



AI Agents: 10 Use Cases Transforming Operations

How operations teams use governed AI agents to automate repetitive work, validate data across systems, and speed up execution without losing control.

The Secure, No-Code AI Platform for Operations

Operations runs on precision, consistent execution, and process discipline. Whether it's processing requests, triaging tickets, validating data across systems, tracking vendor and order workflows, or keeping SOPs current, ops teams spend countless hours moving information between fragmented tools, chasing status updates, and reconciling records by hand.

StackAI, the governed, secure, hybrid-cloud or on-prem AI orchestration platform, now enables operations teams to automate repetitive work, unify scattered data, and surface validated answers instantly. Instead of replacing ops managers, analysts, or coordinators, AI agents work alongside them: extracting key information from documents, routing and resolving requests, validating data against internal systems, monitoring process adherence, and answering frontline questions with citation-backed accuracy. With built-in governance, access control, and auditability, teams can trust AI to speed up execution without losing control. The outcome is faster cycle times, fewer errors and handoffs, cleaner data, and more bandwidth for the high-judgment work that keeps the business running.

What are AI Agents?

AI agents go further than traditional automation tools or static chatbots. They securely interact with documents, tickets, operational data, SOPs, and internal systems inside a governed, auditable environment, pulling information from SharePoint libraries, ticketing systems, ERPs, workflow tools, and internal knowledge bases. An agent can extract structured data from forms, classify and route requests, flag exceptions, validate records across systems, or draft reports aligned with internal standards.

AI agents amplify ops teams rather than replace them. Organizations across industries can use AI to cut operational overhead, strengthen execution, and scale output without increasing headcount or compromising control.



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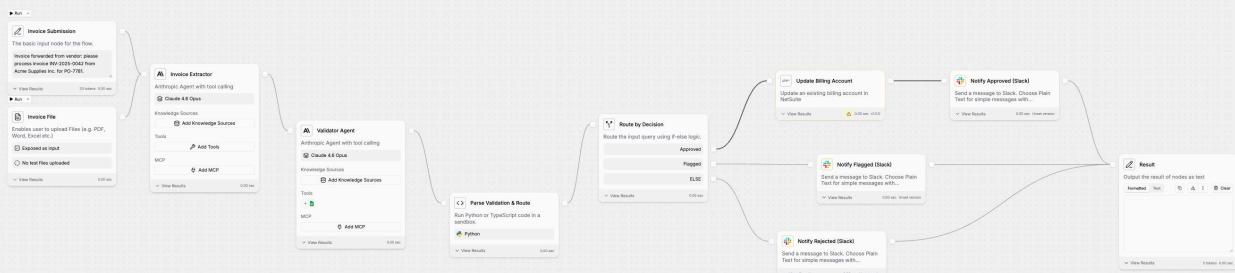
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Invoice Operations Agent

Ops teams manually extract data from thousands of invoices each month, match them to POs, validate details, and route decisions for approval.

This operations agent transforms inbound invoices into validated, PO-matched records ready for ERP entry, flagging anomalies and asking for human approval.

Who It's For	Operations Teams, Procurement Operations Teams
Results	- Helps eliminate manual data entry for invoice processing - Catches duplicate invoices, vendor mismatches, and PO discrepancies before payment
Workflow	- Email trigger fires when an invoice arrives in the AP inbox - Document parser + extraction LLM pull invoice fields, while an API Loader queries the ERP for matching PO and vendor records - Posts the validated record to NetSuite and notifies the team

