tiers, and escalation workflows.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Good ROI; improves compliance, avoids penalties, and strengthens customer trust.

Deliverability Estimate
2–3 weeks (depends on SLA complexity and escalation channels)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Any business offering support under contractual SLAs. Particularly relevant for SaaS, managed services, IT providers, and enterprise support teams.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
o   Tickets breaching SLA unnoticed.
o   Manual monitoring of response times.
o   Escalations only happen after complaints.
o   Lack of visibility into SLA compliance.

Pricing
SME: £2.6k-£8.3k or €3k-€9.5k one-off build
Enterprise: £9.6k+ or €11k+ one-off build

This product may require additional external SaaS subscriptions (helpdesk platforms, monitoring/reporting add-ons), depending on the client's chosen platforms.

Support Level

Basic	monitor single SLA type, basic escalation
Pro	multiple SLA tiers, multi-channel support, automated reporting
PREMIUM	enterprise SLA monitoring, compliance logging, advanced escalations

Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

Helpdesk SLA Monitoring & Escalation
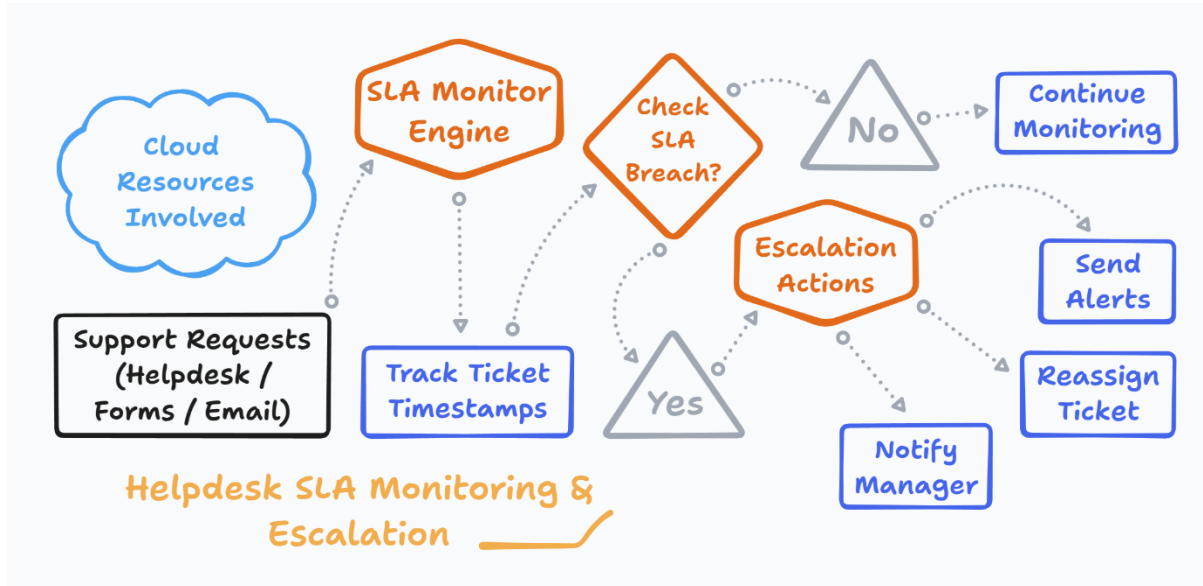
FAQs – Frequently Asked Questions

Question: *Which platforms are supported?*
Answer: Zendesk, Freshdesk, Intercom, Odoo Helpdesk, Salesforce Service Cloud, and others.

Question: *Can escalation rules be customized?*
Answer: Yes, by time elapsed, ticket type, priority, or client contract.

Question: *How are escalations delivered?*
Answer: Via email, Slack/Teams alerts, SMS, or direct manager notifications.

Question: *Does it generate SLA reports?*
Answer: Yes, compliance reports can be scheduled weekly/monthly.

Question: *Is it GDPR compliant?*
Answer: Yes, all ticket data is handled securely within the helpdesk platform.

PS 04

Customer Churn Prediction & Alerts

Big Swing

Overview

Uses AI models to analyze customer behavior and engagement signals to predict churn risk. Automatically alerts account managers and triggers retention actions before clients leave.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on data sources, customer volume, and predictive model sophistication.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Very high ROI; retaining customers is cheaper than acquiring new ones, and proactive saves significant revenue.

Deliverability Estimate

3–4 weeks (depends on data availability and model training)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Subscription businesses, SaaS, telecom, agencies, fitness/wellness, and any business where recurring clients are key.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

- Losing clients without warning or insight into why.
- No system to flag declining engagement.
- Revenue leakage from preventable churn.
- Account managers reacting only after cancellation.

Pricing

SME: £3k-£7.8k or €3.5k-€9k one-off build
Enterprise: £12.2k+ or €14k+ one-off build

This product may require additional external SaaS subscriptions (CRM platforms, analytics tools, AI modeling services), depending on the client's chosen platforms.

Support Level

Basic	track limited engagement metrics + alerts
Pro	AI churn prediction models + retention triggers
PREMIUM	enterprise solution with CRM integration, multi-channel alerts, custom retention flows

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Visual Aid – Simplified Example Flow Diagram

PS
04

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.
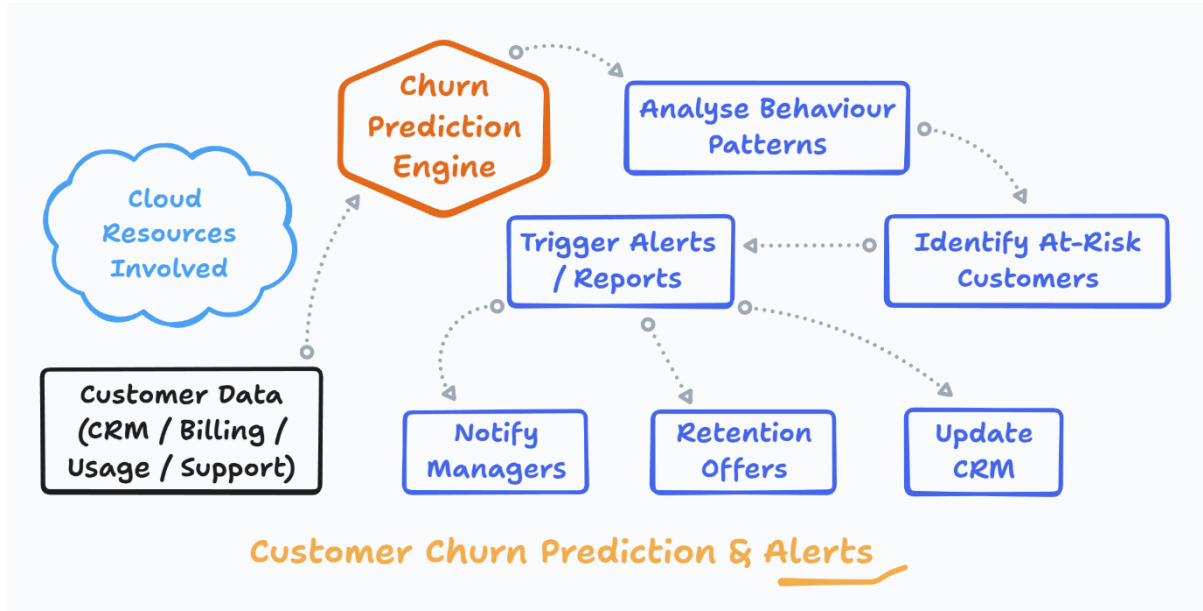
FAQs – Frequently Asked Questions

