GRAIP

Automated Purchase Order Reconciliation Agent



Business use case

User Journey Map: Automated Purchase Order Reconciliation Agent



Problem:

Dealing with purchase order discrepancies is a frequent headache for procurement teams. Differences between the internal PO and what the customer submitted - whether in quantities, pricing, delivery dates, or line item specifics - require laborious manual work. People must perform side-by-side document comparisons to identify and document these issues, then manually draft emails for customer communication. This back-and-forth exchange inevitably delays order confirmation and significantly increases the risk of errors or miscommunication.



Goal:

To reduce time spent on PO reconciliation by automatically comparing PO pairs, identifying discrepancies with clear explanations, and generating contextual customer communications. To enable faster order confirmation cycles while maintaining accuracy and clear audit trails of all identified issues and resolutions.



User in this journey:

A procurement specialist Bill responsible for comparing POs, communicating with customers, and ensuring order accuracy before handoff to fulfillment.



Solution:

Implemented an end-to-end Purchase Order Reconciliation Agent workflow. The system ingests paired PO documents (internal Excel POs and customer-submitted PDFs), automatically compares line items and header details to identify discrepancies in quantities, pricing, dates, and specifications, generates a detailed reconciliation analysis, and drafts a customized email highlighting specific issues. The user reviews and approves the communication, sends it to the customer, captures the customer response, and the agent updates the PO file accordingly. Confirmed data is then exported to final output templates for order fulfillment.

Stages: 1 Discover 2 Document upload 3 Automated comparison 4 Email generation 5 Human review & approval 6 Customer communication 7 Response processing 8 Data update 9 Output generation

1. PO pair identification — Human

Bill identifies a discrepancy case requiring reconciliation and gathers the internal PO in Excel and the customer-submitted PO in pdf.



2. Document upload — Human

Bill uploads both POs into Graip.AI Agent chat



3. Automated comparison & analysis — Agent

Graip.AI Agent performs line-by-line comparison of documents, analyzing header fields and line items. The agent generates report highlighting each discrepancy with specific details (e.g., "Qty difference: Internal shows 100 units, Customer shows 95 units on line item SKU-2847").



4. Email generation — Agent

Graip.AI Agent drafts an email identifying each discrepancy with clear explanations. The email highlights specific line items requiring clarification or confirmation.



5. Review & approval — Human

Bill reviews the email, verifies that all identified discrepancies are accurate, edits the message if needed. Once satisfied, Bill approves the email for sending to the customer.



6. Customer communication — Human

Approved email is sent to the customer from the agent interface.



7. Response capture & processing — Human

The customer responds with clarifications. Bill receives this response and inputs this information back into the agent (either by pasting the email content or uploading any supporting documents from the customer).



8. PO file update — Agent

Graip.AI Agent processes the customer response, updates the internal PO file with confirmed values, and flags any remaining discrepancies that could not be resolved.



9. Output generation & finalization — Agent

Once all discrepancies are resolved and confirmed, Graip.AI Agent generates final output templates containing the reconciled PO data.

GRAIP

Graip.AI makes structured and unstructured document data usable for your business applications

Learn more

www.graip.ai

Contact us

hello@graip.ai

US +1 202-788-0100

EU +371 2030-33-22