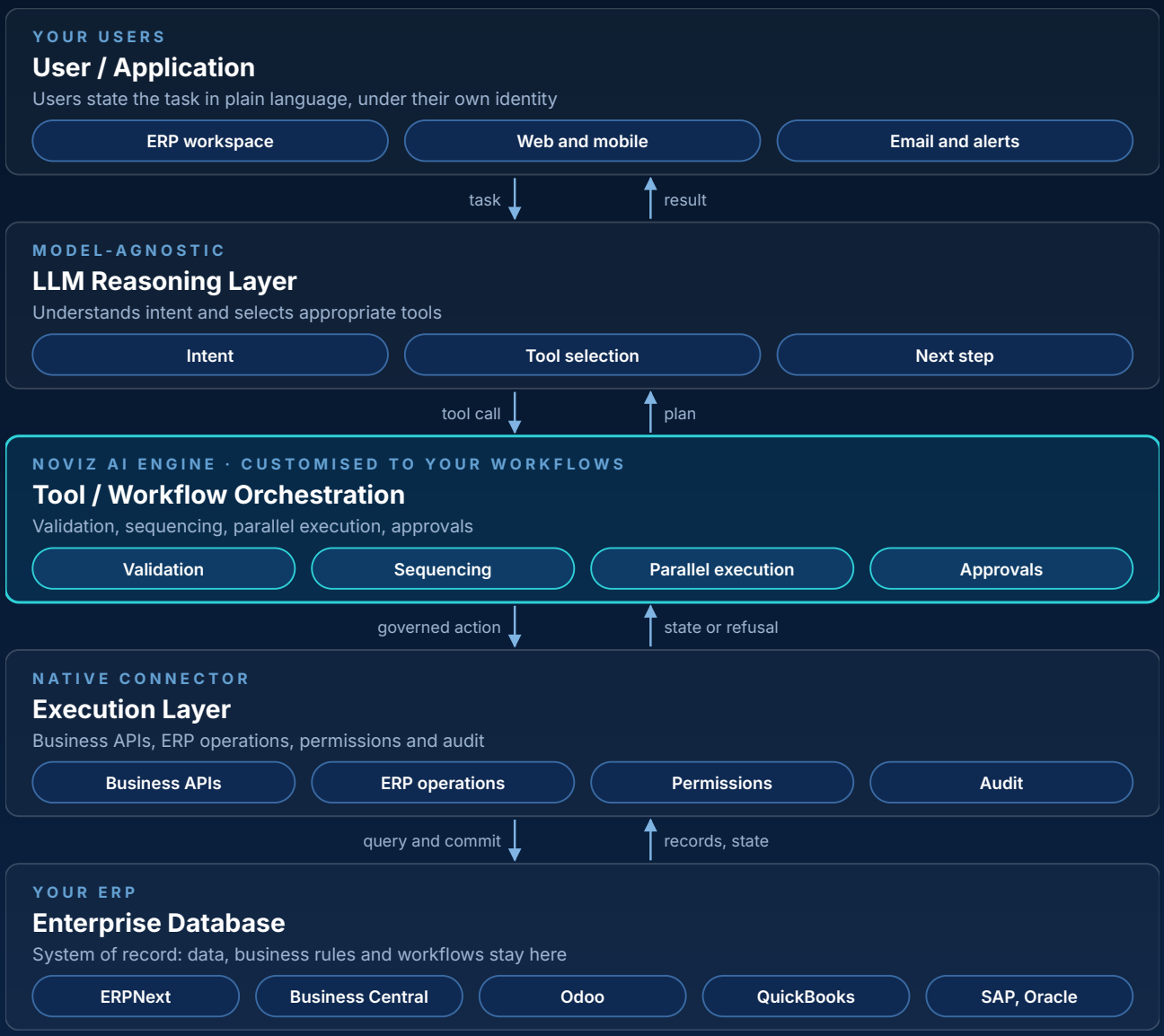
Noviz AI
ENTERPRISE AI AGENTS

Product Catalogue 2026

Workflow automation and agentic orchestration for the ERP you already run.



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BFIF01-G130605-00010-2026

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Company information

Company	Zeetech Soft Solutions
Product brand	Noviz AI
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COMPANY PROFILE

About Noviz AI

Noviz AI, a product of Zeetech Soft Solutions, builds and operates enterprise AI agents for workflow automation. The Noviz agent connects to an organisation's existing ERP, CRM or accounting platform and works inside it, carrying out tasks through the platform's own workflows, validations and approvals, under each user's identity and permissions.

Noviz does not replace the system of record. Enterprise platforms remain the authority for transactions, business rules and approvals, while Noviz orchestrates the work across them: it plans each step, follows what the platform returns and asks for the user's go-ahead before anything is committed. Because the agent is operated centrally, every advance in reasoning, workflow coverage, business rules and AI models is released once and reaches every customer, with no upgrade project on the customer's side.

