
SAMPLE

Claude Workflow Setup

Vendor email triage — sample package

WORKFLOW	Vendor Email Triage
PROMPT VERSION	v1.1
PREPARED BY	Ian Carstairs — iancarstairs.com
ENGAGEMENT	\$750 Claude Workflow Setup (portfolio sample)

SAMPLE — the client, emails, and data are fictional and created for illustration. This is a portfolio piece showing the structure and rigor of a real \$750 Claude Workflow Setup engagement. Names, companies, figures, and scenarios are invented. Nothing here is a testimonial or a measured result.

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Workflow charter

1 · CHARTER

ELEMENT	DEFINITION
Objective	Classify incoming vendor emails (quote / invoice / question / other) and extract key fields, so the Monday sourcing review can be assembled from pre-sorted outputs instead of a raw inbox.
Trigger	Dana exports the prior week's vendor emails to a text file and pastes them into the workflow prompt, one email per block.
Input	Plain-text vendor emails: subject, date header, sender, body. Approximately 25 per week.
Transformation	Each email is classified into exactly one category and its key fields extracted per the output schema, with source quotes for every fact.
Output	A triage table (one row per email) ready for the Monday 9:00 AM review meeting.
User	Dana, operations manager. Process owner.
Business purpose	Reduce Monday triage effort and stop missing time-sensitive items — two were missed last quarter (a quote expiry and an invoice routed to spam).
Human approval	MANDATORY Dana reviews every output row at the Monday 9:00 AM review before anything is acted on, forwarded, or filed. Nothing is sent, signed, approved, paid, or filed by AI.
Success metric	Critical-field accuracy (category + vendor + amount) at or above 95% on the gold test set; zero missed quote expiries or invoices; fewer than 15% of outputs requiring Dana's correction.

EXCLUDED CASES — THE WORKFLOW MUST NOT HANDLE THESE

Emails with attachments that cannot be read as text · Non-English emails · Emails containing prohibited data (employee SSNs, bank account numbers, tenant personal data) — these are quarantined, never processed · Threads longer than five messages (summarization drift) · Vendor disputes or legal correspondence · Any email Dana flags as sensitive. Excluded items go to a manual-review list; the workflow never attempts them.

Client-ready prompt

2 · PROMPT

(illustrative excerpt — structure shown, full text delivered in a real engagement)

The delivered prompt is a versioned, self-contained document (v1.1) that runs in the client's approved Claude workspace. Its full structure:

SECTION	WHAT IT CONTAINS
Role	One line: "You are a careful purchasing assistant triaging vendor emails."
Task	One paragraph defining classify-and-extract for each email block.
<instructions>	Numbered, testable rules (categories, amount cadence, date handling).
<rules>	Client's category definitions, policies, and citation requirements.
<output_format>	Exact field schema with a perfect example — shown below.
<escalation_rule>	The unskippable refusal rule — shown below.
<examples>	Four few-shot examples: a clean quote, an ambiguous email, an incomplete email, and the statement-vs-invoice trap.
<client_input>	The tag where Dana pastes each week's emails.

Excerpt A — output schema (shown in full)

```
CATEGORY: quote | invoice | question | other
VENDOR: [full vendor name as written, never shortened]
AMOUNT: [$X.XX + cadence – e.g. "$4,200/quarter", "$800/mo", "$1,200 one-time"]
EXPIRY: [ISO date, or "none stated"]
SUMMARY: [one line]
ACTION: [forward to Priya | Dana to reply | none]
SOURCE: ["exact quoted span from the email supporting each fact above"]
```

Excerpt B — escalation rule (shown in full)

If the input is ambiguous, incomplete, matches no category, lacks a readable date header, or contains prohibited data, output exactly:

ESCALATE: [specific reason]

Do not guess. Do not pick the closest category. Do not invent a vendor name, amount, or date. An ESCALATE row is a correct row.

Remaining sections (instructions, rules, examples, input tag) follow the same pattern: every rule is written as a testable assertion, every fact requires a source quote, and the few-shot examples deliberately include the hardest cases — including a monthly *statement* that looks like an invoice but must be classified "other."

Input & output templates

3 · TEMPLATES

Input preparation checklist (for Dana, each Monday)

- ☐ Export prior week's vendor emails from purchasing@ inbox as plain text — subject, date header, sender, body per email.
- ☐ Scan each email for prohibited data (SSNs, bank account numbers, tenant personal data). Quarantine any hit — do not paste it into the workflow.
- ☐ Separate out excluded cases: non-English emails, unreadable attachments, dispute/legal correspondence. Add them to the manual-review list.
- ☐ Paste the remaining emails between the <client_input> tags, one email per block, in chronological order.
- ☐ Confirm the date header is present on every email. Missing header → the workflow will escalate that row; note it for manual handling.

