



RPA using Microsoft Power Automate Helps a Logistics Solution Company Automate the Invoice Billing Process and Improve Accuracy and Productivity

CASE STUDY

Customer: An automated logistic solutions development company

Industry: Industrial Automation

Profile: The logistics company specializes in the development of automated logistics solutions for daily consumer goods manufacturing companies in the beverage, food, and tissue sectors.

Services: Robotic Process Automation

Business Need

The client designs automated and integrated logistics solutions for manufacturers of high-volume consumer products and for distribution centers, mainly in the food, beverage, and tissue sectors. Leveraging innovative technologies, the client has been working on the concept of Industry 4.0: smart and interconnected factories from its inception. Yet, the client's current invoice bill processing was done in a semi-automated manner, with several processes also done manually:

- Visiting the Verizon site
- Clicking on each individual account to download the invoice in PDF format
- Converting the PDF file into a CSV file

- Using the detailed CSV bill to carry out operations including
 - Merging and integrating entries
 - Adding invoice date and account details
 - Mentioning account number for respective entry
 - Running a macro for required calculations
 - Changing the format of the file so it can be imported into the SAP accounting system
 - Emailing a copy of the file to the Accounting Department
 - Refreshing Power BI to pull in latest data and understand usage trends
 - Archiving source files onto a network drive for historical purposes

These manual processes lead to several problems: issues with copying and pasting data from one file to another and manually adding in rows often resulted in wrong account numbers being or wrong dates being entered. With incorrect data, the Power BI reports also generated wrong trends, which restricted the client from getting an accurate picture of their billing process.

To drive innovation and improve efficiency, the client wanted to automate its time-consuming, error-prone Verizon bill processing workflows. The client got in touch with Synoptek who recommended using the Microsoft Power Platform to automate the invoice billing process and enable productivity and precision.

