From scattered tasks *to connected work.*

Working systems for customer handoffs, invoice checks and team knowledge. Explore the outputs, the business logic and the evidence behind each workflow.

01 / SELECTED PROJECT

Inquiry to consultation

Inquiry details, sales records, an appointment and a ready-to-review confirmation.

02 / SELECTED PROJECT

Invoice checks & reconciliation

A checked invoice, a matched payment and a balance you can trace.

03 / SELECTED PROJECT

Answers with source controls

A policy answer with its source, access boundary and approval trail.

Explore the working portfolio

Discuss your workflow

Nine workflows. Three starting points. Each project includes a finished output, its operating controls and inspectable execution evidence.

SALES & CUSTOMER EXPERIENCE

A conversation.

A complete handoff.

Turn inquiry details into an organized sales record, a checked appointment and a confirmation draft your team can review.

THE DELIVERED WORK

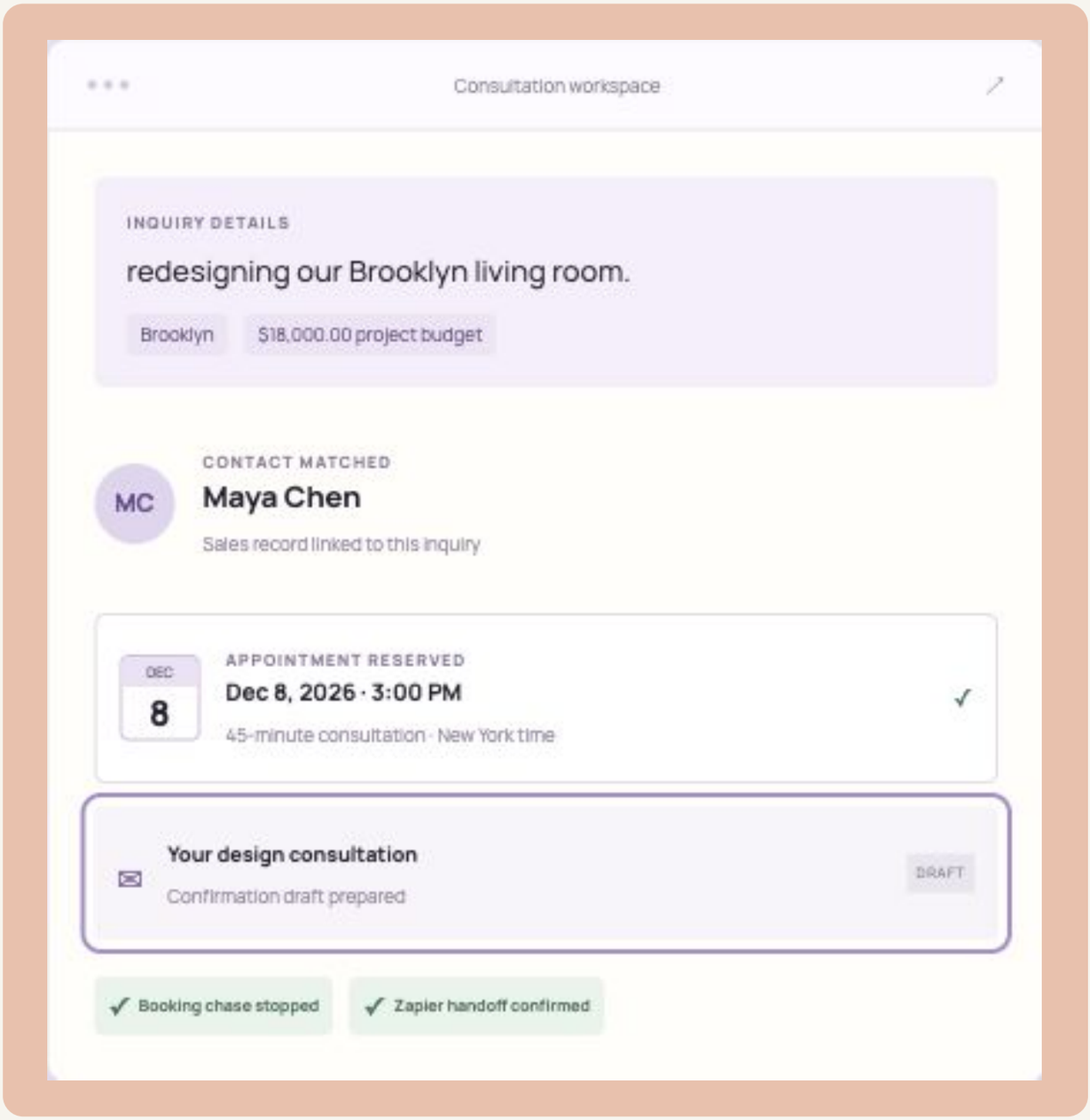
+ Structured inquiry and matched contact
+ Linked sales record and appointment
+ Confirmation draft and follow-up stop rule
+ Verified Manychat request and Zapier handoff

TOOLS & THEIR ROLE

Manychat + Zapier - A verified incoming request and a separately tested destination handoff.

OpenAI - Extracts stated inquiry details into a checked data contract.

