



AI WORKFORCE FOR WHOLESALE DISTRIBUTION

The recurring work your credit and ops teams cannot get out from under.

How a small workforce of AI roles takes on the recurring work in a distribution business, with your team still owning every decision that matters.

Metacto is a Managed AI partner for mid-market companies. We build AI roles around the recurring work your team already does, deploy them in your own environment, and give every role a named owner. Oversight varies by task type, and goes where the work needs it.

DISTRIBUTION AI ROLES

4 REPRESENTATIVE

Order Release Desk AI Role

Case RC-311

\$46,300 · Ships Thu

3 sources cited

awaiting credit

writes back · ERP

PO Promise Chaser AI Role

Chasing 12 PO lines · 4 vendors

ACTIVE

Price Exception Desk AI Role

Reviewing Q-8812 · line 4

BELOW FLOOR

Credit Research AI Role

Matching short-pay · INV 77120

CITED

AT A GLANCE

6

representative
AI roles mapped

45 min

AI Workforce Review

50

open-source
workflow patterns



SEE IT RUN

A \$46,300 held order ready to release, every line cited.

One role, one credit hold, one morning. Five tags mark the standards of safe execution: human oversight, verifiable proof, and automatic record write-back.

ORDER RELEASE DESK AI ROLE • SO 40718

STEP 1: TRIGGER IDENTIFIED

Credit hold • ERP • 10/14 • SO 40718: "Order held. Customer over credit limit; two lines short..."

STEP 2: THE ROLE DRAFTS THE PROPOSAL

RELEASE CASE RC-311 • SO 40718

Credit • payment received 10/13

Stock • 2 lines short, 40 units

Margin • line 4 below floor

Order value

\$7,800 cleared [Cited remittance]

Split ship [Cited PO 55120]

-1.2 pts [Cited quote Q-8812]

\$46,300

STEP 3: CREDIT MANAGER'S EXPLICIT APPROVAL

Approve ✓

awaiting credit review

STEP 4: WRITE-BACK TO YOUR ERP

written back

Released SO 40718 as a split shipment in the order module

EXCEPTION (IF TRIGGERED)

"No payment evidence? The order stays held, and the question goes to your credit team."

every line cited

system of record

human in the loop

ROI you can measure

asks, never guesses

Inside the full blueprint

P.3

How proof gets built on your own work

P.5

21 AI roles, mapped to your business

P.9

Score your AI readiness: 5 factors, 25 points

METHOD

Measured on your workflow, inside your own review queue.

Every role starts in Launch & Prove: a baseline is set before the build, the role runs behind a human review queue with its own approval threshold, and results are measured against that baseline before anything scales.

Baseline

Set before the build

Your numbers

Approval rate

Tracked per role, per week

Measured

Cycle time

Measured against the baseline

Measured



REVIEW QUEUE · ILLUSTRATIVE

ACTIVE REVIEW

→ Held Orders (12)

Release Log

AI ROLES

- Order Release Desk
- PO Promise Chaser
- Price Exception Desk
- Credit Research

Runs this week

SO 40718 · credit hold · \$46,300

Q-8812 line 4 · margin below floor

Release case RC-311 drafted · Awaiting credit approval

Approval rate

Flagged for review

HIGH RISK

MEDIUM

APPROVE

Every number an AI role produces links back to the record it came from, so your reviewers check the work instead of taking it on trust.

