

A PRACTICAL GUIDE FOR BUSINESSES THAT SELL, STOCK, MAKE AND DELIVER PRODUCTS

43 everyday problems, and how automation solves them

Written in plain English, one problem at a time. No technical knowledge needed.

Avas Ali · Edition 2 · October 2026

In short: This playbook lists 43 everyday problems in businesses that sell, stock, make and deliver products, and how automation solves each one. They cover eight teams, from sales to payroll. About half need no AI at all. Each one shows the problem, what changes, what you gain, what you'll need first and how much effort it takes. It's written for Australian businesses, and a person stays in charge of anything that matters.

New in Edition 2: a People & Payroll team, eight new use cases, and tags that show the effort and whether AI is needed.

Why this matters now

65%

of Australian small and medium businesses with no plans to use AI say trust, or keeping people in control, is what holds them back.

National AI Centre, 2026

\$56,600

average cost per cybercrime reported by an Australian small business in 2024–25. Email scams are among the most common.

Australian Signals Directorate, 2025

\$15,257

lost to late payments in a year by the average Australian small business.

Xero, 2026

That's why every idea in this playbook keeps a person in charge of anything that matters.

8

teams

43

use cases

23

quick wins

22

need no AI

Contents

How to use this playbook	2	Manufacturing & Quality	14
How each use case reads	3	People & Payroll	16
Sales	4	Managers & Teams	18
Customer Service	6	Where to start	20
Finance	8	Your automation scorecard	20
Purchasing & Suppliers	10	Common questions	22
Warehouse & Stock	12	Sources	22

WHAT THIS PLAYBOOK IS

Every business that buys and sells products carries the same hidden busywork. Orders are retyped from emails. Supplier bills are checked line by line. Customers and suppliers are chased one at a time.

This playbook shows 43 of those problems across eight teams, from quick wins to bigger projects.

About half need no AI at all, just a well-set-up system. Read the ones that sound like your week, then share the rest with the people who run each team.

WHO IT'S FOR

Owners, managers and the people who run sales, customer service, finance, purchasing, the warehouse, production and payroll.

YOUR SYSTEM

The examples come from businesses that run their orders, stock, suppliers and invoices in one main system, called an ERP, such as Odoo. The ideas apply to any system. If you use Odoo, some of these are already built in and just need setting up properly. We'll tell you which.

How to use this playbook

01

Find your team

The use cases are grouped into eight teams, one section each. Start with yours, or pass that section to the person who runs the team.

02

Start with the problem

Every use case opens with "Today": a short, real-world problem. If it sounds familiar, read on to see what changes.

03

Check the tags

Each use case shows how much effort it takes, whether it needs AI, and what you'll need first. Quick wins are the best place to start.

04

Tick what sounds like your week

Tick the problems you recognise on the scorecard at the back, then email it to us or bring it to a call.

How each use case reads

TODAY

The problem, as it happens in a busy business.

Example: "A supplier bills you for 120 boxes. Only 100 arrived."

WITH AUTOMATION

What changes, in plain steps.

Example: "Every bill is checked against what actually arrived."

THE WIN

What your business gets out of it.

Example: "You only pay for what you received."

What the tags mean

HOW IT WORKS

No AI needed

Rules and a well-set-up system do the work. Often the cheapest fix.

AI reads it for you

AI reads emails, documents and your system's data, and turns them into entries, answers or summaries.

AI suggests, you approve

AI prepares a draft or a recommendation. A person decides.

Examples are illustrative, based on common situations in product businesses.

EFFORT

Quick win

Works with the information most businesses already keep.

Needs some groundwork

Some information needs to be cleaned up or recorded first.

Bigger project

Needs accurate planning data and more set-up time.

You stay in control

You decide what runs on its own. Small, reversible steps, like a payment reminder or a tracking update, can run by themselves once you trust them. Anything that moves money, changes a price or makes a promise to a customer waits for a person. Every action is logged, so you can always see what happened and why.

TEAM 1 OF 8

Sales

Winning orders and keeping customers buying.

SHARE THIS SECTION WITH

Sales managers, sales reps and business owners.

01 Emailed orders, entered for you

EMAIL ORDER TO SALES ORDER

AI reads it for you

Quick win

TODAY	A regular customer emails a PDF order with 15 lines, their own product codes and special prices. Someone types every line into your system.
WITH AUTOMATION	The order is read automatically and matched to the right customer, products and prices, even when they use their own product codes. A draft order waits for a quick check, with anything unclear highlighted.
THE WIN	Orders are entered in minutes, with fewer typing errors and wrong deliveries.
WHAT YOU'LL NEED	Your customer price lists, and each customer's product codes matched to yours once.