Custom backend + Netlify - Matches records, checks appointments and retains the confirmation draft.



OUTPUT FROM THE SAVED EXECUTION

Manychat and Zapier handoffs were verified separately; the Zapier action remains an editor-tested draft.

Explore this workflow

Discuss a similar project

FINANCE & OPERATIONS

An invoice should add up.

Before it hits the ledger.

Extract the invoice, recalculate its total and match a payment to the balance. Keep discrepancies visible for review.

THE DELIVERED WORK

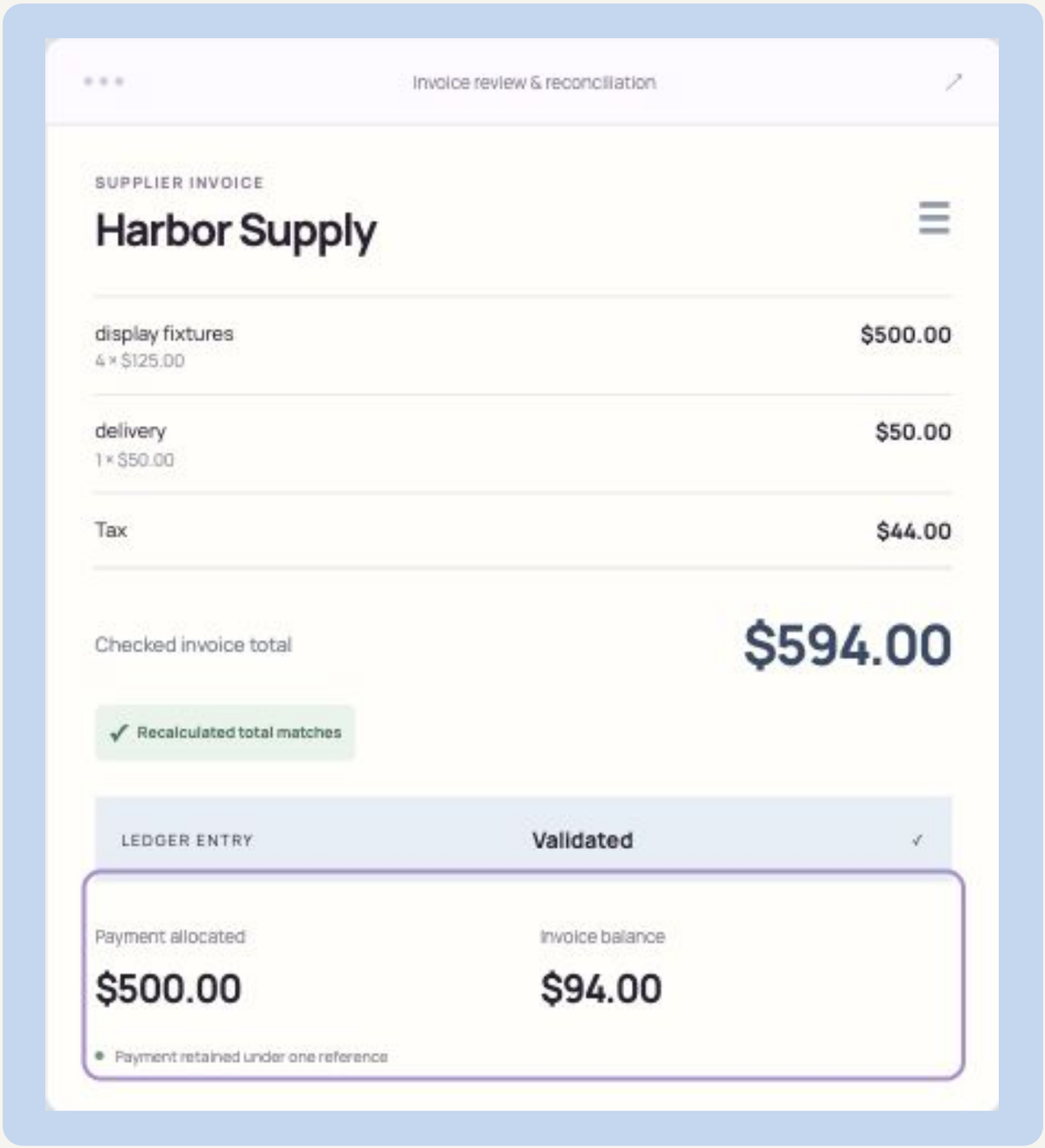
+ Structured invoice and line items
+ Independent total check and review state
+ Persistent ledger and payment allocation
+ Traceable outstanding balance

TOOLS & THEIR ROLE

OpenAI - Reads supplier invoice text into structured line items.

Custom finance logic - Recalculates in cents and protects invoice and payment identities.

Netlify persistent storage - Retains the ledger, allocation and execution receipts.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

AI & TEAM OPERATIONS

Answers you can trace.

Actions you can control.

Give the team an answer grounded in its accessible policy, with the source attached and a separate approval for the next action.