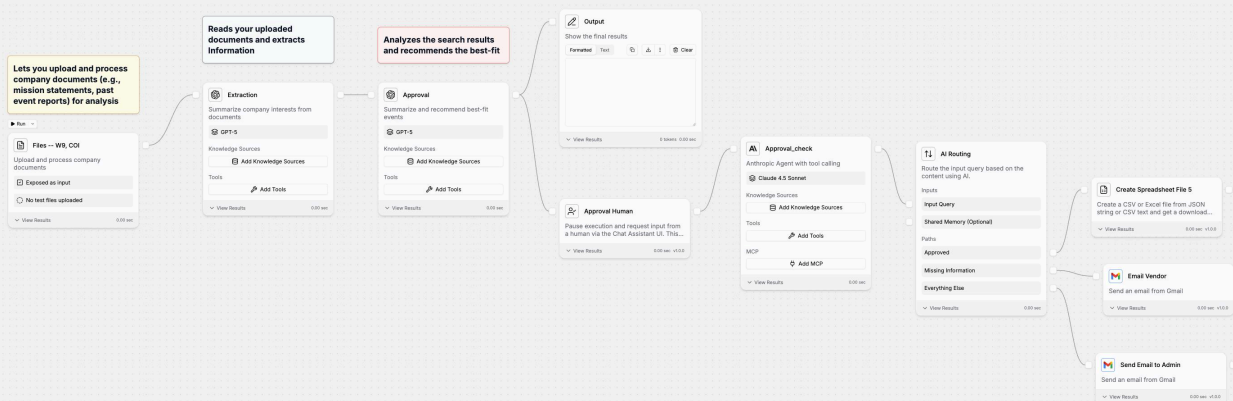


Vendor Onboarding Agent

Ops teams manually collect documents, verify details, chase missing information, and email back and forth for weeks before a new vendor is ready to transact.

This ops agent intakes vendor information, parses and validates submitted documents, and routes next steps automatically.

Who It's For	Operations Teams, Procurement Operations Teams
Results	• Eliminates manual onboarding and initial vendor communications • Uses AI routing to take next steps depending on if information is missing, vendor approved, or vendor disapproved
Workflow	1. Intakes vendor information for analysis 2. Document parser + extraction LLM fire in tandem and send note to human for review and approval 3. Updates spreadsheet, emails vendor, and emails admin to close the loop

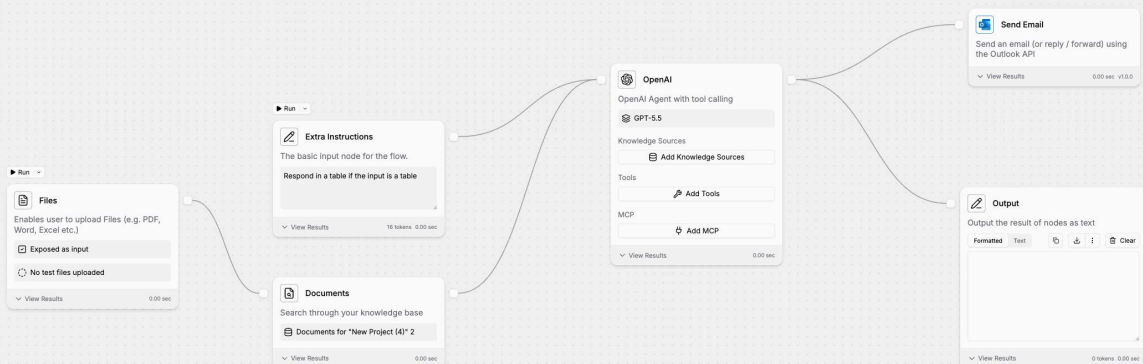


InfoSec Questionnaire Agent

InfoSec questionnaires are deal-blockers, often causing teams to miss important deadline windows entirely.

This response agent transforms a blank questionnaire into a fully-drafted answer document, pulling from your library of past responses, security policies, and docs.

Who It's For	Operations Teams, Sales Ops Teams
Results	• Frees sales team to refine and review rather than drafting from scratch • Ensures consistency across responses by pulling from a single source of truth
Workflow	1. Upload the questionnaire (Excel, Word, or PDF) 2. Multi-LLM pipeline parses each question, retrieves the best-matching past answers from a vector store of prior RFPs and security docs, and drafts a tailored response 3. Compile results into the original document format and route to sales for review

