

UBTI Helped a Client Streamline Overdue Invoices & Reminders Using Automation



UBTI Helped a Client Streamline Overdue Invoices and Reminders Using Automation

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”



THE CLIENT

The client is a full-service food and beverage provider offering breakroom solutions to businesses across sectors. Their services include vending machines, micro markets, office coffee setups, water systems, ice machine rentals, and school snack deliveries. They cater to a wide range of industries, including hospitals, schools, warehouses, offices, and public service centers, making them a trusted partner for everyday refreshment needs.



CHALLENGES

Within the F&B vending operations business, timely payment tracking plays a critical role in customer accountability and regional operations. When payments are delayed, the back-and-forth follow-ups, invoice adjustments, and internal escalations can take up significant bandwidth. In the client's case, these operations lacked the structure and technology to keep up with scale leading to:

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

- **Manual Follow-Ups for Due Payments:** The client's staff had to manually log into their internal app, check overdue invoices, and track payment timelines. This delayed the entire fee follow-up process and made it harder to process large volumes of invoices accurately and on time.
- **Error-Prone Review and Validation:** Verifying due amounts and linking them to original invoices often led to mismatches in fee calculation.
- **Disjointed Communication Across Teams:** Different teams had to manually decide when to email customers versus escalate internally, leading to inconsistent follow-ups.

WHAT WE DO



www.ubtiinc.com



info@ubtiinc.com



+1 (714) 912-1600





SOLUTION

- To bring structure and consistency to the client's late fee follow-up process, UBTI implemented a fully automated email workflow developed using Microsoft Power Automate:
- Automated Delay Tracking: The bot runs a daily scan of invoice data from the client's internal system and determines their payment status based on the invoice date.
- Timeline-Based Reminder Logic: If payment is not received, the system applies an overdue charge and generates a revised invoice on predefined dates (10th or 15th day), based on business rules.
- Internal Alerts for Early and Final Follow-Ups: For the 5th and 25th day delays, emails are sent only to the internal team with regional managers in CC, allowing them to personally handle high-value or sensitive client accounts.
- Final Consolidated Package for 25th Day: On the 25th day, the bot generates a single email with 3 attachments:
 1. The original invoice ZIP file
 2. The late fee invoice ZIP file
 3. A summary Excel list of all unpaid customers
- The system emails these files to the regional manager for further handling.
- Continuous Sync for Long-Term Tracking: From the 25th day onward, the system continues to monitor unpaid invoices on a recurring basis until they are cleared.





OUTCOME

The automation solution delivered key process improvements that made the late fee tracking system easier and more reliable for the client:

- Late fee applied regardless of original invoice date: Overdue charges are applied consistently based on delay duration, regardless of when the invoice was originally created.
- Streamlined communication with the right stakeholders: Emails are triggered by the delay stage (going either to customers or regional managers), ensuring clear ownership of action.
- Prevents missed invoices during high volume days: Since the bot runs daily and scans all records, there is no risk of skipping any customer even during peak billing periods.
- Creates a reliable financial audit trail: All invoices and summaries are stored and shared in a consistent format (PDFs, ZIPs, Excel), making audits and reconciliation easier.
- Time freed up for higher-value tasks: By removing the need for daily manual tracking, email drafting, and invoice generation, our automated solution saves around 4 hours per day, translating to over 80 hours per month and 600+ hours (approx.) annually.
- Faster customer response and higher collections: With reminders sent at defined intervals, customers responded earlier and cleared dues more reliably, helping improve collection rates.

Conclusion:

The client was struggling with a high-volume invoice follow-up process that relied heavily on manual tracking, making it difficult to maintain accuracy and consistency at scale. Over time, this not only slowed down internal operations but also led to delayed customer responses and missed opportunities for timely collections. To address this, UBTI implemented a rule-based automation workflow, with timeline-driven reminder logic and automated overdue calculations to bring structure to the entire process. As a result, invoice follow-ups became consistent, timely, and reliable, allowing teams to focus on more critical tasks while improving overall collection outcomes. UB Technology Innovations, Inc. continues to support food and beverage service providers in managing billing and collections efficiently, so they can stay focused on serving their customers without disruption.



www.ubtiinc.com



info@ubtiinc.com



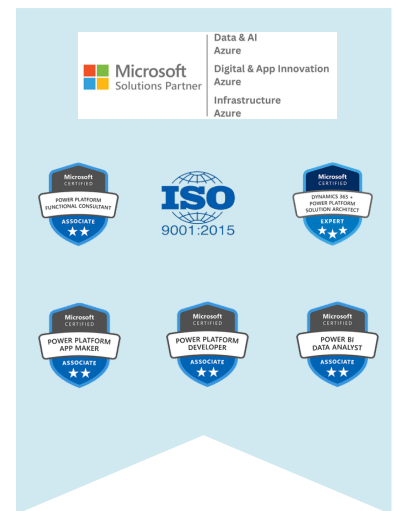
+1 (714) 912-1600





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.



UB Technology Innovations, Inc.
2401 E Katella Ave, Suite 450
Anaheim, CA 92806



www.ubtiinc.com



[company/ubti](https://www.linkedin.com/company/ubti)



info@ubtiinc.com



+1 (714) 912-1600



Connect us