02 Same-day quotes that protect your profit

QUOTE IN MINUTES

AI suggests, you approve

Needs some groundwork

TODAY	A buyer emails asking for 40 units in three sizes, with a bulk discount. Before anyone can reply, someone has to check stock, prices and profit by hand.
WITH AUTOMATION	The request, by email or a quick chat message, becomes a draft quote using your approved prices and discounts. Stock is checked, and any discount that cuts too deep goes to a manager to approve.
THE WIN	Reply the same day without giving away profit. A fast, accurate quote gives you a better chance of winning the order.
WHAT YOU'LL NEED	Price lists, discount rules and product costs kept up to date in your system.

03 Every enquiry gets a reply

ENQUIRY NEVER MISSED

No AI needed

Quick win

TODAY	A new customer fills in your website form on Friday afternoon. Everyone assumes someone else replied. By Tuesday, the buyer has gone elsewhere.
WITH AUTOMATION	Every new enquiry, from your website, phone messages or sales inbox, is given to one named person straight away. If nobody replies within the time you set, that person gets a reminder, then their manager does.
THE WIN	You've already paid to win that enquiry. It won't be lost to a slow reply.
WHAT YOU'LL NEED	All new enquiries arriving somewhere your system can see.

04 Find money you earned but never billed

FORGOTTEN REVENUE FINDER

 No AI needed Quick win

TODAY	Goods went out last week, but the invoice was never sent. A big quote went quiet and nobody followed up. Neither stands out on a busy Monday.
WITH AUTOMATION	Each week, your system is checked for goods delivered but never invoiced, and quotes worth chasing. You get a short list with the dollar value of each and who should act.
THE WIN	Money you've already earned, or nearly won, comes back in.
WHAT YOU'LL NEED	Deliveries confirmed in your system when goods leave.

05 Notice when a regular customer goes quiet

QUIET CUSTOMER ALERT

 AI suggests, you approve Quick win

TODAY	A customer who ordered every month hasn't ordered in eight weeks. Nobody notices until the end of the quarter.
WITH AUTOMATION	Your system learns how often each customer usually orders. When one goes quiet, or has an unresolved complaint, the person who looks after them gets a nudge and a suggested check-in message.
THE WIN	You keep good customers, and keeping one is usually cheaper than winning a new one.
WHAT YOU'LL NEED	At least a year of order history in your system.

TEAM 2 OF 8

Customer Service

Fast answers for customers, and no request left behind.

SHARE THIS SECTION WITH

Customer service leads, support staff and business owners.

06 Every email gets an owner

SHARED INBOX SORTER

 AI reads it for you

 Quick win

TODAY	Sixty emails land in your shared inbox every day: orders, questions, complaints and invoices. Someone spends the morning forwarding them, and a few always slip through.
WITH AUTOMATION	Each email is read, linked to the right customer and order, and handed to the right person as a task. That person gets an alert in Outlook or Teams.
THE WIN	Every request has a name next to it, and nothing sits unanswered.
WHAT YOU'LL NEED	Access to your shared inbox, and customers' email addresses kept in your system.

07 Answer "Where's my order?" in minutes

ORDER STATUS ANSWERS

 AI reads it for you

 Quick win

TODAY	Customers email and call all day asking where their order is. Each question means someone checking your system, then the courier's website.
WITH AUTOMATION	The order is found, its delivery status is checked, and a clear reply with the tracking link is drafted. You choose whether simple answers go straight out, even after hours.
THE WIN	Customers get fast answers, and your team spends its time on real problems.
WHAT YOU'LL NEED	Tracking numbers saved on each delivery, and couriers that share tracking updates.

08 Get the full story behind a complaint, fast

COMPLAINT INVESTIGATOR

 AI suggests, you approve

 Needs some groundwork

TODAY	A customer writes: "My delivery was late, and I was charged for something I didn't get." Support has to ask sales, the warehouse and accounts what happened.
WITH AUTOMATION	The order, delivery, invoice and past emails are pulled into one short summary of what really happened, with a suggested fix and a draft reply to approve.
THE WIN	The complaint is solved in one go, without three teams chasing each other.
WHAT YOU'LL NEED	Customer emails linked to the right customer and order records.

09 Handle returns, and claim the cost back

RETURNS AND WARRANTY CLAIMS

 AI suggests, you approve

☒ ☒ ☐ Needs some groundwork

TODAY	A customer returns a faulty item with no invoice number. Staff hunt for the sale and check the warranty, and the cost is rarely claimed back from the manufacturer.
WITH AUTOMATION	The sale is found from the customer's name, email, phone or serial number, and the warranty is checked. The return is prepared and, if the manufacturer is at fault, so is a claim to them.
THE WIN	Customers get a fair answer fast, and you stop paying for other people's faults.
WHAT YOU'LL NEED	Serial or batch numbers recorded on sales, and your suppliers' warranty terms on file.

- ① **Good to know:** Under Australian Consumer Law, when a fault is the manufacturer's, you can generally claim your costs back from them, with up to three years to do it. Source: [HWL Ebsworth](#)

10 Give every customer your best expert's answer

EXPERT PRODUCT ANSWERS

 AI suggests, you approve

☒ ☒ ☐ Needs some groundwork

TODAY	A customer asks whether a part fits their machine and meets a safety standard. Only one senior person knows, and the customer waits three days for a reply.
WITH AUTOMATION	A draft answer is prepared from your product data sheets, manuals and past replies, showing where each fact came from. Your expert checks it in a minute instead of writing it from scratch.
THE WIN	Customers get expert answers the same day, and your best person isn't a bottleneck.
WHAT YOU'LL NEED	Up-to-date data sheets and manuals, and an expert to approve answers.

