WISE OPERATIONS AGENT

From Excel, paper and email to one shared operations workspace.

Technicians, warehouse, purchasing, finance and leadership log what happens, attach evidence and work from the same records, captured once by the person closest to it.

8 areas · 7 roles · Android · iPhone · desktop · Works offline · AI receipt reading

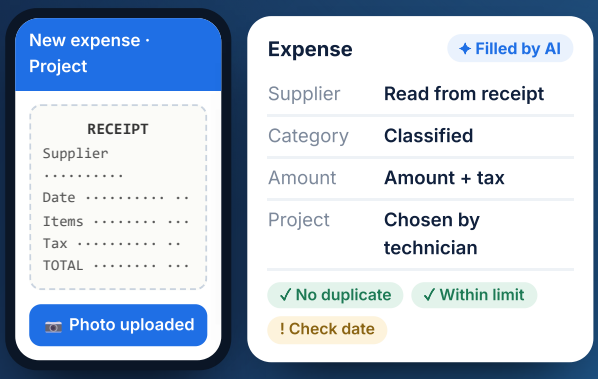


Illustration of the capture flow

CUSTOMER	LOCATION	OPERATION	TEAMS
Supply chain company	Mexico	Industrial projects, field technicians	8 areas, Sales to Leadership

AT A GLANCE

8 areas working from the same records, field to leadership

1 photo of the receipt is all a technician sends

12 photos per spare part in one shared catalog

Offline for warehouses with poor signal

7 roles each with its own permissions and audit history

Executive summary

Receipts and evidence from the phone
Technicians submit them project by project; the AI reads and fills in the expense.

One spare parts catalog
Photos, locations and stock in one place, even offline.

One dashboard for leadership
Projects, stock, purchasing and spending, without asking around.

The shift

Typing every record by hand, again and again → **Checking** records captured once, at the source

Built after a consulting session with every area of the company.

THE CHALLENGE

The same data, typed again and again

Expense reports, technician reports, inventory and purchasing lived in Excel files, Google Sheets, email threads and even paper. The team described a lot of rework.

Expenses rebuilt by hand

For every receipt, an analyst figured out who it belonged to, read it, classified it, typed amount and tax, linked a project and added notes, though the data was already on the receipt.

An ERP that didn't match reality

Few licenses, hard to query and not always showing real stock, so teams kept parallel Excel files.

Email as the archive

Quotes, prices and supplier history were buried in inboxes.

Leadership as the bottleneck

Purchasing couldn't see margins, the warehouse couldn't tell which project a part was for, managers lacked cost data: questions went up to leadership.

THE SOLUTION

Capture it once, at the source

Wise Agents started with the two pieces everything else depends on: what technicians do in the field, and what the warehouse and purchasing spend to support them.

1

Capture

A technician picks the project and uploads a photo of the receipt. The AI reads it and fills in the expense.

→ 2

Review

The analyst sees the receipt, the extracted data and any policy alerts side by side.

Duplicates · Limits · Dates outside the project

→ 3

Resolve

Approve, ask for a correction with a reason, or reject, and record payment proof when needed.

~~The analyst types every record~~

The analyst checks every record

The analyst's job changes from data entry to review, with the evidence and the alerts in front of them.

Key capabilities

Warehouse and spare parts

Codes, brand, model, location, stock thresholds, up to 12 photos per part and full movement history. Android, iPhone and desktop, even offline.

Customers and suppliers

Shared directories with tax info, contacts, brands, sites and purchasing history.

Quotes and purchase orders

Quotes built from inventory, downloaded as PDF or Word. POs tracked from draft to fully received.

AI assistant

Questions in plain language; answers come as tables and charts linked to the source records.

DAY TO DAY

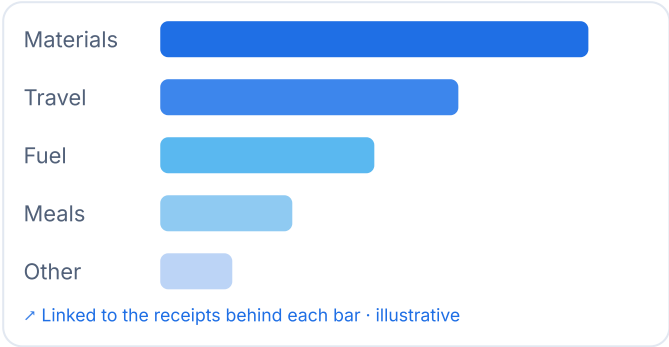
Every area works from the same record

Questions that used to go up to leadership are answered from the data itself, and each role sees exactly what it needs.

Ask the operation

"Show this month's expenses by category."

Example question from the case. Answers link back to the source records.



One dashboard, the right access for each role

Projects, shortages, purchasing, quotes and spending in one view, filtered by period and project. Each role sees and edits only what it should.

- M Management
- T Technical analysts
- F Finance
- S Sales
- P Purchasing
- W Warehouse
- F Field technicians

What changes for each team

Field technicians

Pick the project and send one photo of the receipt, with evidence, from their phone.

Analysts & finance

Check what the AI filled in, with the receipt and policy alerts side by side, instead of typing it.

Warehouse

One catalog with photos, locations, stock and movement history, linked to projects, even offline.

Purchasing & sales

Supplier and price history in one directory; quotes and POs generated from the same records.

Leadership

Projects, stock, purchasing and spending in one dashboard, without asking around.

BEFORE AND AFTER

One workspace instead of a dozen files

AREA	BEFORE WISE	WITH WISE
Technician expenses	Receipts on paper and in chats, typed into Excel by hand	**Photo from the phone, AI fills it in, analyst checks**
Inventory	ERP plus parallel Excel files that didn't match	**One catalog with photos, locations and movement history**
Supplier and price history	Buried in email	**Searchable directory and AI assistant**
Quotes and POs	Built manually in separate files	**Generated from the same records, with tracked status**
Visibility	Questions went up to leadership	**Each area checks the data it needs directly**

What it sets up

Buy materials
Purchasing and spend, recorded

Use them on a job
Field work and evidence, by project

Close the project
One trail from purchase to delivery

LIVE TODAY

- Field expenses
- Warehouse & parts
- Purchasing
- Dashboard

NEXT ON THE LIST

- Commercial quoting
- Project profitability
- Invoicing
- Accounts payable & receivable
- Logistics
- Executive reporting

CONCLUSION

Information is now **captured once, by the person closest to it**, and every area works from that same record. That removes most of the rework the team described, and **leadership can see projects, stock and spending without having to ask around**.

Put your operation on one record

Built around your areas, roles and systems, live in weeks.

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