

ACTUAL IMPLEMENTATION / CLEAR SCOPE / RECORDED CHECKS

See the work. Understand the evidence.

Four documented implementations by Manish Dadhwal, founder of Surrey AI Automation. For operations and finance teams considering one report, workflow or permitted data connection.

These cases come from the founder's work in an anonymized enterprise environment. They do not establish paid Surrey AI Automation client engagements, continuing production health or measured savings. Each case retains its recorded date and verification limits.

WORK	RECORDED SCOPE
Reporting controls	Saved calculation correction October 1, 2026
Guarded workflow intake	Historical creation path October 2, 2026; action history rechecked October 6
Document governance	Bounded pilot August 3, 2026
Report readiness	Validated in staging; production not deployed September 29-30, 2026

Use this guide

Start with the problem closest to yours. Review the implementation and its limits, then bring one source example and one expected result to a scoping conversation. The linked web cases contain the full engineering notes and individual acceptance observations.

[Explore all four cases and their original excerpts](#)

CASE 01 / REPORTING CONTROLS

Make the list and the KPI agree.

Saved calculation correction

Recorded checks: October 1, 2026

The business problem

A detail list and its headline KPI could disagree because they used different calculation paths. Mixed units added a second risk: a quantity could look complete even when a reliable conversion factor was missing.

What was implemented**One calculation path**

Connected the list's Actual Input value to the same readiness-gated measure used by the KPI. The detail and headline now used the same definition in the saved correction.

A visible review state

Kept Actual Input blank and surfaced REVIEW when an eligible line had no clear gram conversion. Missing conversion evidence was not replaced with an assumed factor.

Check the full population

Compared the list value with the KPI measure across the recorded order population, then checked selected reader states after saving the report.

Explain the operating rules

Updated the report guidance so the reader could understand eligible input lines, conversion requirements and the reason an order required review.

Recorded acceptance areas

Shared calculation / Population agreement / Unresolved units stay unresolved / Save and read-back

Evidence and verification limits

This documents a saved calculation correction and its October 1 validation snapshot. It does not establish a new ERP posting, end-to-end source freshness, every report or export state, or an error-free production environment. Later report issues remain separate from this correction.

[Read the full dated case online](#)

This is founder enterprise implementation experience; no paid consultancy-client engagement, measured savings or ROI is implied.

ACTUAL POWER BI EXCERPT / CAPTURED OCTOBER 3, 2026

The native interface excerpt.

An original screen excerpt from the published case, preserving the reviewed capture area. Read the caption for its date and scope.

Production Status	Quality Gate
Finished	PASS
Finished	PASS
Finished	PASS
Finished	PASS
Finished	PASS
Finished	FAIL
Finished	FAIL

Actual Power BI status-column excerpt captured October 3, 2026. Company branding, order identifiers and operational quantities are outside the captured area. This image shows the report interface; the October 1 recorded calculation check supports the case. It does not establish current source freshness or every export state.

Read the full dated case for the recorded validation checks and remaining verification limits.

[Read the case and its verification boundary](#)

CASE 02 / GUARDED WORKFLOW INTAKE

From a real request to a verified ticket.

Historical creation path

Recorded checks: October 2, 2026; action history rechecked October 6

The business problem

The decision contract and the worker's creation condition disagreed. A qualifying request could reach the worker while still being prevented from entering the ticket-creation branch.

What was implemented

Make intake reviewable

Used a private SharePoint queue between message intake and processing, with an explicit state for pending work and processing outcomes.

Repair the contract mismatch

Aligned the creation gate with the decision response so qualifying evidence could reach the intended branch.

Retain the safeguards

Preserved duplicate checks, review fallback and create-attempt tracking. Uncertain evidence continued to have a controlled review path.

Verify after creation

Read the created issue back, checked its returned fields and persisted the completed queue outcome. A successful wrapper alone was not the acceptance check.