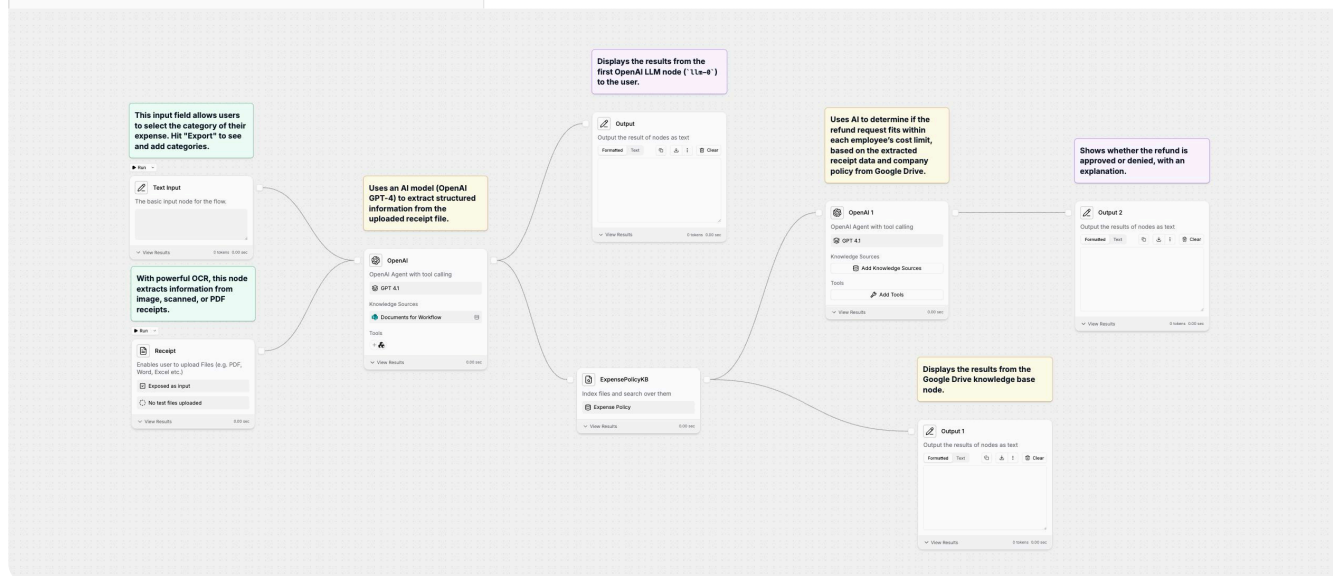


Expense Approval Agent

Ops teams manually review every submitted receipt, dig through expense policy docs, and email employees back and forth to approve or deny reimbursements.

This ops agent extracts data from uploaded receipts, checks each expense against company policy and employee cost limits, and returns an approval or denial.

Who It's For	Operations Teams, Procurement Operations Teams
Results	• Eliminates manual receipt review and policy lookups for routine expense submissions • Returns instant, policy-backed approve/deny decisions with explanations employees can actually understand
Workflow	1. Employee selects an expense category and uploads a receipt (PDF, image, or scan) 2. OCR + extraction LLM pull structured data from the receipt; KB indexes the company policy 3. A second agent outputs the approval or denial with reasoning.

