

Agentic use cases

Boomi's Agentstudio is a full agent lifecycle management solution that enables organizations to design, govern, and orchestrate AI agents at scale with built-in governance for control, oversight, and compliance.

Review the use cases on this page to understand how you can adopt an agentic workflow using Boomi's Agentstudio and solve common business problems, increase efficiency, and achieve business goals. Explore [Boomi Customer Stories](#) to learn more about how organizations have achieved success using the Boomi Enterprise Platform.

Supply Chain

Invoice reconciliation agent

Invoice reconciliation, especially 3-way match, is one of the most tedious parts of the procure-to-pay cycle. It's a slow, manual process, and teams waste hours tracking documents, resolving mismatches, logging discrepancies, and rekeying data into ERP and finance systems. That makes the process error-prone, delays payments, strains supplier relationships, and puts working capital at risk.

Feedback

Boomi changes all of this! Using the Agentstudio, you can build your own agent to automate 3-way match, check quantities, prices, delivery dates, and codes across purchase orders and invoices. When a new invoice comes in, your agent can automatically pull the matching purchase order and goods receipt from your systems, standardize the data, and perform the reconciliation, quantity, price, delivery dates, and item codes all in one automated flow. If everything matches, the invoice is approved automatically. If there's a discrepancy, it's flagged and routed for quick resolution.

Using this agentic workflow reduces processing time from invoice receipt to payment, ensuring compliance by detecting errors, preventing fraud, and unauthorized spending. The agent ensures operational continuity, timely payments, financial accuracy, reduces delivery risks, and safeguards supplier relationships.

Pricing agent

Pricing in today's volatile markets, especially for industries like manufacturing, is challenging. Sales representatives often rely on outdated price lists, scramble across websites, spreadsheets, and colleagues for data, or go with their gut feel. They waste hours hunting down current costs, delay responses, and too often, quotes go out with inaccurate margins. That leads to underpricing, lost revenue, and deals that need rework or stall out entirely.

With Boomi's Agentstudio, you can build an agent to automate dynamic pricing decisions, maximize margins, and reduce pricing risks based on real-time material costs, external signals, and business rules. When a new quote is created or modified, the agent instantly pulls live material costs, like steel or other commodities, calculates the impact on margin, and flags any risks right in your CRM or Configure, Price, Quote system. Representatives know whether to adjust the quote, protecting margins, and accelerating approvals. Over time, the agent learns from past deals to improve recommendations.

Using an agent ensures faster quote turnaround times, enables sales teams to respond with real-time price updates, improves win rates, and achieves higher margins per deal. By reducing manual pricing effort, you also free up sales capacity, driving more quotes and accelerating revenue growth.

Human Resources

Onboarding agent

Employee onboarding is often an inconsistent and manual process in the business. Delays in IT tickets and setup, missed training, lost paperwork, manual notifications, and scattered coordination across HR, IT, and managers slow down new hires and drain time from HR teams.

With the Agentstudio, you can build an agent that can automate onboarding so new hires ramp up quicker, HR spends less time chasing tasks, and the onboarding cycle improves through consistent feedback. As soon as a new hire is entered in the HR system, the agent kicks off the full onboarding flow: triggering IT provisioning, assigning the right training, distributing policy documents, and tracking every step. Managers and HR get visibility into progress, and compliance is handled automatically.

Automating onboarding tasks across HR, IT, facilities, and training systems accelerates employee productivity and reduces administrative overhead. With automated provisioning and onboarding, new employees are up and running faster, compliance, regulatory, and audit requirements are met, provisioning accuracy is high, and HR and tasks are streamlined while delivering a smooth, personalized employee experience.