THE DELIVERED WORK

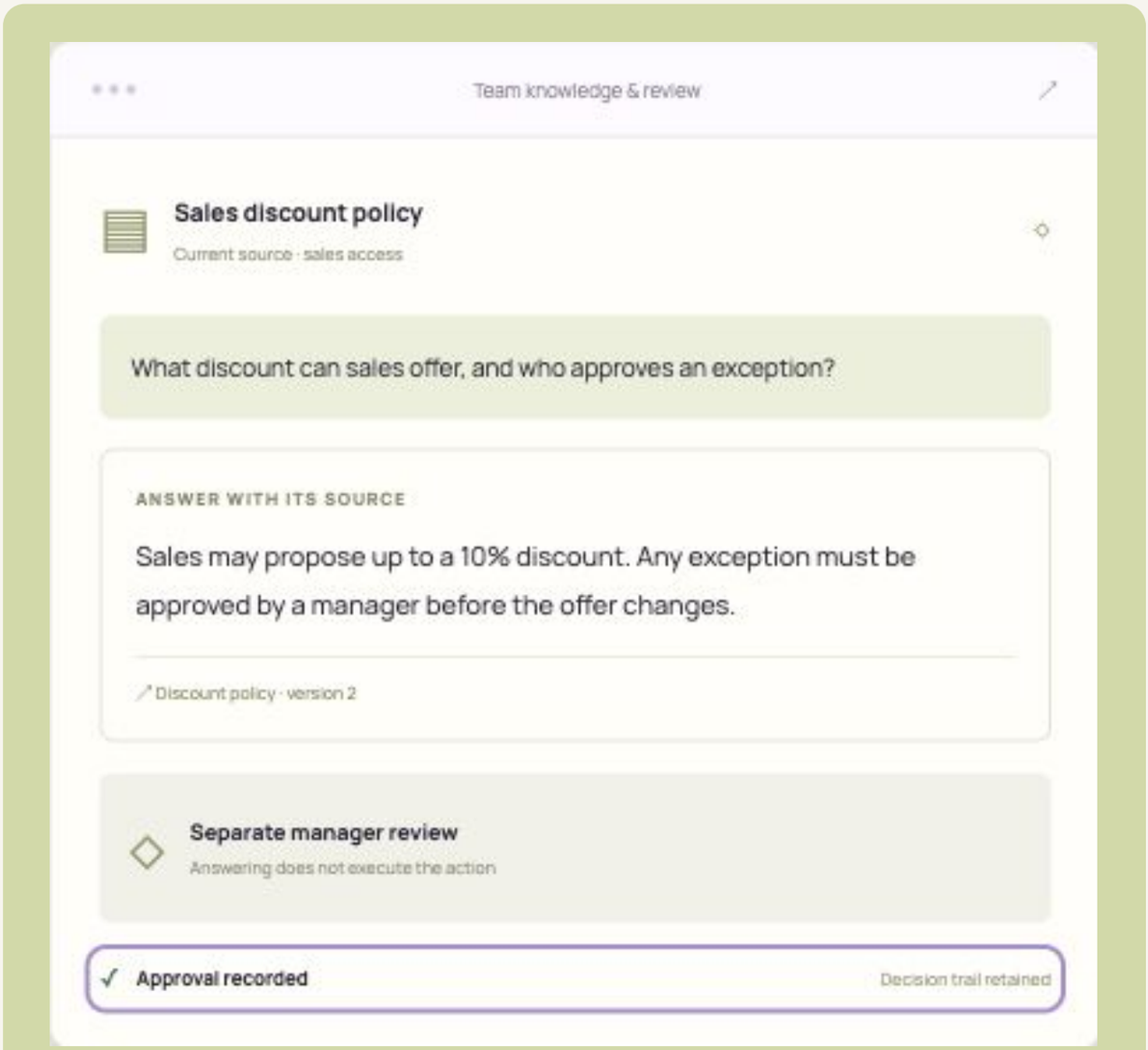
+ Current-source selection by role
+ AI answer with source references
+ Saved question and answer
+ Review request and recorded approval

TOOLS & THEIR ROLE

OpenAI - Answers from the sources selected for the person's role.

Custom source controls - Selects current versions and retains the answer's citations.

Custom approval workflow - Records the review request and separate owner decision.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

SALES OPERATIONS

Every inquiry needs an owner.

And a next step.

Match the contact, check service coverage and team capacity, then give the inquiry a named owner and a follow-up state.