Recorded acceptance areas

Create the destination issue / Verify the key and destination / Verify the fields / Complete the queue outcome

Evidence and verification limits

This verifies the recorded creation path. It does not prove every request type, historical reconciliation, continuous uptime or a fully autonomous support service. A real message exceeding 20,000 characters still requires its separate end-to-end check. No time saving or ROI was measured.

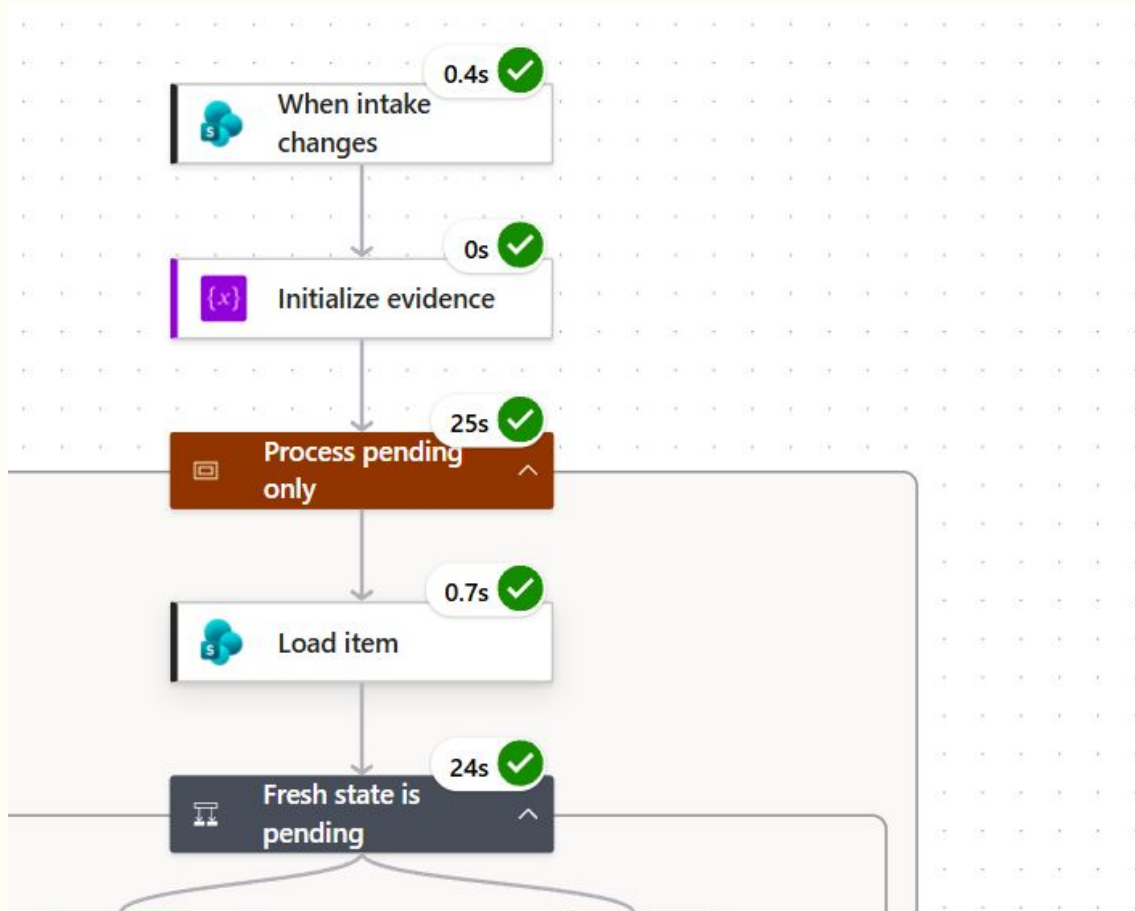
[Read the full dated case online](#)

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ACTUAL POWER AUTOMATE EXCERPT / OCTOBER 2 EXECUTION

The native interface excerpt.

An original screen excerpt from the published case, preserving the reviewed capture area. Read the caption for its date and scope.