- ① **Good to know:** Answers about safety or fit never go out without your expert's approval.

TEAM 3 OF 8

Finance

Getting paid on time, and paying only what you owe.

SHARE THIS SECTION WITH

Finance managers, accounts staff,
bookkeepers and business owners.

11 Stop paying for goods that never arrived

SUPPLIER BILL CHECKER

No AI needed

Quick win

TODAY	A supplier bills you for 120 boxes. Only 100 arrived. Or the same bill is sent twice. Unless someone checks every line, you pay too much.
WITH AUTOMATION	Every bill is checked against what you ordered and what actually arrived. Differences and duplicates are highlighted, and a correction request to the supplier is ready to send.
THE WIN	You only pay for what you received, without checking every bill by hand.
WHAT YOU'LL NEED	Goods recorded as received in your system when they arrive.

① **Good to know:** If you use Odoo, matching bills to orders and deliveries is built in. It just needs setting up properly.

12 Get paid without the chasing

OVERDUE INVOICE CHASER

AI reads it for you

Quick win

TODAY	A customer is 30 days late. They reply, "We'll pay next Friday." The promise is forgotten, and the reminders keep going out anyway.
WITH AUTOMATION	Polite reminders go out on overdue invoices. Replies are read: promises are noted with their date and reminders pause, while disputes go to the right person. If Friday passes unpaid, someone is told to call.
THE WIN	You get paid sooner, without annoying good customers.
WHAT YOU'LL NEED	Correct payment terms and billing contacts for each customer.

① **Good to know:** Australian small businesses were paid 6.0 days late on average in the June 2026 quarter. Source: [Xero](#)

13 Catch fake bank detail emails before you pay

BANK DETAIL CHANGE GUARD

No AI needed

Quick win

TODAY	An email that looks like it's from a regular supplier says, "We've changed banks, please pay our new account." It's a scam, and it looks completely real.
WITH AUTOMATION	Any change to a supplier's bank details is highlighted, and the email is checked for warning signs, like a look-alike address. Payment waits until someone calls the supplier on the number you already have.
THE WIN	One fake email can cost tens of thousands of dollars. A two-minute phone call stops it.
WHAT YOU'LL NEED	A record of every change to supplier bank details, and a call-back rule your team follows.

① **Good to know:** Most Australian banks now also check the account name when you pay a new account for the first time (Confirmation of Payee). Use it as well as the call-back, not instead of it. Source: [IT Brief](#)

14 See a cash shortfall weeks before it hits

CASH FLOW EARLY WARNING

 No AI needed

 Needs some groundwork

TODAY	Sales are strong, but several customers are paying late, and big supplier bills, wages, super and BAS all land in the same fortnight. Nobody sees the gap coming.
WITH AUTOMATION	Money coming in, based on how late each customer usually pays, and money going out, including wages, super and tax, are added up week by week. If you're heading for a shortfall, you're warned early and shown why.
THE WIN	You spot a cash crunch while there's still time to act.
WHAT YOU'LL NEED	Up-to-date money owed to you and by you, plus your wage, super and BAS dates.

① **Good to know:** Since 1 July 2026, super is paid with every pay run instead of every quarter. That changes the rhythm of your cash flow. Source: [Moneysmart](#)

15 Match every customer payment, and check what they held back

CUSTOMER PAYMENT MATCHER

 AI suggests, you approve

 Needs some groundwork

TODAY	A customer pays \$18,450 in one bank transfer with the reference "March invoices". Someone has to work out which invoices it covers, and why it's \$620 short.
WITH AUTOMATION	The payment is matched to the right invoices using the customer's remittance email. Any shortfall or deduction is checked against the order, the delivery and your agreed deals. Fair ones are recorded, and unfair ones get a draft dispute for you to approve.
THE WIN	Your books are right the same day, and money you're owed doesn't quietly disappear.
WHAT YOU'LL NEED	Customers' remittance emails, and your agreed deals and promotions on record.

① **Good to know:** Supplying Coles, Woolworths, ALDI or Metcash? Since 1 April 2025, the Food and Grocery Code limits when they can deduct from your payments. Source: [ACCC](#)

16 Close the month without the scramble

BAS-READY MONTH END

 No AI needed

 Needs some groundwork

TODAY	It's the 3rd. Your bookkeeper is chasing unmatched bank lines, bills sitting in inboxes, goods delivered but never invoiced, and GST codes that look wrong. BAS is due soon.
WITH AUTOMATION	In the last days of the month, a checklist runs itself. Unmatched bank lines, bills received but not entered, uninvoiced deliveries and unusual GST coding are listed with who needs to act. Your accountant gets a clean pack.
THE WIN	The month closes in days, not weeks, and your BAS is built on numbers you trust.
WHAT YOU'LL NEED	Bank feeds connected to your system, and bills entered as they arrive.

