



SERVICE GUIDE · 2026

Agentic AI Systems

AI that works for you — automatically,
reliably, and responsibly.

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WHAT IS AGENTIC AI

AI that thinks, plans, and acts

Most software only does what it's told — step by step, button by button. Agentic AI is different. It's AI that can **think through a goal, plan the steps needed, and carry them out on its own** — using the tools, data, and systems already inside your business.

THINK OF IT LIKE THIS

Imagine hiring a highly capable assistant who doesn't need to be told every step. You say "prepare the monthly supplier report" and they gather the data, check for anomalies, draft the summary, and flag anything needing your attention — all without you guiding each action.

01**How It Works**

A plain-English overview

• You Set the Goal

Describe what you need — a task, a process, an outcome. No complex instructions required.

• The AI Plans & Acts

The AI breaks the goal into steps, picks the right tools, and works through them intelligently.

• You Stay in Control

At any point the AI can pause and ask for your approval before taking important actions.

02**What Can It Actually Do?**

Real-world examples

• Process & Operations

Automatically chase overdue tasks, update records, generate reports, and flag exceptions.

• Research & Summarisation

Gather information from multiple sources, compare findings, and produce a clear summary.

• Supplier Workflows

Chase quotes, reconcile invoices, track deliveries, and escalate issues automatically.

• Communication Handling

Read, categorise, and draft responses, routing urgent items to the right person instantly.

• Data & Reporting

Pull figures from your systems, spot trends, and deliver formatted reports on schedule.

• Cross-System Coordination

Connect your CRM, ERP, inbox, and calendar — and coordinate work across all of them.

INDUSTRY USE CASES

Real scenarios, real outcomes

Below are examples of how Agentic AI is being applied across different departments and industries. Each one replaces hours of manual, repetitive work with a system that runs reliably in the background and escalates only what genuinely needs human attention.

A**Finance & Operations**

From manual chase-ups to automated reconciliation

- **Invoice Processing**

An agent reads incoming invoices, extracts key fields, matches them to purchase orders, flags discrepancies, and routes exceptions to the finance team — closing the loop with the supplier directly.

- **Cash-Flow Monitoring**

Watches inflows and outflows across accounts, surfaces unusual patterns, projects shortfalls in advance, and prepares an executive briefing each morning.

- **Expense Reconciliation**

Categorises transactions, identifies duplicates, matches receipts to claims, and prepares end-of-month reports — leaving the team only the genuinely unclear items to review.

- **Supplier Follow-ups**

Chases overdue confirmations, late deliveries, and missing documents on a schedule — keeping a complete log of every interaction for review.

B**Customer Operations & Support**

Faster resolutions, more consistent service

- **First-Line Triage**

Reads incoming customer queries, classifies them, drafts responses for common cases, and escalates complex or sensitive cases to the right agent with full context attached.

- **Proactive Outreach**

Spots customers who may be at risk of churn, missed deliveries, or expiring contracts — and triggers a tailored outreach workflow before issues arise.

- **Account & Order Lookup**

Pulls together customer history, order status, and recent interactions from across your systems — so a person resolving the case has everything in one place.

- **Knowledge Base Upkeep**

Identifies questions being asked repeatedly, drafts new help articles for review, and updates outdated content — keeping your support knowledge current.

C

Sales, HR & Internal Workflows

Where coordination work disappears

- **Lead Qualification**

Reviews inbound leads against your ideal-customer criteria, enriches them with public information, scores them, and routes the strongest ones to sales with a briefing.

- **Onboarding Coordinator**

When a new hire is added, the agent kicks off accounts, sends documentation, schedules introductions, and tracks completion — surfacing only blockers.

- **Meeting Prep & Follow-up**

Builds a one-page brief for each meeting in your calendar, then drafts follow-up notes and action items afterwards — every attendee gets the right summary.

- **Internal Help-Desk**

Handles IT, HR, and policy questions from staff using your internal documentation — escalating anything sensitive or unresolved to the right team.

A CLOSER LOOK

How Agentic AI actually works

Behind the scenes, every agent runs a continuous loop: it understands the goal, decides what to do next, uses one of its skills, checks the result, and decides what to do after that. This is what makes it different from rule-based automation.

- **1. Understanding**

The agent interprets your request or trigger — extracting the goal, the relevant details, and any constraints (deadlines, approvers, conditions).

- **4. Checking**

After each step it verifies the result — did the action succeed, does the output make sense, is anything missing or ambiguous?

- **2. Planning**

It breaks the goal into smaller steps and decides which skills to use in what order — adjusting the plan as new information arrives.

