

Operations Connector: Customer PDFs to TMS-Ready Excel

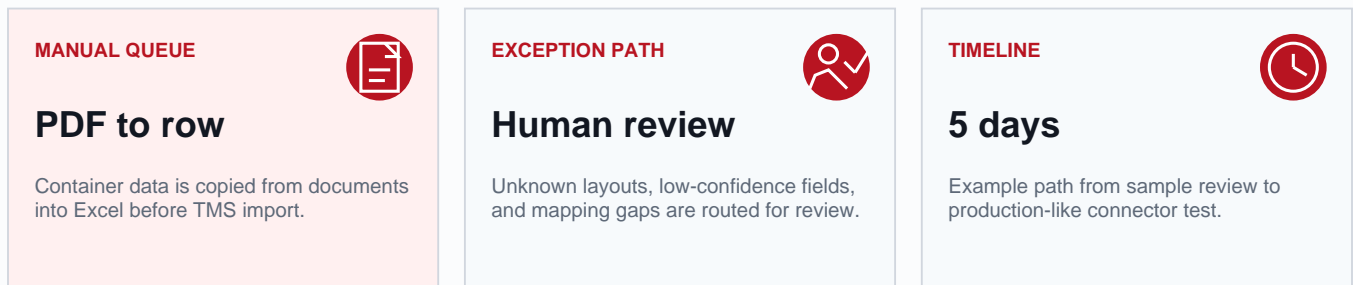
How Cloud28.ai adds agents to an operations workflow so incoming customer PDFs can be extracted, checked, enriched, turned into Excel rows, routed for exception review, and prepared for transport-management-system import.

CLIENT PROFILE	Logistics or transportation operation receiving customer order PDFs by email.
WORKFLOW	Shared mailbox monitoring, PDF intake, order extraction, container rows, port-code enrichment, Excel generation, folder delivery, and exception routing.
SCALE EXAMPLE	10+ orders per day, with customer PDFs ranging from single-container orders to large multi-container files.
CLOUD28.AI ROLE	Add agentic extraction, validation, enrichment, and exception-review support around the existing operations team.
TIMELINE EXAMPLE	Five-day path from kickoff and sample review to production-like test.

01. Why This Operation Needed Cloud28.ai

Customer PDFs contain the operating instructions that move containers from ports to warehouses, rail yards, or other destinations. The problem is that the information arrives as documents, while the downstream process needs structured rows in an Excel template.

When people open each PDF, copy container-level details, look up ports, and paste rows into Excel, the operation pays for delay, rework, and inconsistent handoffs. Cloud28.ai adds agents to this workflow so routine extraction and validation can happen continuously while exceptions still go to humans.



02. Current State

Step	Manual pattern	Operational risk
Email intake	Orders arrive as PDF attachments in a shared mailbox.	Urgent files wait until someone sees and opens them.
PDF reading	A user reads the order and identifies customer, container, port, rail, and destination details.	Important fields can be missed or interpreted inconsistently.
Excel row creation	Each container is copied into the required Excel template.	Large PDFs create repetitive work and copy/paste errors.
Port lookup	Users look up or remember port codes and mappings.	Unconfirmed mappings create downstream corrections.
Exception handling	Unclear layouts are handled ad hoc.	New customer formats can silently produce bad output if not caught.

03. Cloud28.ai Agentic Connector

The connector treats the inbox, PDF, extraction rules, port mapping, Excel template, folder path, and exception process as one operating workflow. The value is not only parsing text; it is getting a checked file to the right destination with a clear route for anything uncertain.

Agentic role	What it does	Human control
Inbox agent	Watches the agreed mailbox and routes new PDFs into the workflow.	Operations defines mailbox, labels, and priority rules.
Extraction agent	Converts customer PDFs into order and container-level fields.	Low-confidence fields are flagged instead of silently accepted.
Mapping agent	Enriches rows with port codes and stored reference mappings.	Unconfirmed mappings route to review and become reusable after approval.
Excel agent	Creates the agreed Excel format and delivery file.	Operations validates sample outputs before production use.
Exception agent	Sends unknown layouts or missing required fields to the team.	Humans decide how to handle new formats and edge cases.

04. Five-Day Delivery Path

Day	Focus	Acceptance signal
1	Kickoff, mailbox rules, target Excel template, sample PDFs, and first extraction path.	A sample PDF becomes structured rows.

Day	Focus	Acceptance signal
2	Container-level parsing, required-field checks, and port-code mapping table.	Common fields are extracted and mapping gaps are visible.
3	Excel generation, folder delivery, and exception notifications.	The workflow produces a file and routes exceptions.
4	UAT against representative customer PDFs, including multi-container examples.	Supported PDFs meet the required output format.
5	Production-like test, handover notes, runbook, and improvement backlog.	Team can operate, review exceptions, and add new formats.

05. Measures to Track

Measure	Baseline	Target signal
Manual effort	Minutes spent per container copied into Excel.	Routine supported formats require little or no manual retyping.
Cycle time	Time from email receipt to usable Excel file.	Supported PDFs move quickly unless an exception requires review.
Error and rework	Wrong container, port, customer, rail, warehouse, or missing-field corrections.	Structured validation catches missing and low-confidence fields.
Mapping reuse	Port codes and customer-specific mappings depend on memory.	Approved mappings are stored and reused.
Unknown layouts	New customer PDFs are handled ad hoc.	Unknown layouts are caught and added to the improvement backlog.

CONTROL PRINCIPLE

Agentic processing should not hide uncertainty. If a PDF layout is unknown, a required field is missing, or a port mapping is not trusted, the connector should stop that file for review and make the exception visible.