TEAM 4 OF 8

Purchasing & Suppliers

Buying well, at the true cost, with fewer surprises.

SHARE THIS SECTION WITH

Purchasing managers, buyers and business owners.

17 Check new suppliers before you pay them

SUPPLIER ONBOARDING CHECK

No AI needed

Quick win

TODAY	A new supplier's first invoice arrives with an ABN, GST and bank details. Someone sets them up in the system without checking any of it.
WITH AUTOMATION	The ABN and GST registration are checked against the Australian Business Register. New bank details are held for a name check and a call-back. Missing documents, like insurance certificates, are requested. The supplier stays on hold until everything is in.
THE WIN	You only pay real, registered businesses, and only claim GST credits you're entitled to.
WHAT YOU'LL NEED	A rule that every new supplier starts on hold until the checks pass.

① **Good to know:** Anyone can check an ABN and its GST status for free on the Australian Business Register's ABN Lookup. Source: [ABN Lookup](#)

18 Turn "we need 50" into an order, ready to approve

REQUEST TO ORDER

AI reads it for you

Needs some groundwork

TODAY	Someone needs 50 of a product. That means emails back and forth, quotes from three suppliers in different formats, and an order typed up by hand.
WITH AUTOMATION	The request comes in by email, chat or your system. Supplier quotes are compared side by side on price, delivery cost and timing, and a draft order is ready to approve.
THE WIN	You buy faster and better, and a person still decides what gets ordered.
WHAT YOU'LL NEED	A list of approved suppliers for each product.

19 Catch late supplier orders, and plan around them

LATE SUPPLIER ORDERS

AI reads it for you

Needs some groundwork

TODAY	Four of your 12 supplier orders were never confirmed, and one supplier now says a key item is ten days late. Several customer orders depend on it.
WITH AUTOMATION	Unconfirmed orders are chased and promised dates recorded. When something will be late, every affected customer order and job is found, other options are checked, and a recovery plan goes to a manager.
THE WIN	You hear about late stock early, and have a plan before customers feel it.
WHAT YOU'LL NEED	Promised dates recorded on supplier orders, and customer orders linked to incoming stock.

20 Know what imported stock really costs you

TRUE COST OF IMPORTS

 AI reads it for you

 Needs some groundwork

TODAY	An imported item costs \$40 from the supplier, but \$52 once freight, customs duty and insurance are added. Your system still shows \$40, so your profit looks better than it is.
WITH AUTOMATION	Freight, customs and insurance bills are read as they arrive and shared across the products in each shipment. Costs are updated, and items selling at too little profit are highlighted.
THE WIN	You set prices on what stock really costs, not on what the supplier charged.
WHAT YOU'LL NEED	Your system set up to add freight and duty to stock costs, and each shipment linked to the goods received.

- ⌚ **Good to know:** If you're registered for GST, the GST paid on imports is generally claimed back as a credit, so it's left out of your stock cost. Your accountant confirms the method once.

21 Spot supplier price rises before they eat your profit

PRICE RISE WATCHDOG

 No AI needed

 Quick win

TODAY	A supplier quietly raises a product from \$45 to \$53, or sends a new price list in a spreadsheet. Your selling price stays the same, so you earn less on every sale.
WITH AUTOMATION	Every new bill and price list is compared with what you paid before. Rises are highlighted with the products and profit affected. You decide what to do next.
THE WIN	\$8 more on 400 units a month is \$3,200 a month off your profit. Catch it on the first bill.
WHAT YOU'LL NEED	Supplier bills linked to the products they're for.

22 Claim every supplier rebate you've earned

SUPPLIER REBATE TRACKER

 AI reads it for you

 Needs some groundwork

TODAY	Your supplier agreement pays you 3% back once you buy \$500,000 in a year. Nobody tracks it closely, so the rebate is claimed late, or never.
WITH AUTOMATION	Your rebate agreements are read and your purchases tracked against them. You're told when a rebate is due, and when a little more buying would reach the next level.
THE WIN	Money your suppliers already owe you actually comes back.
WHAT YOU'LL NEED	Copies of your signed rebate agreements.

TEAM 5 OF 8

Warehouse & Stock

The right stock on the shelf, and orders out on time.

SHARE THIS SECTION WITH
Warehouse managers, stock
controllers and buyers.

23 Reorder the right amount at the right time

SMART REORDER SUGGESTIONS

No AI needed

Needs some groundwork

TODAY	Reorder levels were set two years ago and never touched. Now some products run out every month, while others pile up in the corner.
WITH AUTOMATION	Recent sales, busy seasons and how long each supplier really takes to deliver are reviewed. Suggested orders and updated stock levels are prepared for the buyer to approve.
THE WIN	Fewer empty shelves, and less cash stuck in stock you don't need.
WHAT YOU'LL NEED	One to two years of sales history, and how long each supplier really takes to deliver.

