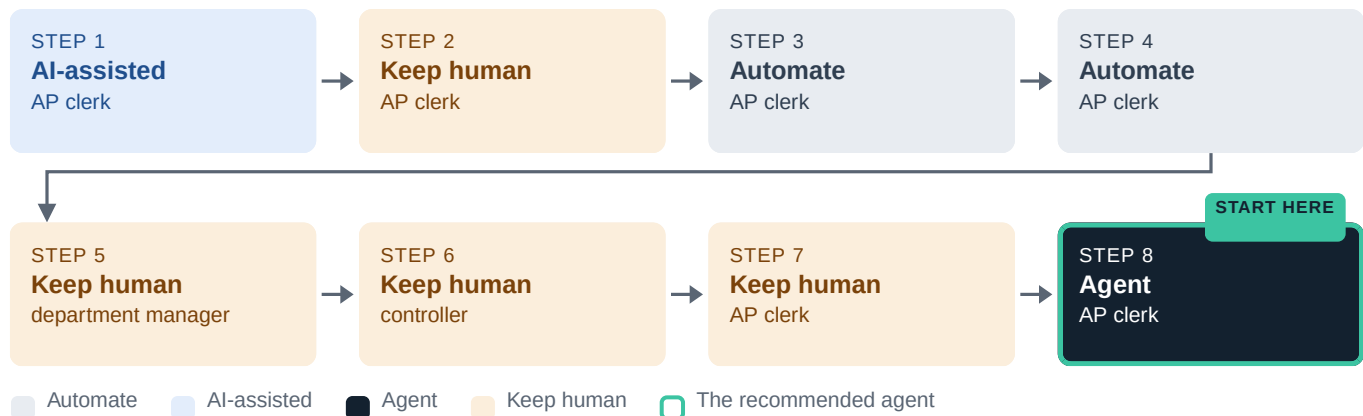


AI Fit Assessment

Invoice Approvals

Exported October 23, 2026. 8 steps.

Workflow at a glance



RECOMMENDED AGENT

Step 8: The clerk emails the vendor or the buyer, waits, reads the free-form reply, keys in the corrected invoice and chases again if it still does not match.

Step 8 is where the pain sits. The clerk emails the vendor or the buyer, waits, reads a free-form reply, keys in the corrected invoice and chases again if it still does not match. That is one goal pursued over several actions in email and NetSuite, and each next move depends on what the reply says. An agent can watch for replies, draft each follow-up and prepare the corrected entry, while the clerk approves what goes out.

Why not the other steps

Steps 1 to 4 are single actions or reading work, so automation or AI help is enough. Steps 2, 5, 6 and 7 are decisions a person makes: matching, approval, payment release and how a mismatch is resolved. Step 8 is the only step with a loop of waiting, reading and acting again.

What would make it a bad idea

It would be a bad idea if the agent sent messages to vendors or buyers without the clerk approving them, or if it decided how a mismatch is resolved instead of following the clerk's decision at step 7. The client also said vendor relationships stay personal.

Step map

Step 1 AI-ASSISTED

The clerk opens each emailed invoice and reads it, by hand where the vendor uses a different layout.

Who: AP clerk. Systems: AP inbox.

Most vendors use one layout, but the clerk reads the others by hand, so AI could read and draft the invoice data for the clerk to check.

Step 2 KEEP HUMAN

The clerk checks the invoice against the purchase order and decides whether it matches.

Who: AP clerk. Systems: NetSuite, purchase orders.

The client said a person decides each case, including slightly different amounts, so the match decision stays with the clerk.

Step 3 AUTOMATE

The clerk keys the matched invoice into NetSuite.

Who: AP clerk. Systems: NetSuite.

Once the invoice is judged a match, keying it in is a repeatable entry with no decision in it.

Step 4 AUTOMATE

The clerk sends the matched invoice to the department manager for approval by email.

Who: AP clerk. Systems: email.

Every matched invoice goes to the manager, so sending it is a single fixed action.

Step 5 KEEP HUMAN

The department manager approves each matched invoice.

Who: department manager. Systems: email.

The manager approves every matched invoice, which is an approval decision that carries accountability for money.

Step 6 KEEP HUMAN

Approved invoices go into the weekly payment run, and the controller releases it every Friday.

Who: controller. Systems: none stated.

Pain point: Some vendors get paid late.

The controller releases the payments, which is accountability for money that stays with a person.

Step 7 **KEEP HUMAN**

When an invoice does not match, the clerk decides how the case gets resolved.

Who: AP clerk. Systems: none stated.

Pain point: Mismatched invoices sit for days while the clerk chases answers.

The client said the clerk decides each case, so the resolution is a person's call.

Step 8 **AGENT**

The clerk emails the vendor or the buyer, waits, reads the free-form reply, keys in the corrected invoice and chases again if it still does not match.

