

## WISE PO MANAGEMENT AGENT

# Staying ahead of purchase orders, vendors and delivery dates.

Connected to the team's Outlook, the agent detects every purchase order that goes out, tracks the vendor's response and shows what is on track and what needs action.

Outlook

PO PDFs

Vendor follow-ups

Shared task list

ERP in phase 4

## Purchase orders

All

Needs action

Overdue

|         |                           |                  |
|---------|---------------------------|------------------|
| PO-1042 | Vendor A · acknowledged   | ✓ Acknowledged   |
| PO-1043 | Vendor B · sent today     | Waiting · < 24 h |
| PO-1044 | Vendor C · follow-up sent | Overdue · 2 days |
| PO-1045 | Vendor D · new ship date  | Date mismatch    |
| PO-1046 | Vendor E · price changed  | Repriced         |
| PO-1047 | Vendor F · draft ready    | Overdue · 24 h   |

Illustrative status board

## CUSTOMER

Plastics supplier

## VOLUME

A steady flow of customer and vendor POs

## WORKS IN

The team's Outlook

## ROLLOUT

4 phases, up to the ERP

## AT A GLANCE

## Every PO

detected automatically from sent email and its PDF

## 24 h

acknowledgement window before an order is flagged

## 24 h · 2 d · 3 d

overdue levels that trigger follow-ups

## 4 phases

from Outlook tracking to ERP-connected automation

## Executive summary

**Tracks every acknowledgement**

And sends the follow-ups when a vendor goes quiet.

**Flags problems before the customer sees them**

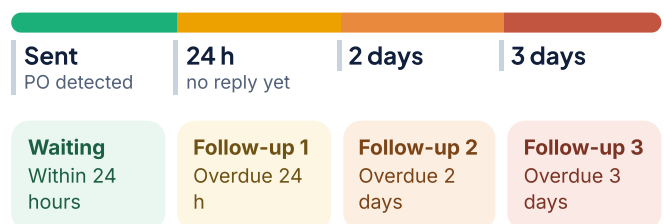
Late, mismatched or repriced orders surface early.

**People stay in charge**

The team reviews follow-ups and approves delivery exceptions.

## The acknowledgement clock

From the moment a PO is sent, every order runs on the same clock.



Follow-ups go out automatically or as drafts the team reviews. An acknowledgement stops the clock.

## THE CHALLENGE

# Order details spread across inboxes

Managing a PO means tracking much more than whether it was placed: vendor acknowledgements, promised delivery dates, pricing changes, customer questions and open follow-ups. All of it lived in email threads and individual trackers.



### Missed signals

A missing acknowledgement or a pushed delivery date could go unnoticed until it became a customer problem.



### Repetitive follow-up

The team spent hours chasing vendors and searching inboxes for updates.



### No single view

Customer POs, vendor responses and order history lived in different places.

## THE SOLUTION

# Every PO tracked from the moment it is sent

1

### Detect

Sweeps sent email, checks the attached PDFs and adds every valid purchase order to the follow-up queue.

2

### Track

Each order gets a status: waiting (within 24 h), overdue (24 h, 2 or 3 days) or acknowledged.

3

### Follow up

Overdue orders trigger follow-up emails to the vendor, sent automatically or as drafts the team reviews.

4

### Act

A shared task list shows the next steps for the team, with clear priorities.

### The shared task list



Confirm shipments



Send POs



Create sales orders



Answer customer questions

## Key capabilities



### Lower operational risk

Missing acknowledgements, delivery mismatches and potentially late orders surface early.



### One workspace

A table of every PO, a detail view with the full vendor conversation, and filters by status.



### Less busywork

Fewer manual follow-ups and inbox searches, more time for exceptions and customers.

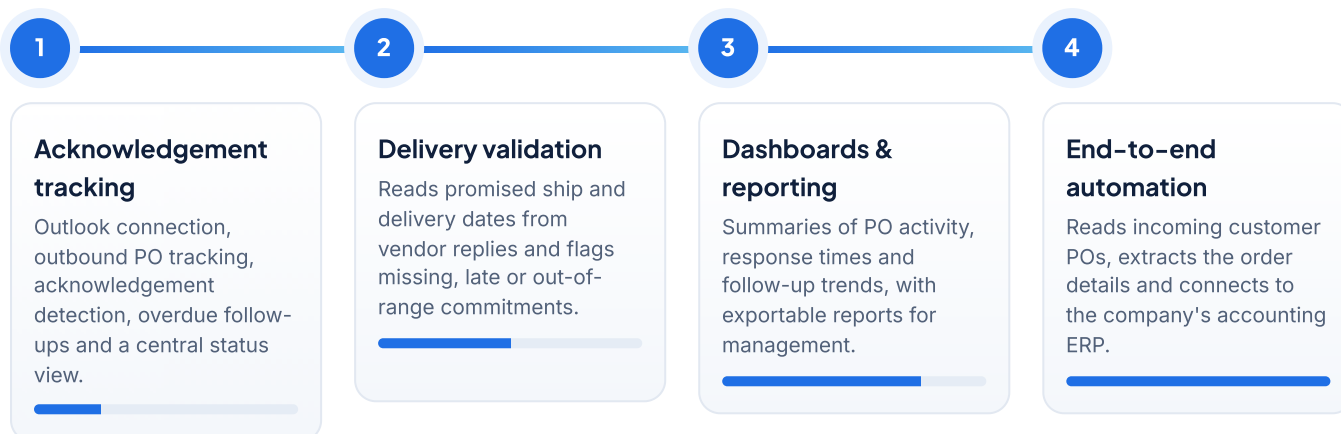


### Human oversight

The team reviews pending follow-ups and approves delivery exceptions.

## ROLLOUT

## Four phases, each building on the last



## BEFORE AND AFTER

## From chasing to staying ahead

| AREA             | BEFORE WISE                               | WITH WISE                                       |
|------------------|-------------------------------------------|-------------------------------------------------|
| Finding open POs | Searching sent email by hand              | Detected automatically from every PO sent       |
| Order status     | Spread across email and personal trackers | One workspace with every order's status         |
| Vendor follow-up | Manual emails, one by one                 | Follow-ups triggered at 24 h, 2 and 3 days      |
| Exceptions       | Found late, often by the customer         | Flagged early: late, repriced or unacknowledged |
| Next steps       | Depended on each person's memory          | Shared task list with clear priorities          |

## CONCLUSION

By combining **automatic follow-up with clear order visibility**, the agent helps the team manage purchasing **ahead of time instead of reacting**, and important details stop falling through the cracks.

## Stop chasing purchase orders

Connected to your inbox and, when you're ready, your ERP. Live in weeks.

## Book a demo

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