24 Spot orders at risk before it's time to pack

ORDERS AT RISK

No AI needed

Quick win

TODAY	Sales promised 60 units for next Tuesday, but the incoming stock won't arrive in time. Another order is for a customer who's over their credit limit. Nobody notices until the warehouse goes to pack.
WITH AUTOMATION	Every morning, orders at risk are found before packing starts: short stock, customers over their credit limit, and delivery addresses that won't work. Other options, like stock at another location, are checked and a draft customer update is prepared. Credit holds go to a person, with the customer's payment history, to release or keep.
THE WIN	Fewer late deliveries, fewer awkward phone calls, and fewer surprise bad debts.
WHAT YOU'LL NEED	Stock reservations, incoming dates and customer credit limits kept up to date.

25 Hear about delivery problems before your customer does

DELIVERY PROBLEM ALERT

No AI needed

Quick win

TODAY	The courier marks a parcel as lost or delayed. Customer service only finds out when the customer complains.
WITH AUTOMATION	Courier updates are matched to the right order. The responsible team is alerted, and a replacement or a customer update is prepared for approval.
THE WIN	You tell customers about a problem before they have to chase you.
WHAT YOU'LL NEED	Couriers that send tracking updates to your system.

26 Turn slow or expiring stock back into cash

SLOW AND EXPIRING STOCK

 No AI needed

   Quick win

TODAY	Some products have barely sold in six months, and some stock passes its use-by date next month. Money sits on the shelves while cash is tight.
WITH AUTOMATION	Slow and soon-to-expire stock is listed by the money at risk, with practical options: sell it first, move it, stop reordering it, or run a promotion.
THE WIN	Less stock thrown away or written off, and cash back in the business.
WHAT YOU'LL NEED	Batch and expiry dates recorded for anything with a use-by date.

27 Never sell online what you don't have

ONLINE STOCK CHECK

 No AI needed

   Needs some groundwork

TODAY	You sell on your website and an online marketplace. Stock levels drift out of step, so you sell something you don't have, or an online order never reaches the warehouse.
WITH AUTOMATION	Online orders and stock levels are checked against your system throughout the day. Missing orders and oversold items are highlighted, so they're fixed before a customer notices.
THE WIN	Fewer cancelled orders, refunds and bad reviews.
WHAT YOU'LL NEED	Your website and marketplaces connected to your system.

TEAM 6 OF 8

Manufacturing & Quality

Promising dates you can keep, and catching problems early.

SHARE THIS SECTION WITH

Production managers, planners and quality leads.

28 Promise delivery dates you can actually keep

DELIVERY DATE CHECKER

No AI needed

●●● Bigger project

TODAY	Sales promises a customer 500 units by the 20th, without checking whether the factory can make them in time.
WITH AUTOMATION	Before a date is promised, materials, stock and machine time are checked, and a date the factory can actually meet is suggested.
THE WIN	Customers get dates they can trust, and the factory isn't set up to fail.
WHAT YOU'LL NEED	Accurate bills of materials, production steps and machine capacity.

29 Keep production moving when a part is missing

PRODUCTION RECOVERY

AI suggests, you approve

●●● Bigger project

TODAY	Tomorrow's job can't start because one part is missing. Three later jobs and two customer deadlines are now at risk.
WITH AUTOMATION	The blocked jobs are identified, other parts or suppliers are checked, and a new schedule that protects the most important deadlines is proposed to the production manager.
THE WIN	The factory keeps moving, and the deadlines that matter most are met.
WHAT YOU'LL NEED	Accurate production planning data, and a clear list of your priority customers and orders.

30 Stop a bad batch before it reaches more customers

QUALITY PROBLEM CONTAINMENT

AI suggests, you approve

●●○ Needs some groundwork

TODAY	A batch fails its quality check. Some of it is still in the warehouse, and some is already on its way to customers.
WITH AUTOMATION	In one step, the affected stock is flagged for hold, and every affected order and customer is listed. A person confirms the hold, and draft customer notices and next steps are ready to go.
THE WIN	The problem is contained quickly, and customers hear about it from you first.
WHAT YOU'LL NEED	Batch numbers tracked from goods received through to each customer.

- ① **Good to know:** If a product may have caused a death, serious injury or illness, or you start a safety recall, Australian law requires you to notify the ACCC within two days. Your team makes the call; the system makes sure nobody misses the clock. Source: [HWL Ebsworth](#)

31 Find out where a job lost money

JOB COST OVERRUN FINDER

 No AI needed

 Needs some groundwork

TODAY	A job was priced at four hours of labour but took seven, and used extra material. Nobody looks into why the profit disappeared.
WITH AUTOMATION	Planned and actual costs are compared for every job. Big gaps are highlighted, and the manager sees exactly where the extra time or material went.
THE WIN	You fix the cause, and price the next job properly.
WHAT YOU'LL NEED	Time and materials recorded against each job.

