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AUTOMATING EMAIL DISTRIBUTION WITH RPA

Robotic Process Automation has been digitizing processes around the world. With a remarkable growth rate, many organizations already use the technology to achieve excellent efficiency results.

Sector:
Finance

Business Unit:
DevOps & Automation

Solution:
Robotic Process Automation

3
Weeks project

2
Consultants

350
emails/day

11h
Day operating system

THE CHALLENGE

Our client felt the need to automate the correct forwarding of email communications from all their clients to the delegated manager in charge.
The manual handling of the emails was a routine and time-consuming task and the main challenge was to design a process to gather the relevant information in a more efficient way.

GOALS

With this project, the client sought to:

> Automate the forwarding of emails depending on the contract holder

> Unify the information related to specific clients in a customer manager email box

> Have a global view of each client and identify cases where there is a lack of relevant information to act

> Improve internal processes, increasing efficiency, and productivity, with less wasted time

SOLUTION

The solution is divided into the following steps:

› The robot reads the emails in the inbox.
› For each email, the robot searches for the contract numbers in the subject or email's body text.
› If no contract number is found, the robot looks for a VAT or plate number. The TIN or license plate number found is used to search for any contract associated with an AS400 terminal application.
› Once a contract number is found, a search is performed in the Debt Manager application to identify the manager in charge of the contract.
› The manager's name is located through an Excel file, which associates the name with the email address.
› Finally, the email is forwarded to the manager in question.
› If no contract number, VAT, or license plate number is found in the email, an automatic reply email is sent to the customer requesting more information.
› On the other hand, if no manager associated with the contract is found, the emails are forwarded equally to the managers available at the time.
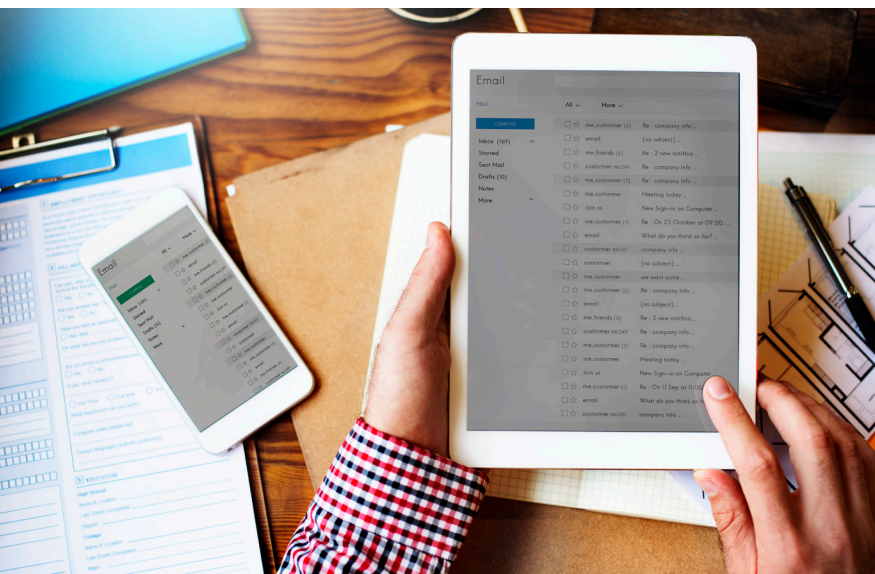
THE RESULT

The Robotic Process Automation project had the following results:

› Emails are read and distributed every working day from 09:00 to 20:00.
› An average of 350 emails are distributed per business day.

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Noesis is an international tech consulting company offering services and solutions to support clients in their business and digital transformation. Noesis solutions focus on infrastructures, software, quality, and people. The organization is based on highly specialized talents, operating in nine business units and six countries: Portugal, Spain, the Netherlands, Brazil, Ireland, and The USA. Since 2020, Noesis has joined Altia, listed on The Alternative Equity Market, with over 2000 employees, 3 Datacenters, and 20 offices.

UiPath

Robotic process automation (RPA) is a software technology that makes it easy to build, deploy, and manage software robots that emulate humans' actions interacting with digital systems and software. For the third year in a row, in 2021, Gartner recognized UiPath as a leader in the magic quadrant in the RPA area.