Where an organisation needs workflows shaped to its own processes, Noviz delivers workflow automation and customisation projects. For organisations yet to adopt a system of record, Noviz provides its own cloud ERP and CRM with the agent natively embedded.

Key figures

4

Enterprise platforms supported natively: ERPNext, Dynamics 365 Business Central, Odoo and QuickBooks Online

300+

Business tasks the agent carries out across sales, purchasing, stock, finance, HR and more

100

Standard business analyses and KPI dashboards across 12 categories

0

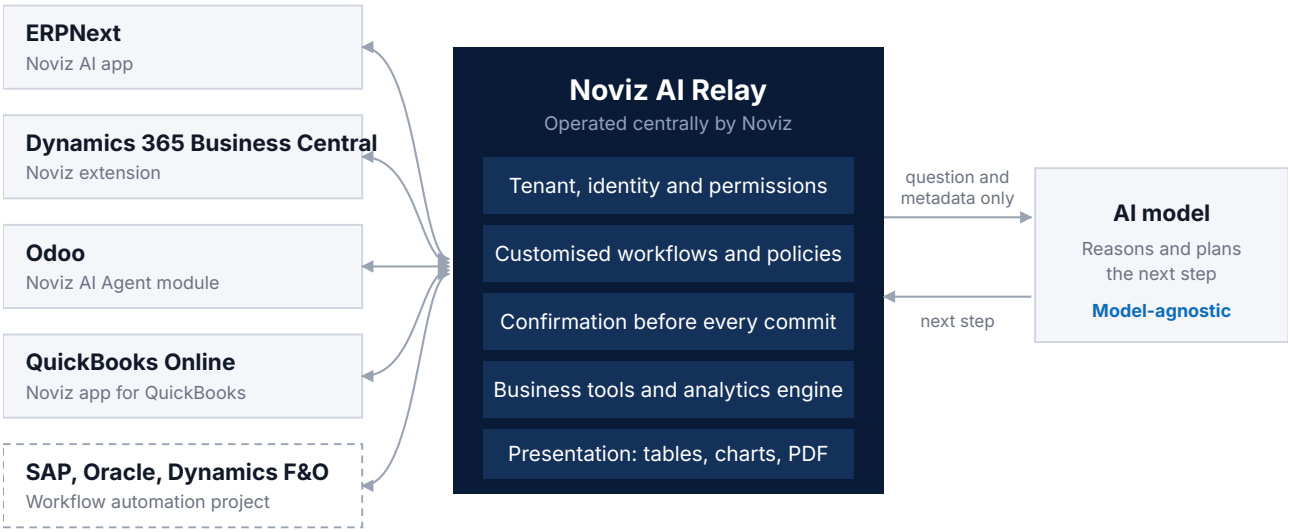
Data migration. The existing platform, workflows and permissions remain in place

SOLUTION ARCHITECTURE

How the Noviz agent works

Every customer platform connects to the Noviz AI relay through a lightweight connector. The relay governs each task and orchestrates the steps, while every action is executed inside the customer's own system, through its workflows and validations, under the signed-in user's session and permissions.

CUSTOMER PLATFORMS



Delivery model

1. Connect

A lightweight connector integrates the existing platform. No data migration is required.

2. Automate

The agent carries out tasks within established workflows, validations and approvals, under each user's own session.

3. Evolve

Enhancements and reviewed workflow patterns are released on the shared platform and reach every customer.

4. Subscribe

A predictable subscription, with no in-house AI engineering, model training or maintenance.

PORTFOLIO

Product overview

The Noviz portfolio is organised in three families: agents that automate workflows on the enterprise platforms an organisation already operates, workflow automation and customisation projects for larger or customised estates, and Noviz business applications for organisations that have yet to adopt a system of record.

PRODUCT	DESCRIPTION	PAGE
AGENTS FOR ENTERPRISE PLATFORMS		
Noviz for ERPNext	Workflow automation on an organisation's own ERPNext site	5
Business Central Extension	The Noviz agent carrying out tasks inside Microsoft Dynamics 365 Business Central	6
Noviz for Odoo	The Noviz agent carrying out tasks inside Odoo	7
Noviz for QuickBooks	Accounting tasks automated in QuickBooks Online	8
WORKFLOW AUTOMATION PROJECTS		
Enterprise Agent Integration	Workflow automation and customisation, with a dedicated connector for Dynamics 365, SAP, Oracle and other enterprise estates	9
NOVIZ BUSINESS APPLICATIONS		
Modern ERP with AI Agent	Cloud ERP with an AI agent that automates your workflows	10
Noviz ERP Basic	Cloud ERP across finance, sales, purchasing and inventory	10
Noviz CRM Advantage	CRM with an agent prepared for the organisation's domain and follow-up tasks	11
Noviz CRM Basic	Lead, contact and pipeline management	11
WhatsApp Automation	Customer messaging connected to ERP and CRM records	11

> Every product is served by the same central Noviz agent. A workflow improvement released for one platform strengthens the agent for every platform and every customer.