32 Make sure everyone switches to the new design

PRODUCT CHANGE HELPER

 No AI needed

 Needs some groundwork

TODAY	Engineering switches to a new screw size used in five products. Purchasing, the warehouse and the factory floor may still be working from the old design.
WITH AUTOMATION	Every open order, stock item and job that still uses the old part is found, and a checklist of actions with owners is prepared for approval.
THE WIN	Everyone works from the same instructions, and nothing outdated gets bought or built.
WHAT YOU'LL NEED	Accurate bills of materials in your system.

TEAM 7 OF 8

People & Payroll

Paying people right and on time, and new starters ready on day one.

SHARE THIS SECTION WITH

Business owners, payroll and HR staff, and office managers.

33 Catch pay mistakes before the pay run

PAYROLL PRE-CHECK

No AI needed

Quick win

TODAY	A new starter's rate was keyed in wrong. A pay rise approved last month never reached payroll. Someone who resigned is still on the pay run.
WITH AUTOMATION	Before each pay run, every change since the last one is compared with what was approved: new starters, pay rises, finishes and leave. Anything that doesn't match is listed for your payroll person to fix or confirm.
THE WIN	Mistakes are fixed before people are paid, not after. Fixing an underpayment later costs more, and staff notice.
WHAT YOU'LL NEED	Pay changes approved in one place before each pay run.

- ① **Good to know:** Since 1 January 2025, deliberately underpaying staff can be a crime. Honest mistakes aren't, but catching them early protects your people and your business. Source: [Fair Work Ombudsman](#)

34 Make sure super lands on time

PAYDAY SUPER CHECK

No AI needed

Quick win

TODAY	Since 1 July 2026, super must be paid with every pay run and reach each fund within 7 business days. One contribution bounces back because of a wrong fund detail, and nobody notices for weeks.
WITH AUTOMATION	After every pay run, super payments are checked against what each person was owed. Returned or late contributions are flagged with the reason, and the fix is prepared for approval.
THE WIN	Super arrives on time, every pay run, without anyone checking each fund by hand.
WHAT YOU'LL NEED	Payroll software that shows the status of each super payment.

- ① **Good to know:** If super doesn't reach the fund within 7 business days of payday, the employer can be liable for the super guarantee charge. Source: [ATO](#)

35 Keep pay rates in step with award changes

AWARD RATE CHECK

No AI needed

Needs some groundwork

TODAY	Award minimum rates rise each year from the first full pay period on or after 1 July. A few staff on award-based pay are missed and quietly underpaid.
WITH AUTOMATION	When you load the new rates, each employee's pay is compared with the rate for their award and classification. Anyone below it is listed for review before the next pay run.
THE WIN	Honest mistakes are caught early, and you have a record showing you checked.
WHAT YOU'LL NEED	Each employee's award and classification recorded in your system.

- ① **Good to know:** It compares pay against the rates you load. It doesn't interpret the award for you, so a person checks the new rates first.

36 Answer staff questions without the HR inbox

STAFF QUESTIONS

AI reads it for you

Quick win

TODAY	"How much leave do I have?" "Can I work from home on Fridays?" Every question lands with the owner or office manager.
WITH AUTOMATION	Staff ask in Teams. Answers come from their own leave balance and your written policies, with a link to the source. Anything personal or sensitive goes straight to a person.
THE WIN	Staff get answers in seconds, and the manager gets their afternoon back.
WHAT YOU'LL NEED	Leave balances kept in your system, and your policies written down.

37 New starters ready on day one

NEW STARTER SETUP

No AI needed

Quick win

TODAY	A new warehouse hand starts Monday. The TFN declaration and super choice form aren't signed, there's no login, and nobody ordered the safety boots.
WITH AUTOMATION	Once an offer is accepted, a checklist starts itself. Forms are sent and chased, including the TFN declaration, super choice form and Fair Work information statements. Logins are requested, equipment is ordered and day-one details go out. The manager sees what's still outstanding.
THE WIN	New people start ready to work, and nothing on the legal checklist is missed.
WHAT YOU'LL NEED	A standard starter checklist for each type of role.

TEAM 8 OF 8

Managers & Teams

Clear answers fast, and decisions that turn into action.

SHARE THIS SECTION WITH

Owners, managers and team leaders.

38 Know what needs attention before your first coffee

MORNING BRIEFING

AI reads it for you

Quick win

TODAY	Every morning, a manager asks for yesterday's sales, overdue invoices and orders likely to ship late. The answers arrive in separate spreadsheets.
WITH AUTOMATION	One short email or Teams message arrives each morning: what changed, what's at risk and what to do next, with links straight to the details.
THE WIN	You start the day focused, and nobody spends hours building reports.
WHAT YOU'LL NEED	Agreement on the handful of numbers that matter each morning.

