

AUTOMATE **Advanced** 50 MIN · UPDATED 2026-09-30

Build an invoice exception agent.

Stand up a Copilot Studio agent that catches invoice discrepancies before they reach accounts payable and suggests the resolution.

MICROSOFT 365

Excel

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

Fewer incorrect payments and less manual three-way-match work for the AP team.

Workflow Steps

Step 1: Define the match rules

Excel

Write out exactly what counts as a discrepancy — invoice amount vs. PO amount beyond a tolerance, quantity mismatch against the receiving record, missing PO reference, duplicate invoice number — sourced from your current AP exception process.

Step 2: Build the matching agent

Copilot Studio

In Copilot Studio, connect the agent to your PO, receiving, and invoice data (via Excel exports or a connected line-of-business source) and have it run the three-way match, returning a structured flag with the specific field that doesn't reconcile.

PROMPT

Compare invoice INV-88213 against its referenced PO and receiving record. Flag any mismatch in unit price, quantity, or total amount beyond [your tolerance]% tolerance, and state exactly which field and values don't match.

Step 3: Suggest, don't auto-resolve

SharePoint

Configure the agent's output to always include a recommended action (hold for vendor clarification, adjust to match PO, escalate for approval) alongside the discrepancy, written into a SharePoint list an AP reviewer checks before anything moves.

Never wire the flow so the agent can approve or adjust a payment amount on its own, no matter how minor the discrepancy looks.

Step 4: Feed clean invoices straight through

SharePoint

Let invoices with no flagged discrepancy continue straight into the normal AP approval and payment process without a manual re-check – re-verifying work the three-way match already confirmed just reintroduces the delay this workflow exists to remove.

✓ Check the work

- Spot-check a sample of "clean" (unflagged) invoices manually — a missed discrepancy here means a wrong payment goes out.
- Confirm every flagged discrepancy cites the specific PO/receiving/invoice values it compared, not just "mismatch detected."
- Track resolution outcomes over time to see if the agent's suggested resolutions are actually being accepted or routinely overridden.

Expected Outcome

A working list of flagged invoices with the specific discrepancy and a suggested resolution for each, before they hit the AP queue.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■