

Invoice processing, before and after.

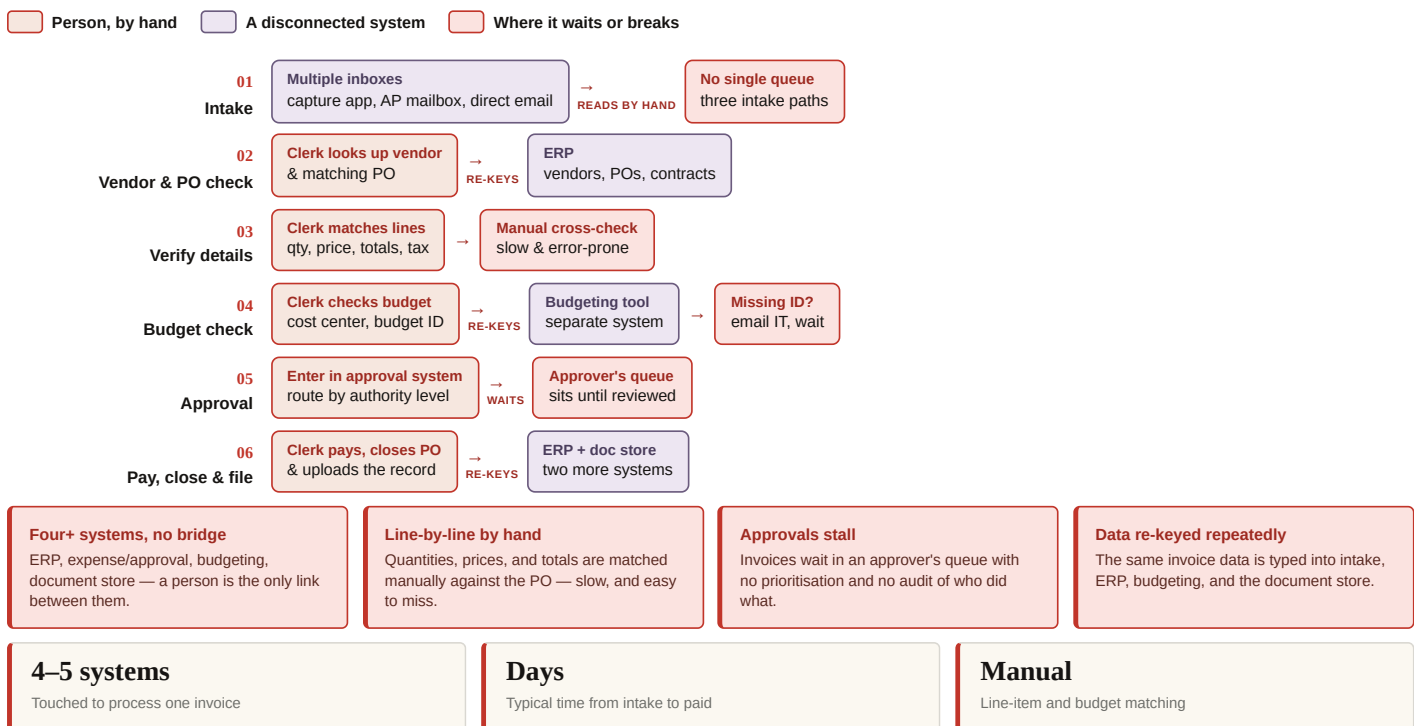
A worked example on a workflow nearly every operation runs: accounts-payable invoice processing. It's shown three ways — how it runs today across several disconnected systems, the preparation that changes it, and how a prepared agent crew runs it with people kept in control of the decisions that matter. It's a generic illustration, not a real client, and all system names are shown by role.



This is an illustrative example, not a real client. Workflow: accounts-payable invoice processing · high volume, multi-system · owned by an AP / Finance Operations lead.

1 Before — how one invoice moves today

A single invoice is checked and paid by a person moving data across four or five systems that don't talk to each other — an ERP, an expense/approval system, a budgeting tool, and a document store. Every step is manual, and every handoff is a place to wait or mis-key.



2 Prepare — the eight-tenths nobody did

None of this needs a smarter model. It needs the workflow bounded, the rules written, the systems connected by meaning, the tolerances agreed, an owner for "correct," and a measure of done — answered before any building, and proven on the real work before a build fee is owed.

THE FIVE QUESTIONS THAT TURN "BEFORE" INTO "AFTER"

- 1 · Trigger** — What starts the work, and which system holds the real record? → Invoices arrive by capture app, mailbox, and direct email; the ERP holds the true vendor, PO, and contract.
- 2 · Read** — What must be understood, and where does it live? → Vendor, PO number, line items, totals, tax, payment terms — extracted from any invoice format.
- 3 · Rules** — What decides the outcome, and what must a person always approve? → Exact-match quantities & unit price, 2% tolerance on discrepancies; any mismatch or failed check → a person.
- 4 · Act** — What happens, in which systems, and what's logged? → Validate against the ERP, assemble the approval package, close the PO, file the record — every step logged.
- 5 · Close** — What does "done right" look like, and who owns it? → Approved invoices paid within terms, with a full audit trail; the AP lead owns "correct."

This is the map. The tolerances, the match rules, and the escalation path are agreed here — so the agent is built around how the work truly runs, not an idealized version of it.

3 After — a prepared agent crew, with people in control

Once prepared, the routine work is carried by a small crew of single-purpose agents — each doing one bounded, checkable task in sequence. Anything that fails a check, or needs judgment, routes to a person. This is preparation made concrete: the work broken into clean, sequenced cuts.

☐ An agent does one bounded task ☐ A person stays in control ☐ Control point

THE VALIDATION CREW — SIX AGENTS, IN SEQUENCE

AGENT 1

Extract the key fields

Reads the invoice in any format and pulls structured data — parties, line items, totals, payment terms.

AGENT 2

Validate the vendor

Looks the vendor up in the ERP and compares it against the PO vendor; flags mismatches.

AGENT 3

Verify the PO reference

Confirms the PO number exists in the system and retrieves its details.

AGENT 4

Cross-check line items

Matches quantities and unit prices against the PO, within the agreed 2% tolerance.

AGENT 5

Audit the financials

Recalculates subtotals, tax, and totals, and compares them to the invoice values.

AGENT 6

Coordinate the decision

Aggregates every check into one verdict: approved for payment, or requires review.

DECISION ROUTER

The verdict from the crew decides what happens next — a clear logic gate, not a guess.

All checks pass → assemble the approval package

Any check fails → route to a person

THE HUMAN PATH — WHERE PEOPLE STAY IN CONTROL

When a check fails, a person receives a plain summary of exactly what failed and how to fix it, and decides. And every payment is approved by a manager — the agent assembles the case and the report, but a person always says yes.

ON APPROVAL — THE AGENT FINISHES THE ROUTINE WORK

THEN

Prepare the approval report & email

Generates a clear report and a manager-ready email with the decision, the numbers, and the next steps.

THEN

Close the PO & file the record

On the manager's yes, closes the purchase order in the ERP and files the record — every action logged.

◆ Control point · a manager approves every payment; failed checks always go to a person

Minutes

To validate a clean invoice (from days)

6 checks

Run on every invoice, the same way

100%

Of payments kept under human approval

The through-line

The model was never the hard part. The difference between the “before” and the “after” is preparation — bounding the work, writing the match rules and tolerances, connecting the systems by meaning, naming who owns “correct,” and deciding where a person must stay in the loop. Each agent is one clean cut; together they are a prepared crew. That is the craft.

段取り八分、仕事二分 — preparation is eight-tenths of the work; the work itself, only two.