Timesheet approval agent

Timesheet approvals can be a source of inefficiency for HR, payroll, and managers. Employees make manual entries, forget submissions, errors slip through, approvals get delayed, and payroll teams end up chasing last-minute corrections. It's a manual cycle that drains productivity and leads to payroll errors. With Boomi, you can automate this by building an agent in the Agentstudio and accelerating payroll processing, driving faster approvals, running cleaner payroll, improving time tracking accuracy, and reducing approval delays. The agent can monitor timesheet deadlines, validate entries against policy, and route approvals intelligently, sending reminders, flagging issues, and auto-approving accurate submissions. Managers and payroll teams get real-time visibility, and the agent continuously learns to reduce repeat issues. With this agentic workflow, you ensure data quality, complete time entries, support project tracking, flag policy violations early, & increase efficiency by reducing manual approvals and rework.

Finance

Reporting agent

Financial close is one of the most critical and challenging processes in the finance office. It's often manual, slow, and full of hidden risks. Teams spend days chasing and extracting data across ERP, accounting, and banking systems, reconciling spreadsheets, and scrambling to validate reports, with delays and inconsistencies at every step.

Adopting an agentic workflow using Boomi's Agentstudio, you can solve this by building an agent and adding automation to enhance accuracy, reduce manual effort, and accelerate close cycles by automating financial data consolidation, validation, and reporting across ERP, accounting, and banking. Your agent can automatically kick off at period close, pulling data from all key systems, applying consistent business rules to validate and reconcile, and consolidating it into live dashboards. This gives finance leaders real-time visibility, faster closes, and strong confidence in the numbers with far less manual effort.

The agent ensures reconciled data accuracy, automated validation, and auditability. It accelerates period-end close with real-time data ingestion and reporting pipelines and delivers insight and forecast readiness with timely dashboards and metrics to inform strategic decisions.

Claims processing agent

Claims review is often slow, manual, and error-prone. Teams waste time checking for missing fields, chasing down incomplete data, and validating claims by hand. Without automated checks, many unusual or fraudulent claims slip through, only to be caught later after causing bigger downstream problems.

You can automate by building an agent in the Agentstudio, delivering better data quality, faster claims processing, and stronger fraud prevention, all with less manual effort. As soon as a claim comes in, the agent validates completeness, checks field formats, detects anomalies, and compares the claim to historical patterns. If anything looks off, missing data, strange amounts, or unusual behavior, the agent flags it immediately and alerts the right team. High-risk claims can be stopped before they move further into the process.

The agent reduces manual work, improves data quality, completeness, and accuracy to enable faster, cleaner revenue processes and prevent downstream process failures. It reduces risk by automating the detection of suspicious patterns early to prevent fraud, penalties, and compliance gaps.

Governing high-stakes workflows

A mid-size bank deployed a range of Boomi and Salesforce agents to automate workflows like loan origination, compliance documentation, and customer onboarding. As different teams rolled out their agents, the bank faced difficulty maintaining a clear picture of agent usage and performance.

Boomi brings about order and governance in such situations with the Agent Control Tower. This is a central point of governance for all AI agents created with Boomi Agentstudio or through third-party providers like Amazon Bedrock and Salesforce Agentforce. It controls agent sprawl, monitors agents for performance, allows pause and play for agents, and governs agents from errors to token usage.

Using Agent Control Tower, the bank can visualize all agents currently active or idle, helping ensure critical financial workflows are covered without overlap or gaps. They can track how many agents are deployed for sensitive operations and ensure they remain within controlled environments. Using Anomaly detection they identified irregular agent behavior or performance deviations early. This helped prevent potential compliance risks and ensured process integrity across financial operations. They are also able to regularly audit agent usage and reduce shadow automation by providing teams with a centralized source of truth. By consolidating visibility, the bank enhances operational discipline and ensures automation supports—rather than undermines—regulatory and risk frameworks.

Education

Enhancing the student support experience

A big university implemented Boomi agents to support critical functions such as student engagement tracking, IT support automation, and AI-powered student retention strategies. As adoption grew across departments, so did the number of agents, making it difficult to track which agents were active, effective, or redundant. To solve this, the university uses Boomi's Agent Control Tower to gain centralized visibility and control over all Boomi agents in use. With the Agent Control Tower, the university can:

- Control agent sprawl—easily visualize all Boomi agents created and deployed across different teams, ensuring no duplicate or unused agents clutter the system.
- Monitor agent performance—track slow or underperforming agents and identify friction points before they impact students or staff.