THE DELIVERED WORK

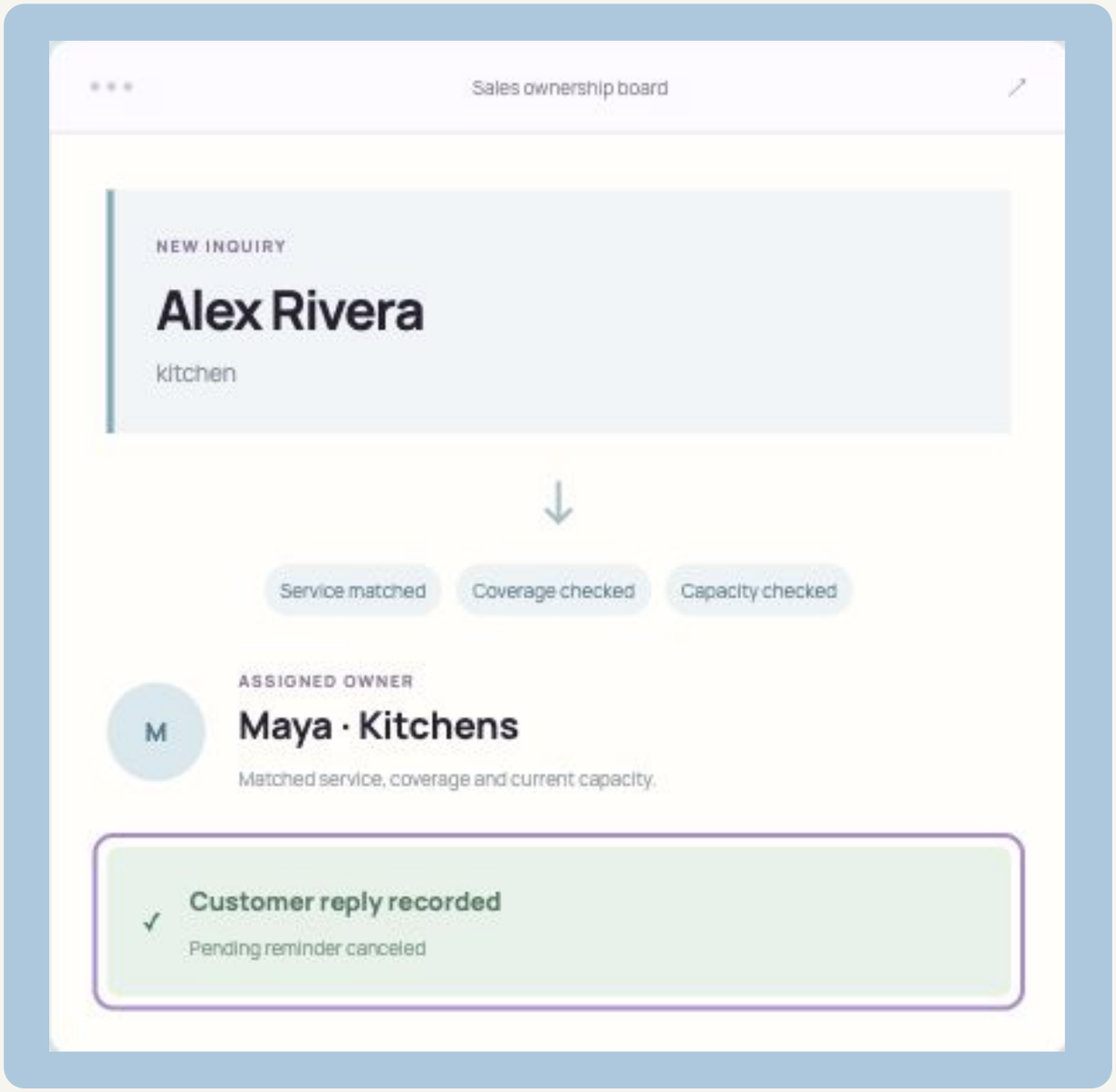
+ Matched contact and inquiry record
+ Service and capacity-based assignment
+ Owner notification in the team inbox
+ Follow-up tracking with a reply stop

TOOLS & THEIR ROLE

Custom CRM - Keeps contact, inquiry and assignment context linked.

Routing rules - Checks service, coverage and current owner capacity.

Persistent workflow state - Retains the notification and cancels follow-up after a reply.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

CUSTOMER EXPERIENCE

Helpful answers.

Human control where it counts.

Match the order, prepare a reply from the return policy and keep the approval decision separate from the conversation.

