



Intelligent Automation Helps a Spirits Company Parse Emails and Move Info to a Database

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WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/lowcode solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment”

WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience



THE CLIENT

The client is a premium spirits company based in San Diego, California. With a portfolio that includes renowned Vodka and Tequila beverages, they operate across 75+ countries. Their mission is to build a globally compelling and consumer-obsessed portfolio of beverage brands. Known for their commitment to quality and innovation, they bring the same pride and attention to every partnership and process. This mindset drives their reputation as a trusted name in the global spirits industry.



CHALLENGES

As a leading brand with a diverse product catalog, the client collaborates with several vendors and distributors. This means constant coordination across the supply chain, sales, compliance, and operations – all of which rely heavily on email communication.

However, this diversity also created a problem: a high volume of transactional and operational emails with attachments made it harder to manage manually every day. Here is what it looked like:

- Filtering the Email for Relevance: Teams had to glance and read through each email to decide if it was relevant. They checked the subject, who sent it, and from where, taking up the majority of their time.
- Extracting Information from Attachments: Even after identifying the relevant emails, the documents attached, like invoices, updates, and reports, came in different formats (PDFs, Excels, and CSVs). Someone had to open each file and pull out the needed info manually.
- Pushing the Data into System: Upon pulling out the relevant information, teams manually entered it into a database. This not only slowed down processes but also led to errors.



- **Tracking Delays in Data Updates:** There was no system to alert the team if data was not updated promptly into their cloud-based data warehouse. This meant delays often went unnoticed until someone spotted the issue.



SOLUTION

To replace manual email processing, we implemented an automated workflow using Microsoft Power Automate, with support from AI Builder as follows:

- **Smart Email Filtering:** Instead of checking every email by hand, a Power Automate flow now watches a specific inbox and filters emails based on Subject, Sender, and Domain. AI Builder adds flexibility by noticing keyword patterns, even if the subject lines vary, removing the need for someone to sort through emails manually.
- **Automated Reading of Attached Documents:** Once a relevant email is found, the flow pulls into the attached files. Depending on the format, these files are automatically read using AI Builder, saving time from opening each file and manually extracting data.
- **Direct Data Entry into Database:** The extracted information goes directly into the database through built-in connectors. This cuts out manual data entry and ensures the data is ready for use as soon as it arrives.
- **Automatic Alerts for Delays and Escalations:** The workflow sends an approval alert if the data doesn't update in their cloud-based data warehouse within a set time. This way, the respective people are notified and can step in if needed, keeping things on track and avoiding delays.



SOLUTION BENEFITS

The automation process solved the client's earlier bottlenecks and set the foundation for a more scalable and responsive operation with the following benefits:

- **Improved Data Accuracy:** Automated email extraction and direct input into the database reduced the risk of human errors, ensuring cleaner, more reliable data.
- **Faster Decision-Making:** With real-time data updates flowing into their cloud-based data warehouse, teams had quicker access to the information they needed to act.
- **Better Visibility and Control:** The approval alerts helped flag delays early, giving stakeholders visibility and a chance to intervene before issues escalated.
- **Easy to Scale and Adjust:** The setup can handle new email formats, rules, and document types with minimal effort, making it flexible for future needs.
- **Freed-Up Team's Bandwidth:** The automation eliminated routine work, giving back 100+ monthly hours (approx.) that teams can now use to focus on operations and decision-making.



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Conclusion:

What was once a slow, manual, and error-prone email process is now a fully automated, intelligent workflow. By combining Power Automate and AI Builder, they now have a smooth email parsing setup that supports day-to-day operations and is ready to grow with future needs. This success reflects how UB Technology Innovations, Inc. helps beverage and spirits companies simplify operational workflows and build reliable, automation-driven systems that keep pace with business demands.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions Partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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