

WISE ADMIN AGENT

From one reporting agent to a family of AI agents.

A marketing company handed over its heaviest monthly job, commission reporting. Once the first agent proved itself, it added reconciliation and weekly bookings, and freight is next.

51-200 employees

3 agents live

4th in progress

300+ h saved a year

1

Admin Agent

Monthly commission reports

Live

2

Commission Reconciliation

Reports vs paid invoices · late 2025

Live

3

Bookings Report

Weekly workbook per sales rep

Live

4

Freight Agent

FedEx / UPS tracking vs ERP jobs

Next

CUSTOMER

Marketing company

SIZE

51-200 employees

STARTED WITH

Monthly commission reporting

TODAY

3 agents live, a 4th on the way

KEY KPIS

75%

less time on monthly commission reporting

15h → 3-5h

monthly commission reconciliation

25-27h

saved per month across reporting and reconciliation

300+ h

saved per year

Executive summary**Started with one painful workflow**

And proved value within the first reporting cycles.

**Expanded to the processes next to it**

Reconciliation and weekly bookings, with freight next.

**Every agent on the same platform**

Each new one costs less to add and needs less training.

Hours per month, before and after**Commission reporting****-75%**

Before



20+ h

With Wise



~5 h

Reconciliation**15 h → 3-5 h**

Before



15 h

With Wise



3-5 h

THE CHALLENGE

Twenty hours of spreadsheets every month

Every month, commission reporting meant cleaning raw data, formatting spreadsheets, applying commission rules and handling exceptions by hand.



Manual reporting

More than 20 hours a month to turn raw margin data into commission reports.



Exceptions everywhere

Card sales, refunds and negative margin adjustments all needed special handling.



Slow reconciliation

Checking commission statements against paid invoices took another 15 hours.

THE SOLUTION

One agent at a time

1

Admin Agent

Live

Turns raw margin data into structured, editable Excel reports and applies the compensation rules and exceptions automatically. Part of why it worked: the customer was very clear from day one about what the reports needed to do.

2

Commission Reconciliation

Live · late 2025

For accounting: cross-checks commission reports against paid invoices, updates statements on payment confirmation and produces individual and overall summaries.

3

Bookings Report

Live

Turns weekly sales order reports into a booking workbook for each sales rep: cleans and checks the orders, assigns each to its rep and builds a summary with rep-level detail.

4

Freight Agent

Next

Will cross-check FedEx and UPS tracking numbers against job records in the ERP and produce a color-coded report.

TRACKING	ERP JOB	STATUS
1Z...4821	Job ...112	Matched
7745...09	Job ...118	Close
1Z...7730	—	Unmatched

Illustrative report

Where it's going

One portal

Every agent behind single sign-on: switch between them or see all at once.



Shared dashboards

Each new agent costs less to add and needs less training.



Direct ERP connection

Nobody has to upload raw files anymore.

BEFORE AND AFTER

Hours back, every month

75%

less commission reporting time

300+ h

saved per year

3 agents

live, with a fourth on the way

AREA	BEFORE WISE	WITH WISE
Commission reporting	20+ hours of manual spreadsheets each month	About 5 hours with the Admin Agent
Reconciliation	15 hours of manual cross-checks	3 to 5 hours with the Reconciliation Agent
Weekly bookings	Sales order reports split by rep by hand	Rep-level workbooks built by the agent
Shipment checks	Hundreds of tracking numbers a day, mostly unchecked	Color-coded report from the Freight Agent (in progress)

Strategic takeaway

LAND

One painful workflow

The company didn't try to automate everything at once.

PROVE

Results in the first cycles

Value showed up within the first reporting cycles.

EXPAND

The process next door

Then reconciliation, bookings and freight, one at a time.

CONCLUSION

Commission reporting went from **20+ hours to about 5**, reconciliation from **15 hours to 3–5**, and the company keeps picking the next process to hand over.

Start with your most painful report

One agent first, then the processes next to it, on the same platform.

Book a demo

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