39 Get answers by simply asking

ASK YOUR SYSTEM IN TEAMS

AI reads it for you

Needs some groundwork

TODAY	A manager wants to know, "Where is order SO123?" or needs to move a deal to the next stage. That means clicking through several screens, or asking a colleague.
WITH AUTOMATION	They type the question or the change into Teams, in everyday words. The answer comes back with a link. Changes are only made where that person is allowed to make them.
THE WIN	Answers in seconds, without hunting through screens or interrupting anyone.
WHAT YOU'LL NEED	Each person's access in your system matched to their Teams account.

- ⓘ **Good to know:** We start with questions only. Changes are switched on later, and only for what each person is already allowed to do in your system.

40 Approve requests in one tap

APPROVALS IN TEAMS

No AI needed

Quick win

TODAY	A purchase order or a big discount needs a manager's OK. The manager is out, the request sits waiting, and everyone else waits too.
WITH AUTOMATION	The request appears in Teams with the key details. The manager approves or rejects it in one tap, your system is updated, and the person who asked is told.
THE WIN	Decisions take minutes, not days, and your rules stay in place.
WHAT YOU'LL NEED	Your approval rules written down: who can approve what, and up to how much.

41 Turn meetings and calls into finished work

MEETINGS AND CALLS INTO TASKS

 AI suggests, you approve

 Quick win

TODAY	A meeting ends with five promises, like calling a customer and checking stock. A sales rep finishes six calls and has to type up every one. A week later, half of it is forgotten or never entered.
WITH AUTOMATION	With everyone's permission, the written record of the meeting or call is used to draft actions, owners and due dates, and to update the customer record. After a quick review, they become tasks with reminders.
THE WIN	Promises actually get done, and customer records stay up to date without the typing.
WHAT YOU'LL NEED	Everyone's permission to record, and a CRM or task list to update.

42 Never miss a contract deadline

CONTRACT KEY DATES

 AI reads it for you

 Quick win

TODAY	A software contract renews for another three years because nobody remembered the 90-day notice period. A lease review date passes unnoticed.
WITH AUTOMATION	Your supplier, lease and software contracts are read once. Renewal dates, notice periods and price-review clauses are pulled out and confirmed by you, then you're reminded well before each one.
THE WIN	You decide whether to renew, renegotiate or walk away, instead of the contract deciding for you.
WHAT YOU'LL NEED	Copies of your current supplier, lease and software contracts.

43 Keep your business data clean and trustworthy

SYSTEM HEALTH CHECK

 No AI needed

 Quick win

TODAY	Duplicate customers, products with no cost and missing supplier details quietly make reports wrong and slow everyone down.
WITH AUTOMATION	Your system is checked every week for common data problems. You get a list of what's wrong and who should fix it, and you can see the clean-up progress over time.
THE WIN	Reports you can trust, and every other idea in this playbook works better.
WHAT YOU'LL NEED	Nothing extra. This is a good first step for any business.

Where to start

Pick two or three quick wins that sound like your week. They prove the idea in your business before you spend on anything bigger.

How we build it

1. **Rules first.** If a simple rule or a setting in your system can do the job, we use that. It's cheaper, and it never guesses.
2. **AI where judgement helps.** Reading a messy PDF or an email, or drafting a reply, needs AI. We use it where it helps and where a person can check the result.
3. **People for what matters.** Anything that moves money, changes a price or makes a promise to a customer goes to a person.

Your data

Automation runs inside the systems and accounts you already use, with the same access rules as your staff. Every action is logged. We choose AI services that don't use your data to train their models, and we'll tell you exactly where your data is processed before anything goes live.

Your automation scorecard

Tick every problem you recognise, and jot down roughly how many hours a week each one costs your team. Then email it to avas@workforceagents.io or bring it to a call, and we'll show you what's worth doing first.

Prefer to do it online? Tick them on the web version and send your list in one click:

workforceagents.io/resources/automation-playbook

NO.	USE CASE	TEAM	HOW IT WORKS	EFFORT	HOURS A WEEK
☐ 01	Emailed orders, entered for you	Sales	AI reads it for you	●○○ Quick win	
☐ 02	Same-day quotes that protect your profit	Sales	AI suggests, you approve	●●○ Needs some groundwork	
☐ 03	Every enquiry gets a reply	Sales	No AI needed	●○○ Quick win	
☐ 04	Find money you earned but never billed	Sales	No AI needed	●○○ Quick win	
☐ 05	Notice when a regular customer goes quiet	Sales	AI suggests, you approve	●○○ Quick win	
☐ 06	Every email gets an owner	Customer Service	AI reads it for you	●○○ Quick win	
☐ 07	Answer "Where's my order?" in minutes	Customer Service	AI reads it for you	●○○ Quick win	
☐ 08	Get the full story behind a complaint, fast	Customer Service	AI suggests, you approve	●●○ Needs some groundwork	
☐ 09	Handle returns, and claim the cost back	Customer Service	AI suggests, you approve	●●○ Needs some groundwork	
☐ 10	Give every customer your best expert's answer	Customer Service	AI suggests, you approve	●●○ Needs some groundwork	
☐ 11	Stop paying for goods that never arrived	Finance	No AI needed	●○○ Quick win	
☐ 12	Get paid without the chasing	Finance	AI reads it for you	●○○ Quick win	
☐ 13	Catch fake bank detail emails before you pay	Finance	No AI needed	●○○ Quick win	
☐ 14	See a cash shortfall weeks before it hits	Finance	No AI needed	●●○ Needs some groundwork	

