CARE

WHITEPAPER

The Difference Between Documented and Ready

Readiness is a decision supported by verified controls and explicit unresolved work.

Transition quality depends on what the receiving operator can understand, verify and accept.

AGENTIC CARE

https://ai-managementsystem.com

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The most dangerous status is almost ready

A process can have an excellent procedure and still depend on one workstation, shared credentials or an undefinec Declaring it ready because the documentation is complete substitutes document count for operational evidence.

> **KEY FINDING**
>
> Readiness is a decision supported by verified controls and explicit unresolved work.

Use the AP process as a readiness exercise

The CARE material shows a readable procedure, owner approval, dry-run, idempotency, verification and incident-in exposes no automated parity tests, no agreed response-time target, incomplete cut-over criteria, and no document incorrect import.



ORGANIZATION
Taskboard

- Box workspace [redacted] holds the master AP sheet, vendor PDF folders and dated backups in `_meta/`.
- Agent messaging to AP Sync Orchestrator, ERP AP Sink and Steuerberater Sync.
- Canonical archive: [redacted]. The [redacted].
- Credentials: held in the runtime environment and never written into this SOP.

Inputs and triggers

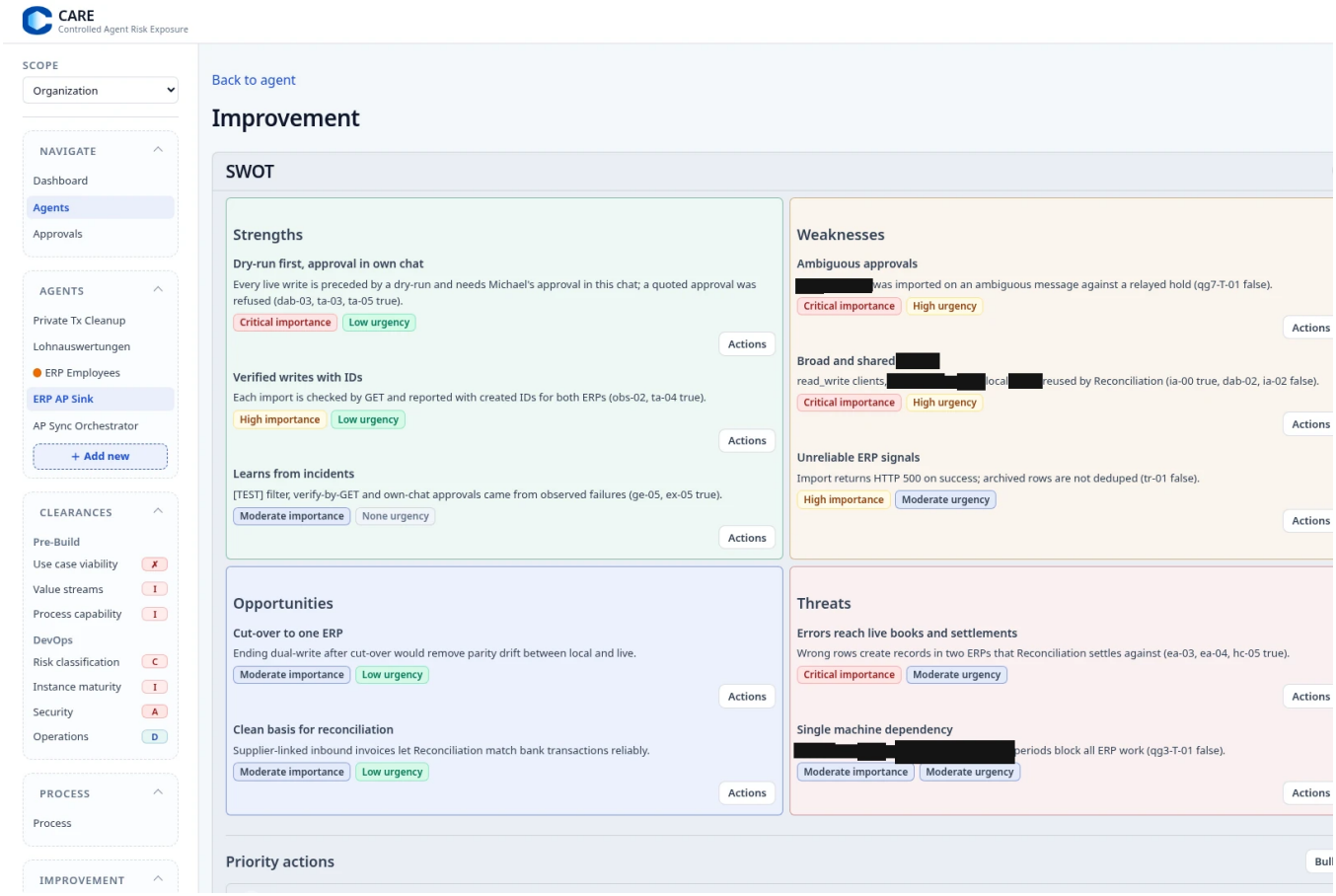
- Scheduled: AP Sync Orchestrator, Mon–Fri, twice daily (morning about 09:19 and afternoon about 15:19 Europe/Berlin). Each run covers the window since the previous run.
- Ad hoc: Michael sends a manual download path on [redacted] (e.g. [redacted]…) or attaches a PDF in chat.
- Inputs: new or unlabeled invoice-like Gmail with PDF attachments; the existing AP sheet and vendor folders; files parked on the box that are waiting for [redacted]