THE DELIVERED WORK

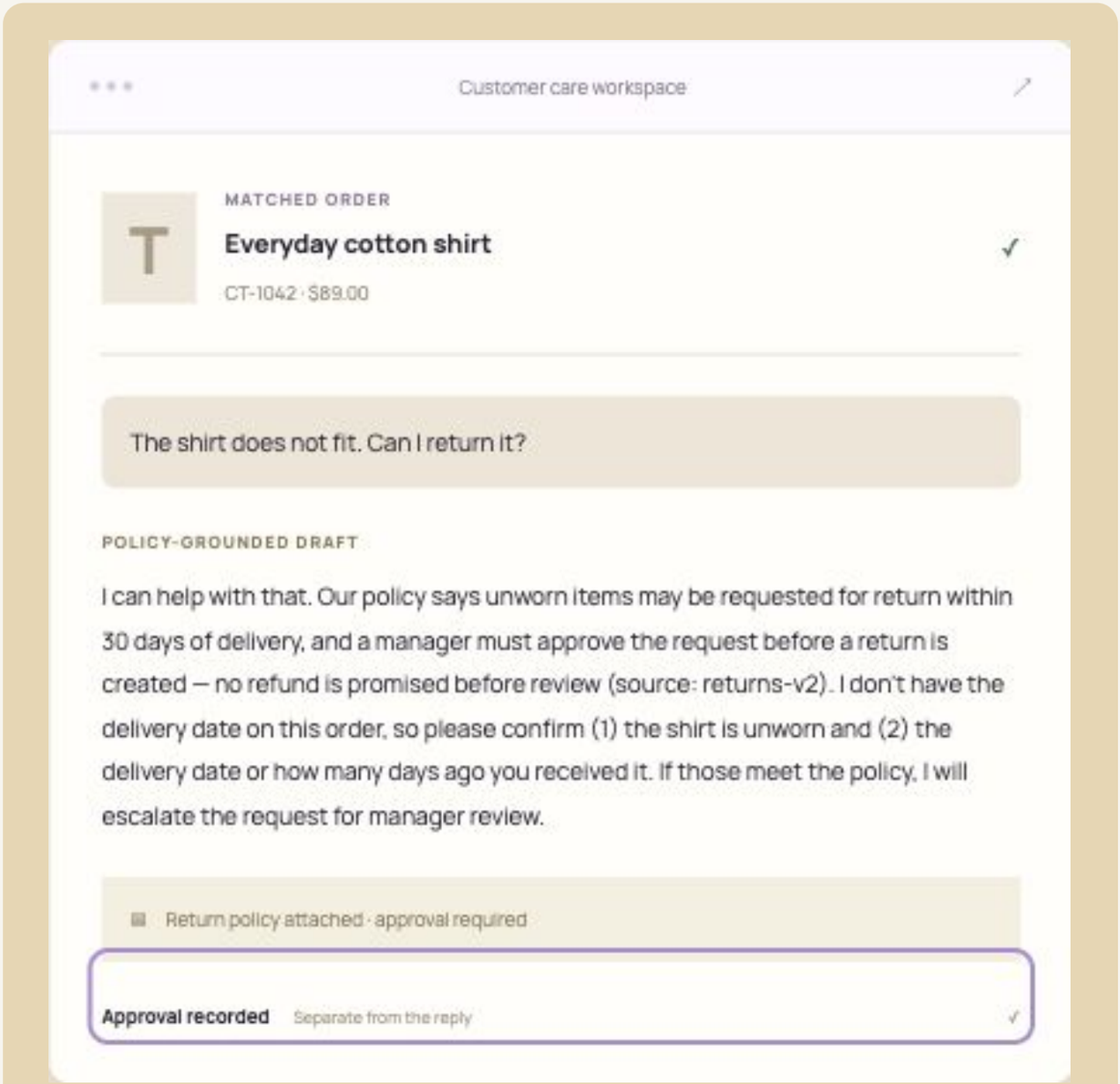
+ Order-context matching
+ Policy-grounded reply draft
+ Support and review record
+ Recorded approval decision

TOOLS & THEIR ROLE

OpenAI - Drafts a policy-grounded answer from verified order context.

Custom order matching - Checks customer identity before returning order details.

Approval workflow - Keeps the support draft and return decision separate.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

FIELD OPERATIONS

A clear plan for the crew.

A clean handoff to billing.

Check site readiness and crew availability, retain the current instruction and carry a recorded completion into billing review.

THE DELIVERED WORK

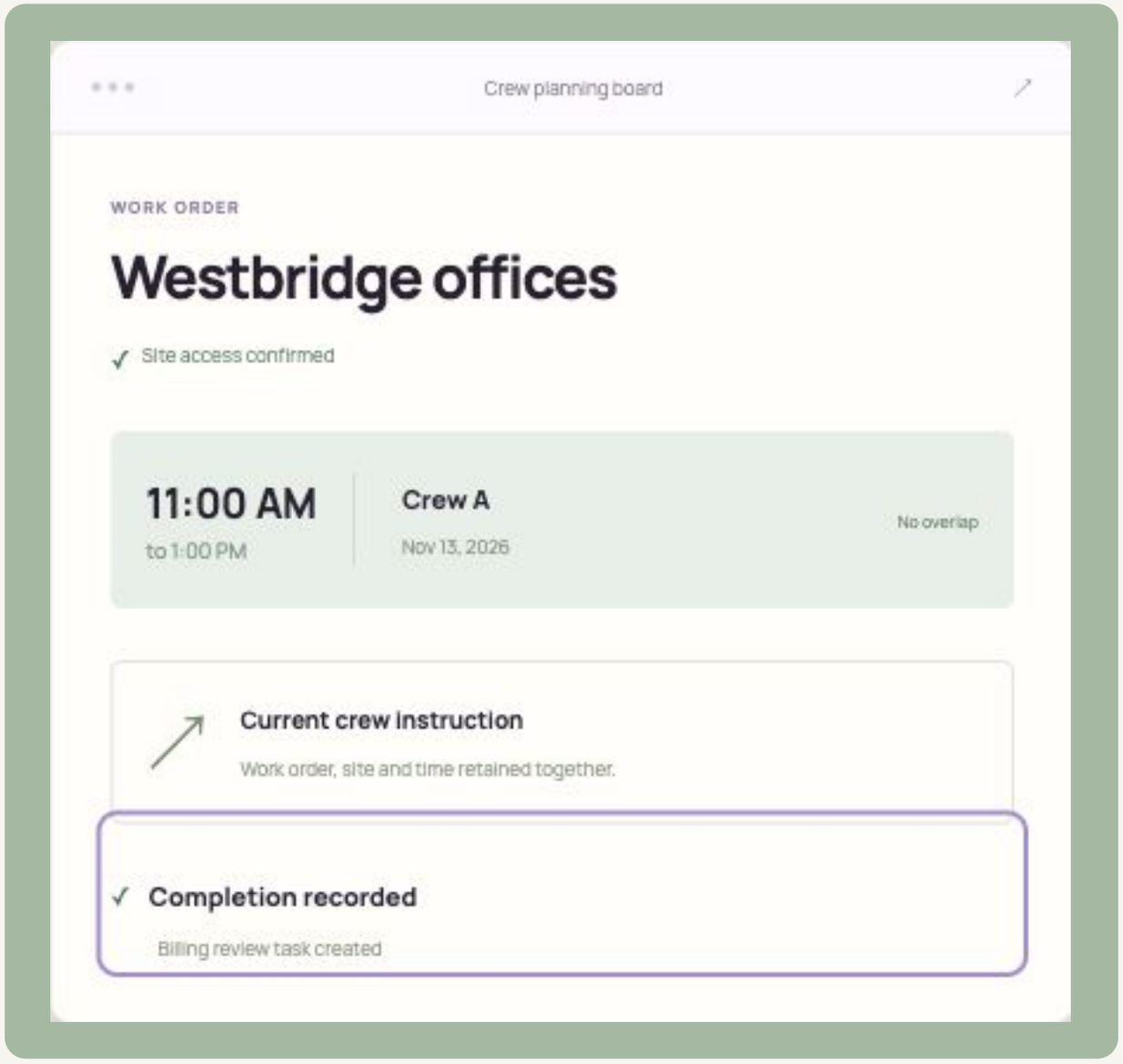
+ Work order and readiness check
+ Crew assignment with overlap protection
+ Current dispatch instruction
+ Completion and billing-review handoff