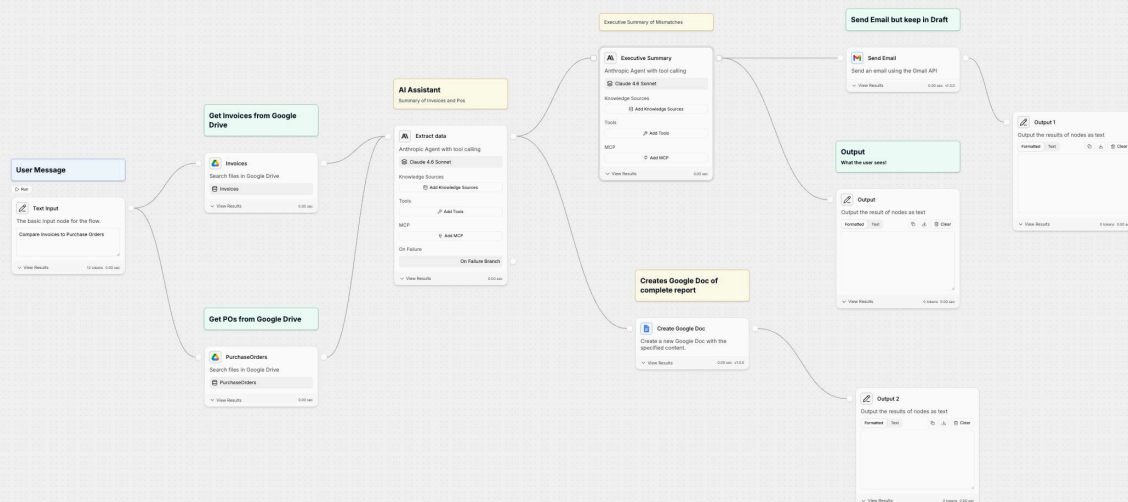


Supplier & Vendor Statement Reconciliation

Finding payment discrepancies (missing invoices, duplicate payments, mis-credits) between AP records and supplier statements is manual line-by-line work.

This agent ingests supplier statements and matches them line-by-line with AP records to flag missing invoices, duplicates, and more.

Who It's For	AP teams managing supplier relationships
Results	- Improves cash management and supplier relationships - Exception report the AP team can work directly - Creates an audit trail for the supplier conversation
Workflow	- Ingests supplier statements (PDF or Excel) - Matches line-by-line against AP records - Flags missing invoices, duplicates, mis-credits, aging discrepancies - Produces an exception report with evidence and send for human review

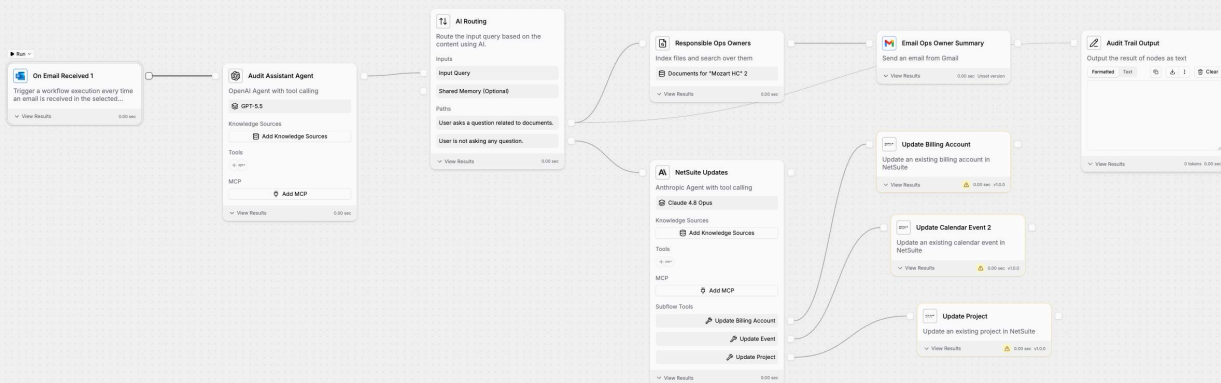


Audit Assistant

Ops teams spend weeks before every audit pulling records, tracking down supporting documents, and manually checking transactions against policies.

This ops agent continuously reviews transactions and records against internal controls, compiles audit-ready documentation, and flags gaps or anomalies before auditors ask.

Who It's For	Operations Teams, Procurement Operations Teams
Results	- Cuts audit prep from weeks to hours by keeping records review and documentation up to date - Surfaces control gaps, missing documentation, and anomalous transactions
Workflow	- Agent pulls transactions, records, and supporting documents from the ERP and connected systems - Document parser + LLM check each record against internal controls and policy requirements - Compiles an audit trail with flagged exceptions and routes anything unresolved to the responsible ops owner

