Report

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Tool Used: Zapier + AI (ChatGPT)
Platform: No-code/Low-code automation

Business Context
Samarth Eldercare receives frequent partnerships proposals via email. Manual screening takes time . The goal is to automate the first level screening and maintain structured partner data.

Workflow Overview
The AI agent reads emails from "partnerships inquiries" Gmail Label ,extracts key details using Chat GPT, validate completeness, update Google sheet , and reply accordingly to each sender depending upon completeness.

Introduction
Samarth Eldercare receives multiple partnership proposals from physiotherapists, diagnostics providers, meal service companies, and similar partners. These emails often contain inconsistent formats, and manually reviewing them takes time.
This project demonstrates an AI-powered automation workflow that reads incoming partnership inquiry emails, extracts key information, checks for completeness, and responds automatically. The solution requires no coding, uses low-code tools, and fully automates the initial screening process**.**

Tools Used
Zapier: Main workflow builder
Email Parser by Zapier: Extract fields from raw email text
AI Model (ChatGPT API via Webhook): Clean, structure, and validate extracted data
Google Sheets: Store structured inquiry records
Gmail: Send automated acknowledgment or request for missing info
Google Docs: Maintain a centralized log of all submissions

Business Workflow Requirements
The agent needed to:
1. Read incoming emails from a dedicated Gmail label (e.g. *Partnership Inquiries*).
2. Extract four important details:
   Company Name
   Service Offered
   City
   Contact Person
3. If **all fields are provided**, add the details to the Google Sheet.
4. If **any detail is missing**, identify which fields are incomplete.
5. Send an automatic email reply:
   Acknowledgment message if all details are present
   Request for missing information otherwise
6. Log every submission in a Google Doc for record-keeping.
The final workflow satisfies all these requirements.

4. Workflow Design Overview
Step 1 — Read Incoming Email (Email Parser)
Emails sent to the designated parser inbox are automatically captured.
The parser extracts the four fields using a custom template.
This ensures consistent field detection even when email formats vary.
Step 2 — AI Processing (Webhook + ChatGPT)
The parsed text is sent to an AI model.
The model:
* Cleans the extracted fields

- Normalizes text
- Detects missing fields
- Returns structured JSON output

This makes the data reliable for the next steps.

Step 3 — Path Conditions (All Info vs Missing Info)
Zapier Paths split the flow into two branches:
- **All Info Present**
- **Missing Info**

This allows automated decision-making.

Step 4 — Google Sheets Record Creation (Complete Info Path)
If all details are present, the workflow creates a new row in the **Partnership Inquiries Sheet**.
This builds a structured database of partner proposals.

Step 5 — Gmail Auto-Reply
Each email sender receives a tailored automated response:
- **If all details are present:**
  A polite acknowledgment that the proposal has been received and will be reviewed.
- **If details are missing:**
  A professional request asking specifically for the missing fields.

Step 6 — Google Docs Logging
Each inquiry—complete or incomplete—is appended to a central Google Doc.
This creates a chronological text log useful for internal reference.

Test Demonstration
To test the agent, a sample partnership email was sent containing:
Company Name, Service, City, and Contact Person.
The automation performed perfectly:
- The parser extracted all fields
- AI cleaned the values
- Google Sheet row was added
- Acknowledgment email was sent
- The information was appended in Google Docs

When a test email was sent with an intentionally missing field, the workflow correctly:
- Detected the missing value
- Did NOT update the Google Sheet
- Instead emailed the sender requesting the missing information

This confirms the logic works for both scenarios.

Why These Tools Were Chosen
- **Zapier** provides simple visual workflow building.
- **Email Parser** reliably extracts structured data.
- **ChatGPT AI** adds intelligence by handling inconsistent email text.
- **Google Sheets** is ideal for partner tracking.
- **Gmail** offers easy automated communication.
- **Google Docs** ensures documented history without manual effort.

Together, these tools create a fully automated, low-cost, scalable screening system.

Conclusion
This no-code AI solution fully automates the initial screening of partnership proposals at Samarth Eldercare. It reduces response time, eliminates manual work, maintains consistent records, and ensures that potential partners receive timely communication.
The system is flexible, extensible, and can be expanded later with scoring, categorization, or CRM integration.