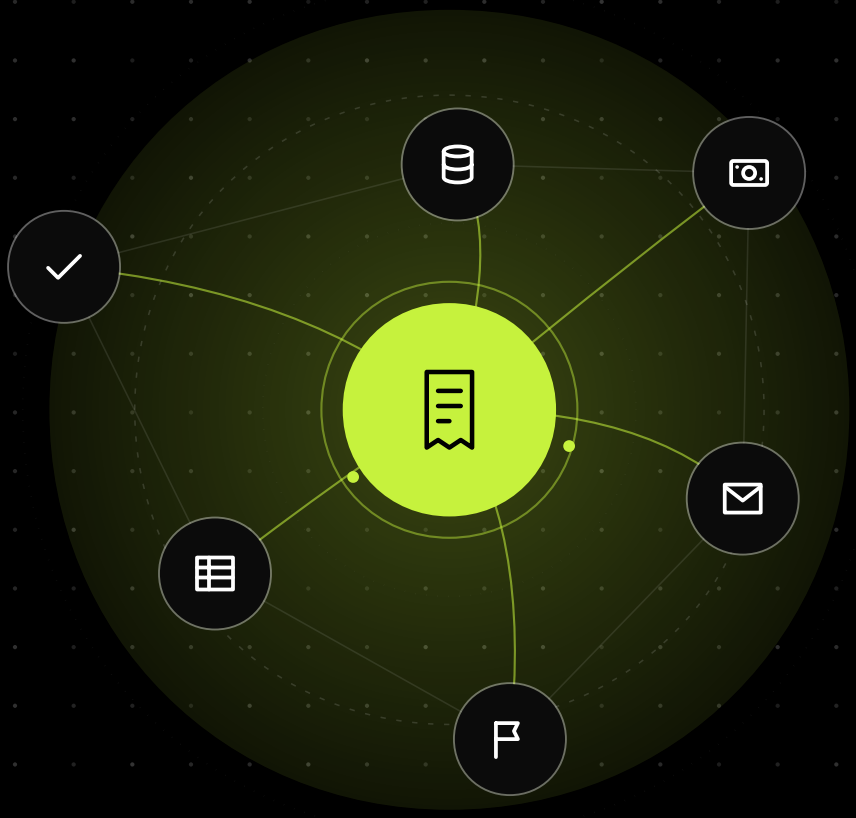


PSC Insurance

95% of invoices processed with no human touch

PSC Insurance Group's accounts payable team went from keying every invoice by hand to an AI pipeline that reads, codes and posts invoices into its accounting system.

Insurance | Accounts payable, invoice processing | Invoice AI | Sage X3 integration

95%
of invoices processed with no human intervention

10x
more invoices processed with no added staff

<5%
of transactions now need staff to step in

AT A GLANCE

COMPANY	SCALE	SYSTEMS	REPORTED
PSC Insurance Group	40+ businesses, 1,000+ team members, six countries	Affinda AI invoice models and Sage X3	Affinda (the vendor) case study, May 13, 2025

01

The challenge

PSC's accounts payable team processes more than 24,000 invoices a year across regions including Australia, New Zealand and the UK, and accounts staff were handling 100% of them.

PSC is a diversified, multinational business offering commercial insurance broking and life insurance, with 40+ trading businesses, over 1,000 team members and 200,000+ clients across six countries.

Invoices arrived by email. Staff mapped each supplier and business entity by hand, coded each line item to general ledger accounts by hand, and keyed the data into Sage X3. The audit trail lived in email chains saved across multiple locations.

24,000+
invoices a year through accounts payable

100%
of invoices handled by accounts staff before

6
countries across the group

BEFORE

- × Every invoice handled by accounts staff
- × Suppliers and entities mapped by hand
- × Line items coded and keyed into Sage X3 by hand
- × Audit trail scattered across email chains

AFTER

- ✓ 95% of invoices processed with no human intervention
- ✓ Duplicates and junk attachments flagged automatically
- ✓ Coding filled in using PSC's own rules
- ✓ Full audit trail and direct posting to Sage X3

02

The solution

PSC worked with Affinda, which built custom AI invoice models for PSC's document types and general ledger structure, with a two-way connection to Sage X3.