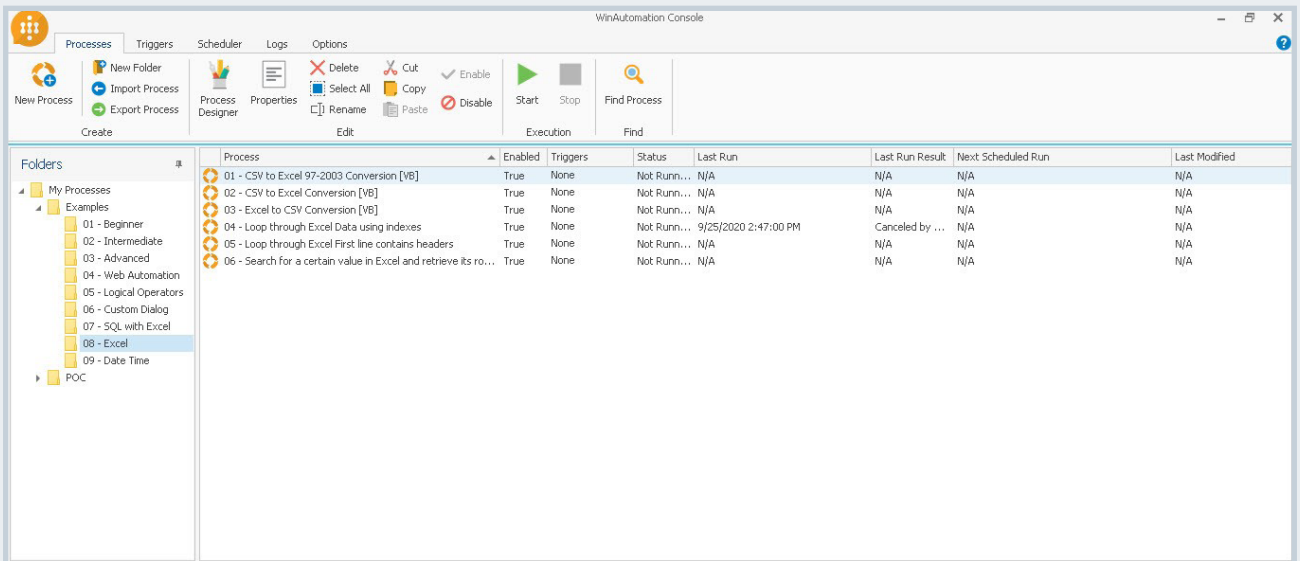
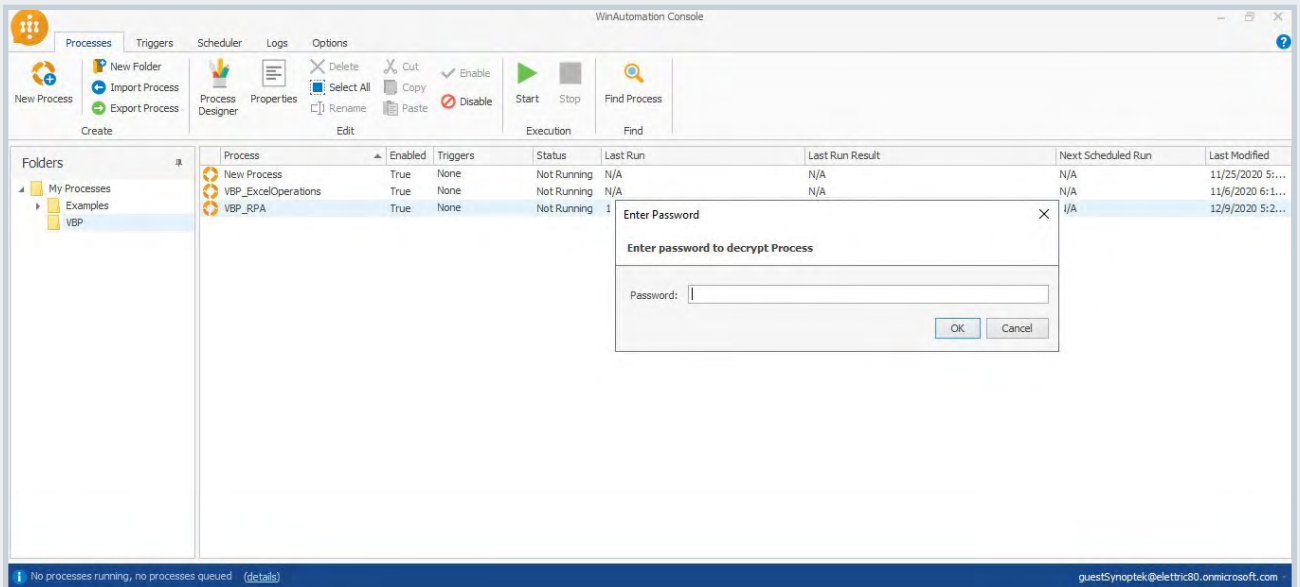
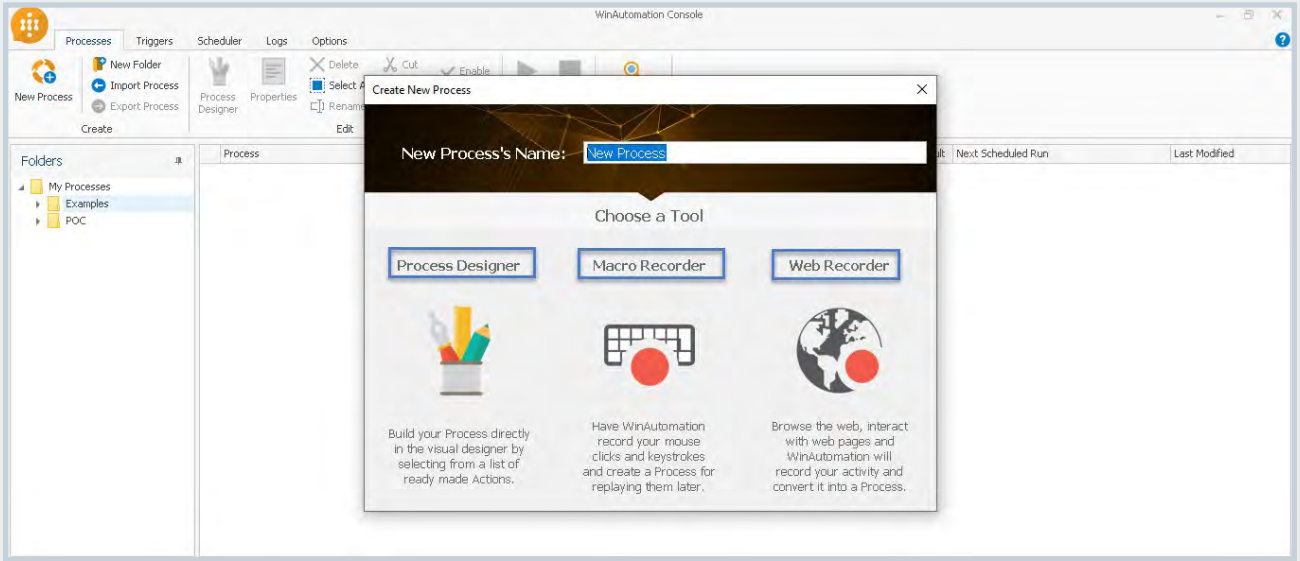
Synoptek's Solution and Approach