Question: *What data is analyzed?*
Answer: Usage frequency, support tickets, payment patterns, NPS, logins, and engagement metrics.

Question: *Can it integrate with my CRM?*
Answer: Yes, Salesforce, HubSpot, Odoo, HL, Zoho, and more.

Question: *How are alerts delivered?*
Answer: Email, Slack/Teams, or CRM tasks for account managers.

Question: *Does it suggest retention actions?*
Answer: Yes, pre-configured playbooks (discounts, calls, check-ins) can be triggered automatically.

Question: *Is it GDPR compliant?*
Answer: Yes, only lawful customer data is processed with logs and audit trails.

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PS 05

Automated Customer Education / Onboarding Series

Big Swing   **Popular**

Overview

Automates structured onboarding and education sequences for new customers. Delivers tutorials, guides, and reminders via email, SMS, or in-app messaging, ensuring clients quickly adopt and gain value from your product or service.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on content volume, delivery channels, and integration with CRM/support tools.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Strong ROI; faster onboarding reduces churn, increases adoption, and drives long-term customer value.

Deliverability Estimate

2–4 weeks (depends on content creation and channel integrations)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

SaaS, e-commerce, training providers, agencies, and any business where customer education directly impacts retention and upselling.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution ...

o   New customers confused about how to use the product/service.
o   High support volume for basic "how-to" questions.
o   Poor product adoption leading to early churn.
o   No consistent onboarding process across clients.

Pricing

SME: £3k-£7.4k or €3.5k-€8.5k one-off build
Enterprise: £10.9k+ or €12.5k+ one-off build

This product may require additional external SaaS subscriptions (email/SMS platforms, learning management tools, content hosting), depending on the client's chosen platforms.

Support Level

Basic	simple email sequences with guides
Pro	multi-channel delivery (email, SMS, in-app), content personalization
PREMIUM	enterprise onboarding with AI-driven segmentation, multimedia tutorials, advanced analytics

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Visual Aid – Simplified Example Flow Diagram

PS
05

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.
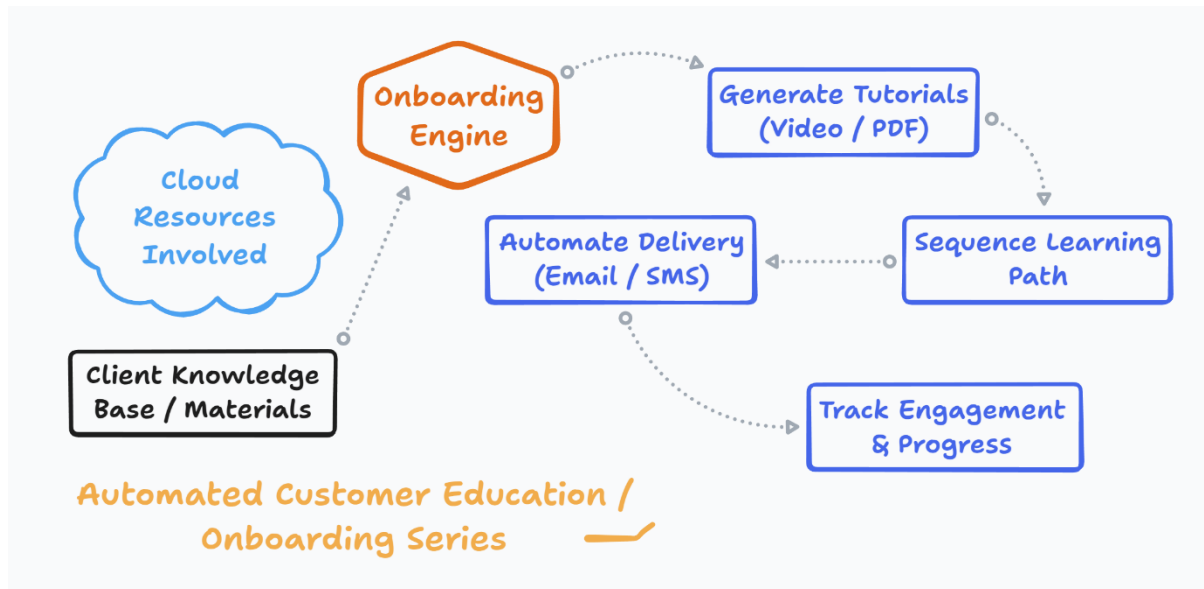
FAQs – Frequently Asked Questions

Question: *What types of content can be delivered?*
Answer: Emails, PDFs, videos, voiceovers, step-by-step tutorials, and checklists.

Question: *Can content be personalized?*
Answer: Yes, sequences can adapt based on user role, usage level, or product tier.

Question: *Can AI generate onboarding content?*
Answer: Yes, AI can assist in producing guides, videos, and voiceovers from provided materials.

Question: *Does it integrate with CRMs?*
Answer: Yes, Salesforce, HubSpot, Odoo, HL, and others.

Question: *How is effectiveness measured?*
Answer: Analytics track engagement, completion rates, and follow-up support tickets.

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PS 06 Upsell & Cross-sell Recommendation Engine

Big Swing   Popular

Overview

Automates tailored upsell and cross-sell offers based on customer behavior, purchase history, and engagement signals. Increases average order value and customer lifetime value by surfacing the right offers at the right time.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on data availability, personalization rules, and sales channels.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Very high ROI; proven to drive revenue growth through personalized recommendations.