Who: AP clerk. Systems: email, NetSuite.

Pain point: Mismatched invoices sit for days while the clerk chases answers, and some vendors get paid late.

The clerk chases, waits for free-form replies and keys in the correction, and each next move depends on what comes back.

Design document

Items marked "Assumption" are not stated in the description or confirmed by the client.

GOAL

Cut the days that mismatched invoices sit while the clerk chases answers, so fewer vendors are paid late. The agent supports step 8 and follows the clerk's decision at step 7.

SUCCESS MEASURE

Fewer mismatched invoices sitting for days and fewer late vendor payments. The target and the baseline are not stated. (Assumption)

TRIGGER AND INPUTS

- The agent starts when the clerk has decided that an invoice does not match and has decided how the case gets resolved.
- It receives the mismatched invoice, the matching purchase order and the free-form email replies from the vendor or the buyer.

SYSTEMS AND DATA

- Email, to send follow-ups to the vendor or the buyer and to read their replies.
- NetSuite, to read the purchase order and to prepare the corrected invoice entry.

ACTIONS IT MAY TAKE ON ITS OWN

- Watch for replies from the vendor or the buyer on each open mismatched invoice.
- Draft each follow-up email and prepare the corrected invoice entry for the clerk to review. (Assumption)

ACTIONS THAT NEED A PERSON TO APPROVE

- Send any email to a vendor or a buyer, only after the clerk approves it. (Assumption)
- Key the corrected invoice into NetSuite, only after the clerk approves it. (Assumption)
- Chase again when the corrected invoice still does not match, only after the clerk approves the message. (Assumption)

GUARDRAILS

- The agent never decides whether an invoice matches. A person decides each case.
- The agent never decides how a mismatch is resolved. The clerk decides each case.
- The agent never sends the invoice for approval and never releases payment. The department manager approves and the controller releases the payment run.
- The agent never sends messages to vendors or buyers without the clerk approving them, because vendor relationships stay personal.

TEST CASES

A vendor replies with a corrected invoice that matches the purchase order.

The agent prepares the corrected entry and gives it to the clerk to approve before it is keyed in.

A vendor replies and the corrected invoice still does not match. (Assumption)

The agent drafts a new follow-up for the clerk to approve and does not send it on its own.

A reply is unclear or does not say what the agent needs to know. (How it should fail) (Assumption)

The agent does not guess. It hands the case to the clerk with the reply attached.

An invoice is slightly different from the purchase order and the clerk has not yet decided if it is a match. (How it should fail)

The agent does nothing on that invoice until the clerk decides.

To confirm with the client

1. The clerk decides how each mismatch is resolved at step 7, and the agent only chases and follows up within that decision.
2. Corrected invoices from vendors arrive by email.
3. Invoices from vendors with a different layout are a small share of the total.
4. The weekly payment run is assembled from approved invoices without a separate decision.
5. Actions it may take on its own: Draft each follow-up email and prepare the corrected invoice entry for the clerk to review.
6. Actions that need a person to approve: Send any email to a vendor or a buyer, only after the clerk approves it.
7. Actions that need a person to approve: Key the corrected invoice into NetSuite, only after the clerk approves it.
8. Actions that need a person to approve: Chase again when the corrected invoice still does not match, only after the clerk approves the message.
9. Success measure: Fewer mismatched invoices sitting for days and fewer late vendor payments. The target and the baseline are not stated.

Other questions for the client

- Step 2: How does the clerk decide when a small difference from the purchase order still counts as a match?
- Step 8: How many invoices mismatch each week, and how long do they stay open?
- Step 8: Which vendors are relationship-sensitive enough that the clerk should write every message personally?

- Step 6: Do late payments come mainly from waiting on replies or from missing the Friday payment run?
- How long should the agent wait for a reply before it flags the invoice to the clerk?
- Which mismatches should go to the vendor and which to the buyer?
- Should the clerk approve every message, or can routine reminders go out without approval?

Confirmed with the client

When an invoice does not match, who decides how it gets resolved?

The clerk decides each case

How does the clerk decide that an invoice matches the purchase order?

A person decides each case

For example, if an amount is slightly off from the purchase order, does the clerk still treat the invoice as a match?

A person decides each case

Do the vendor and buyer replies come as free-form emails, or do they follow a set format?

Free-form emails

Once a vendor or buyer replies, what does the clerk do next?

Clerk keys in the corrected invoice

For example, if the vendor's corrected invoice still does not match, does the clerk chase again?

Clerk waits for a reply

Does the department manager approve every matched invoice, or are there limits on what they can approve?

Approves every matched invoice

Do invoice layouts vary from one vendor to another?

Most vendors use one layout

For the vendors that use a different layout, does the clerk read each invoice by hand?

Clerk reads each one by hand

What would make an agent a bad idea in this workflow?

Vendor relationships stay personal