Operating procedure

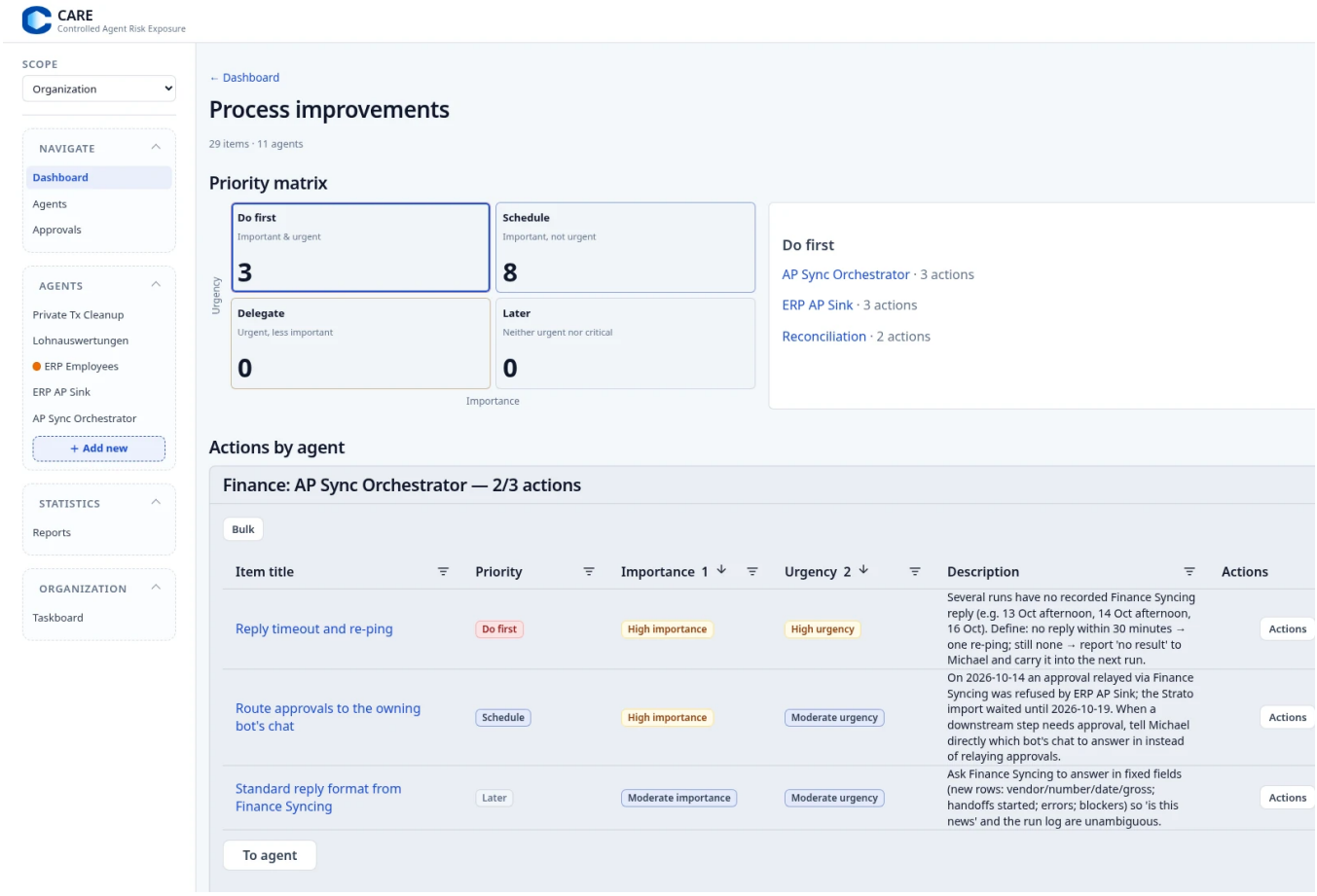
Title	Action	Checkpoint	Expected outcome
Search Gmail	Search for invoice-like mail after the last run, including forwards. If an email is non-financial (server alert, newsletter, bank postbox notice), ignore it completely and do not report it	Time window set from the previous run	Candidate list with MessageId, sender, date and attachments
Classify and route	AP invoice → AP.[redacted]Lohnauswertung → [redacted] (and archive [redacted] only. Statement/non-invoice → [redacted]Miro receipt → [redacted]. Paddle `[TEST]` → [redacted]. Strato login-only → [redacted]	Each item has exactly one route	No payroll, archives or test items in AP
Deduplicate	Check Vendor+InvoiceNumber and MessageId against the sheet. One email can carry several invoices, so check each invoice separately	Every candidate is checked	No duplicate rows
Save PDFs	Save to [redacted]. For manual downloads, copy from [redacted] first	PDF readable	PDF stored under its vendor
Extract and append	Extract vendor, number, date, currency, net, tax and gross. Back up the CSV/XLSX to `_meta/`, append rows with Status=`Pending review`, rebuild the xlsx	Amounts come from the document; empty with a note if absent	Sheet updated, with backup
Label Gmail	Apply `Rechnungen` + partner sublabel (or `Sonstige`) and mark read. Never skip unlabeled invoices	Row written	Mail trail complete
Sync Windows	If [redacted] is online: copy via [redacted]…, check the Windows CSV line count is not above the box copy, make a `.bak`, move into [redacted] (PowerShell syntax). If offline, park on the box and sync on the next run	Line-count check passed	[redacted] matches the box
Report to orchestrator	SendToAgent to AP Sync Orchestrator, priority false: nothing new, rows added (vendor/number/amounts), or the error	Run finished	Orchestrator informed
Hand off	If there are new AP rows: ask ERP AP Sink for a dry-run (live only after Michael approves in ERP AP Sink's own chat), and send supplier invoices to Steuerberater Sync for the [redacted] Never send [redacted] payroll or `[TEST]` items	New rows exist	Sinks informed
Notify Michael	Message Michael only with real results, decisions or blockers. Stay silent on "nothing new" and on non-financial mail	Something material happened	Michael informed only when it matters