TOOLS & THEIR ROLE

Custom scheduling - Checks site access and rejects overlapping crew assignments.

Crew inbox - Keeps the current work instruction with the assignment.

Persistent billing handoff - Retains one review task after a completion is recorded.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

APPOINTMENTS & CUSTOMER EXPERIENCE

Check the calendar.

Then say yes.

Turn a booking request into structured customer details, a checked time and a saved appointment confirmation.

THE DELIVERED WORK

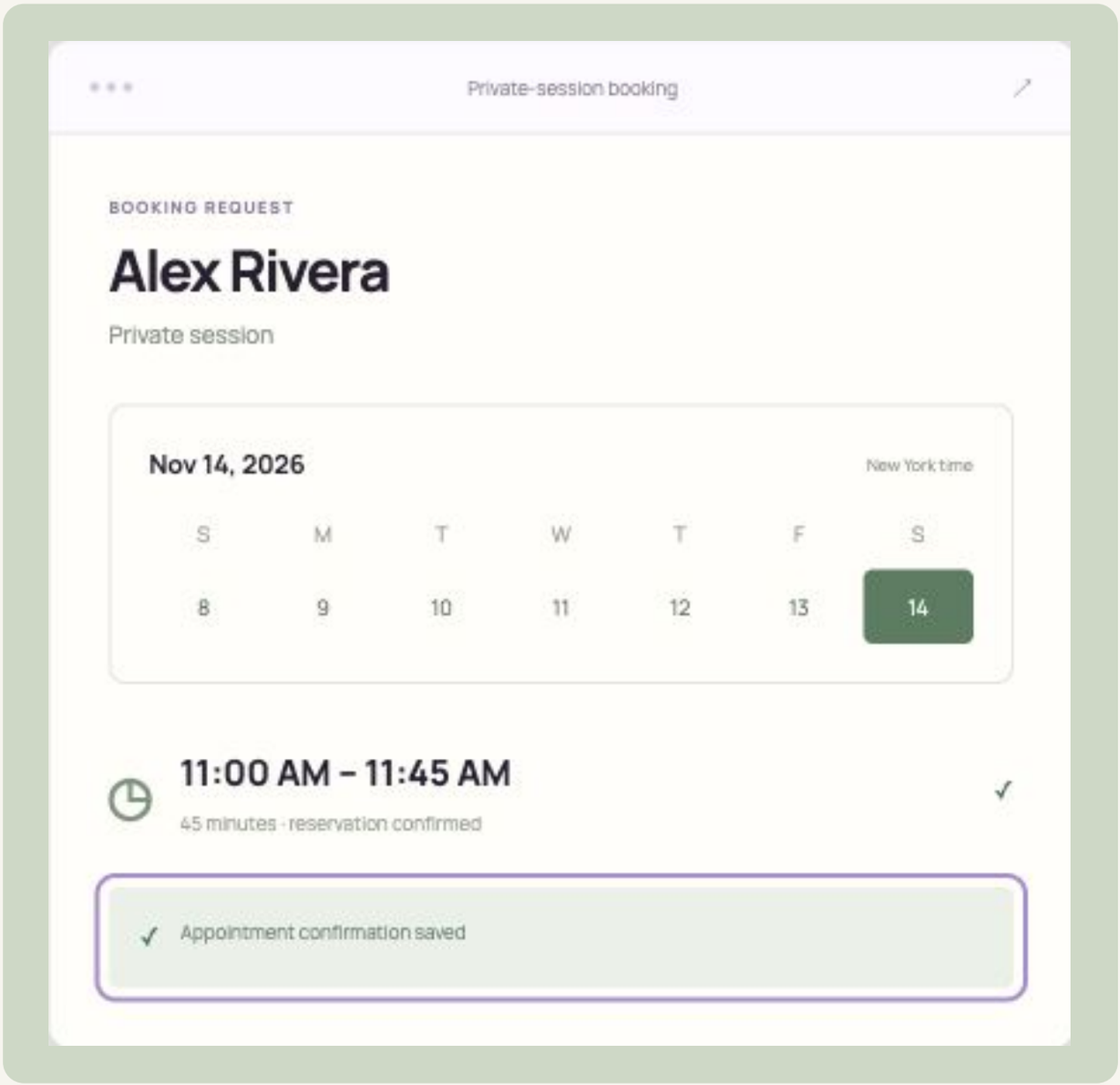
+ Structured booking inquiry
+ Saved customer identity
+ Availability-checked reservation
+ Appointment confirmation record

