



Workman AI


Automated manual data entry integrated
with your bookkeeping software

Q2 2024

Goal

To automate manual data entry of invoices to existing bookkeeping software, without having to learn any new technology

User Dashboard



Bills

For Approval5

Completed✓

marcechaman@gmail.com

Sign Out

Bills > For Approval

Bills for Approval

Upload New Bills

Review Selected

Search Filters

Filter by Date

<input type="checkbox"/>	File Name & Sender	Project Code	Date Sent	Date Due	Date Uploaded	Balance
<input checked="" type="checkbox"/>	File Name (#INVOICE) Company Name	12345	April 28th, 2024	May 7th, 2024	April 28th, 2024	\$1047.90
<input type="checkbox"/>	File Name (#INVOICE) Company Name	12345	April 28th, 2024	May 7th, 2024	April 28th, 2024	\$1047.90
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Bills For Approval

Invoices from a clients inbox have been pulled and scanned with AI to extract all relevant information that is normally updated in their bookkeeping software.

The most important information to the user at this stage is

- project code
- date sent
- date due
- balance due

At this stage, the user may select any or all files and click ‘Review Selected’ to approve the data and upload it to their bookkeeping software

Human Review Process

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Bills > For Approval > Review

Current FileInvoice_2134_CarterLumber_0424.pdf

Queue (3)

Invoice_7519_CarterLumber_0424.pdfReviewedInvoice_2134_CarterLumber_0424.pdfActive ReviewInvoice_7520_CarterLumber_0424.pdfPending

ORDER NUMBER45300134488ORDER DATE04/08/24REQUEST DATE04/09/24SHIP DATEFILLED-BYDELV-BYDELIVERED WILL CALL

3365 Florence RoadPowder Springs, GA 30127PH (678)-324-8616Fax (678)-265-8474

SOLD TOPrecision Homes of CantonPO Box 4115CantonGA 30114770-720-2052SHIP TOGORECKI RESIDENCE34 CEDAR GATE LNKingston, GA 30145770-720-2052SALESPERSONTexin RussellPAGE NUMBER001001

TRANSACTION DATE04/09/24 09:52:57ACCOUNT NUMBERG4500139-043CUSTOMER POMISC

QUANTITY	X	DESCRIPTION	ITEM	UNIT PRICE	UNIT	EXT PRICE
8		SIM LUS26Z 2X6 JST HGR Z-MAX	30108	1.99	EACH	15.92
8		SIM LUS28-2Z DBL 2X8 JST HGR IM	30097	6.39	EACH	51.12
45		SIM H2.5AZ HURRICANE TIE Z-MAX	70729	0.71	EACH	31.95
32		2X6X16 SPF #2	2616	11.14	EACH	356.48
50		2X4X16 SPF #2	2416	8.17	EACH	408.50

NON-TAXABLE0.00TAXABLE863.97KINGSTON, GA, 30145, BAK60.48TOTAL924.45

A Finance Charge of up to 1.5% (36% annually) will be added to all past due amounts. This invoice is due on or before 05/15/24

Divisions of the Carter Lumber Company

Holmes Lumber

KempsvilleBuilding Materials

KnightHOME CENTER

ORDER NUMBER45300134488ORDER DATE04/08/24REQUEST DATE04/09/24SHIP DATEFILLED-BYDELV-BY

Carter Lumber SC 453 (900-453)3365 Florence RoadPowder Springs, GA 30127PH (678)-324-8616Fax (678)-265-8474

SOLD TOPrecision Homes of CantonPO Box 4115GORECKI RESIDENCE34 CEDAR GATE LNKINGSTON, GA 30145

TRANSACTION NUMBER45300137519TRANSACTION DATE04/09/24 09:52:57ACCOUNT NUMBERG4500139-043CUSTOMER POMISC

INVOICE

1. Review & Edit Details(2/3)

2. Upload to Quickbooks

Total: \$924.45

Subtotal Total: \$863.97Tax: \$60.48

Bill Details

Vendor NameCarter Lumber

Invoice #45300137519Purchase OrderMISC

Date Issued04/09/2024Date Due05/15/2024

ProjectGorecki Residence

Items

DescriptionSIM LUS26Z 2X6 JST HGR Z-MAXBalance (\$15.92Cost Code (ID)30108

DescriptionSIM LUS28-2X DBL 2X8 JST HGR ZMBalance (\$51.12Cost Code (ID)30097

DescriptionSIM H2.5AZ HURRICANE TIE Z-MAXBalance (\$31.95Cost Code (ID)70729

Description2X6X16 SFF #2Balance (\$356.48Cost Code (ID)2616

Description2X4X16 SFF #2

<Review Next Bill>

Upload All to QuickBooks >

Reviewing & Approving Extracted Data

A user can review, edit and approve all the files they had selected to ensure accuracy. A review process eliminates an already low margin of error, and is significantly faster than manual data entry.

Users can see the file queue and select any file from it to review, or can toggle between files with the file navigation on the bottom.

Lastly, once the user is comfortable with the data extracted, they may ‘Upload All’.