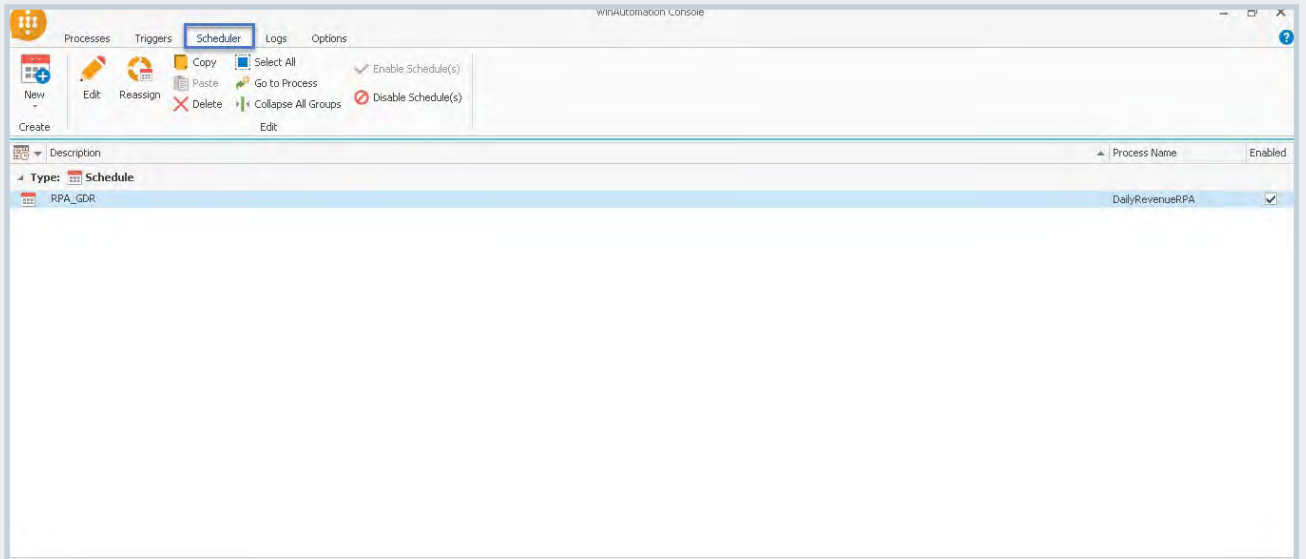
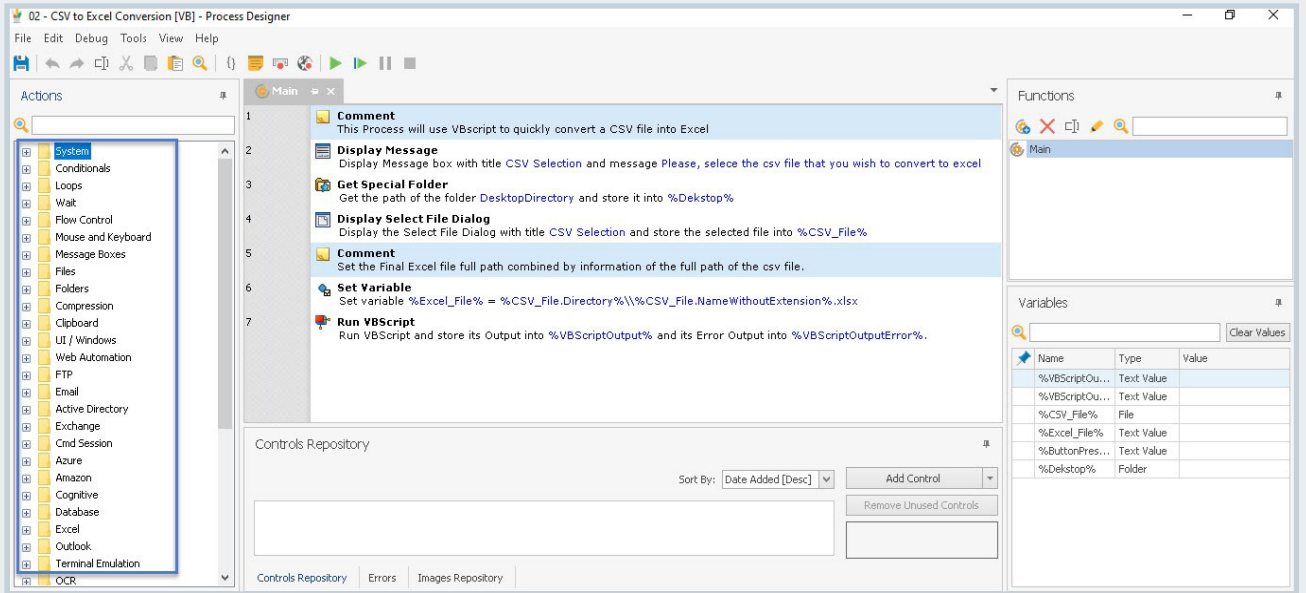
To automate the client's current bill processing workflow, Synoptek used Microsoft's Power Automate to develop an Attended RPA bot who would carry out all individual tasks in an automated manner. Activities included:

- Understanding the invoice process in detail and identifying tasks that require automation
- Building a roadmap for automation rollout
- Using Microsoft Power Automate to design the automation framework
- Creating a WinAutomation feature for automating the different activities including downloading invoice, changing format, running macro, sending emails, and updating the Power BI report
- Orchestrating workflows, enabling governance, and validating the rollout
- Monitoring the functionality of the bot to make required improvements

Thanks to Synoptek's solution, all steps in the invoice processing workflow were automated. Today, the RPA bot automatically:

- Logs into the Verizon site to download the PDF file
- Logs out of the Verizon site and closes the browser
- Converts the PDF invoice into a CSV format
- Runs the macro, adds account number and date, and consolidates all data into a master total
- Logs in automatically to Power BI, enters username and password
- Goes to a specific report and refreshes the data
- Emails the reports to the SAP and accounting teams





Business Benefits

Given the competitive environment in which the client operates, achieving faster time-to-value is critical to stay competitive. The client's manual approach to bill processing was not only time-consuming, it was also extremely prone to error.

Synoptek helped the client in streamlining its Verizon bill processing workflows. With development of the RPA bot using Microsoft Power Automate, the client is now able to

- Eliminate human intervention
- Save precious man hours and effort
- Improve accuracy of bill processing
- Enhance productivity of employees

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

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