Deliverability Estimate

2–3 weeks (depends on integration complexity and personalization depth)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

E-commerce, SaaS, hospitality, subscription services, and any business with opportunities for add-ons or product/service bundles.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

- Missed opportunities to upsell existing clients.
- Generic offers that don't resonate with customers.
- Low average order values.
- Manual setup of promotions with limited targeting.

Pricing

SME: £3k-£10k or €3.5k-€11.5k one-off build
**Enterprise**: £13.1k+ or €15k+ one-off build

This product may require additional external SaaS subscriptions (e-commerce personalization tools, CRM connectors, marketing platforms), depending on the client's chosen platforms.

Support Level

Basic	rule-based offers (e.g., "buy X, suggest Y")
Pro	AI-driven recommendations with CRM/e-commerce integration
PREMIUM	enterprise personalization with multi-channel delivery, A/B testing, analytics

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Visual Aid – Simplified Example Flow Diagram

PS 06

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.
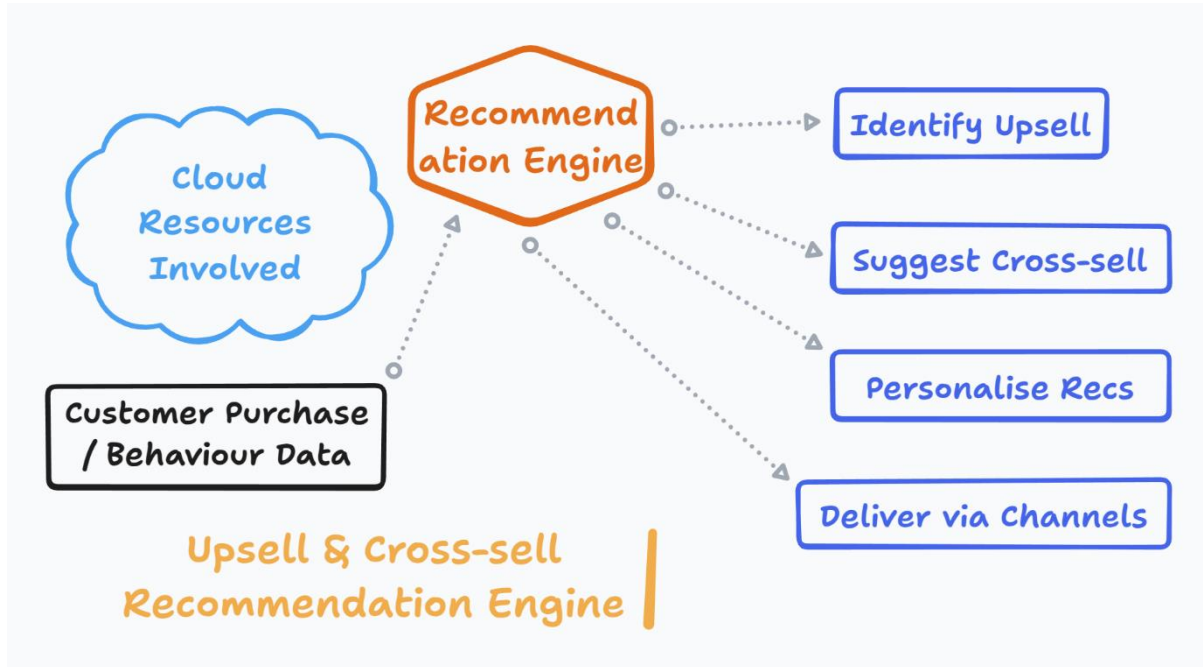
FAQs – Frequently Asked Questions

Question: *Which platforms can this integrate with?*
Answer: Shopify, WooCommerce, Magento, Salesforce, HubSpot, Odoo, custom CRMs.

Question: *How are recommendations generated?*
Answer: Rule-based logic or AI analyzing purchase history, behavior, and preferences.

Question: *Can offers be delivered across channels?*
Answer: Yes — email, SMS, push notifications, in-app, or website banners.

Question: *Does it support A/B testing?*
Answer: Yes, to measure performance and continuously optimize offers.

Question: *Is GDPR compliance ensured?*
Answer: Yes, all customer data is processed securely with audit logging.

PS 07 — Renewal & Subscription Reminder Automation

Quick Win **Popular**

Overview

Automates reminders for upcoming contract or subscription renewals. Notifies customers across channels, provides payment/renewal links, and reduces churn caused by missed renewals.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Relatively simple; mostly depends on subscription type, CRM integration, and reminder logic.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Good ROI; prevents lost revenue from missed or late renewals.

Deliverability Estimate

1–2 weeks (quick setup — reminder flows + integrations)

Suitable for (Company Size)

Small, SME, Enterprise.

Suitable for Business Types

Any business offering recurring subscriptions, contracts, or services — SaaS, telecom, insurance, gyms, agencies, and professional services.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o Customers forget to renew contracts or subscriptions.
o Staff manually chase renewals, wasting time.
o Lost revenue from expired agreements.
o No visibility of upcoming renewal dates.

Pricing

SME: £2.2k-£5.9k or €2.5k-€6.8k one-off build
Enterprise: £7.4k+ or €8.5k+ one-off build

This product may require additional external SaaS subscriptions (CRM or billing platforms, email/SMS delivery tools), depending on the client's chosen platforms.

Support Level

| Basic	single-channel reminders (e.g., email)
Pro	multi-channel reminders with payment links
PREMIUM	enterprise renewal workflows with CRM integration, analytics, compliance logs

