

Automation · Service guide

Document Data Extraction

The details you need, pulled from your documents.

The fields you care about are taken from PDFs, forms and supplier invoices and placed into a spreadsheet or your CRM. Anything unclear is flagged for a person to check.

Message only

How it works	Works in the background
Best for	Property Management
You stay in control	You choose which fields are captured
First step	A short call with no obligation

How this helps

What it means for your business

Someone is still copying details from PDFs into a spreadsheet.

Repetitive reading, sorting and writing is prepared for you, so your team starts from a draft instead of a blank page. You check the work before it is used.

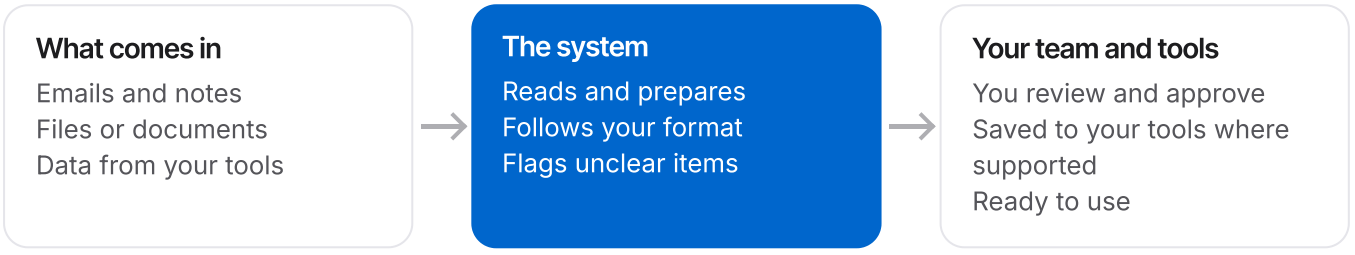
What you get

- Less typing for your team
- Fewer copying mistakes
- Information ready to search and use
- Unclear documents flagged, not guessed

What changes day to day

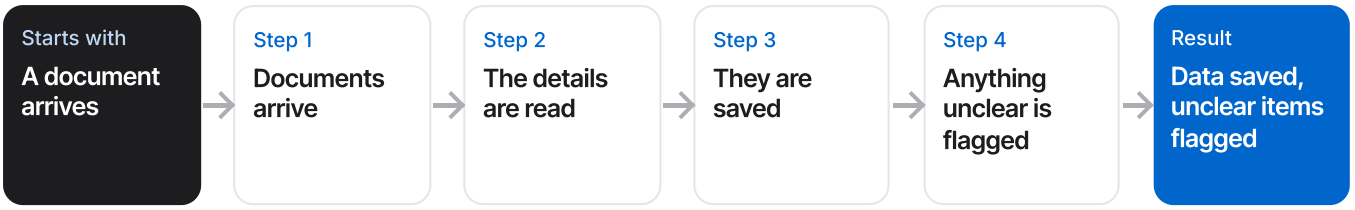
	Common today	With this service
Starting point	A blank page	A prepared draft
Format	Varies by person	Follows the format you set
Unclear items	Easy to miss	Flagged for a person to check
Your time	Spent on repetitive work	Spent on review and decisions
Final say	Your team	Still your team

How it fits with your business



How it works

From start to finish



Step 1

Documents arrive

By email, upload or a shared folder.

Step 2

The details are read

The fields you chose, from each document.

Step 3

They are saved

In your spreadsheet or CRM.

Step 4

Anything unclear is flagged

For a person to check.

Example · Work scene

A supplier sends an invoice as a PDF. The details are read automatically.

Works in the background

What happens next

The fields land in your spreadsheet or CRM, and anything uncertain is flagged.

Supplier invoice processed

Supplier	Westside Supply Co.
Invoice number	INV-20931
Date	October 14
Total	$2,416.80
Status	Added to your spreadsheet

How easy it is

We do the heavy lifting

Most of the work happens on our side. You make the decisions, and we tell you exactly what we need.

What we handle

- Agree the format with you
- Connect your tools where supported
- Set the rules and the review step
- Test it on real examples
- Adjust the results after launch

What you do

- Share your rules and examples
- Approve the format
- Review the first results
- Tell us what to change

Service levels

Start simple, go further when you are ready

Level 1

Draft mode

We prepare the work and you approve it before it is used.

Level 2

Connected

Runs with your tools where supported, on the schedule you set.

Level 3

Advanced

More rules, several workflows working together, and reporting.

The right level is confirmed during discovery, based on your business and the tools you use.

What we need from you

- Examples of how the work is done today
- Access to the tools it needs to work with
- The format you want the result in
- Who on your team approves it

How we get started

1. A short call about your business
2. A clear plan and scope
3. Setup and testing with you
4. Go live with your approval

Why Calvyrn

Why businesses choose to work with us

Built for your business
Your rules, your wording and your tools. Not a one-size template.

You approve first
Nothing goes live until you have seen it and said yes.

Start small
Begin with one service or one first version, then add more if it helps.

One team
AI systems, automations, websites and web applications in one place.

Plain language
You always know what is being built, why, and what comes next.

Honest limits
We tell you what a system cannot do and where a person should stay involved.

You stay in control

- You choose which fields are captured
- Results it is unsure about are flagged for review
- Original documents are kept as they are

Questions you may have

Does it phone anyone?
No. This service works in writing and makes no phone calls.

How long does it take to set up?
Most automations are live within one to two weeks of receiving what we need from you.

Do I need to change the tools I use?
Usually not. We work with the tools you already have wherever possible, and confirm this on our first call.

What if I want to stop?
Plans are month to month. You can pause or stop any automation.

Important notes

- Examples in this guide use fictional businesses, names and details.
- Results depend on your business, tools, customers and how the service is set up. We do not guarantee revenue, bookings or search rankings.
- AI can make mistakes. That is why approvals, clear limits and human hand-off are part of the setup.
- Features depend on your plan and on the tools you use. The final scope is confirmed during discovery and in your proposal.
- This guide is not legal, medical, tax or financial advice.

See how it would work for you
Tell us about your business. There is no obligation.

calvyrn.com/contact.html
info@calvyrn.com