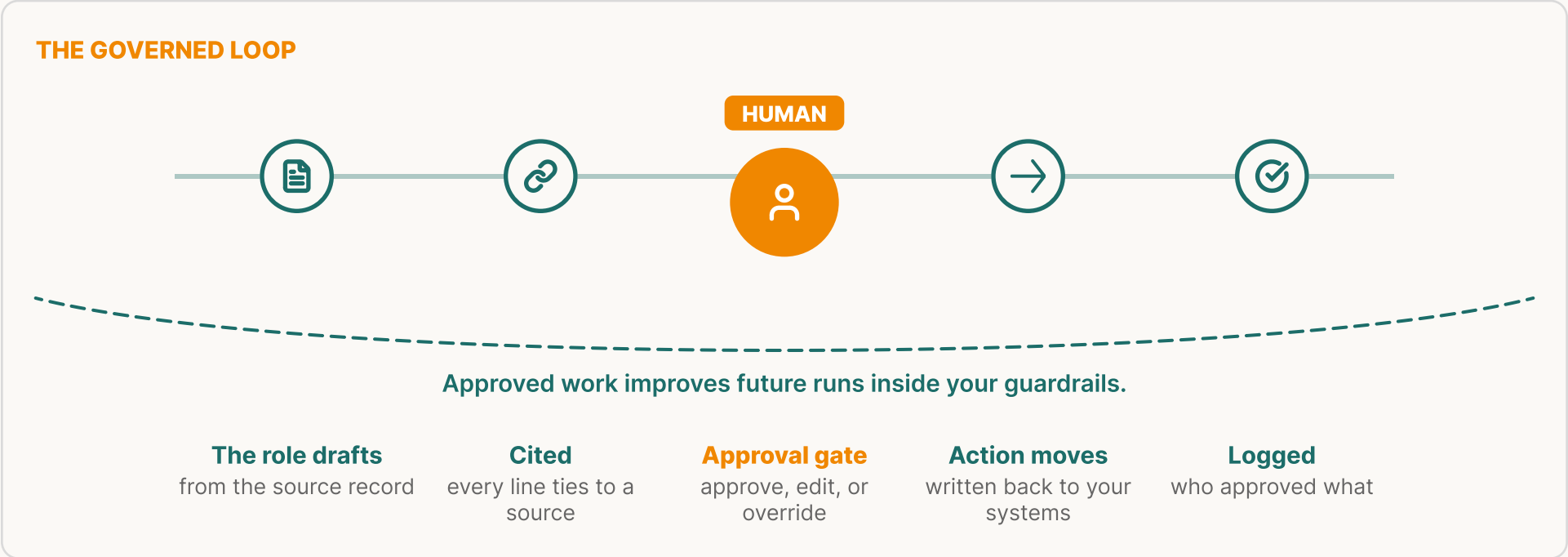
· HOW REVIEW WORKS

No results are claimed on this page, and the queue shown is illustrative. Your baseline, approval rate, and cycle time are measured on your own work during Launch & Prove.



Your team decides. The role prepares the work.

AI roles earn trust while you use them, and approved work improves future runs. Every Metacto AI role runs the same governed loop, ensuring absolute visibility over every source, calculation, and system write-back.



One held order, fully accounted for

- 7:02 AM | Credit hold posted in your ERP
- 7:06 AM | AI role drafts release case RC-311, citations attached
- 9:15 AM | **Credit manager edits & approves (human decision)**
- 9:15 AM | Release written back to your ERP
- 9:16 AM | Immutable audit entry logged to secure database

The controls, as your team sees them

PERMISSIONS
Signed in: Credit Manager · Central region only

CITATION
\$7,800 → AR aging · remittance 10/13

EXCEPTION
▲ Margin below floor · line held for pricing review

AUDIT
J. Smith approved the split ship · 9:15 AM

EARNED AUTONOMY · THE THREE TIERS AND WHO SETS THEM

Drafted · a person approves each item	Approved · acts within set limits	Autonomous · acts, team audits after
1. Which tasks may act unattended?	2. What evidence moves a tier up?	3. Who can move a tier back down?



Your operating model, turned into a governed AI workforce.

Built around the work your business already does, and the people who already own it. Your credit, purchasing, and sales teams keep every decision; specialized AI roles prepare the work, route it to your team, and carry approved records into the next workflow.

- **Credit hold**
SO 40718 · flags the hold the moment it posts
- **Order Release Desk AI Role**
drafts release case RC-311 · credit and stock cited → your credit queue
- **Credit review**
approve, edit, or reject · each action logged → approved
- **PO Promise Chaser**
confirms the PO 55120 date with the supplier → purchasing record
- **Customer Status Builder**
drafts the split-ship update for the customer → customer record

Your team's queue

3 waiting

RC-311 · SO 40718

AWAITING CREDIT

Q-8812 · line 4

CITED · READY

PO 55120

ETA UNCONFIRMED

MORE KINDS OF RECURRING WORK AN AI ROLE CAN COVER:

Order Entry Desk

Quote Builder

Price List Loader

Vendor Confirmation Chaser

Backorder Status

Allocation Prep

Returns (RMA) Desk

Freight Claim Prep

Short-Pay Research

Rebate Tracker

Product Data Enrichment

Substitution Finder

Customer Inquiry Desk

Cycle Count Review

AP Three-Way Match

Roles are designed around your business's work, not selected from a menu. Every AI role protects one of four distribution pillars: Margin (pricing), Fill rate (supply), Cash (credit), or Service (customers).

