



## CHALLENGE:

Our client provides staff augmentation services for one of its customers, with 65+ resources deployed in several locations and various time zones. Generating invoices for these resources is a key task that involves several man-hours at the beginning of each month. With so many resource records to intake, efficient invoice processing is a critical business operation that must be completed accurately, efficiently, and on time. In this business case, an RPA solution was applied across the entire process to decrease the overall time of invoicing, reduce expenses, and eliminate human errors.

### Specific Project Requirements

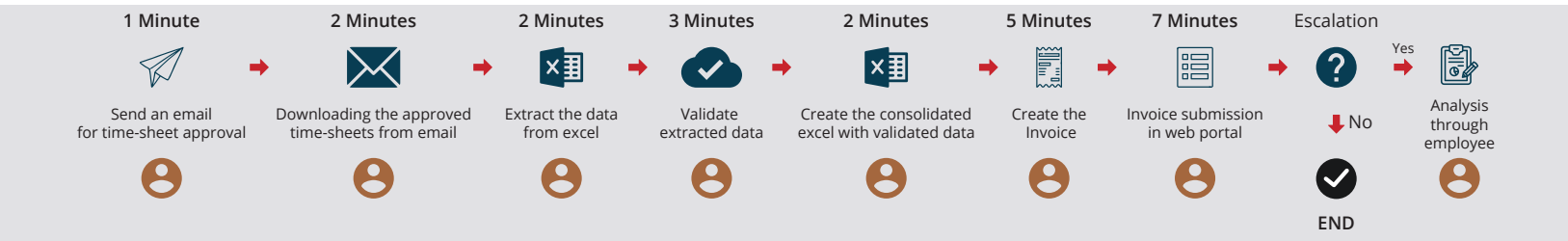
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|--|---|
| <ul style="list-style-type: none"><li>• Sending email notification to the resources to obtain manager approved timesheets.</li><li>• Send reminders when there is no response available.</li><li>• Downloading the timesheets from the email based on keywords like 'Approved' or 'OK' in the email message and with reference to the subject.</li><li>• Gathering the project code, task code, calculating the no of billable days considering leaves and business days for a specific month.</li><li>• Validating project code and task code with the Vendor reference file.</li></ul> | <ul style="list-style-type: none"><li>• Sending email reminder to resource before 1 month for date extension based on contract end date mentioned in the Vendor reference file.</li><li>• Creating the month-wise updated excel with employee name, project code, task code, no. of billable days, no of business days and total invoice amount, etc..</li><li>• Generating invoice with month-wise updated excel input.</li><li>• Validating the invoice details with month-wise updated excel.</li><li>• Log in to the Vendor Management portal and submit the invoice with invoice details and uploading the necessary required documents.</li></ul> |
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## SOLUTION:

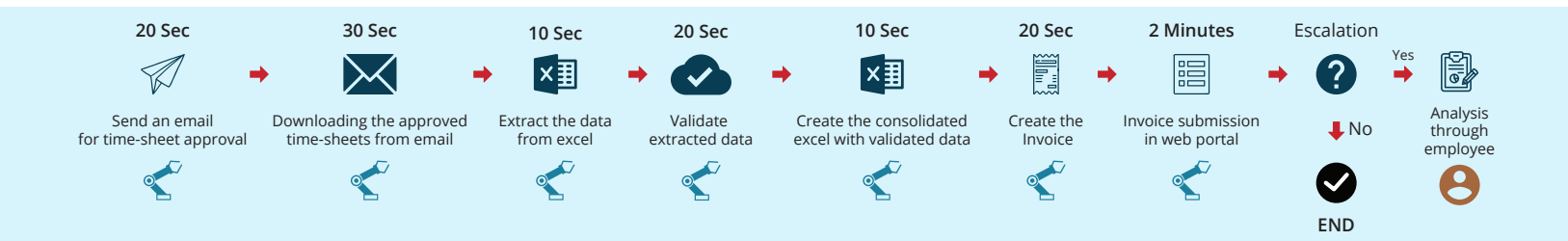
The objective of this solution was to automate the invoice creation process and uploading of the invoice details into the client's vendor management system. Please refer to Table 1 above for the detailed project requirements incorporated into the solution we created.

Our team built a digital worker (bot) capable of sending the email containing timesheets, verifying the approvals, and extracting information from the timesheets. From there, the bot also calculates the cost, inputs the data, and submits the invoices. The bot we built can automate the data input, perform error reconciliation and even process certain decision-making required throughout the invoice processing, minimizing the need for human intervention. The diagram below depicts the time required for each of the different tasks during the invoice processing timeline:

### As-Is Process Flow timelines



### Bot processing time



## BENEFITS OF OUR RPA SOLUTION



**Solidify Your Competitive Edge** - Our approach is implemented by top experts using the latest technology and tools to assure you have an optimized solution.



**Significant process improvements** - Process cycle times are significantly faster than the manual approach, while the standardization that was implemented resulted in greater consistency.



**Faster Processing Time** - Using the bot, we were able to save more than 3 working days per month for the team, improving invoicing and payment turnaround times.



**Improved Compliance** - Bots follow regulatory compliance rules to the tee and provide an audit trail history for proper record-keeping.



**Increased Process Reliability** - Bots are scheduled to work at regular intervals throughout the day without interruptions or disruptions.



*Find out how Idexcel solutions can help your business. Contact us today!*

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