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

PS 07
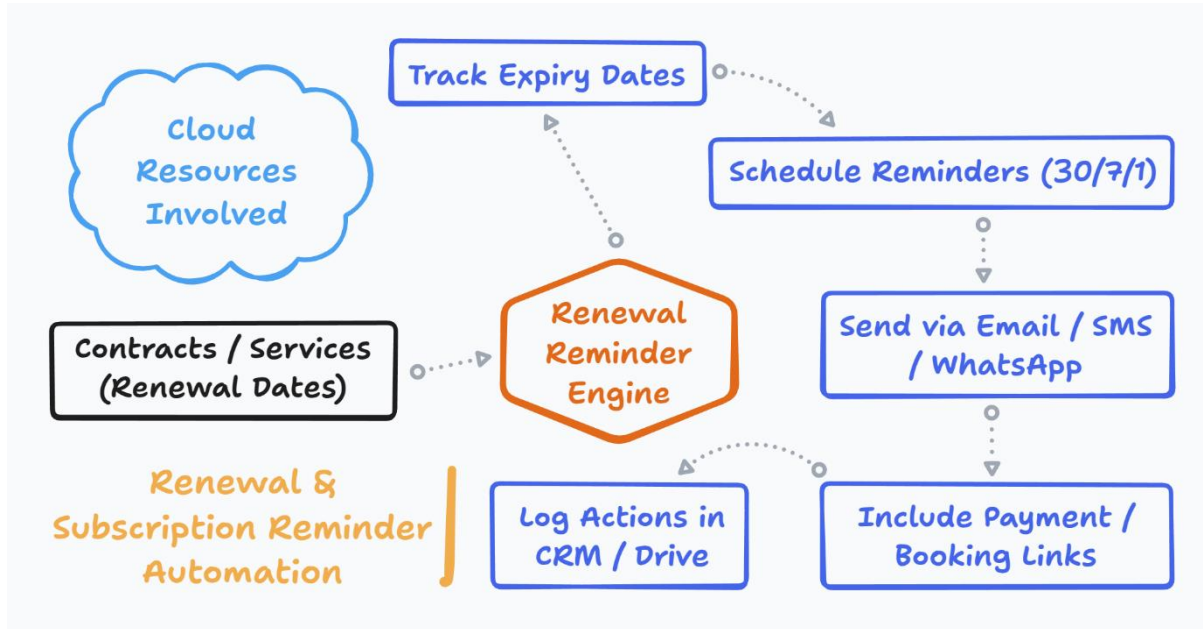
FAQs – Frequently Asked Questions

Question: *Which platforms can it integrate with?*
Answer: Stripe, GoCardless, HubSpot, Salesforce, Odoo, HL, and custom CRMs.

Question: *Can reminders be customized?*
Answer: Yes, timing, channel, and content can be personalized.

Question: *Does it support automated renewals?*
Answer: Yes, where the payment gateway/CRM supports auto-renew.

Question: *Can customers update details via reminders?*
Answer: Yes, links can direct to secure portals for updates and payments.

Question: *Is it GDPR compliant?*
Answer: Yes, all customer data is processed securely with audit-ready logs.

Miscellaneous Products

Not every valuable automation fits neatly into sales, operations, or support. Our Miscellaneous category collects high-impact solutions that enhance internal efficiency, compliance, HR processes, and other essential functions. These products address a wide range of "behind-the-scenes" needs that often determine how smoothly a business runs and how well it scales.

Tags of products in this category:

MC 01 MC 02 MC 03 MC 04 MC 05 MC 06

MC 01 — Employee Timesheet & Payroll Automation

Quick Win   Big Swing

(can be both depending on scope)

Overview

Automates the collection, validation, and processing of employee timesheets. Connects directly with payroll systems to reduce errors, save admin time, and ensure accurate salary payments.

Complexity Score

1	2	3	4	**5**	**6**	**7**	8	9	10

Medium; depends on timesheet source systems, validation rules, and payroll integrations.

ROI Potential

1	2	3	4	5	6	**7**	**8**	9	10

Strong ROI; saves HR/admin hours, avoids compliance issues, improves payroll accuracy.

Deliverability Estimate

2–3 weeks (depends on payroll system complexity and approval flows)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business with hourly employees or project-based billing. Especially valuable for agencies, construction, retail, and service industries.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

- Manual timesheet collection and verification.
- Frequent payroll errors or disputes.
- Late payments due to admin bottlenecks.
- Difficulty consolidating timesheets from multiple sources.

Pricing

SME: £2.4k-£6.1k or €2.8k-€7k one-off build
Enterprise: £9.6k+ or €11k+ one-off build

This product may require additional external SaaS subscriptions (HR/payroll platforms, timesheet apps), depending on the client's chosen platforms.

### Support Level

Basic	automate timesheet collection from a single system
Pro	validation rules, approval flows, and multi-system integration
PREMIUM	enterprise payroll automation with compliance reporting and audit logs

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

MC 01
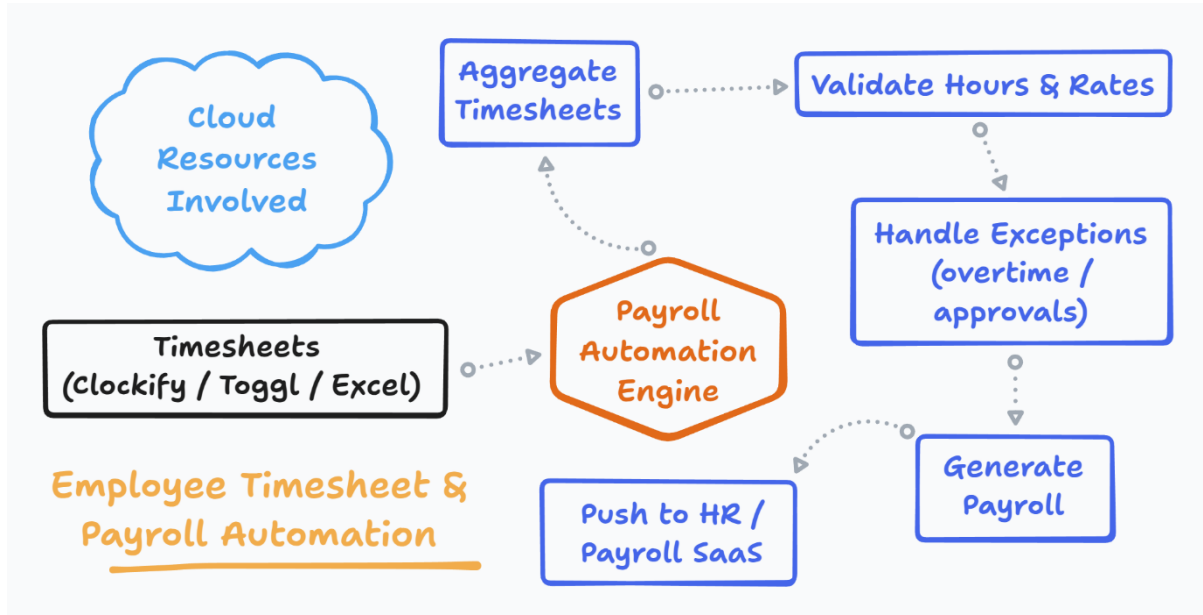
FAQs – Frequently Asked Questions

Question: *Which payroll systems can be integrated?*
Answer: ADP, Sage, QuickBooks, Xero, Odoo, and custom payroll solutions.

Question: *Can timesheets be auto-validated?*
Answer: Yes, based on hours, roles, projects, or compliance rules.

Question: *Can managers approve before payroll?*
Answer: Yes, optional approval workflows can be included.

Question: *Does it handle multiple locations?*
Answer: Yes, data can be consolidated across branches or countries.

