

Your complete setup and usage guide— how to install the skill, what it produces, and how to run it on the included sample data today. No configuration required to get started.

WHAT'S IN YOUR DOWNLOAD

- **Invoice Validator Skill (.md)** — ready to install directly in Claude with no setup required
- **Skill-building prompt** — use this to build the skill yourself and understand how it works under the hood
- **Example draft invoice** — a ready-to-use sample input so you can test drive the skill immediately
- **Example customer master record** — the second sample input, pre-paired with the invoice above

WHAT THIS SKILL DOES

Cross-references your draft invoice against the customer account record before it goes out the door, classifies every field as: Pass, mismatch, or missing, and delivers a single-glance verdict: approved, to send, or to hold for corrections... ready for billing team action.

What you'll get as output

SECTION 1

Verdict

The binary send-or-hold decision at the top of every report. APPROVED TO SEND when zero critical mismatches found. HOLD FOR CORRECTIONS when even one critical field fails. No softening, no maybes — just the call.

SECTION 2

Hold Conditions

Every critical mismatch shown side-by-side: what the invoice says, what the account record says, what to fix. Numbered, scannable, action-ready. Only appears when the verdict is HOLD — clean reports stay clean.

SECTION 3

Field Validation Table

Every extracted field with its PASS, MISMATCH, or MISSING status — billing address, PO number, payment terms, line item pricing, tax, totals. Non-critical warnings called out separately so nothing buries a real issue.

The skill outputs a clean Markdown report directly in chat — no spreadsheet, no macros, nothing to enable or trust. Drop it into your billing system, paste it into a ticket, or screenshot it for the AR team.

Follow the steps below to install the skill, personalize it for your business, and run your first invoice validation on the included sample data.

How to get it running — two options

Upload the .md file directly

FASTEST

- 1 Open Claude & navigate to **Profile** → **Customize** → **Skills**
- 2 Click **Add Skill** and select the .md file from your download folder
- 3 The skill is now live and ready to use — no additional configuration needed

Build it yourself using the prompt

- 1 Open the included **prompt file** from your download
- 2 Paste it into a new Claude conversation
- 3 Follow the output — Claude walks you through building the skill step by step

Recommended if you want to understand how the validation logic works and customize the skill's behavior for your specific billing rules.

HOW TO CUSTOMIZE WITHOUT BREAKING IT

SAFE TO EDIT

- ✓ Your company name and branding in report headers
- ✓ Field categories specific to your industry (construction, healthcare, professional services)
- ✓ Tolerance rules for what counts as a match (address abbreviations, legal-name shortenings)
- ✓ What's "critical" vs "non-critical" for your billing workflow

DO NOT EDIT

- ✗ The 6-step process sequence — this is what makes the validation reliable
- ✗ The verdict logic — any critical MISMATCH or MISSING auto-triggers HOLD
- ✗ The "never soften a HOLD at user request" rule — keeps the skill honest

HOW TO TEST DRIVE IT TODAY

Both inputs are already in your download as ready-to-use sample files. Open the skill in Claude and upload them when prompted — the skill handles everything from there.

- 1 **Example draft invoice** — upload this first when prompted by the skill
- 2 **Example customer master record** — upload this second to complete the input pair

Once you've seen it run on sample data, swap in your own invoices and account records the exact same way. The skill accepts PDF, Word, Excel, email text, or pasted content — any format your billing system produces.