Output template (one row per email)

#	CATEGORY	VENDOR	AMOUNT	EXPIRY / DUE	ACTION	DANA'S CHECK
1	quote	Apex HVAC	\$4,200/quarter	2026-07-20	Add to review sheet	☐
2	invoice	Meridian Supply	\$1,240.00	due 2026-07-15	Forward to Priya	☐
3	ESCALATE	missing vendor full name; unclear whether this replaces quote Q-8812 — expiry cannot be determined				Manual triage

Evaluation approach & graded cases

4 · EVALUATION

Before handoff, the prompt is run against a gold test set of 18 cases (10 normal, 3 incomplete, 3 ambiguous, 2 edge) with expected outputs written in advance. Each case is graded:

CORRECT no changes needed **MINOR EDIT** style/wording fix **MAJOR EDIT** wrong field or category
UNSAFE / UNSUPPORTED invented fact or missed escalation — automatic fail for that case

Graded example cases (3 of 18)

Case 7	the statement trap (edge)	CORRECT
INPUT	"Subject: June statement. Your June statement is available — 4 invoices totaling \$5,120. No action needed unless disputing."	
WORKFLOW OUTPUT	CATEGORY: other (statement, not an invoice) SUMMARY: June statement, 4 invoices totaling \$5,120 ACTION: none unless disputing — do NOT treat as invoice SOURCE: "No action needed unless disputing"	
RESULT	The classic false positive (treating a statement as a payable invoice) was avoided.	
Case 12	ambiguous update (ambiguous)	CORRECT
INPUT	"Subject: Updated numbers. Dana — reworked the proposal, new total \$3,950. Let me know. — Marco"	
WORKFLOW OUTPUT	ESCALATE: missing vendor full name; unclear whether this replaces quote Q-8812 or is a new quote; expiry cannot be determined.	
RESULT	Refused to guess, exactly as the escalation rule requires.	
Case 15	quote plus question (edge)	MINOR EDIT
INPUT	"Subject: Quote Q-9901 + quick question. Attached quote for landscaping \$800/mo. Also — are you still at the same billing address? — GreenGrow"	
WORKFLOW OUTPUT	CATEGORY: quote (+ question flagged) VENDOR: GreenGrow AMOUNT: \$800/mo SECONDARY: billing-address question for Dana SOURCE: "Attached quote for landscaping \$800/mo"	

RESULT

Correct classification and extraction; reviewer reworded the secondary-intent note for Dana. One-line prompt tweak logged as v1.1.

Pre-run result (illustrative): 18 cases — 15 Correct, 2 Minor edit, 1 Major edit (a missing cadence on an annual amount; fixed by strengthening the amount rule), 0 Unsafe. The major-edit fix was re-run across all 18 cases before sign-off.

Reviewer checklist & escalation path

5 · REVIEW

Monday 9:00 AM review — Dana checks every row

- ☐ Category is correct — especially "invoice" vs. "other" (statements are not invoices).
- ☐ Vendor name is complete and matches the email — no shortened or invented names.
- ☐ Amount includes cadence (\$/quarter, \$/mo, one-time) — never a bare number.
- ☐ Expiry/due date is an ISO date computed from the email's date header — or the row is escalated.
- ☐ Every fact has a SOURCE quote — rows without source quotes are rejected back to manual triage.
- ☐ ESCALATE rows were handled, not skipped — each has a manual decision recorded.
- ☐ False-negative sweep: scan the raw inbox for any quote expiry or invoice the workflow missed — any miss is logged as a defect.

ESCALATION PATH

Trigger: an ESCALATE row, a reviewer rejection, or a suspected false negative.

Who: Dana triages manually the same day; anything involving money over \$5,000 or a contract term goes to Priya (finance) before the Monday review closes.

Record: every escalation is logged with date, email reference, decision, and who decided. Recurring escalation patterns are reported to Ian for prompt revision under change control.

#	SECTION	WHAT IT COVERS
1	Purpose & permitted use	Triage only. Classification and extraction — never drafting replies, never decisions.
2	Who may use it	Dana and one named backup. Approved workspace: the client's Claude Team workspace only.
3	Input preparation	The Monday checklist from §3, including prohibited-data screening and quarantine.
4	Run steps	Open prompt v1.1 → paste emails in <client_input> → run → copy triage table to the review sheet.
5	Validating output	The reviewer checklist from §5 — every row, every Monday, before the review meeting.
6	Mandatory human approval	No output is acted on, forwarded, or filed until Dana's 9:00 AM review is complete. This step cannot be skipped or delegated to the workflow.
7	Escalation	Triggers, owners, and logging from §5.
8	Known limitations	Summary of §7 — read before first use.
9	Version & change log	v1.1 current. Any prompt edit requires Ian's change-control sign-off and a full 18-case re-run.
10	Data handling	Outputs live in the shared drive. Raw inbox exports deleted after 90 days. Prohibited data never enters the workspace.

- The workflow reads **text only** — scanned PDFs, images, and spreadsheet attachments are excluded and handled manually.
- Date math depends on the email's date header. Emails without one are escalated, not estimated.
- Performance was measured on 18 test cases, not production volume. The 30-day review re-grades 20 live cases against the same rubric.
- Vendor behavior changes (new email formats, new categories) will degrade accuracy silently — the false-negative sweep in the reviewer checklist is the backstop.
- This workflow covers **one** bounded task. Extending it (reply drafting, PO matching, a second inbox) is a new engagement, not a tweak.

CHANGE-CONTROL RULE

Prompt, examples, and SOP share version v1.1. Any edit — however small — requires Ian's sign-off, a version bump, and a full re-run of the 18-case gold set before the new version is used. The 30-day review (20 live cases, same rubric) is scheduled at handoff.

AI-assisted workflow design. Human review required — this workflow never sends, signs, approves, pays, or changes records autonomously.

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