Question: *Is it GDPR compliant?*
Answer: Yes, sensitive employee data is stored and processed securely.

MC 02 — HR Onboarding Automation

Quick Win   Big Swing

(can be both depending on scope)

Overview

Automates employee onboarding from the moment a contract is signed. Creates accounts, schedules induction sessions, provides documentation, and ensures all setup tasks are completed consistently.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	**7**			

Medium; depends on number of systems, departments, and compliance steps involved.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**		

Strong ROI; saves HR time, standardizes processes, improves new employee experience.

Deliverability Estimate

2–3 weeks (depends on number of systems and onboarding complexity)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any business hiring regularly and managing multiple systems/accounts for staff. Particularly valuable for agencies, SaaS companies, and enterprises with high staff turnover.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

o   Manual account creation across multiple platforms.
o   Missing or delayed onboarding steps.
o   HR overwhelmed by repetitive tasks.
o   Poor new hire experience due to unstructured onboarding.

Pricing

SME: £2.2k-£7k or €2.5k-€8k one-off build
Enterprise: £8.7k+ or €10k+ one-off build

This product may require additional external SaaS subscriptions (HRIS, LMS, scheduling tools), depending on the client's chosen platforms.

Support Level

Basic	account creation and document delivery
Pro	induction scheduling, multi-system integration, checklists
PREMIUM	enterprise onboarding with compliance workflows, training portals, and reporting

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

MC 02
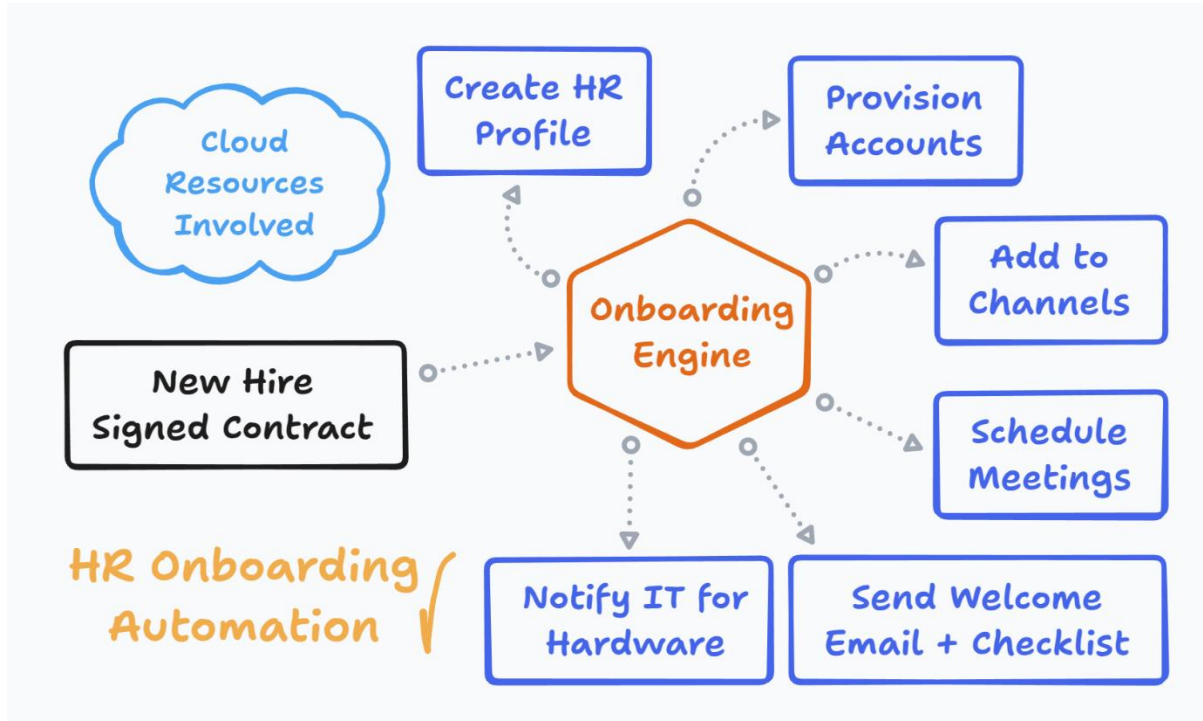
FAQs – Frequently Asked Questions

Question: *Which systems can it integrate with?*
Answer: Microsoft 365, Google Workspace, Slack, HRIS platforms, Odoo, other tools and SaaS, and custom systems.

Question: *Can onboarding steps be customized?*
Answer: Yes, tailored per role, department, or location.

Question: *Does it handle documentation securely?*
Answer: Yes, all contracts, policies, and employee docs are stored securely with access controls.

Question: *Can training be included?*
Answer: Yes, onboarding can connect to LMS or training platforms.

Question: *Is compliance ensured?*
Answer: Yes, mandatory steps (e.g., ID verification, policy acknowledgment) can be enforced.

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MC 03 AI Recruitment Assistant

`Big Swing` `Popular`

Overview

Streamlines recruitment by automating CV intake, candidate screening, and interview scheduling. Uses AI to rank applicants against job criteria, helping HR teams focus only on the best-fit candidates.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium-to-high; depends on data sources, role diversity, and integration with HR/recruitment platforms.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Very high ROI; reduces time-to-hire, saves recruiter hours, and improves quality of hires.

Deliverability Estimate

3–4 weeks (depends on recruitment flow complexity and ATS integrations, ATS = Applicant Tracking System)

Suitable for (Company Size)

SME, Enterprise.

Suitable for Business Types

Any organization with frequent recruitment needs. Especially beneficial for agencies, SaaS firms, retail chains, and enterprises with large HR demands.

Common Pain Points

If you or your business face any of these challenges, this automation could be the solution …

- o Overwhelmed HR teams reviewing hundreds of CVs manually.
- o Long time-to-hire, leading to lost candidates.
- o Poor candidate experience due to slow communication.
- o Difficulty ensuring consistent, unbiased screening.

Pricing

SME: £3k-£10k or €3.5k-€11.5k one-off build
Enterprise: £10.9k+ or €12.5k+ one-off build

This product may require additional external SaaS subscriptions (ATS platforms, scheduling tools, AI scoring services), depending on the client's chosen platforms.

