What is kept, what is impossible

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Fictional document

> **Fictional document — demonstration example**
> This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

> **Fictional document**, produced for demonstration. **A question put to an employee does not constitute a precedent.** An employee asked for a clarification in March must not be "the employee we already had to ask" in October.

Item	Kept?	Why
The claim	**Yes**	Basis of reimbursement
Its receipts	**Yes**	Accounting document
The gap recorded and its family	**Yes**	**Attached to the claim, not the person**
The question asked and the answer	**Yes, attached to that claim**	**Justifying an approval**
The approver's decision	**Yes**	Traceability
The dates	**Yes**	Reimbursement times
Spend profile per employee	**Impossible**	**Would measure the job held**

Item	Kept?	Why
Gap frequency per person	**Impossible**	**Would constitute a precedent**
Ranking	**Impossible**	**Would circulate**
Trace of a question beyond the claim	**Impossible**	**Same reason**

What the monthly summary contains

Content	What it indicates
Reimbursement times	**The gap to the stated time**
Types of spend outside the policy	**Lines to add**
Causes of illegible receipts	A screen to fix
Approval bottlenecks	A deputy to appoint

> **All four indicators concern the process.** None descends to the level of a person, and that is what makes them usable in a meeting without putting anyone in difficulty.

To be set by the company

Retention period for claims and their receipts: _____ months

Retention period for questions asked and answers: _____ months

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> This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.
> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-gestion-des-notes-de-frais

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