TOOLS & THEIR ROLE

OpenAI - Extracts customer details from the booking request.

Custom calendar - Checks the requested slot before retaining a reservation.

Netlify persistent storage - Keeps the appointment and its confirmation together.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

AUTOMATION RELIABILITY

A failed handoff.

An inquiry worth keeping.

Retain the event when a destination fails, replay it after recovery and check that repeated delivery keeps one destination identity.

THE DELIVERED WORK

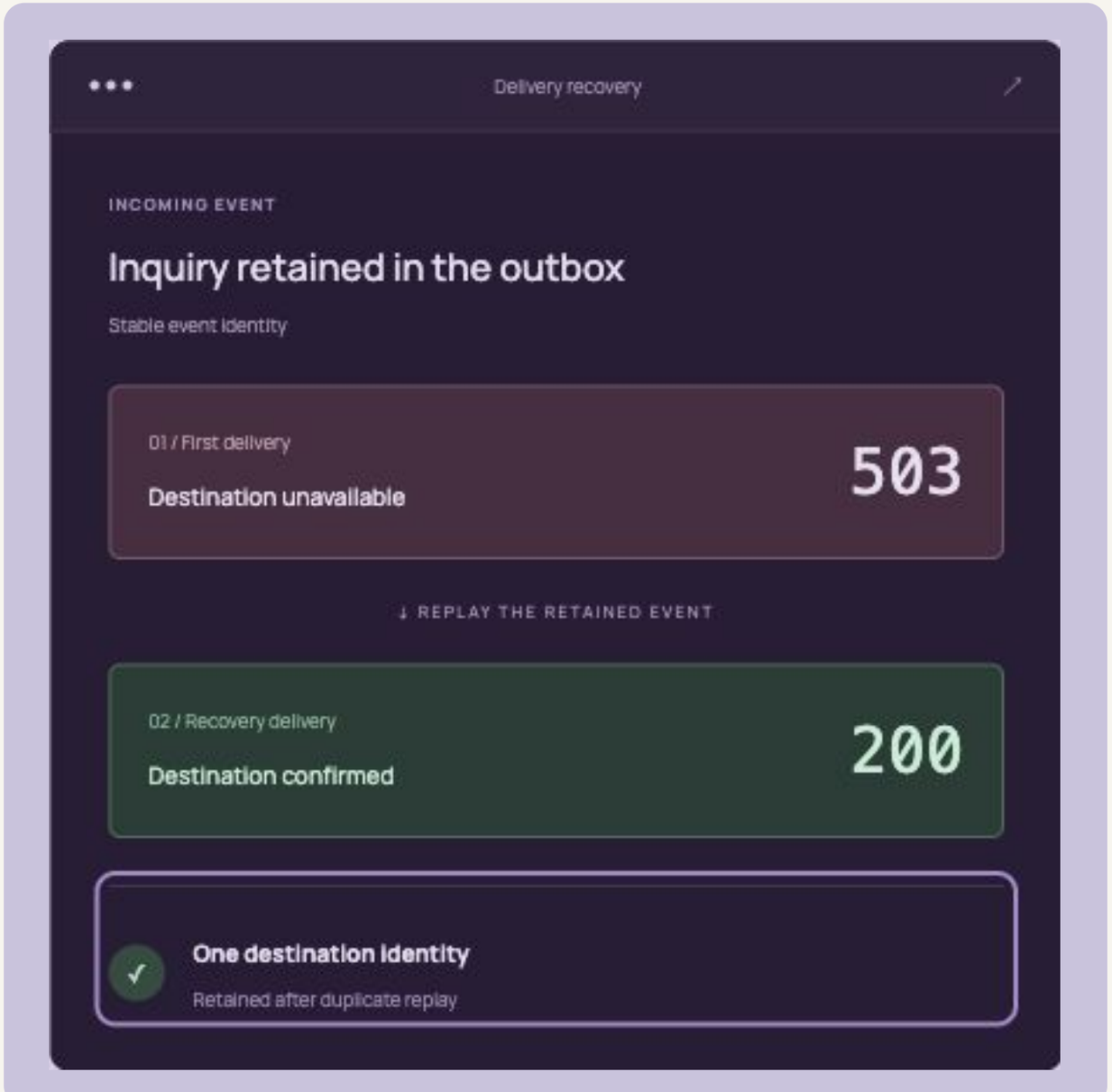
+ Retained webhook event
+ Recorded HTTP failure and recovery
+ Confirmed destination record
+ Duplicate replay check

TOOLS & THEIR ROLE

HTTP webhooks - Verifies actual destination failure, recovery and repeated delivery.