Support Level

| Basic	CV intake, keyword matching, basic scheduling
Pro	AI-driven candidate scoring, multi-channel communication
PREMIUM	enterprise-level recruitment automation with ATS/HRIS integration, compliance checks, advanced reporting

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

MC
03
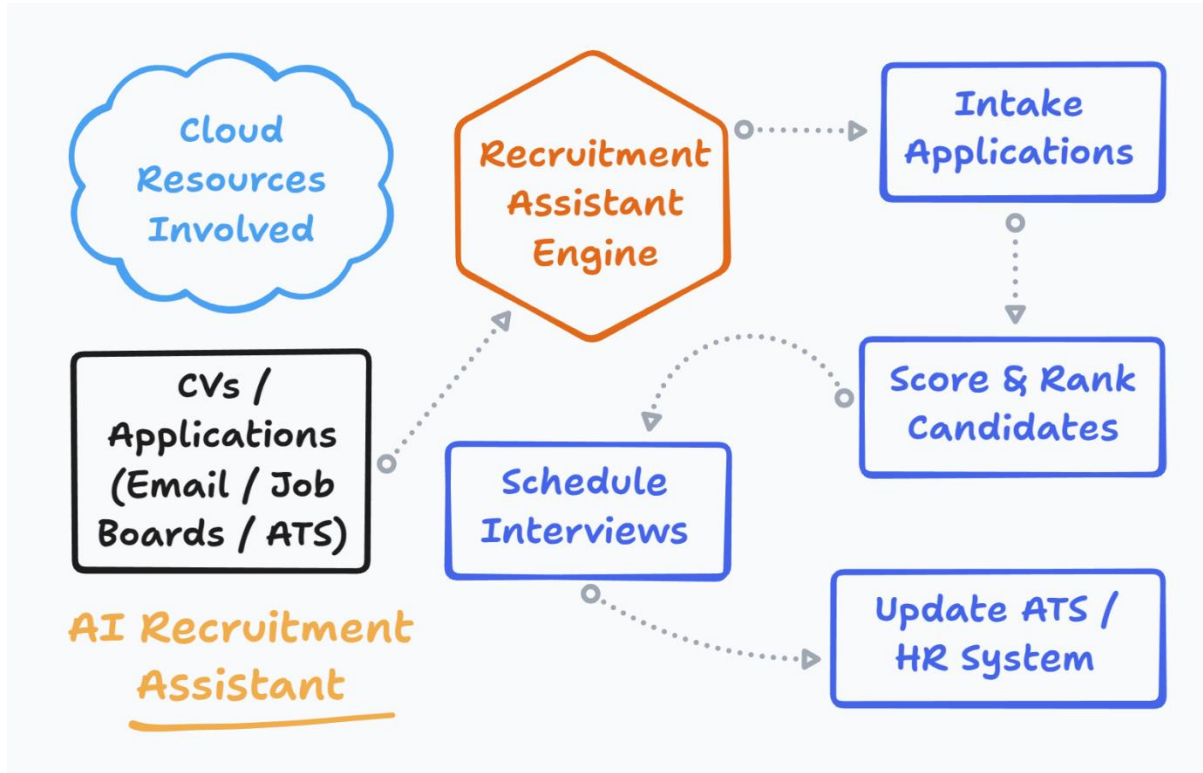
FAQs – Frequently Asked Questions

Question: *Can it integrate with my ATS (Applicant Tracking System)?*
Answer: Yes, integrations available for Greenhouse, Lever, Workable, Odoo, and others.

Question: *Can AI screen candidates fairly?*
Answer: Yes, models can be configured to reduce bias by focusing only on objective criteria.

Question: *How are interviews scheduled?*
Answer: Automated links sync with calendars (Google, Outlook, etc.), letting candidates pick available slots.

Question: *Can candidates receive automated updates?*
Answer: Yes, via email, SMS, or portal notifications.

Question: *Is compliance ensured?*
Answer: Yes, GDPR and equal-opportunity hiring standards are respected.

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MC 04 — Employee Training & Certification Tracking

Quick Win   Big Swing

(can be both depending on scope)

Overview
Automates the tracking of employee training, certifications, and renewals. Sends reminders before expirations, verifies credentials, and generates compliance reports to keep businesses audit-ready.

Complexity Score

1	2	3	4	5	6	7	8	9	10

Medium; depends on the number of employees, certification sources, and reporting requirements.

ROI Potential

1	2	3	4	5	6	7	8	9	10

Good ROI; reduces compliance risks, prevents expired certifications, and saves HR/admin time.

Deliverability Estimate
2–3 weeks (depends on employee headcount and compliance requirements)

Suitable for (Company Size)
Small, SME, Enterprise.

Suitable for Business Types
Any business in regulated industries (healthcare, construction, aviation, finance) or with recurring training obligations.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
- Certifications expiring unnoticed, causing compliance issues.
- HR manually tracking training dates in spreadsheets.
- No centralized record of staff qualifications.
- Stress during audits due to missing or outdated records.

Pricing
SME: £3k-£7.7k or €3.5k-€8.8k one-off build
Enterprise: £10k+ or €11.5k+ one-off build

This product may require additional external SaaS subscriptions (LMS = Learning Management System, certification verification services), depending on the client's chosen platforms.

Support Level

Basic	track training and certifications in a central log
Pro	reminders, renewal tracking, verification via issuer API/QR
PREMIUM	enterprise-level compliance dashboards, multi-location tracking, automated reporting