This centralized oversight helps the university maintain efficient, scalable, and reliable automation without losing track of agent growth. By managing Boomi agent sprawl and performance from a single interface, the university ensures a high-quality student experience, responsive IT support, and data-driven retention strategies—all powered and governed effectively.

Feedback

Services

Data quality agent

A large mechanical company uses Workday to manage its employee data. However, resolving data issues required coordination among a team of five developers to manually identify missing fields, track root causes across systems, and implement fixes. To automate the process, the company used Boomi Agentstudio to create a Data Quality AI agent.

The agent automates data integrity checks, flags incomplete or inconsistent records, and guides resolution steps with 100% accuracy, outperforming a similar AI agent built on one of the hyperscalers, which achieved only 80% accuracy.

With Boomi, they eliminated manual investigation, accelerated resolution times, and reduced dependence on high-skill IT resources. The VP of IT estimates this single use case already offsets the cost of Agentstudio Pro. The company plans to add more AI agents across HR, Finance, and IT to surface issues earlier, reduce maintenance costs, and improve trust in enterprise data.

Improving field service efficiency

A manufacturing company wants to implement various Boomi integrations to automate processes and connect to warranty, inventory, and order management systems. However, service technicians will need to interact with multiple systems and processes to service products at a customer site, which is tedious and time-consuming.

With the help of API Management and API Control Plane, developers can easily expose their integration processes as a Field Service API. In a no-code user interface, they can expose the API as a publicly accessible MCP server. The MCP server contains all the necessary endpoints to connect to their systems through pre-configured MCP tools.

With Agentstudio, the company can create an AI agent with field service capabilities from their MCP server tools. Service technicians interact with the agent in a conversational user interface, and the agent helps them investigate issues, receive troubleshooting steps, check warranties, and process replacement part orders.

When updates to integrations emerge—like a new input parameter for advanced replacement shipping—the updated MCP tool definition gets pulled into the agent with one click. This seamless change management ensures the agent stays current, reduces maintenance effort, and empowers technicians to resolve issues faster, boosting operational efficiency and customer satisfaction.

Construction

Incident analyzer agent

A big construction company wanted to proactively reduce workplace injuries and operational disruptions across job sites. Using Boomi's Agentstudio, the company created an AI agent and attached integration and prompt tools that correlated near-miss events with actual incidents using root cause patterns, incident report and claims data, and time proximity. The AI agent then analyzed two years of incident history to uncover trends.

By analyzing incident costs and modeling avoided incidents based on near-miss data, the company identified significant cost savings potential. Boomi helped the company clean and standardize safety data, eliminate duplicates, and ensure all incidents were within the 24-month analysis window.

The company lowered safety-related costs and improved regulatory compliance. The company now uses these insights to target high-risk areas, allocate safety resources more efficiently, and strengthen its competitive position on safety-sensitive bids.

Healthcare

Patient Onboarding & Care Coordination Agent

Patient onboarding in healthcare is slow, fragmented, and involves numerous manual steps, including collecting information, verifying insurance, creating EHR records, and coordinating care across different systems. These inefficiencies delay treatment, frustrate staff, and impact the patient experience.

With Boomi Agentstudio and the API Control Plane, you can build an intelligent Patient Onboarding & Care Coordination Agent that seamlessly connects your EHR, CRM, insurance, and billing systems. When a new patient registers, the agent automatically verifies eligibility, creates EHR and billing records, assigns the care team, and even sends updates to staff in Teams or Slack. Every connection is powered by governed APIs in API Control Plane, ensuring security, compliance, and data consistency across the organization.

By automating patient onboarding and coordination, healthcare providers reduce administrative work, accelerate intake, and deliver a smoother, more personalized care experience from registration to recovery.

Feedback

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