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Business Domain

Finance, Payments and POS

Project Type

Web application and automation

Supporting Employees with Disabilities in the UK – Automation of Invoices and Credit Notes in SAP

Client

The Client is a UK-based company operating dozens of branches. The Client's specialty is Lean (JIT) consulting and training programs, including programs to support people with disabilities into mainstream employment.

Project

Development and implementation of an RPA solution to generate self-billing invoices for the Client's delivery partners (DP).

Objective

Automation of creating invoices and credit notes that are further sent to the supplier (DP) and posted to SAP.

Team Reinforcement

The Client required the development of resources to make its accounting process faster and more effective by implementing an automated solution for financial management. It had to be designed and implemented from scratch. Intetics's team included 2 developers and 1 architect with a BA specialization who analyzed the workflows of the project to be automated.

Challenge

The Client's mission is to create an inclusive workspace environment by developing programs supporting people with disabilities into mainstream employment in other businesses.

The Client operates dozens of branches within the UK. By helping employers recognize the value of their business operating in an inclusive workplace environment, the Client assists them in consulting on RPA the projects available, providing training programs and other support services.

To achieve an efficient and inclusive environment for one of its projects, the Client reached out to Intetics with a request to implement an RPA within an application for generating self-billing invoices for DP. The main challenges the Client wanted to solve were automating data entry tasks to enhance the efficiency of the process by decreasing manual errors to 0%.

Quick Facts

- ✓ The 12-step management process automated in 1.5 months
- ✓ Execution improved by 75% regarding the time resources spent and by 71% in terms of SLA performance
- ✓ The process of invoice management sped up 3.5 times
- ✓ Manual errors decreased to 0%.

Technologies

UiPath / Excel / SAP

Solution

★ 01

The developed RPA solution automatically generates invoices, sends credit notes to DP, and posts relevant data to SAP. It makes financial management faster, more convenient and efficient, thus helps employees with disabilities keep up with intensive business processes.

★ 02

The Client received the RPA solution that automatically generates invoices, sends credit notes to partners, and posts relevant data to SAP. Iterative implementation eliminated the risks of new practices and technologies. The business results of the solution proved to be efficient.

★ 03

Using UiPath, the Intetics team automated the 12-step process of creating invoices and performing MI file management in 1.5 months. 12-step automated process includes operations like opening files in various formats, data selection, data modification, data copy-pasting, file saving, printing, and uploading to the SAP system.

★ 04

Each month a series of 'Self-Billing' invoices are generated for all DP for the previous month's activity. The information sent to each supplier includes the invoice (sent as a PDF, created in Excel), a credit note (if due, in the same format as the invoice), and a breakdown of the Master file (MI file).

★ 05

The financial management system may be customized. Invoices, credit notes and MI files are emailed in a single letter to each DP. The email usually includes all relevant information, but if needed, current service fees and performance payments can be sent in separate invoices.



Client Reference



Amazing RPA service (secure, reliable, cost-effective) – it's invaluable to our organization. What we appreciate most about the Intetics team is the ability to deliver results that meet expectations. They are proving their professionalism again every time.

VP of Engineering

Benefits and Results

- ★ Business results of the automated process were sufficient in cost reduction, quality increase and total error elimination, rocketing SLA performance.
- ★ SLA performance increased 3.5 times. Before RPA solution implementation, it took 7 days to carry out the whole process. Now it takes only 2 days.