WOLFFISH

Expense reports on autopilot

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The five steps every expense agent runs

1. **Capture** — photo, PDF, forwarded email, or a watched folder.
2. **Extract** — OCR reads merchant, date, total, tax, currency.
3. **Categorise** — learned from how you filed the same merchant before.
4. **Check against policy** — before a human sees it, not after.
5. **Route and sync** — approver first, then the accounting system.

Why expenses suit agents unusually well

- The schema is fixed — no creative judgement in extraction.
- Errors are visible — a wrong total is wrong on its face.
- Volume is high, value per item is low.
- The audit trail matters more than the speed.

Set it up in four steps

1. Start with capture, not categorisation: one place for every receipt.
2. Give it your category list, not your judgement.
3. Encode the policy once — limits, thresholds, exclusions.
4. Keep approval manual, make the send automatic.

Three failure modes

- **Auto-approving anything** — an agent optimised to clear a queue will clear it.
- **Letting it see everything** — receipts and a category list, not your whole inbox.
- **Trusting the OCR silently** — flag low-confidence reads for a human look.

The takeaway

Automate capture, extraction and categorisation. Keep approval — and the ability to reconstruct what the agent read — firmly human.