AGENT FOR ENTERPRISE PLATFORMS

Noviz for ERPNext

Workflow automation on an organisation's own ERPNext site.

Overview

Noviz for ERPNext adds an AI agent to ERPNext that carries out business tasks in plain language. Users state the task, such as raising a quotation, converting a sales order to a delivery or recording a payment, and the agent prepares each document for confirmation, then proposes the next step in the chain.

Each step runs on the organisation's own ERPNext site through the Noviz AI app, under the signed-in user's session, roles and permissions. ERPNext's own validations and approval workflows remain in force, and the agent follows what ERPNext returns: the document state, the allowed transitions or its refusal.

Key capabilities

- **Tasks across modules.** Selling, buying, stock, accounts, manufacturing, projects, CRM and HR.
- **Documents with confirmation.** Quotations, orders, invoices, payments and more, created and updated only after the user confirms.
- **Document chains.** The agent proposes the next step, from quotation to sales order, delivery and invoice.
- **Approval workflows.** Documents move through the organisation's own ERPNext workflow states and approvers.
- **Document scanning.** Supplier documents prepared as draft transactions for review.
- **Standard analytics.** 100 KPI dashboards with observations, recommendations and forecasts.

Specification

Platform	ERPNext, cloud or self-hosted
Delivery	Noviz AI app installed on the customer's site, with a Noviz AI key
Security model	ERPNext users, roles and permissions, unchanged
Output	Documents, record cards, charts, dashboards and PDF

Setup

1. Install the Noviz AI app on the ERPNext site.
2. Obtain a Noviz AI key from a noviz.in account.
3. Enter the key under Noviz AI Settings.
4. Open Noviz AI from the ERPNext workspace and begin.

Example tasks

> Create a quotation for this customer with these items.

> Convert this sales order to a delivery note.

> Record the payment received against this invoice.

> Give me a sales performance dashboard for the last 12 months.

AGENT FOR ENTERPRISE PLATFORMS

Business Central Extension

The Noviz AI agent carrying out tasks inside Microsoft Dynamics 365 Business Central.

Overview

The extension brings the Noviz agent to every user's home page, next to Customers, Vendors and Items. Users state the task, such as preparing a sales quote, converting a quote to an order or updating order lines, and the agent prepares each document for confirmation, within Business Central's own validations and permission sets.

Key capabilities

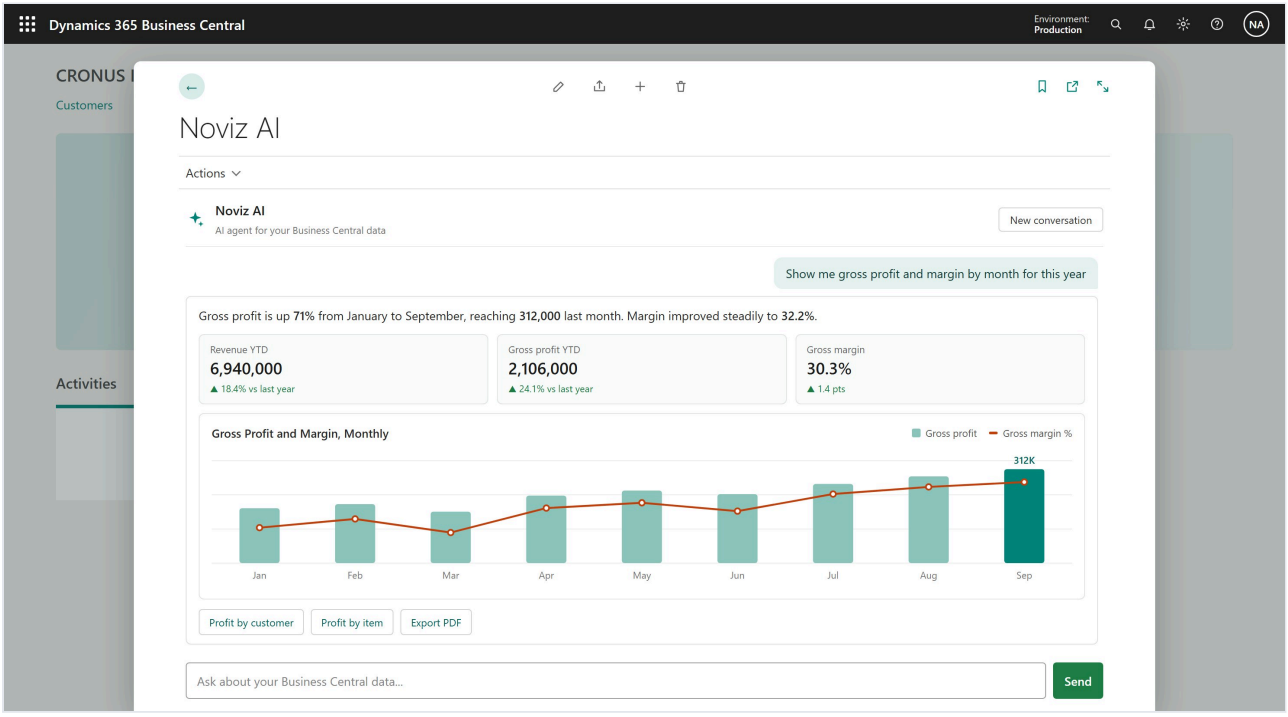
- **Documents.** Quotes and orders created and updated with their lines, after confirmation; quotes converted to orders in one step.
- **Tasks on records.** Customers, vendors, items, quotes, orders, invoices and ledger entries.
- **Reports.** Document PDFs from the company's own Business Central report layouts.

