AGENT JOB DESCRIPTION CANVAS

Write the job first.

Then build the agent.

Give one agent a clear job, the tools it needs and someone accountable for the work.

HOW TO USE IT

01 Pick one job per canvas.

02 Work with the person who does it today.

03 Set clear measures and limits.

04 Read the handover rules aloud.

COMPANY *Harbourline Distribution*

COMPLETED BY *Finance Manager and AP team*

DATE *12 February 2027*

Job title

THE ROLE 01

What would you call this role in a job ad?

Accounts Payable Coordinator. Agent name: Paige.

Purpose

THE ROLE 02

What does the business get? What can staff do instead?

Match every supplier invoice to its purchase order within a day. Free the AP team for supplier queries and month-end.

Inputs

03

What arrives, from where and how often?

About 800 supplier invoices a week reach the AP inbox as PDFs. The ERP holds POs, receipts and supplier records.

Tasks

04

List the steps and where a person takes over.

1. Extract supplier, ABN, amount and PO.
2. Match the PO and receipt. Flag exceptions.
3. Queue matches and send exception summaries.

Tools and systems

05

List system access and who approves it.

AP inbox, POs and supplier master: read only.
ERP invoice drafts: edit. CFO approves access.

Decides alone

THE RULES 06

Which decisions can it make? Set hard limits.

Queues invoices under $10,000 if the PO and receipt match within 1%. May request a missing PO. Never approves or pays.

Hands over

THE RULES 07

Name the trigger, owner and response time.

Price gap over 1%: AP officer, same day. Bank details change: Finance Manager, within an hour. Over $10,000: AP Manager, same day.

Success measures

THE RESULTS 08

Choose three measures. Record today's result and its target.

MEASURE	TODAY	TARGET
Invoices matched without staff handling	*0%*	*60%*
Days from receipt to coding	*4 days*	*1 day*
Duplicate payments per quarter	*2*	*0*

Human manager

RESULTS 09

Who reviews the work and can switch it off?

NAME AND ROLE

AP Manager

REVIEW CADENCE AND SAMPLE

Every Monday, sample of 20

We build AI workflows.

We run them, too.

Spark Factory finds, builds and runs AI workflows for growth companies. We take on one workflow at a time, with a result your team can measure.

01

Find.

Find the repeatable job where AI can improve cost, speed or quality.

02

Build.

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03

Run.

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YOUR NEXT STEP

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