Use case:

Finding documents, mentioned in emails or other documents (PDF included).
Finding information, related to entities mentioned in text (PDF included).

Actors:

CEO
Employee (client)
Employee (supplier)

Scenarios:

1. Acting upon **delivery delay** notification email - finding corresponding Purchase Order and Invoice
2. Acting upon **wrong transaction sum** notification- finding corresponding Invoice, Purchase Order, Bank Account
3. Acting upon **refund inquiry-** finding purchase order and invoice
4. Acting upon a **resignation letter** - finding contract and other related documentation
5. **Organizing your trip** (to a **company event**)
6. **Finding a law** referred to in a contract - link to PDF
7. **Adding new contact** from email

Entities List:

processed:

ORGANIZATION_NAME
INDIVIDUAL
DOCUMENT
      INVOICE_NUMBER
      BILL_OF_LADING_NUMBER
      ORDER_NUMBER
      ROLE_CODE
      INTERNAL_DOCUMENTATION_DocName

Texts: emails

Finance / Administration

1. Delivery delay

Hello Jack,

*I am sorry to inform you that your order will be delivered with a 6 day delay. Your bill of lading number is **890332890**, tracking service is available.*

A remuneration of 7% from the order total has been transferred to the Connor & Mane Inc. bank account.

Paid invoice is # 869943, from 31/12/2018, please make sure you verify the numbers.

Please accept our apologies for the inconvenience.

Kind regards,
Michael Wilson @ OfficeGo LLC

```
>> Actor: employee Jack
>> Actor actions:
→ Jack checks the bill of lading number's information
→ Jack checks "Connor & Mane Inc." to find their bank account
→ Jack checks invoice to see invoice total
→ Jack checks saves the date of paid invoice
→ Jack checks Michael Wilson and all previously related information
```

2. Wrong transaction total

Hello Lora,

We have noticed that the payment of your order # 89976 from 5/26/2019 does not include VAT. Invoice number # 873588.

This mistake is quite common among our clients, we apologize for the inconvenience. We are in the process of implementing a better invoice layout which will not cause such errors.

Please, make sure you transfer the amount remaining as soon as possible to enable dispatchment.

Thank you.
Michael Wilson @ OfficeGo LLC

```
>> Actor: employee Lora
>> Actor actions:
→ Lora checks purchase order to verify content
→ Lora checks invoice to verify sum
→ Lora clicks "OfficeGo LLC" to find their bank account and copy it
to check bank transactions archive and verify sum is not correct
→ Lora creates a new payment order for remaining sum
```

3. Refund inquiry

Hello,

I'm writing to you regarding order # 231442.
It was paid via bank transfer processed on the 2nd of Sept., invoice # 879667 from 31/08/2019.

Included in the invoice and paid, and delivered is one extra poster, size A0.
It is not present in the PO # 231442 from 25/08/2019.
I would like to kindly ask you to refund the extra $84 transferred for this invoice.

You are welcome to collect the poster from our office every work day from 9 to 5. We are located at 23 West Lombard Street, Baltimore, MD, USA.

Thank you.

Lora Jones
Office Assistant at *Langshire House Legacy Fund*

```
>> Actor: unknown employee
>> Actor actions:
→ checks order to verify content
→ checks invoice to compare to order and to verify sum
→ clicks company profile to copy bank account and proceed with refund
transaction
```

HR

4. Resignation letter

Hi Alicia,

I would like to inform you personally that I am going to start a new job in two months.

I am thankful to Norsk Ltd. for the experience, and I am particularly thankful to you for having been so supportive and such a great leader.

However, I have found a company which better suits my career goals.

Hi Rick,
My contract is number 8796, my role code is 2443. My contract is set with a one month notice, so my last day will be 07/25/2019.

Please find attached my official resignation letter.

Kind regards,
Lynn

```
>> Actor: employee Rick
>> Actor actions:

→ Rick clicks the contract number to read the contract and
verify notice duration

→ Rick clicks role code to check procedure specifics
```

5. Company event

Dear all,

I am glad to inform you that the yearly company event will be taking place at the Stanford Cottage Resort, November 6th to 8th, Friday to Sunday.

Please, make sure you confirm your attendance on [SOFTWARE] no later than Oct the 15th.
Please, purchase your tickets via FLICKS.

Closest airports to the event venue are Gultch (34 miles) and Gratton (39 miles).
We encourage you to share-rent vehicles for the airport-to-venue drive.
We are expecting to have at least 3 people per car.

Enter your name at the corresponding date/hour slot in the Timetable sheet
TIMETABLE_STANFORD EVENT and check who else arrives at that time, so you can
coordinate co-renting vehicles.

Looking forward to seeing you all at the event.
I hope we will have a memorable celebration!

Kind Regards,
Maya

Maya Mugler
Head of HR @ Milton Highlands Fund

```
>> Actor: employee
>> Actor actions:
→ Employee checks event location without searching
→ Employee blocks event dates in his agenda without opening new tabs
→ Employee navigates directly to buy tickets
→ Employee logs in her arrival time and location into designated
document
→ Employee sees who else will be there at that time- their names are
highlighted
→ Employee contacts colleagues directly to plan renting a car
together
```

Legal Dept.

6. ПРОТОКОЛ- DHI Cluster - link to PDF

```
>> Actor actions:
```

7.Contact details

Hi Kate,

I am now sending you the details of the company I told you about at the Gates event last week in relation to the INGRID G. case.

It's Connor & Mane Inc., contact Gary Clover, head of legal department.
*I'm sure he will give some valuable insight on the strategy since he has a long list of wins in cases which involved **aiding and abetting** under his belt.*
Moreover, at Connor & Mane Inc they had a very similar case just recently.

I hope this proves to be a good recommendation after you do your research.

Keep me posted.

Sigrid

```
>> Actor: employee Kate
>> Actor actions:
→ Kate checks Gates event info to remember conversation
→ Kate checks "Connor & Mane Inc."
→ Kate saves the contact of Gary Clover with all related information
```