Specification

Platform	Microsoft Dynamics 365 Business Central
Delivery	Business Central extension, installed with the customer's administrator
Security model	Business Central permission sets; no Entra app or OAuth consent required

Setup

1. Install the Noviz AI extension with the customer's administrator.
2. Obtain a Noviz AI key from a noviz.in account.
3. Enter the key in the Noviz AI settings in Business Central.
4. Open Noviz AI from the home page and begin.



The Noviz agent presenting gross profit and margin by month inside Business Central.

AGENT FOR ENTERPRISE PLATFORMS

Noviz for Odoo

The Noviz AI Agent module, carrying out tasks inside Odoo.

Overview

Noviz for Odoo carries out business tasks in Odoo in plain language. Users state the task, for example preparing a quotation, registering a vendor bill or creating a lead from an enquiry, and the agent prepares each document for confirmation and proposes the next step.

The module carries out each step within Odoo itself, through the Odoo ORM as the signed-in user, under Odoo's own access rights, record rules and validations. No database credentials leave Odoo.

Key capabilities

- **Documents with confirmation.** Quotations, customers, leads and vendor bills created and updated after confirmation.
- **Applications.** Sales, Purchase, Inventory, Invoicing, CRM, Projects, Employees and Manufacturing.
- **Tasks on records.** Customers, vendors, products, quotations, orders, invoices, bills and journal items.
- **Navigation.** Any record named in a response opens directly in Odoo.
- **Posting controls.** Posted entries, payments and stock moves remain with Odoo's own validation steps.

Specification

Platform	Odoo 20
Delivery	Standard Odoo module, with a Noviz AI key
Security model	Odoo groups, access rights and record rules, unchanged
Output	Documents, record cards and charts, with export to PDF

Setup

1. Install the Noviz AI Agent module from Apps within Odoo.
2. Obtain a Noviz AI key from a noviz.in account.
3. Under Settings, Noviz AI, enter the key and save.
4. Open Noviz AI from the main menu and begin.

Example tasks

> Create a quotation for the customer with these products.

> Register this vendor bill.

> Create a lead for this enquiry.

> Which customers have the highest receivables?

AGENT FOR ENTERPRISE PLATFORMS

Noviz for QuickBooks

Accounting tasks automated in QuickBooks Online, connected securely through Intuit sign-in.

Overview

Noviz for QuickBooks brings the Noviz agent to QuickBooks Online accounting. Business owners, accountants and finance teams state the task in plain language, such as preparing an estimate, raising an invoice or recording a bill, and the agent prepares each transaction for confirmation.

The company connects through Intuit's own sign-in and authorisation. Every call runs against the QuickBooks Online Accounting API under that authorisation, and QuickBooks' own validations and messages are returned to the user as they are.

Key capabilities

- **Sales.** Estimates, invoices and payments received.
- **Purchasing.** Purchase orders and bills.
- **Accounting.** Journal entries and standard financial reports.
- **Records.** Customers, vendors, products and services, employees and the chart of accounts.
- **Confirmation.** Nothing is recorded in QuickBooks until the user confirms.

Specification

Platform	QuickBooks Online
Delivery	Noviz app for QuickBooks, operated by Noviz
Connection	Intuit OAuth 2.0 and Sign in with Intuit
Security model	The company's Intuit authorisation; tokens stored encrypted

Setup

1. Connect the QuickBooks company through Intuit sign-in.
2. Obtain a Noviz AI key from a noviz.in account.
3. Enter the key under Settings in the Noviz chat.
4. State the first task.

