What is kept, what is never produced

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

Document issued on 09/11/2026

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

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Legal notice (in French): bluelemonagent.ai/mentions-legales

Retention period for delay families: _____ months after payment

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-ia-recouvrement-creances

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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.