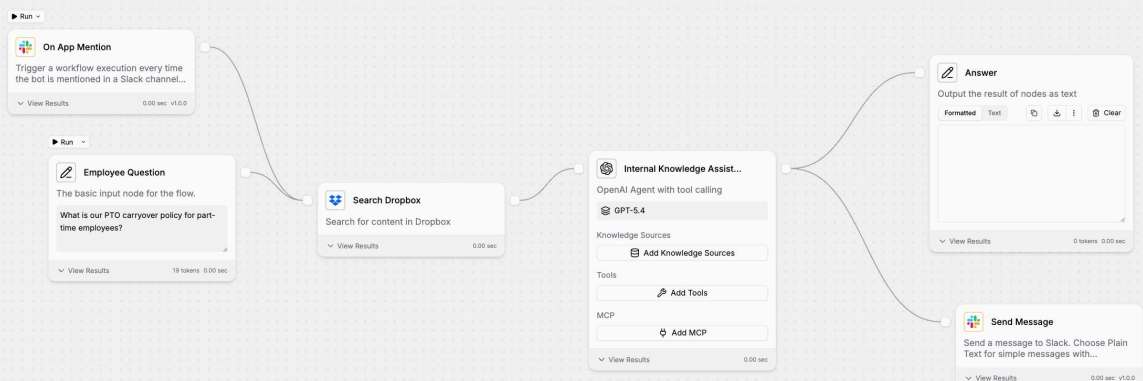


Internal Knowledge/SOP Assistant

Employees waste hours every week searching scattered Confluence pages, Notion docs, and Google Drive folders for SOPs, policies, and answers.

This knowledge agent transforms your existing documentation into an instant-answer assistant, grounded strictly in your company's source-of-truth content with citations.

Who It's For	Operations Teams
Results	• Frees senior team members from being interrupted with repetitive questions • Builds trust through citations — every answer links back to the source SOP
Workflow	1. User asks a question via chat interface 2. Knowledge Base node retrieves the most relevant chunks from indexed SOPs, wikis, and policy docs 3. LLM answers strictly from retrieved context and returns a cited response with source links

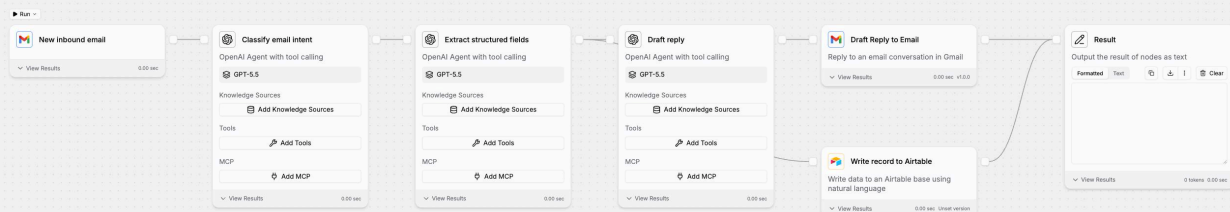


Email & Inbox Automation Agent

Knowledge workers spend a massive part of their day in email — triaging, classifying, and replying to repetitive requests that follow predictable patterns.

This email agent transforms inbound Gmail or Outlook messages into automated triage, structured data capture, and FAQ-grounded auto-replies.

Who It's For	Operations Teams, Sales Operations
Results	• Provides 24/7 question coverage including nights and weekends • Converts unstructured email threads into clean Airtable or Salesforce records
Workflow	1. Outlook or Gmail trigger fires on new inbound email 2. Multiple LLMs classify intent, extract fields, and draft a response, with If/Else routing to handle FAQ vs. human-needed vs. data-collection branches 3. Action node sends the reply and writes structured data to CRM or Airtable