Example tasks

> Prepare an estimate for this customer.

> Create an invoice for this customer with these services.

> Record this bill from the vendor.

> Show the profit and loss for this quarter.

WORKFLOW AUTOMATION PROJECTS

Enterprise Agent Integration

Workflow automation and customisation projects: the Noviz agent connected to Microsoft Dynamics 365, SAP, Oracle and other enterprise estates through a dedicated connector, configured to the organisation's own workflows, approval rules and policies.

Overview

Built around your workflows

The agent is configured to the organisation's document flows, approval limits, validation rules and roles, rather than asking the organisation to restate them in a new system.

Customised to your processes

Each project designs the tasks to automate, the steps they follow and where a person approves, on the systems already in place, using the organisation's identity provider and permissions.

Improves after go-live

Because the agent is operated centrally, each new capability, rule and model upgrade reaches the deployment without a new project.

Typical workflow automation projects

- **Order to cash.** Quotation, sales order, delivery, invoice and payment, each step prepared and confirmed.
- **Procure to pay.** Requisition, purchase order, receipt and supplier bill, matched within the ERP.
- **Supplier document intake.** Scanned invoices prepared as drafts and routed for approval.
- **Approval routing.** Documents moved through the ERP's own approval workflow and approvers.
- **Period-end and reporting tasks.** Recurring analyses, KPI dashboards and PDF reports.
- **Customer and supplier follow-up.** Status updates and reminders tied to the record.

Engagement model

STAGE	SCOPE
1. Discovery	Business workflows, platform architecture, roles, approval limits and validation rules are mapped, and the tasks to automate are agreed.
2. Workflow design	Each automated task is designed as steps on the organisation's own documents, validations and approvals.
3. Connector	A dedicated connector maps standard business concepts to the organisation's system.
4. Governance	Permissions, confirmation rules and audit are configured and validated in a test environment.
5. Live operation	The agent operates in production and continues to receive every central improvement.

Systems in scope

- Dynamics 365 Finance and Ops
- Dynamics 365 Business Central
- SAP
- Oracle
- ERPNext and Odoo
- CRM platforms
- Group and multi-system estates

