CARE

WHITEPAPER

What Happens When the ERP Lies?

Design recovery around observed outcomes rather than misleading API responses.

Operational weaknesses become actionable once they are connected to an actual process and its observed outcomes.

AGENTIC CARE

https://ai-managementsystem.com

Contents

01 A failed response is not always a failed transaction

02 The correct response is evidence-seeking

03 The failure crosses multiple boundaries

04 What remains to resolve

05 What management can verify

06 Start with one agent

A failed response is not always a failed transaction

In the documented invoice workflow, the import call can return HTTP 500 after writing the records. Automatically re status may create duplicate financial entries. That behavior changes the safe operating procedure.



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

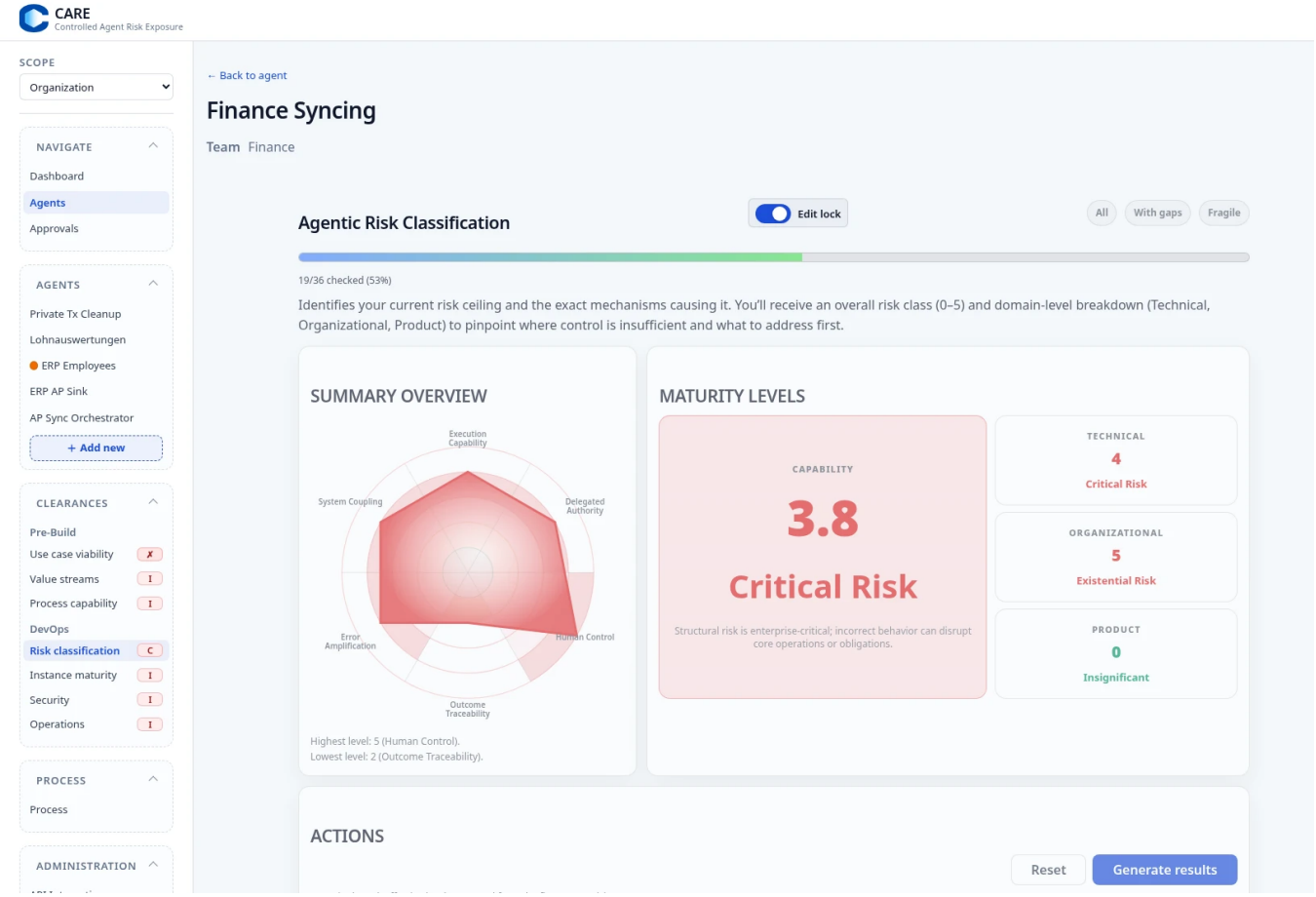
Title	Action	Checkpoint	Expected outcome
Search Gmail	Search for invoice-like mail after the last run, including forwards. If an email is non-financial (server alert, newsletter, bank postbox notice), ignore it completely and do not report it	Time window set from the previous run	Candidate list with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