Actual Power Automate run excerpt captured October 3, 2026, from the October 2 execution. It shows intake and pending-state controls. Company identifiers, request content and action payloads are outside the captured area. Creation and read-back were checked separately in action-level evidence; they are not visible in this excerpt. Action history was rechecked October 6.

Read the full dated case for the recorded validation checks and remaining verification limits.

[Read the case and its verification boundary](#)

CASE 03 / DOCUMENT GOVERNANCE

Structure the documents. Keep the originals.

Bounded pilot

Recorded checks: August 3, 2026

The business problem

Operational documents needed a clearer future structure and a repeatable governance approach. A broad move before validating ownership, metadata, links and access would have made rollback harder.

What was implemented**Establish the destination**

Created the future-state document libraries covering the agreed operating areas.

Define the pilot metadata

Added the pilot governance fields, including document status, owner, review date, sensitivity and retention category.

Copy a bounded sample

Copied a bounded pilot sample into the target governance library and retained their original source folder and files.

Read the state back

Checked the library structure, metadata columns, pilot folder and retained originals, and confirmed navigation cleanup after a fresh page reload.

Recorded acceptance areas

Destination libraries / Governance fields / Pilot and originals / Navigation persisted

Evidence and verification limits

This was a governance pilot, not a completed organisation-wide migration. Metadata population, business-owner review, wider copying and validation of links, permissions and user access remained next steps. Evidence comes from the saved August 3 implementation and validation log; no public screenshot of those documents is included. A saved implementation log records the structure, metadata, bounded pilot copy and read-back checks. The original documents remain private. Wider migration and metadata population remained future work.

Read the full dated case online

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CASE 04 / REPORT READINESS

Review readiness. Before the rollout.

Validated in staging; production not deployed

Recorded checks: September 29-30, 2026

The business problem

A readiness view needs to show why an order requires review. Forced dropdown selections hid available orders, reset could leave an unintended narrow view, and floating-point residue could produce a false shortage.

What was implemented**Build a reconciled staging model**

Generated the Power BI model and report for Business Central data, then recorded schema, measure and population checks in staging.

Correct selection and reset

Removed forced dropdown selection and checked that reset cleared the operating filters. Corrected the line-ranking context for component detail.

Make comparison precision explicit

Rounded the on-hand comparison so negligible residue did not create a false SHORT verdict, then repeated reconciliation.

Exercise the reader journey

Recorded a rendered staging check of opening state, search, component review, filters, sorting, reset and drill-through/back.

Recorded acceptance areas

Model reconciliation / Filter and reset behavior / Reader decision path / Release status

Evidence and verification limits

The saved September 29-30 implementation log records the build and staging checks. It explicitly says the production report was not deployed. Later layout edits, raw export results, current report health, ongoing refresh behavior and business acceptance have not been independently established by this case. A recorded refresh-skip check contains an unresolved timing inconsistency, so this page makes no accepted skip-path claim. The separate Power Apps application has its own validation issues and is not included in this report's acceptance. The evidence is a dated saved implementation and staging-validation log. Source identifiers, order records, volumes and operational quantities are withheld. No privacy-safe screenshot of this staging report is published. The separate reporting interface excerpt on the Work page is not used as evidence for this build.

[Read the full dated case online](#)

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A PRACTICAL FIRST CONVERSATION

Bring one example. Agree one check.

A useful first scope starts with a business question and a reference result. Keep company data in your permitted systems until access and handling are agreed.

1 / Name the recurring decision

Which report, handoff or repeated request needs attention? Describe the recurring decision and one concrete example.

2 / Identify the source and access owner

Name the current Excel file, Power BI model, Business Central data or permitted workflow source, and who can authorize access.

3 / Provide one reference result

Explain the expected value, state or completed outcome. This gives the first build an acceptance check.

4 / Agree the operating boundary

Separate a pilot or staging build from production rollout. Define refresh, review, exception and handover responsibilities.

5 / Measure before claiming improvement

Record the current task and an agreed baseline. A successful deployment alone does not establish time saved, ROI or new customers.

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