Invoices are forwarded by email, screened, read and coded automatically, then reviewed and approved with a full audit trail before the data is pushed into Sage X3.

Staff work from inside Sage X3 or a standalone web interface, and PSC can update its own mapping rules and logic as the business evolves.

HOW IT WORKS

STEP 01

Email intake

Invoices are forwarded to the system by email.

STEP 02

Screen out duplicates and junk

Duplicate invoices and irrelevant attachments are flagged automatically.

STEP 03

Read with PSC's own rules

AI extracts the invoice data and applies PSC-specific mapping rules.

STEP 04

Fill in the coding

Supplier, entity, general ledger account and approver fields are populated automatically.

STEP 05

Review and approve

Invoices are reviewed and approved with a full audit trail.

STEP 06

Post to the accounting system

All invoice data is pushed directly into Sage X3.

BUILT WITH

Affinda AI invoice models | Sage X3 (ERP) | Two-way integration | Email intake | Custom mapping rules | Audit trail

03

The results

Staff moved from data entry to quality assurance and managing outliers, with more time for high-value finance work like end-of-financial-year reporting.

95%

of invoices processed with no human intervention

10x

the invoice volume, with no increase in staffing

<5%

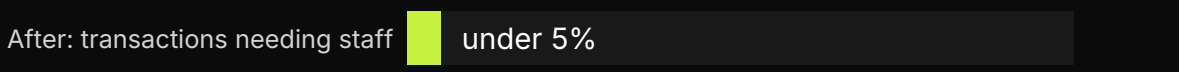
of transactions now need staff to intervene

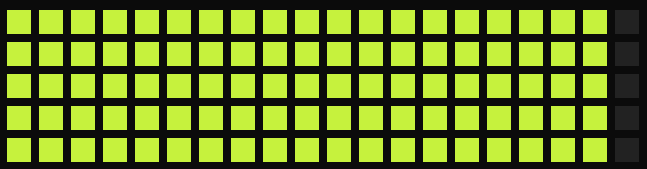
Hours

to train and fully onboard staff; the tool was in use on deployment day

SHARE OF WORK HANDLED BY ACCOUNTS STAFF







95 of every 100

invoices processed with no human intervention

04

What made it work, and what to watch

> "It has allowed us to process 10 times the volume of invoices without the need to increase staffing levels."
>
> Nat Barrs, Chief Technology Officer, PSC Insurance Group

1	**Fit the AI to your documents**	The invoice models were custom-built for PSC's document types and general ledger structure, not used off the shelf.
2	**Keep the rules in your hands**	PSC can update mapping rules and logic itself as the business changes, without waiting on the vendor.
3	**Keep a human checkpoint**	Invoices are still reviewed and approved, now with a full audit trail instead of scattered email chains.
4	**Plug into the system you already use**	A two-way Sage X3 integration meant staff could work inside the tool they knew.
5	**Change the job, not just the tool**	The team now focuses on quality assurance and outliers. The source also reports a significant reduction in errors and reconciliation issues.

IS THIS A FIT FOR YOUR BUSINESS?

- ✓ Do invoices arrive by email in different formats from many suppliers?
- ✓ Does someone on your team key invoice data and code it by hand?
- ✓ Is your audit trail spread across inboxes and folders?
- ✓ Would you like volume to grow without adding bookkeeping staff?