- **5. Deciding**

Based on the check, it either continues, retries differently, asks a person for input, or escalates the whole task with full context.

- **3. Acting**

It uses its skills to read, write, search, calculate, or call into your systems — each action recorded with a clear reason.

- **6. Reporting**

When the task is complete, it produces a clear summary of what was done, what was decided, and anything still open.

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What We Build For You

The key components of your system

- **Skills & Abilities**

A set of skills — specific things your AI knows how to do, such as reading documents, sending notifications, or querying your database.

- **Teamwork Between Agents**

Multiple agents that collaborate — one for research, another for drafting, another for approvals — working together automatically.

- **Routing & Decision Logic**

The system knows when to act and when to escalate — simple tasks automated, sensitive ones routed to your people.

- **Memory**

Your agent remembers context — what's been done, what was said, what's outstanding — so it handles multi-step tasks reliably.

- **Human Approval Gates**

Checkpoints where the AI pauses for human approval before proceeding with important or sensitive actions.

- **Connections to Your Tools**

We connect your AI to the systems you already use — email, spreadsheets, databases, CRMs, ERPs, and more.

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Oversight, Governance & Responsible AI

Built-in accountability — always included

- **Full Visibility**

See exactly what your AI is doing at any time — every action, decision, and outcome — through a clear activity log.

- **Audit Trails**

Every action recorded with timestamp and reason — a searchable record for compliance and review.

- **Continuous Improvement**

Your AI gets better over time. We review outcomes, identify improvements, and update the system.

- **Guardrails & Boundaries**

Clear rules for what your agent can and cannot do. Sensitive actions always require human sign-off.

- **Ongoing Monitoring**

We monitor performance over time, flagging anything unusual and ensuring continued accuracy.

- **Data Privacy & Security**

Your data stays yours. We follow rigorous practices and work within your security policies.

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Hosting & Deployment

We handle the technical side — you focus on the results

Once your Agentic AI system is built, it needs somewhere to live and run reliably. We take care of all of that for you.

- **Cloud Hosting**

Hosted on secure, enterprise-grade cloud infrastructure. Runs 24/7, scales with usage, maintained by our team.

- **Hybrid Setup**

Hybrid deployments combining cloud convenience with on-site control, tailored to your requirements.

- **On Your Own Systems**

If data must stay on-premises for compliance or security, we deploy your AI entirely within your environment.

- **Ongoing Management**

Managed packages include monitoring, updates, performance tuning, and ongoing support as your AI matures.

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AI Consulting & Advisory

We help you figure out what you actually need

Not sure where to start? Most organisations know AI could help — but not where, how, or what to prioritise. We work through that with you honestly, without jargon.

- **Discovery & Scoping**

We understand your operations, challenges, and goals — then identify where Agentic AI delivers the most value first.

- **Roadmap Planning**

A phased plan — starting with a focused pilot that delivers early results, then expanding as confidence and ROI grow.

- **Feasibility & Risk Assessment**

An honest view of what's achievable, the risks involved, and a realistic timeline. No overpromising, no jargon.

- **Stakeholder Alignment**

We help communicate the plan internally — leadership, operations, compliance, IT — with materials for non-technical audiences.

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Training & Adoption Support

Making sure your team feels confident

The best AI system only creates value if your team knows how to use it, trust it, and get the most from it. We provide tailored training and support to make adoption smooth.

- **Team Onboarding**

Practical, jargon-free sessions for people working alongside the AI every day — what it does and when to step in.

- **User Guides & Playbooks**

Clear, plain-English documentation tailored to your system — a reliable reference whenever your team needs it.

- **Leadership Briefings**

Focused sessions for senior stakeholders covering outcomes, governance, risk, and measuring success.

- **Ongoing Support**

As confidence grows and workflows evolve, we're available for follow-up sessions, Q&A, and improvements.

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Our Delivery Process

From first conversation to live system

- **01 — Discovery Call**

We learn about your business, challenges, and where AI can help most.

- **02 — Scoping & Proposal**

We map the solution, confirm feasibility, and agree on clear outcomes.

- **03 — Build & Test**

We build your system, test it thoroughly, and refine it with your input.

- **04 — Deploy & Integrate**

We go live — connecting the AI to your tools on your chosen infrastructure.

- **05 — Train Your Team**

Onboarding sessions and documentation so your team is ready to use it.

- **06 — Monitor & Improve**

We track performance, maintain governance, and keep improving over time.



NEXT STEP

Ready to put AI to work in your business?

Let's start with a conversation. We'll listen to where you are, what you're trying to achieve, and show you what's possible.



GET IN TOUCH

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