ILLUSTRATIVE SAMPLE · FICTIONAL COMPANY · NOT A CLIENT

AUTOMATION BLUEPRINT

Process: matching carrier invoices to delivery proofs and orders

One process, written up in plain language: where the hours go, what to automate and how, what it is worth, and a 4-week pilot plan. Every number is shown so you can check it.

Nordkai Freight GmbH

Fictional freight forwarder, made up for this sample.

Prepared from	The form answers and public information about the company and its industry
Reviewed by	A senior engineer, before it was sent
Language	English

1 · WHERE THE HOURS GO

Fifteen hours a week go into matching paper to paper.

Each carrier invoice is checked by hand against the order in the TMS and the signed delivery proof (a scanned PDF from the driver app). Mismatches are chased by email.

Re-typing invoice lines into the TMS		**6 h / week**
Matching invoices to orders and delivery proofs		**5 h / week**
Chasing mismatches with carriers		**4 h / week**

Hours per week, from what the form told us.

What we noticed

- Most invoices match on order number, weight and date. Only the exceptions need a person.
- Delivery proofs already arrive as PDFs, so nobody has to scan anything.
- Chasing is slow because the reason for a mismatch is not written down anywhere.

2 · OPTIONS

What to automate, and how.

A **Connect the systems, let rules do the matching** RECOMMENDED

Invoices from the accounting inbox and orders from the TMS are matched on order number, weight and date. Clean matches are approved; only exceptions go to a person, with the reason attached.

Touches: accounting inbox, TMS, accounting system

B **AI reads the documents, a person approves**

ADD LATER IF A LEAVES MANY EXCEPTIONS

AI reads invoices and delivery proofs that arrive in odd formats and proposes the match. A person approves each one in a single click.

Touches: accounting inbox, driver-app PDFs, TMS

C **Leave it manual** NOT RECOMMENDED HERE

If invoice volume falls or the TMS is being replaced this year, automating now is not worth it. We would say so.

Touches: nothing

3 · WHAT IT IS WORTH

About €26,220 a year in manual work.

Hours per week on this process	**15 h**
Loaded cost of one hour	**€38**
Working weeks per year	**46**
Manual work per year	**≈ €26,220**

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15 h × €38 × 46 weeks = €26,220
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Illustrative example. Your blueprint uses your hours and your cost.

What stays manual

Option A leaves the exceptions with a person. If they are about one invoice in five, roughly three of the fifteen hours remain. The pilot measures the real share.

How to use this number

Weigh any quote against it. The sprint and the pilot each have a fixed price, quoted in writing before you commit.

4 · PILOT PLAN

A 4-week pilot in your real systems.

Week 1	Map the process and the exceptions. Connect the inbox, TMS and accounting system.
Week 2	Build the matching rules and the exception queue.
Week 3	Run it next to the manual way and compare every result.
Week 4	Measure hours saved and exception share, then decide together.

Terms

- Fixed price, fixed scope, agreed before we start.
- You keep the code and the connections either way.
- Data stays in the EU.

Next step

Reply to the email this came with, or request a 30-min call on hopin.it/contact. We reply within a few hours.