Durable outbox - Retains the event before it attempts delivery.

Identity controls - Checks that a duplicate replay keeps the destination record.



OUTPUT FROM THE SAVED EXECUTION

Explore this workflow

Discuss a similar project

MARKETING OPERATIONS

Find the signal.

Give the next action an owner.

Compare the source records, check their timestamp and turn a finding into an investigation with a named owner.

THE DELIVERED WORK

+ Retained source delivery
+ Timestamp and period checks
+ Calculated finding
+ Assigned and acknowledged investigation

TOOLS & THEIR ROLE

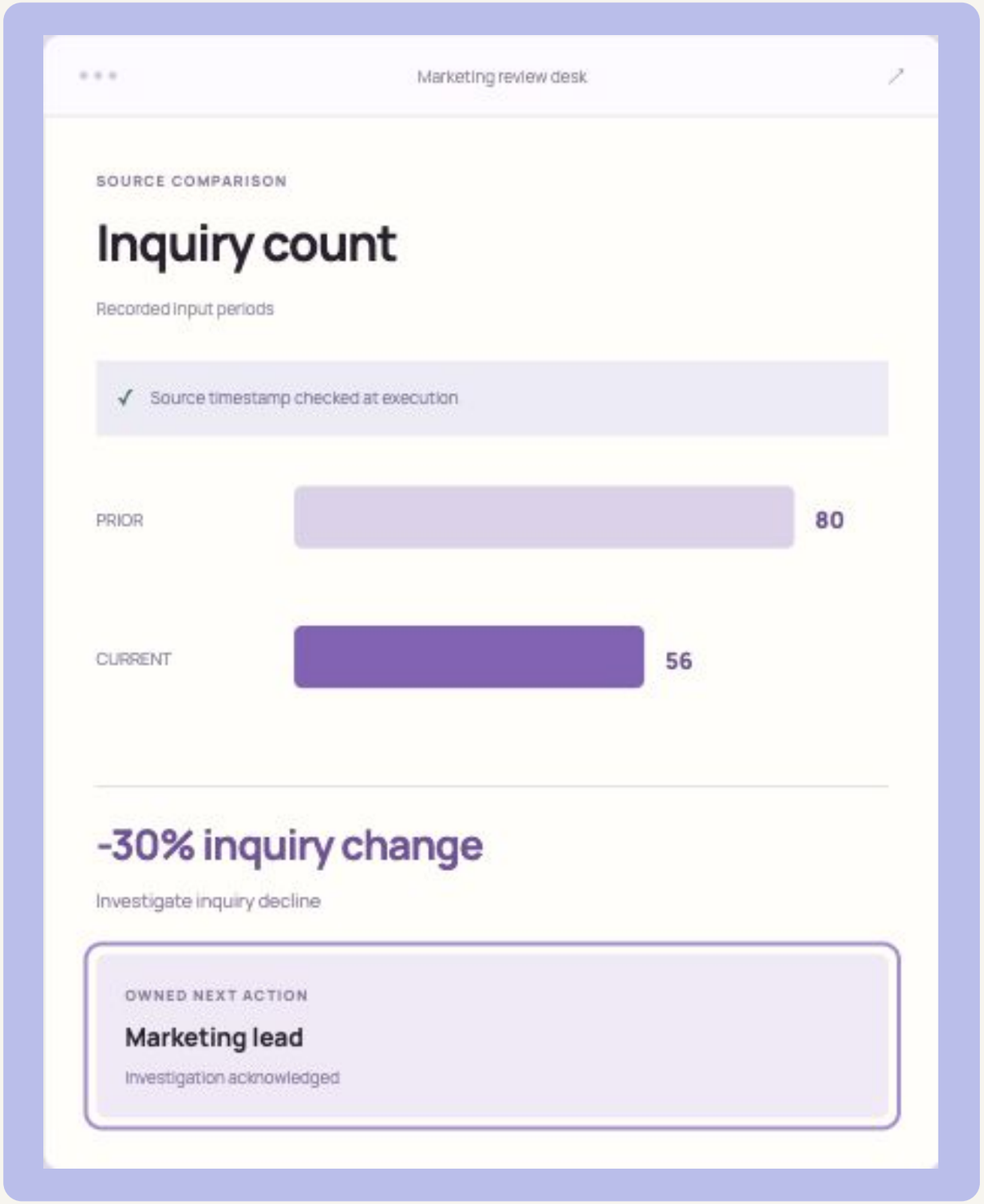
Source intake - Retains supplied reporting periods and their observation time.

Custom reporting logic - Checks freshness and computes the period comparison.

Action queue - Assigns the finding and records the owner's acknowledgment.

Explore this workflow

Discuss a similar project



OUTPUT FROM THE SAVED EXECUTION