

INVOICES AND CREDIT NOTES MANAGEMENT AUTOMATION IN SAP

RPA solution implementation by the Intetetics team is made in an iterative way, which is totally agreed with the Customer at each step and allows to eliminate the risks driven by new technologies and practices implementation.

Among results:
SLA performance was improved by 3.5 times. Before RPA solution implementation it took 7 days to carry out the whole process. Now it takes 2 days only.

Objective

Automate the process of creating invoices, credit note that are further sent to the supplier and posted to SAP

Quick Facts

- ✓ *Client received the RPA solution that can automatically generate invoices, send credit notes to partners, and post relevant data to SAP*
- ✓ *In 1.5 month, our team improved the process execution by 75 % regarding the time resources spent and by 71 % in terms of SLA performance*
- ✓ *As a result, client uses 12 automated process steps including operations like opening files of various formats, data selection, data modification, data copy-pasting, files saving, printing, and uploading to the SAP system.*

Challenge

Our Client's mission is to develop programs to support disabled people into mainstream employment with other businesses.

The Client operates dozens of branches within the UK. By helping employers to recognize the value of their business operating in an inclusive workplace environment, the Client assists its clients within consulting on RPA 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 delivery partners. The main challenges the Client sought to solve were automating data entry tasks to enhance the efficiency of the process by decreasing relevant manned errors to 0 %.

Solution

★ 01

Intetics's team comprised of two developers and one architect with a BA specialization analyzed the workflows of the project to be automated.

★ 02

Each month a series of 'Self-Billing' invoices are generated for all Delivery Partners (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).

★ 03

Invoices (and credit notes, if due) and MI are emailed to each Delivery Partner. The email should include all relevant invoices (current service fees and performance payments may be sent on separate invoices, however, there is no reason these cannot be consolidated into a single invoice for that month).

★ 04

For 1.5 month and with the usage of UiPath our team automated the 12 process steps of creating invoices and MI files management.

★ 05

We faced a few difficulties along the process of automation solution creation, as our Client is non-technical, and it took additional time and resources to communicate mutual expectations and results. Nevertheless, the business results of this RPA project proved to be quite efficient.



Client reference

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

Benefits and Results

★ Business benefits of this automated process were sufficient cost reduction, quality increase and errors total elimination, rocketing SLA performance.

Processing Cost Reduction	Before RPA	After RPA
Daily Average FTE	14	2
Quality Improvement	Before RPA	After RPA
Average daily errors	40	0
SLA Performance	Before RPA	After RPA
Average monthly SLA performance	7 days	2 days
% performance against target	50%	100%