NEXT How Metacto builds it inside your stack >



AI roles work inside the systems you already run.

Designed around the software you already run: your team on top, governed intelligence in the middle, your systems of record at the base.

1

Human Interface

your team

Credit queue · purchasing queue · approve, edit, or override AI role output before any system write-back occurs.

DRAFTS STAGED FOR REVIEW ▲ / ▼ APPROVALS & EDITS COME BACK

2

Intelligence

specialized AI roles

AI roles draft & prepare · grounded calculations based on your specific SOPs and cited record data.

AI ROLES RUN ON GOVERNED CONTEXT ▲ / ▼ APPROVED WORK COMPOUNDS THE CONTEXT

3

Context

your operating knowledge

Connected records · the logic of your business, roles, permissions, and exception thresholds.

READS THE SOURCE RECORDS ▲ / ▼ WRITES APPROVED RESULTS BACK · AUDIT LOGGED

4

Systems of Record

your software

ERP · WMS · CRM · sales orders, POs, inventory, price lists, credit, and shipment records.

TYPICAL SYSTEMS OF RECORD:

ERP

WMS

CRM

Pricing

Purchasing

Supplier portals

EDI

Transportation

AR & credit

Product data

eCommerce

Data warehouse

OPEN BY DEFAULT

50 open-source workflow patterns published through Vociion, readable before you buy. The platform is open source and runs in your own account.

NEXT

How Metacto builds it and keeps it improving >



How Metacto builds it and keeps it improving.

Metacto maps, designs, builds, and integrates AI roles around the work your business already does, then keeps them accountable, measurable, and improving. Three stages, one accountable path.



01

AI Workforce Review

Where recurring work is costing the most time and margin, and the first one or two roles mapped around it.

45 MINUTES



02

Launch & Prove

We structure your context, build the first roles on your live systems, and prove them behind a human review queue.

SCOPED AT THE REVIEW



03

Managed Operations

Review gates, quality and cost tracking, and monthly value reviews; approved work compounds into better runs.

ONGOING

Standard path: We start with one high-impact piece of work (e.g., order holds or supplier confirmations) to prove the review loop before scaling the workforce.

Stop the service, keep the workforce. The AI roles you deploy stay yours and keep running on their last deployed version. What ends is Metacto keeping them accountable, measured, and improving.

NEXT

[The value model: what funds the build >](#)



Your number gets built before you commit budget.

Order hold opportunity · your inputs		Worked example	
		ILLUSTRATIVE	
Held orders per year, across branches	[_____]	Held orders mid-size distributor	2,400
Avg margin at risk \$ per held order	[_____]	Avg margin at risk \$ per held order	\$350
Recoverable share vs. your baseline	[_____]	Recoverable share protected by faster release	25%
Team hours recovered × loaded labor cost	[_____]	Team hours recovered 900 hrs × \$55 loaded	\$49,500
Estimated annual opportunity:	\$ _____	Your estimated annual opportunity:	≈ \$260K / YR



Score your AI readiness.

Business impact	margin, fill rate, or cash moves on every order	/ 5
Workflow repeatability	recurs on every order	/ 5
Source readiness	records exist in systems	/ 5
Approval clarity	one owner who signs off	/ 5
Implementation path	clean destination system	/ 5

TOTAL SCORE: _____ / 25

21-25: READY TO MAP

Book an AI Workforce Review

15-20: NEEDS DISCOVERY

Worth mapping workflow logic

< 15: PREPARE FIRST

Line up digital records first

Your Distribution AI Workforce Starts Here.

45 minutes. We look at where recurring work is costing the most time and margin, and map the first one or two roles around it. Nothing to prepare.

Book an AI Workforce Review