



Suhas Bhairav

AI Accounts Receivable Past Due Email Flow

Automate polite past-due emails with AI while preserving human review and compliance.

Helps finance teams detect late payments and generate compliant, courteous reminders automatically.

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suhasbhairav.com

What to Automate and Review

Define automatable activities and where human review is essential. Align data, templates, and control points for reliable outcomes.

Key move Define the non-negotiables: data access, approval thresholds, and escalation contacts before automation.

PRACTICAL CHECKLIST

- 01** Analyze client payment history to identify overdue patterns and risk signals.
- 02** Auto-generate initial past-due emails with tone controls and variable data.
- 03** Schedule follow-ups and retries; escalate when thresholds are reached.
- 04** Enforce business rules for late fees, grace periods, and currency/timezone.
- 05** Push emails and outcomes to CRM/ERP for audit trails.
- 06** Flag high-risk accounts for human review before sending.
- 07** Maintain data provenance: timestamping, versioning, and model performance logs.

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Data, Tools & Boundaries

Outlines data inputs, AI tooling choices, and guardrails to support safe, auditable email automation.

Key move Approve a data map and guardrails before running pilots.

PRACTICAL CHECKLIST

- 01** Data elements: customer name, email, last payment date, amount, due date, terms, currency.
- 02** Data quality checks: up-to-date records, duplicate handling, field normalization.
- 03** Data privacy: PII controls, consent logging, retention, and access restrictions.
- 04** Tools: an AI writer, an orchestration/automation layer, CRM/ERP connectors, and dashboards.
- 05** Templates: include firm, polite, and neutral tones; localize by currency and date format.
- 06** Guardrails: auto-approve low-risk messages; require supervisor sign-off for high-risk content.
- 07** Measurement: open rates, click rates, payment receipts, and time-to-payment after reminder.

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Adoption Plan in Weekly Steps

Offers a practical, weekly ramp plan for piloting AI-generated past-due emails in finance.

Key move Assign ownership for each rule and establish a monthly safety review.

PRACTICAL CHECKLIST

- 01** Week 1: Define scope, identify data sources, disable sending, and run dry-run drafts.
- 02** Week 2: Build templates, set tone controls, and test with internal emails.
- 03** Week 3: Enable automated drafts with human review for first 50 messages.
- 04** Week 4: Integrate CRM logging; monitor metrics and adjust thresholds.
- 05** Week 5: Pilot with a small segment; collect feedback and fixes.
- 06** Week 6: Scale to broader portfolio; formalize approvals and ownership.
- 07** Week 7: Review outcomes; iterate on templates, rules, and guardrails.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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