Chase mandate — capped, dated, withdrawable in one word

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

Document issued on 09/11/2026

Draft submitted to the firm · 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 the demonstration. A message leaving under the firm's letterhead engages its relationship with the client. **That is not a prohibition, it is a delegation — the one a firm already gives an assistant, except that here it is written down.**

What the mandate authorises, and nothing else

Limit	Value adopted	Why this limit
Document families	**Bank statements · purchase invoices · expense claims · credit notes**	**Nothing touching payroll, legal matters or a file under audit**
Number of sends	**3 maximum per file per month — D+0, D+4, D+9**	**Beyond that it is pestering, and it is the firm's client**

Limit	Value adopted	Why this limit
Message wording	Fixed, reviewed and approved by the firm	The agent fills in amounts and document names; it does not rewrite the message
Copy to the account manager	Systematic, at the moment of sending	Not the next day in a summary
Excluded files	**6 under tax audit · 4 behind on fees · 3 in insolvency proceedings**	**Those stay manual, always**
Term	**31 March — then the mandate lapses of its own accord**	**It has to be renewed, not cancelled**
Withdrawal	**In one word, at any time**	**Everything reverts to document-by-document approval, nothing lost, nothing to reconfigure**

What approval costs the firm, with and without a mandate

Situation	What the staff member has to do	Measured time
Without a mandate	88 emails reviewed and sent one by one	**6 h 20 in March**
With a mandate	**One screen, 88 lines, untick what you want, approve the rest**	**4 minutes**
Veto per file	Kept in both cases	—

The mandate does not remove human approval: it groups it. Every chase is still put before the firm before going out, and every send leaves a line in the log, with the time, the file and the exact wording of the message.

The pilot proposed

LINDBERGH FORMATION — Blue Lemon Agent — Companies register (RCS) Évry 817 946 114 —
Legal notice (in French): bluelemonagent.ai/mentions-legales

Parameter	Proposal
Scope	**40 files — retail and independent professionals**
Selection criteria	No audit under way, no unpaid fees, portal active
Duration	1 month
What will be measured	**Return rate at D+11, number of vetoes used, client complaints**
Decision at term	**The firm extends, narrows or stops — the figure decides, not the agent**

Signature

Mandate given by (role): _____

Effective date: _____ · Expiry: _____

Files removed from scope in addition to the 13 excluded: _____

> **Request a demo with your own documents**
> 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-support-comptable-client-cabinet

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.

LINDBERGH FORMATION — Blue Lemon Agent — Companies register (RCS) Évry 817 946 114 —
Legal notice (in French): bluelemonagent.ai/mentions-legales