



ORCA paid audit example: mail/PDF triage

Client: Firma Serwisowa Alfa Sp. z o.o. [synthetic]
Process: mail + PDF triage for service requests
Date: 2026-06-05
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Synthetic example: names, numbers and workflow details are illustrative only. No client data is used.

1. Executive decision

Decision
Build prototype

Best first automation
Intake assistant for inbound mail + PDF

Primary risk
Client data in attachments and over-trust in classification

Field	Value
Main reason	The process has repeated inputs, clear outputs and visible manual cost, while high-risk decisions can stay with a human.
Human approval required?	Yes, before client-facing reply and before any financial/contractual decision.
Suggested next step	10-day prototype on anonymized examples and a manual approval queue.

2. Current process map

Step	Owner	Input	System/source	Manual work	Output	Pain
1	Office coordinator	Email with PDF request	Shared mailbox	Opens attachment, checks request type and client name	Informal category	8-12 min per case
2	Service specialist	PDF + previous email thread	Mailbox and spreadsheet	Checks missing fields, copies data to spreadsheet	Row in tracking sheet	Errors and duplicates
3	Team lead	Spreadsheet row	Excel/Teams	Chooses owner and priority	Assigned owner	Delays
4	Coordinator	Manual status	Email	Writes confirmation	Reply email	Inconsistent tone

3. Process fit score

Criterion	Score	Notes
Repeated input	3	180-240 similar requests per month.
Clear expected output	3	Category, priority, missing fields, owner recommendation and draft reply.
Rules can be written down	2	Most cases follow rules, edge cases need escalation list.
Human approval is acceptable	3	Team already approves assignments manually.
Data access is feasible	2	Mailbox access is possible, production connection should wait.
Business pain is visible	3	Manual work creates delay and spreadsheet errors.
Owner is available	3	Coordinator and team lead can test.

Total: 19/21 - strong fit for prototype.

4. Economics estimate

Metric	Estimate	Notes
Cases per month	210	Average from coordinator estimate.
Minutes per case	14	Open PDF, copy fields, assign, draft status.
Monthly manual hours	49 h	$210 * 14 / 60$.
Hourly cost assumption	85 PLN	Conservative operations cost.
Monthly manual cost	4 165 PLN	Excludes rework and customer delay.
Error/rework cost	800-1 500 PLN	Duplicate rows and missing data follow-ups.
Automation savings	45-60%	AI drafts classification and handoff, human approves.

A conservative 45% time reduction gives about 22 hours/month returned to operations before counting fewer errors.

5. Data and RODO risk map

Data category	Present?	Risk	Handling decision
Personal data	Yes	Medium	Use anonymized examples first, minimize stored fields.
Financial/accounting data	Sometimes	Medium	Do not classify financial commitments automatically.
Client confidential data	Yes	Medium	Redact attachments in prototype, store only extracted fields.
Special category data	No in normal flow	High if found	Escalate and exclude from automation.

6. Automation candidates

Candidate	Impact	Effort	Risk	Order	Notes
Email/PDF intake classifier	High	Medium	Medium	1	Largest manual time sink.
Missing-field detector	High	Low	Low	2	Reduces back-and-forth.
Draft client reply	Medium	Low	Medium	3	Approval-only.
Owner recommendation	Medium	Medium	Medium	4	Needs clean routing rules.
Spreadsheet/CRM write-back	High	Medium	High	5	After quality is accepted.

7. Recommended prototype scope

Goal

Create an approval-first queue that converts inbound service emails and PDFs into structured cases with category, missing fields, priority and suggested owner.

Inputs

- 30-50 anonymized emails and PDF structures.
- Category list and priority rules.
- Current owner assignment rules.

Outputs

- Structured case row.
- Draft reply.
- Exception reason if confidence is low.
- Audit trace with source snippets and rules used.

Out of scope

- Production mailbox write access.
- Autonomous client replies.
- Autonomous financial/contractual decisions.

8. Next proposal

Recommended paid step	10-day prototype: ORCA Mail/PDF Intake Queue
Scope	Anonymized data pack review, extraction/classification workflow, approval queue, draft reply generator and accuracy report on 30-50 examples.
Commercial note	5 000-12 000 PLN netto depending on whether the first version uses spreadsheet/n8n handoff or ORCA module UI.