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

MC
04

Employee Training & Certification Tracking
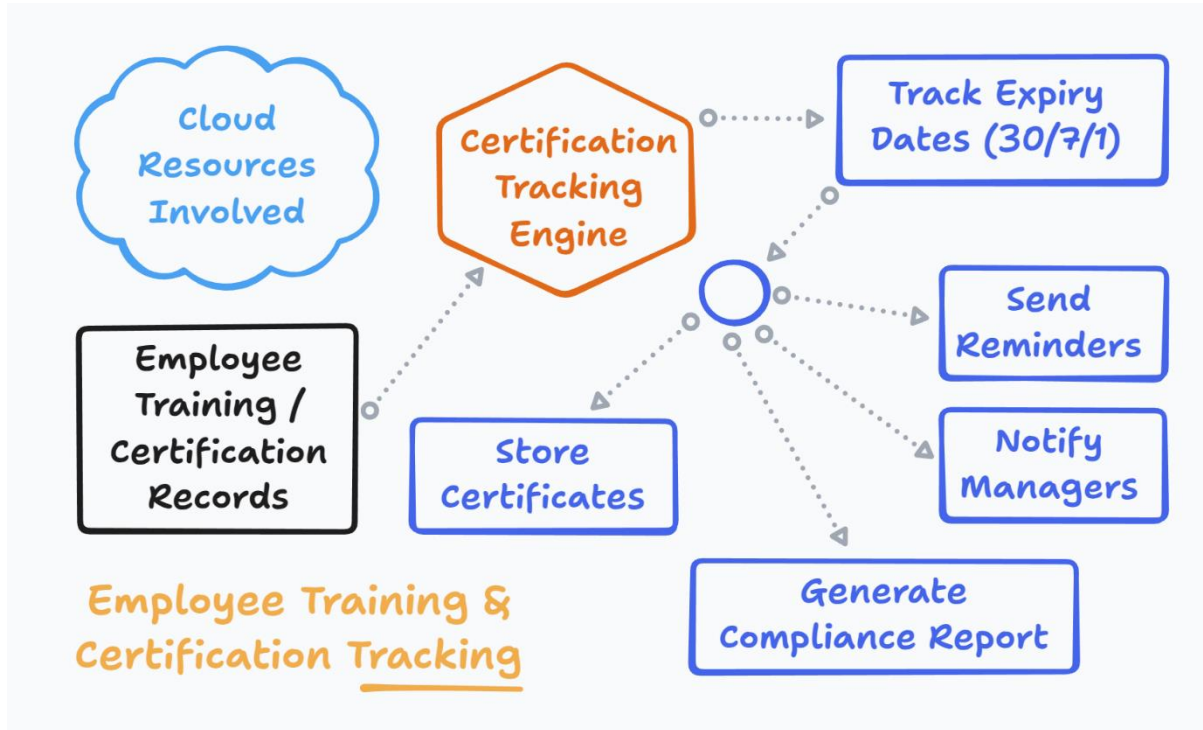
FAQs – Frequently Asked Questions

Question: *Can it integrate with LMS (Learning Management System) platforms?*
Answer: Yes, integrations available for Moodle, TalentLMS, Odoo, and others.

Question: *How are certifications verified?*
Answer: Via issuer APIs, QR codes, or manual upload with approval.

Question: *Can managers receive alerts?*
Answer: Yes, automated reminders go to employees and managers before expiry.

Question: *Can reports be exported?*
Answer: Yes, compliance-ready reports can be generated monthly or on demand.

Question: *Is GDPR compliance ensured?*
Answer: Yes, personal data is securely processed and access-controlled.

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MC 05 — HR Admin Assistant Automation

Quick Win   Big Swing
(can be both depending on scope)

Overview
Automates routine HR administration tasks such as leave requests, sick notes, maternity forms, policy reminders, and document storage. Frees up HR teams to focus on strategic work instead of repetitive paperwork.

Complexity Score

1	2	3	4	5	6	7	8	9	10
					6	**7**			

Medium; depends on number of processes, document types, and approval chains.

ROI Potential

1	2	3	4	5	6	7	8	9	10
						7	**8**		

Strong ROI; reduces admin time, ensures consistency, and improves employee satisfaction.

Deliverability Estimate
2–3 weeks (depends on workflows and system integrations)

Suitable for (Company Size)
Small, SME, Enterprise.

Suitable for Business Types
Any business with 15+ employees handling HR requests regularly. Particularly valuable for SMEs without dedicated HR staff and enterprises looking to streamline HR admin.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
- HR overwhelmed by routine requests and paperwork.
- Employees waiting too long for approvals.
- Inconsistent policy reminders across departments.
- Important HR documents lost or untracked.

Pricing
SME: £3k-£8.7k or €3.5k-€10k one-off build
Enterprise: £10.5k+ or €12k+ one-off build

This product may require additional external SaaS subscriptions (HR platforms, document storage tools), depending on the client's chosen platforms.

Support Level

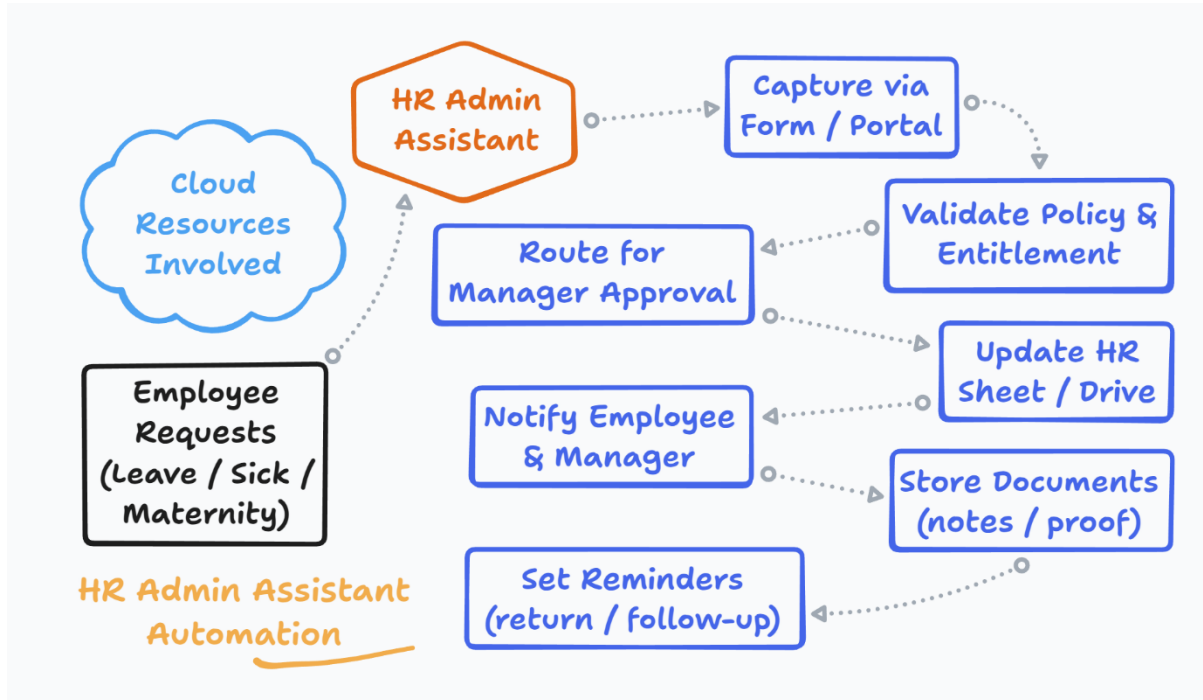| Basic	automate single request types (e.g., leave forms)
Pro	multiple workflows with approvals and notifications
PREMIUM	enterprise-level HR assistant with policy tracking, compliance reminders, and secure document archiving

Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

MC 05

Cloud Resources Involved

HR Admin Assistant

Capture via Form / Portal

Validate Policy & Entitlement

Route for Manager Approval

Update HR Sheet / Drive

Employee Requests (Leave / Sick / Maternity)

Notify Employee & Manager

Store Documents (notes / proof)

HR Admin Assistant Automation

Set Reminders (return / follow-up)

FAQs – Frequently Asked Questions

Question: *Which HR systems can it integrate with?*
Answer: BambooHR, Personio, Odoo, SAP SuccessFactors, and more.