The correct response is evidence-seeking

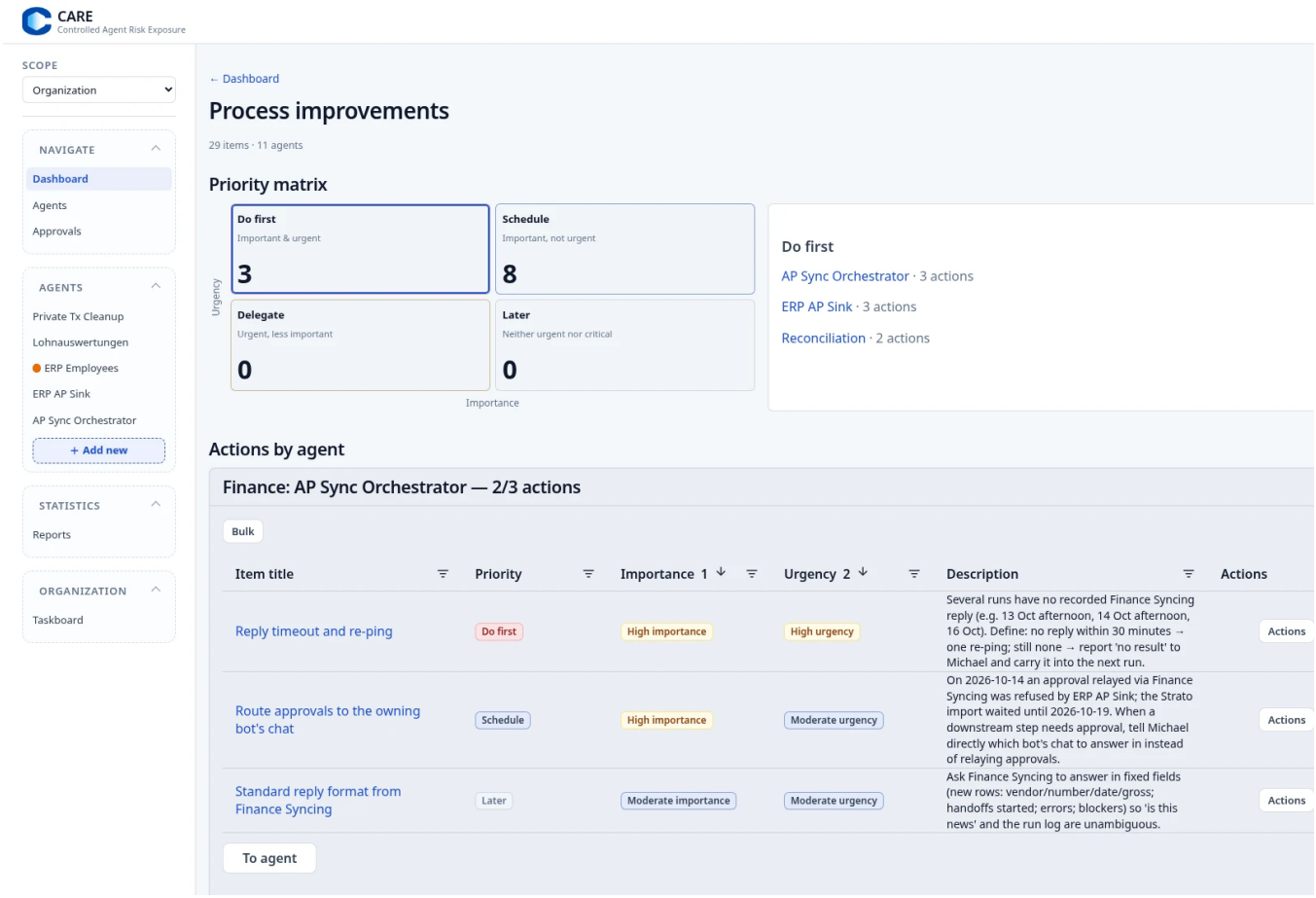
The CARE SOP records a specific Must condition: after the import's HTTP 500, verify by GET rather than retrying. Th procedure also uses idempotency keys and confirms that the approved rows exist once in each ERP environment. T outcome takes precedence over the superficial success or failure label.



Observed CARE Agentic Risk Classification for Finance Syncing: capability score 3.8 labeled Critical Risk, with Technical Organizational 5 domain scores (19/36 checklist items checked).

The failure crosses multiple boundaries

What begins as an API irregularity becomes a process risk, an accounting concern and a handover requirement. A r operator must know the endpoint behavior, the verification method, and what to do when results differ. A receiving this information before declaring routine support readiness.



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).

What remains to resolve

The procedure still identifies gaps: a fully documented reversal path and automated parity checks are not yet estab deliverable is not a claim of error-proof import. It is a precise failure scenario with an accepted interim response an improvement backlog.

> **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
Response	Interpret HTTP 500 as uncertain outcome	No blind retry
Observation	Fetch actual records from both ERP instances	Row exists once per environment
Recovery	Define action when results do not match	Explicit exception owner and unresolve

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