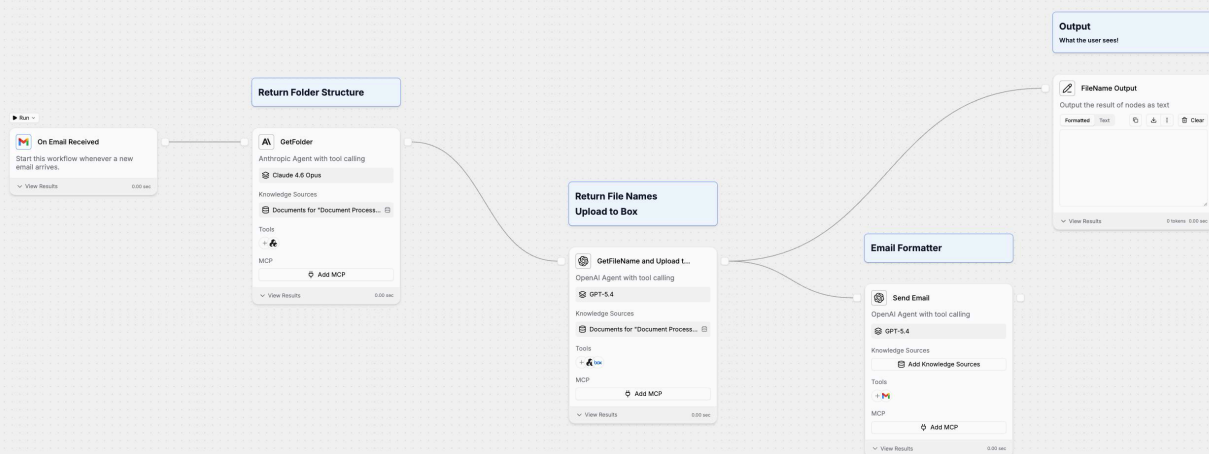


Document Ingestion Agent

Document review and data entry is a high-volume, error-prone task that traditionally requires hours of human work.

This extraction agent intakes documents on a trigger and automatically files them to SharePoint, Egnyte, and more with the correct folder paths and naming structure.

Who It's For	Finance/AP Teams, Operations Teams
Results	• Maintains official enterprise folder and naming conventions • Runs always-on with zero queue time: documents are processed the moment they arrive
Workflow	1. Receive raw document or message 2. Classifies document according to knowledge base of internal folder structures; renames document 3. Uploads the document in SharePoint, Box, Egnyte; notifies ops team of any sensitive documents

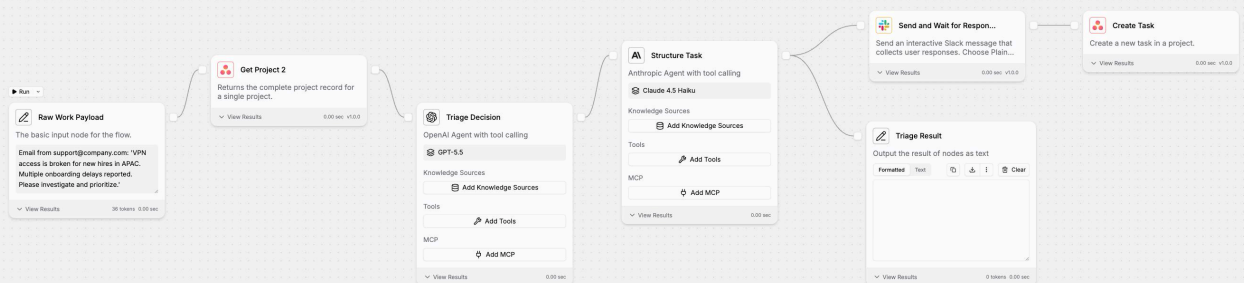


Project Management Triage Agent

Teams drown in duplicate, misrouted, and incomplete tickets — and leadership becomes the human router for inbound work.

This triage agent transforms inbound work payloads into deduplicated, correctly-routed Jira, Asana, or Linear tasks, eliminating manual review of every new request.

Who It's For	Operations Teams, IT Operations
Results	• Routes tickets correctly the first time, eliminating multi-day queue delays • Frees team leads from being the human router for inbound work
Workflow	1. Receive raw ticket payload from any inbound channel 2. API Loader fetches existing tickets, then an LLM with AI Routing decides: create new, update existing, or discard 3. Maps fields and posts the cleaned ticket directly to Jira, Asana, or Linear



The use cases in this white paper are just the beginning. With StackAI's drag-and-drop interface, secure infrastructure, and 100+ integrations, anyone can build production-ready AI agents in just a few clicks.



Let's Build AI Agents for
Operations, Together

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