CARE

WHITEPAPER

# The Operating Procedure That Writes Itself

Agent-assisted operating procedures can specify actions, checkpoints and exceptions.

A business process becomes manageable when its participants, boundaries and dependencies are explicit.

**AGENTIC CARE**

https://ai-managementsystem.com

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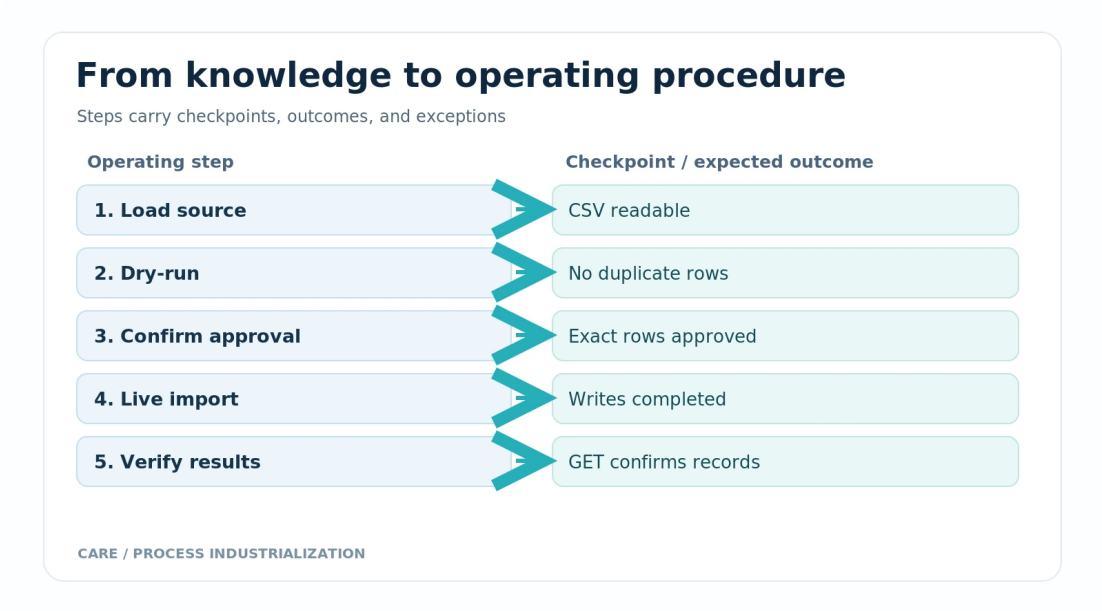
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## Documentation usually arrives after operations

Teams often stabilize an automation through trial, incident response and informal instructions, then ask someone t an SOP. The resulting document is frequently too vague to reproduce a difficult situation. 'Import approved invoice instruction when the import endpoint sometimes returns HTTP 500 after a successful write.




Explanatory illustration (not a product screenshot): operating steps linked to checkpoints such as CSV reac duplicate rows, and writes completed.

**KEY FINDING**

Agent-assisted operating procedures can specify actions, checkpoints and exceptions.

final report.



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

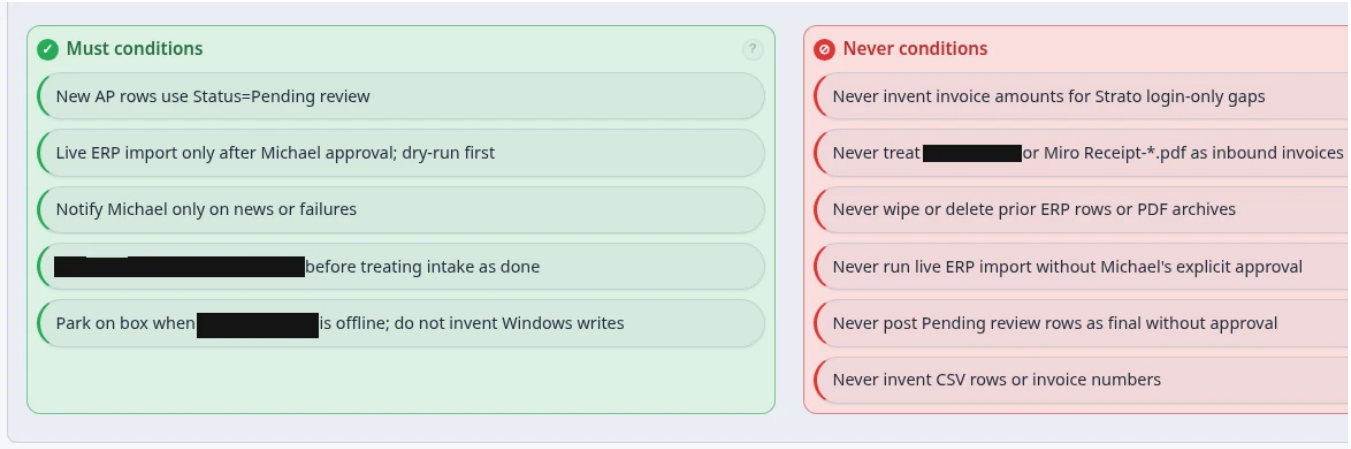
| Title | Action | Checkpoint | Expected outcome |
|---|---|---|---|
| Search Gmail | Search for invoice-like mail after the last run, including forwards. If an email is non-financial (server alert, newsletter, bank postbox notice), ignore it completely and do not report it | Time window set from the 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.

## Exceptions are part of the procedure

The same output records how to handle missing dates or amounts, duplicate invoice identifiers, a hold issued by th unavailability, and conflicting instructions. These details matter more to the receiving team than a generic diagram




Observed CARE business rules: Must conditions such as Status=Pending review and dry-run before live ERP import, an such as never inventing invoice amounts or running live import without explicit approval.

A receiving operator can inspect required inputs, observable checkpoints and what to do when something fails. The states which procedures remain unresolved, including undoing a wrong import. That is preferable to treating the SO proof of readiness.

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

## What management can verify

The following checkpoints translate the paper's argument into a review of the actual operating arrangement. They a not claims that a proposed control has already been implemented.

| Checkpoint | Management question | Evidence to request |
|---|---|---|
| **Action** | Specify API method and expected response | Repeatable step rather than gen |
| **Checkpoint** | Identify the state that proves the action happened | GET verification and expected re |
| **Failure** | Record a recovery route or unresolved gap | No silent retry after misleading H |

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. the agent to https://ai-managementsystem.com/under-care.
2. 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.