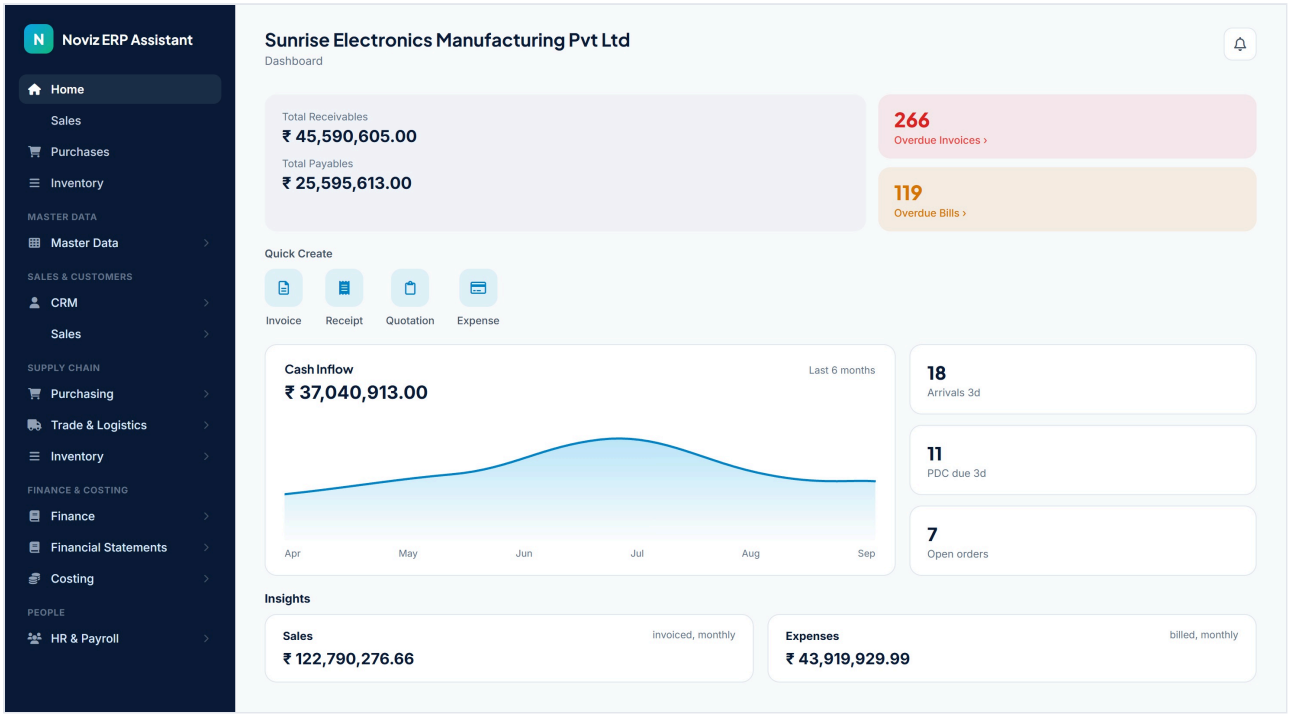
Suited to

Organisations operating an established ERP or a group of business systems that require workflows automated and customised to their own processes.

NOVIZ BUSINESS APPLICATIONS

Modern ERP with AI Agent

For organisations yet to adopt a system of record, Noviz provides a cloud ERP built on ERPNext, the open source framework with a long record of use across manufacturing, distribution and services.



Noviz ERP home dashboard: receivables, payables, cash inflow and operational alerts.

Noviz ERP Basic

The operational core of the business within a single system. Finance, sales, purchasing and inventory are recorded once, so reporting reflects the current position of the organisation.

- Enterprise resource planning across every operational module
- Access control aligned to roles and the organisational hierarchy
- Financial accounting, sales and purchase management
- Inventory visibility, valuation and stock control in real time

Modern ERP with AI Agent

The complete ERP core with an AI agent that automates your workflows. Colleagues state the task, and the agent carries it out through the ERP's own workflows, validations and approvals.

- All capabilities of Noviz ERP Basic
- Embedded Noviz AI agent, with permissions aligned to roles
- Tasks carried out through the ERP's workflows, validations and approvals
- Multi-step workflows orchestrated, with a record of each action

NOVIZ BUSINESS APPLICATIONS

Noviz CRM and WhatsApp Automation

Noviz CRM Basic

Leads, contacts and opportunities within one system, so the progress of each relationship is visible to the colleagues who need it. Activity and correspondence are recorded against the account, so the history stays with the organisation.

- Lead, contact and pipeline management
- Deal and activity tracking
- Collaboration tools for every team
- Guided implementation and onboarding programme

Noviz CRM Advantage

The CRM core extended with an agent prepared for the organisation's domain. It carries out the assessment of enquiries, follow-up tasks and the maintenance of the record.

- All capabilities of Noviz CRM Basic
- Agentic AI integration across the CRM
- Agent aligned to the organisation's products, services and terminology
- Advanced process automation and workflow orchestration

WhatsApp Automation

Business messaging connected to ERP and CRM records, so that order confirmations, dispatch notices and service messages reach customers on the channel they already use.

- **Messages that reflect the record.** Confirmations and status updates drawn from the same records the business works from.
- **Approved templates.** Messaging through approved WhatsApp Business templates.
- **Routine enquiries handled.** The agent handles common requests, such as the status of an order.
- **Handover.** Conversations pass to a colleague with their full history whenever required.

Common to all Noviz business applications

Agent-ready

Every Noviz application is prepared for the Noviz agent, so an organisation can begin with the core system and add workflow automation when it is ready.

Open foundation

Built on proven open source frameworks, the applications can be extended as processes develop, without licence restrictions.

Guided adoption

Implementation and onboarding cover data, stages and working practices, so teams are productive from the outset.

CAPABILITIES

Capabilities and analytics

Automate

Multi-step tasks orchestrated across documents, from quotation to invoice and payment.

