Training Twist Case Study

How AI and Gmail Solved a Real Document Challenge

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Executive Summary

A small organization receiving a large volume of email attachments - such as vendor proposals and critical communications - faced a document management bottleneck. Training Twist created streamlined automation using standard Google tools that eliminated manual errors, saved time, and centralized document storage.

The Challenge

The organization received important documents through a shared Gmail inbox but had no consistent way of storing or retrieving these files. Attachments were manually downloaded, saved, and renamed—leading to errors, version control issues, and inefficiency. Key challenges included inconsistent file names from vendors and lack of a centralized, searchable storage solution.

The Solution

Using Gmail and Google Drive, lightweight automation was developed to streamline document handling:

- Automatically identifies and saves only relevant attachments (PDFs, Word docs).
- Stores all approved files in a centralized Google Drive folder accessible to board/admin members.
- Renames each file with a standardized format including original filename + email subject + received date + sender.
- Avoid duplicates by tracking previously processed emails.
- Leaves the inbox untouched (email read/unread status is preserved).
- Includes a one-time archive to capture all historical documents.
- Continuously runs checks on recent emails to keep the process efficient and up to date.

AI and Tools Used

- Gemini (Google AI): Assisted with generating and refining custom code.
- Google Apps Script: Used to build the automation logic between Gmail and Drive.
- Gmail & Google Drive: Platforms for reading emails, extracting files, and managing organized storage.
- Google Properties Service: Enabled the system to remember what had already been processed.

Results and Impact

- Reduced time spent organizing or locating proposals.
- Improved document version control and traceability.
- Created shared access to key records for all board/admin members.
- Reduced risk of file loss or email-related issues.
- Provided long-term scalability and minimal maintenance.

Conclusion

This solution shows how even basic tools, used strategically with AI support, can eliminate manual bottlenecks and improve operational clarity.