

CASE STUDY

Claude AI Enablement for Legal Accounting

The Frenkel Lambert AP Invoice Skill: A Technical Case Study

Company Overview

Frenkel Lambert Weisman & Gordon, LLP represents mortgage servicers and lenders in foreclosure, bankruptcy, title-curative, and loss-mitigation matters. Accounting runs on Great Plains, with a migration to QuickBooks underway; invoice volume splits between firm overhead vendors and client-billable work tied to a matter number.

FRENKEL LAMBERT

The Challenge

The firm Finance Manager processed AP invoices by hand every week: reading each PDF, looking up vendor ID and G/L account, building and sorting a two-line journal entry block per invoice, and copying finished rows into pinned Great Plains notepads for import. A missed or misread vendor could post to the wrong G/L account with no warning.

Two constraints shaped the engagement beyond automating that workflow as-is.

Cost & reliability at volume

The firm's principal asked directly what happens to a run of 100 to 200 invoices if the process fails partway through and burns usage without producing output. That question became the design brief for everything the skill does with tokens.

Defensibility for audit

The firm's IT and audit contact at PaperSolve needed a straight answer for the firm's auditors: how is PII being handled when an AI tool touches financial data, and what record exists of what it did. That question is the direct origin of the skill's audit trail.

4

SESSIONS

v7

SKILL VERSION

~80%

TIME REDUCTION

\$20

SUBSCRIPTION/MONTH

What Was Built: The AP Invoice Export Skill

The Skill turns a folder of raw vendor invoices into Great Plains-ready export files, and a run summary.

- **Token-disciplined ingestion:** a bundled Python pre-extractor reads invoice text before Claude opens a file, so cost scales with content read rather than invoice count; large batches process in chunks to avoid it stalling.
- **A deterministic export engine:** a bundled Python engine, not the model, builds the journal entries and resolves vendor ID/G/L by lookup, guaranteeing byte-for-byte consistency run after run.
- **A vendor matching protocol that never guesses:** exact match, a bundled alias map, then a stop-and-ask naming the closest match. Anything unresolved gets a loud "G/L MISSING" flag rather than a guess.
- **Validation and self-reconciliation:** invoice counts and totals are checked across every run, duplicate payments are caught before posting, and near-due invoices are flagged automatically.
- **An audit trail:** every run writes a Run Log of what matched, what didn't, and what was flagged and why, directly answering the firm's audit-defensibility question.
- **Governance:** the skill lives as an organization skill in the firm's Claude Team account so it updates firm-wide.

Performance: Measured Time Savings

Scenario	10 Invoices	100 (extrapolated)	200 (extrapolated)
Manual (measured)	11 min 26 sec	1 hr 54 min	3 hr 49 min
Claude Cowork + Skill v7	2 min 15 sec	22 min 30 sec	45 min
Time Saved	~80%	~80%	~80%

A Second Proof Point: Comparing Legal Descriptions

An issue was raised about verifying the legal description across documents, including scanned, non-searchable PDFs their team couldn't open in Copilot without OCR. We tested live against a real title-policy Schedule A (scanned) and mortgage Schedule A (searchable) for the same property, Claude read both natively and found they were not identical, catching direction and street-name mismatches, and an internal inconsistency within the title policy itself. In a foreclosure practice, a mismatched legal description is exactly the kind of defect that clouds title.

An Unprompted Second Skill: in Session 4, a participant showed the room a work-list prioritization tool she'd built into Claude on her own between sessions, one that flagged why an item hadn't been assigned (this is notably something the firm's existing dashboard doesn't do). What a developer would need real time and budget to build, the Frenkel team delivered in a single morning, clear proof of the caliber of talent already on this team.

The clearest sign of success was how quickly the team began building with Claude on their own, a leading indicator for expansion within the firm, not just proof one workflow worked.