Validate

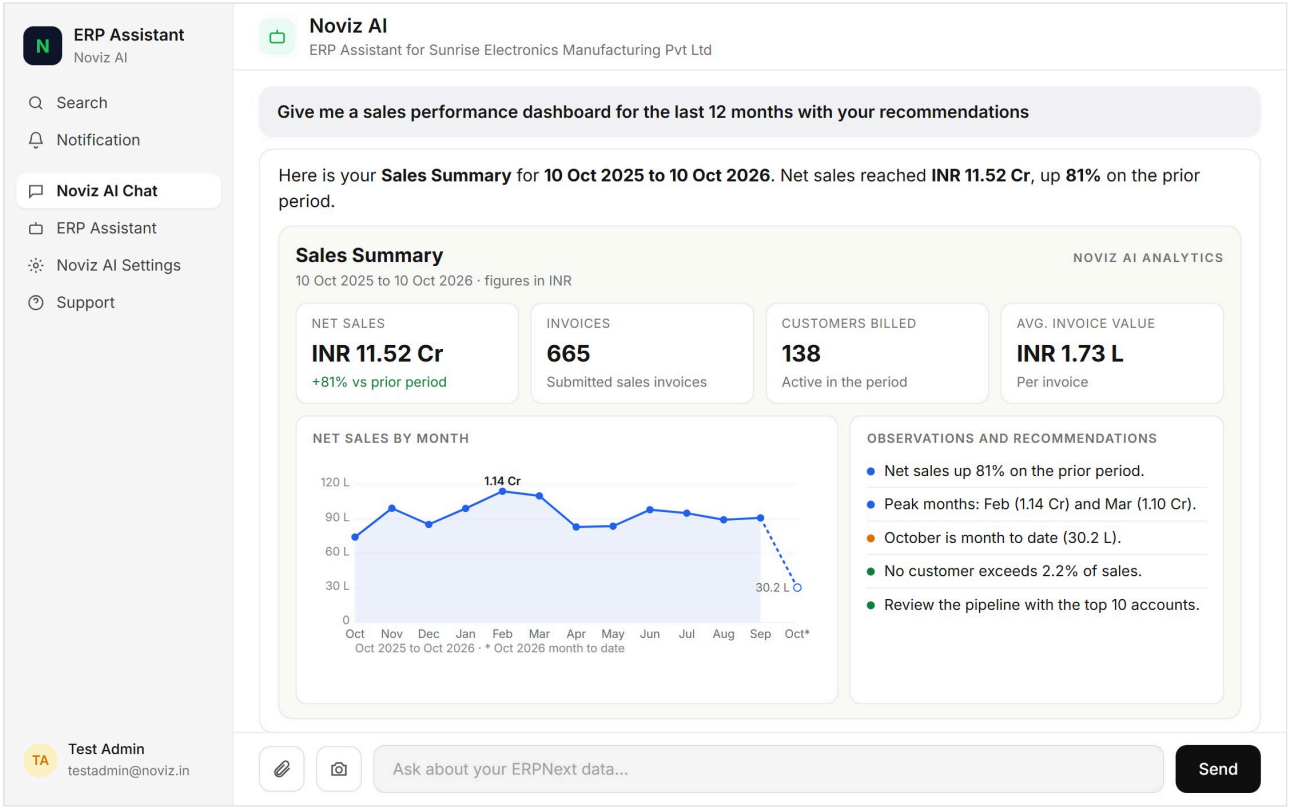
Each step checked by the platform's own validations and approval workflow; its messages returned as they are.

Act

Documents created, updated and progressed through their workflow, always confirmed by the user before committing.

Analyse

KPI dashboards with observations, recommendations and forecasts, with reports ready for print and PDF.



A sales performance dashboard with observations and recommendations, produced from a single request.

Standard business analyses: 100 across 12 categories

Sales	10	**Purchase**	8	**Inventory**	12	**Finance**	12
Customer	8	**Supplier**	8	**Production**	10	**HR**	8
Project	6	**Cash flow**	6	**Profitability**	5	**Executive**	7

TRUST

Security, privacy and governance

Governance is engineered into the way Noviz operates. The enterprise system remains the system of record and keeps its workflows, validations and approvals; Noviz orchestrates tasks within them, enforces existing access controls and minimises what is shared with AI models.

Task flow

STEP	DESCRIPTION
1. Task	The user states the task in plain language, with verified identity and tenant.
2. Metadata	The relay shares the request and a description of the data with the model.
3. Next step	The model reasons and plans the next step.
4. Execute	The step runs inside the enterprise system under the user's permissions, validations and approval workflow.
5. Outcome	Documents, totals and state changes are produced by the system itself, or it returns its own refusal.
6. Response	The result is presented to the user as documents, tables or charts, with the next step proposed.

Business records are not sent to the AI model. Noviz never stores business records outside the enterprise system.

Security and governance

- **The user's own identity.** Every call executes within the signed-in user's session, never as a super-user.
- **Native permissions.** Roles, permission sets and record rules of the platform apply unchanged.
- **Confirmation before commit.** No document is created, changed or submitted without the user's confirmation.
- **Rules in code.** Business rules are enforced in code, not left to the AI model.
- **Auditability.** Every governed action is recorded and reviewable.
- **Tenant isolation.** Each organisation's keys, connections and activity are kept separate.

Privacy and responsible AI

- **Data minimisation.** The model receives the request and metadata only.
- **No training on customer data.** No model training or product development on an organisation's data.
- **Analytics on secure servers.** Analyses are computed by Noviz; raw rows are not passed to the model.
- **Human accountability.** Decisions with financial, legal or compliance impact remain subject to review by a qualified person.
- **Autonomy set by the customer.** The organisation decides what the agent may do on its own.