05

How Agent Victoria could do this for you

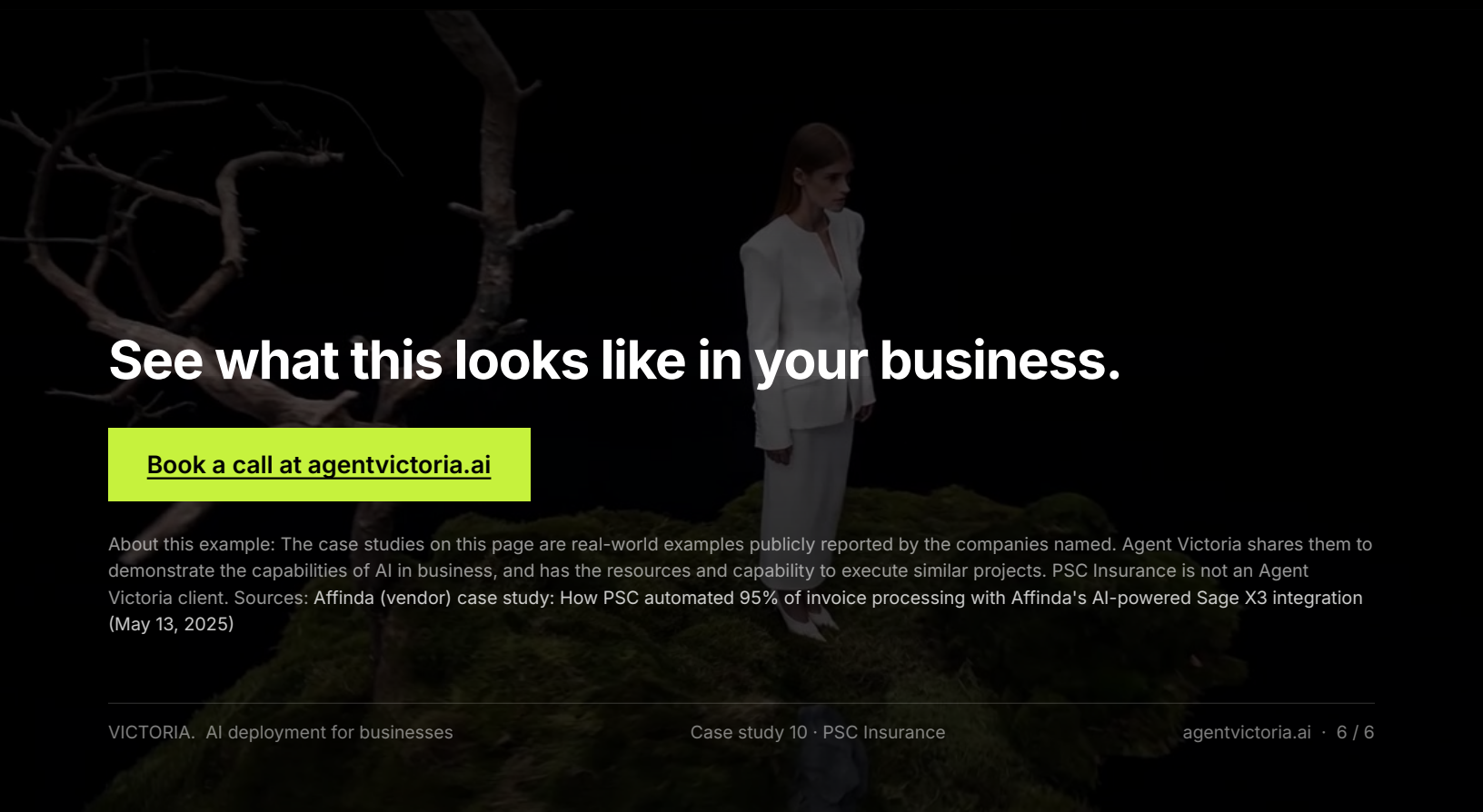
We could build an agent that reads invoices from your inbox, catches duplicates and enters them into your accounting system with a full record of each step. Your bookkeeping keeps up as you grow, without adding staff.

01
Watch your inbox
Invoices land where they already do.

02
Catch duplicates
Repeat invoices and stray attachments are set aside.

03
Code to your books
Fields filled using your own rules and accounts.

04
You approve, it posts
Entered into your accounting system with a full record.



See what this looks like in your business.

Book a call at agentvictoria.ai

About this example: The case studies on this page are real-world examples publicly reported by the companies named. Agent Victoria shares them to demonstrate the capabilities of AI in business, and has the resources and capability to execute similar projects. PSC Insurance is not an Agent Victoria client. Sources: Affinda (vendor) case study: How PSC automated 95% of invoice processing with Affinda's AI-powered Sage X3 integration (May 13, 2025)