Business rules and exceptions

Observed CARE Standard Operating Procedure for Finance Syncing: scheduled and ad-hoc triggers plus a step table co
classify, deduplicate, save PDFs, extract, sync, hand off, and notify.



A limited, supervised pilot may be acceptable while a fully outsourced production service is not. The owner must de scope, which controls are mandatory, which gaps can be temporarily accepted, what tests must pass, and who will r incidents.



Observed CARE Process improvements board: priority matrix (Do first / Schedule) and proposed actions for AP Sync O reply timeout re-ping and routing approvals to the owning bot chat (proposed, not shown as completed).

The contribution CARE already makes

CARE structures much of the definition and the decision evidence needed for this conversation. The claim we can su makes readiness requirements and gaps legible. Proof of completed tests, operational support and service acceptar from the actual receiving environment.

> **MANAGEMENT IMPLICATION**
>
> Management takeaway: retain the decision and verify the operating evidence before treating a delivered control.

What management can verify

Checkpoint	Management question	Evidence to request
Process	Check SOP and exception coverage	Reviewable procedure present
Control	Verify parity, rollback and identity handling	Missing evidence remains visib
Approval	Define a scope-specific readiness gate	Accepted pilot or production c

Where evidence is missing, record the gap and the accountable owner rather than treating the document itself as p

Start with one agent

Use a real agent and review what it produces.

1. F the agent to https://ai-managementsystem.com/under-care.
2. V it is finished, log into CARE and review its documentation.

Images and text generated with the assistance of ChatGPT by OpenAI.

AGENTIC CARE

Instant AI Management System for your Agents, as a Managed Service.

https://ai-managementsystem.com