Question: *Can approvals be multi-step?*
Answer: Yes, workflows can include line managers, HR, and directors.

Question: *Does it notify employees automatically?*
Answer: Yes, via email, Slack/Teams, or SMS.

Question: *Can it handle document storage?*
Answer: Yes, documents are stored securely with audit trails.

Question: *Is GDPR compliance ensured?*
Answer: Yes, all sensitive employee data is processed under strict security.

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MC 06 — Automated Compliance Logging & Reporting

Big Swing

Overview
Automates the capture, storage, and reporting of compliance-related events. Creates immutable logs, generates audit-ready reports, and alerts stakeholders about anomalies to ensure regulatory obligations are met.

Complexity Score

1	2	3	4	5	6	7	8	9	10
						7	8		

Medium-to-high; depends on the number of systems monitored and the depth of reporting required.

ROI Potential

1	2	3	4	5	6	7	8	9	10
							8	9	

Very high ROI; reduces audit risks, ensures compliance, and saves countless admin hours.

Deliverability Estimate
3–4 weeks (depends on number of systems and reporting requirements)

Suitable for (Company Size)
SME, Enterprise.

Suitable for Business Types
Organizations in regulated industries — finance, healthcare, legal, government contractors, SaaS, and enterprises with strict audit requirements.

Common Pain Points
If you or your business face any of these challenges, this automation could be the solution …
- Manual compliance logging prone to errors.
- Stressful, time-consuming audits.
- No centralized record of compliance events.
- Risk of fines for non-compliance.

Pricing
SME: £3.5k-£12.2k or €4k-€14k one-off build
**Enterprise**: £15.7k+ or €18k+ one-off build

This product may require additional external SaaS subscriptions (compliance tools, logging services, cloud monitoring), depending on the client's chosen platforms.

Support Level

Level	Description
Basic	capture and log events from one system
Pro	multi-system monitoring, automated reporting, anomaly alerts
PREMIUM	enterprise solution with audit trails, long-term archiving, advanced analytics

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Visual Aid – Simplified Example Flow Diagram

This diagram is a high-level, indicative, and simplified flow of how the AI automation product may function in practice.

MC
06
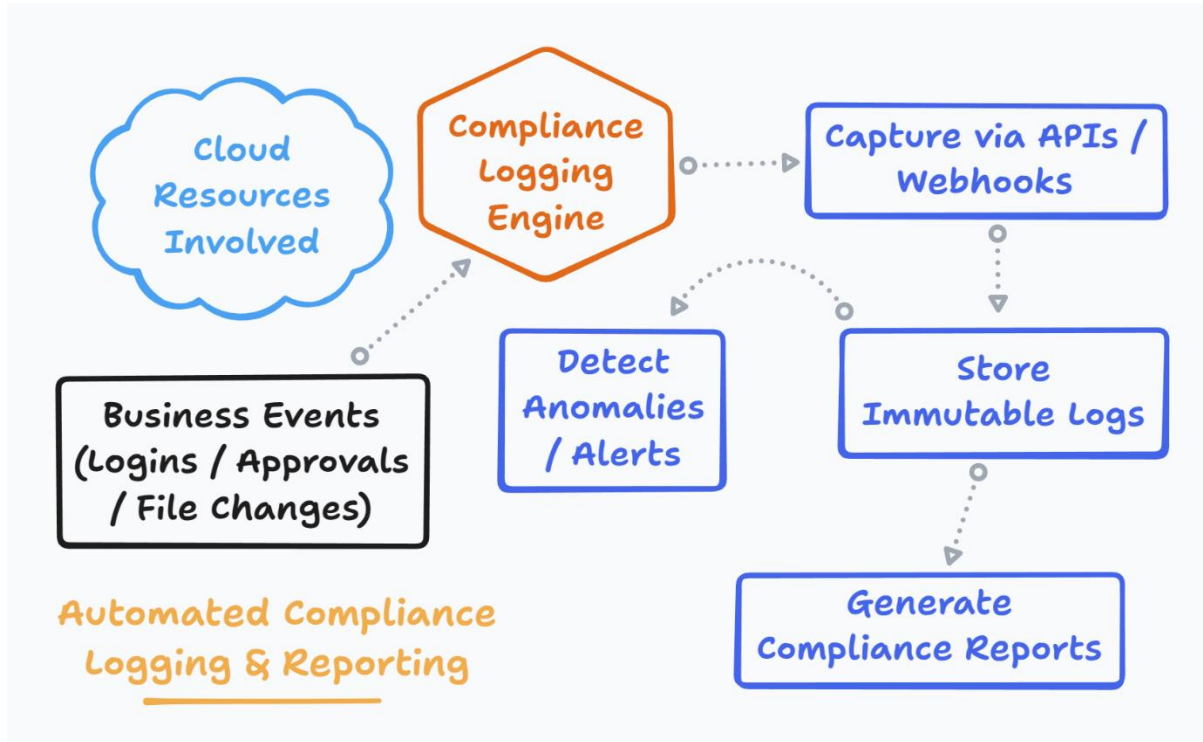
FAQs – Frequently Asked Questions

Question: *What types of events can be logged?*
Answer: Access attempts, financial transactions, policy changes, data updates, and system activity.

Question: *Can it integrate with existing compliance tools?*
Answer: Yes, supports SIEMs, ERP/CRM systems, and custom APIs.

Question: *How long are logs stored?*
Answer: Retention policies are configurable per regulation (GDPR, HIPAA, SOX, etc.).

Question: *Are logs tamper-proof?*
Answer: Yes, stored immutably with access control and encryption.

Question: *Can reports be automated?*
Answer: Yes, weekly/monthly audit-ready reports can be generated and distributed.

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Next Steps & How to Learn More

Thank you for reviewing our catalogue of 32 featured AI automation products. To explore how Dlogic can support your business, we invite you to take the next step with us:

- o **AI Automation & Integration** – practical, business-ready automations tailored to your workflows.

- o **AI Employees & AI Agents** – scalable digital assistants handling calls, tasks, and client interactions.

- o **In-Depth AI Audits** – structured discovery of automation opportunities, backed by real business analysis.

- o **Bespoke Automation Builds** – custom flows and integrations designed to fit your business logic.

- o **AI & Software Consultation** – guidance on strategy, architecture, and implementation.

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