ENGAGEMENT

Engagement and partners

Engagement process

1. **Consultation.** Share the platforms your organisation operates today and the workflows it needs automated.
2. **Connection.** Noviz connects the agent through the native connector for your platform, preserving your workflows, data model and permissions.
3. **Adoption.** Users state tasks in plain language, supported by guidance and documentation.
4. **Evolution.** Every central improvement reaches your organisation as part of the subscription.

Partner programme

Noviz collaborates with channel partners and marketing partners worldwide, including implementers, resellers and advisers, to expand market reach and deliver tailored workflow automation to their clients.

Applications: noviz.in/partners.html

Contact

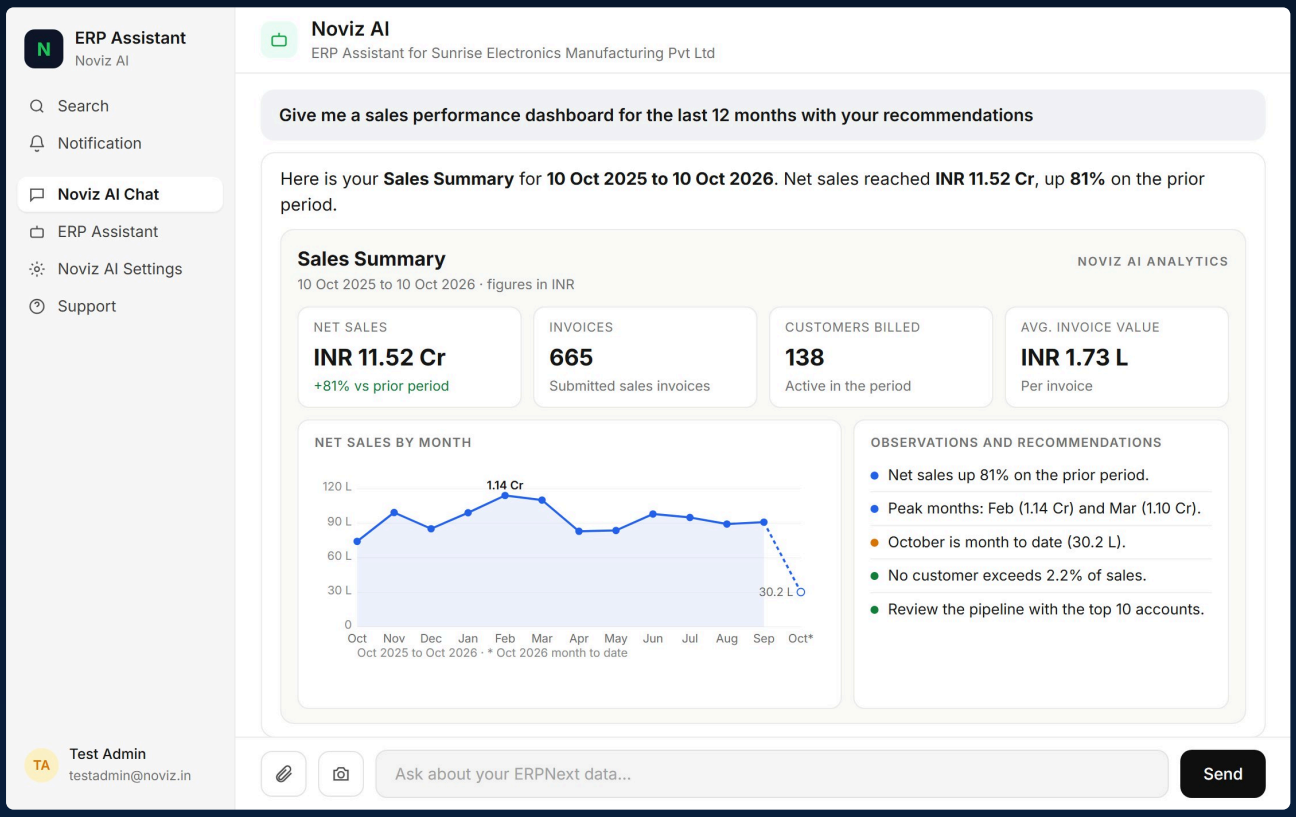
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Noviz AI
ENTERPRISE AI AGENTS

CONCLUSION

Noviz AI provides enterprise AI agents for workflow automation within the business systems an organisation already uses. The agent carries out tasks through each platform's own workflows, validations and approvals, under the user's existing roles and permissions, and every action that commits a record requires the user's confirmation.

The product range covers ERPNext, Microsoft Dynamics 365 Business Central, Odoo and QuickBooks Online, together with Enterprise Agent Integration, the workflow automation and customisation projects for organisations operating established or several systems, and the Noviz business applications. All products are served by the same central Noviz agent and delivered as a subscription, so improvements reach every customer without upgrade projects.



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PARTNERS

Channel and marketing partner applications
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