



What is kept, what is never produced

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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. **No customer risk score is produced**. A score built on past delays outlives the situation that produced it.

Item	Kept?	Why
The invoice and its due date	Yes	Basis of the follow-up
The delay family, dated	Yes	Attached to an invoice, not a customer
The chaser prepared and whether sent	Yes	Knowing what was said
The customer's reply	Yes	Understanding the blockage
The payment	Yes	Measuring what works
Customer risk score	No	Would outlive the situation
"Bad payer" label	No	Same reason
Transferable rating	No	Would leave the company

Item	Kept?	Why
Statistics per collections officer	No	Would push towards systematic firmness

A customer who had six hard months in 2024 would carry a label into 2027, and somebody would refuse an order on that basis — without knowing the score is three years old.

The difference between a family and a score

Delay family	Risk score
Attached to an invoice	Attached to a customer
Dated to the day of the flag	Updated and cumulative
A finding	A judgement
Ends with the invoice	Survives indefinitely

What the monthly summary contains

Content	What it indicates
Causes of delay	Where the process blocks
Recurring missing documents	An invoice template to complete
Unapplied credit notes	Chasers to avoid
Settlement times by family	What works, by type of chaser

To be set by the company

Retention period for chasers and their replies: _____ months

Retention period for delay families: _____ months after payment

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.