NO.	USE CASE	TEAM	HOW IT WORKS	EFFORT	HOURS A WEEK
☐ 15	Match every customer payment, and check what they held back	Finance	AI suggests, you approve	●●○ Needs some groundwork	
☐ 16	Close the month without the scramble	Finance	No AI needed	●●○ Needs some groundwork	
☐ 17	Check new suppliers before you pay them	Purchasing	No AI needed	●○○ Quick win	
☐ 18	Turn “we need 50” into an order, ready to approve	Purchasing	AI reads it for you	●●○ Needs some groundwork	
☐ 19	Catch late supplier orders, and plan around them	Purchasing	AI reads it for you	●●○ Needs some groundwork	
☐ 20	Know what imported stock really costs you	Purchasing	AI reads it for you	●●○ Needs some groundwork	
☐ 21	Spot supplier price rises before they eat your profit	Purchasing	No AI needed	●○○ Quick win	
☐ 22	Claim every supplier rebate you’ve earned	Purchasing	AI reads it for you	●●○ Needs some groundwork	
☐ 23	Reorder the right amount at the right time	Warehouse	No AI needed	●●○ Needs some groundwork	
☐ 24	Spot orders at risk before it’s time to pack	Warehouse	No AI needed	●○○ Quick win	
☐ 25	Hear about delivery problems before your customer does	Warehouse	No AI needed	●○○ Quick win	
☐ 26	Turn slow or expiring stock back into cash	Warehouse	No AI needed	●○○ Quick win	
☐ 27	Never sell online what you don’t have	Warehouse	No AI needed	●●○ Needs some groundwork	
☐ 28	Promise delivery dates you can actually keep	Manufacturing	No AI needed	●●● Bigger project	
☐ 29	Keep production moving when a part is missing	Manufacturing	AI suggests, you approve	●●● Bigger project	
☐ 30	Stop a bad batch before it reaches more customers	Manufacturing	AI suggests, you approve	●●○ Needs some groundwork	
☐ 31	Find out where a job lost money	Manufacturing	No AI needed	●●○ Needs some groundwork	
☐ 32	Make sure everyone switches to the new design	Manufacturing	No AI needed	●●○ Needs some groundwork	
☐ 33	Catch pay mistakes before the pay run	People & Payroll	No AI needed	●○○ Quick win	
☐ 34	Make sure super lands on time	People & Payroll	No AI needed	●○○ Quick win	
☐ 35	Keep pay rates in step with award changes	People & Payroll	No AI needed	●●○ Needs some groundwork	
☐ 36	Answer staff questions without the HR inbox	People & Payroll	AI reads it for you	●○○ Quick win	
☐ 37	New starters ready on day one	People & Payroll	No AI needed	●○○ Quick win	
☐ 38	Know what needs attention before your first coffee	Managers	AI reads it for you	●○○ Quick win	
☐ 39	Get answers by simply asking	Managers	AI reads it for you	●●○ Needs some groundwork	
☐ 40	Approve requests in one tap	Managers	No AI needed	●○○ Quick win	
☐ 41	Turn meetings and calls into finished work	Managers	AI suggests, you approve	●○○ Quick win	
☐ 42	Never miss a contract deadline	Managers	AI reads it for you	●○○ Quick win	
☐ 43	Keep your business data clean and trustworthy	Managers	No AI needed	●○○ Quick win	

Common questions

Do all of these use AI?

No. About half need no AI at all. Rules and a well-set-up system do the work. We only use AI where it genuinely helps, like reading a messy PDF or drafting a reply.

Will automation replace my team?

That's not the aim. It takes the retyping, checking and chasing off their plate, so they spend their time on customers, suppliers and decisions. People still approve anything that matters.

Do I need Odoo?

No. Many of the examples come from Odoo users, but the ideas apply to any system that holds your orders, stock, suppliers and invoices.

What happens to my data?

Automation runs inside the systems and accounts you already use, with the same access rules as your staff, and every action is logged. Before anything goes live, we'll tell you exactly where your data is processed.

Where should I start?

With two or three quick wins that sound like your week. They prove the idea in your business before you spend on anything bigger.

Is this only for big businesses?

No. It's written for owners and managers of small and medium businesses, including teams without an IT department.

Sources

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11. HWL Ebsworth, Initiating a voluntary product recall · hwlebsworth.com.au

Need help with this in your business?

We help Australian businesses turn AI tools and automation into workflows that actually do the work.

Tell us what's slowing the business down. Thirty minutes. We'll tell you honestly whether we can help — and if we can't, who can.

Book a call: workforceagents.io · avas@workforceagents.io