DCM Infotech

Case Study

Automation Service

Automation – Transforming Invoice and Billing Processes with Intelligent Automation

Client is a Software Services company. Processing of invoice and billing for client from employee timesheet is a long & complex process and goes through multiple manual steps. There are multiple teams of engineers deployed with different customers. Each customer follows a different format for timesheets and approvals. Multiple people get involved in processing of the timesheet due to multiple iterations, resulting in delays in billing.

The client operates in the software services industry, deploying multiple teams of engineers with varying levels of experience and rates across different customers. Each customer follows a unique format for timesheets and approvals, and negotiates different rates for different roles and projects. This complexity was further compounded by varying policies on overtime and conveyance allowances, making the timesheet processing and billing a highly intricate task.

Company Overview

Leading Software Services company

IT service company, specializing in intelligent automation solutions

Business Environment

Excessive FF and CHA invoices

All data entered in SAP

CHALLENGES

Complex Timesheet Processing: The client's timesheets needed multiple teams and manual steps due to different formats and approvals.

Invoice Posting: After approval, generating and posting invoices on portals was slow and error-prone.

Rate Variability: Varying engineer rates based on experience and project needs added complexity.

SOLUTIONS

Documenting the Process: We mapped the workflow, identified issues, and outlined steps for automation.

Architecting BOTs: We designed BOTs to automate tasks like data extraction, invoicing, and bill dispatch.

Development, Testing, and Deployment of BOTs

IMPACT

Faster Processing: Automation cut timesheet and invoice processing from days to hours.

Boosted Morale: Automation allowed employees to focus on meaningful work, boosting satisfaction.

Faster Billing: Streamlined processes sped up billing, boosting cash flow and stability.

Case Study | Automation Service

Automation of Software Billing Collection

CHALLENGES

- **Complex Timesheet Processing:** The client's timesheet processing involved multiple teams and manual steps due to the diverse formats and approval processes of different customers.
- **Rate Variability:** Different rates for different engineers, based on experience and project requirements, added to the complexity.
- **Policy Variations:** Different policies on overtime and conveyance allowances for different projects within the same customer further complicated the process.

- **Manual Iterations:** The need for multiple iterations to get approvals from customers resulted in significant delays in billing.

CLIENT REQUIREMENTS

The client required a comprehensive solution to automate the entire invoice and billing process. The key requirements were:

- **Automating the extraction of "amount of time worked" from timesheets:** This involved extracting data from various timesheet formats used by different customers.
- **Automating the data-entry into the Invoicing system:** Ensuring accurate and efficient data entry into the invoicing system.
- **Automating the data transfer to the Accounting System for billing:** Streamlining the transfer of invoicing data to the accounting system for billing purposes.

CHOOSING THE RIGHT SOLUTION AND MEETING THE DEADLINES

SOLUTION

To address these challenges, we implemented an intelligent automation solution using both Automation Anywhere (AA) Tools and IBM RPA. The solution involved the following steps:

- **Documenting the Process:** We began by thoroughly documenting the existing process, identifying key pain points, and mapping out the workflow. This step was crucial in understanding the intricacies of the process and designing an effective automation strategy.
- **Architecting BOTs:** Based on the documented process, we designed and architected BOTs to automate various tasks. This included BOTs for extracting data from timesheets, entering data into the invoicing system, transferring data to the accounting system, and dispatching bills.
- **Development, Testing, and Deployment of BOTs:** The BOTs were developed, rigorously tested, and deployed in a phased manner to ensure smooth implementation and minimal disruption to the client's operations.

IMPLEMENTATION

- **Automating Timesheet Extraction:** Using IBM RPA, we developed BOTs to handle the extraction of "amount of time worked" from various timesheet formats. The BOTs were equipped with advanced data extraction capabilities, allowing them to accurately capture data from different formats and input it into a standardized format for further processing.
- **Automating Data Entry into the Invoicing System:** Microsoft Power Automate was used to automate the data entry process. The BOTs were designed to validate the extracted data, ensuring accuracy before entering it into the invoicing system. This step eliminated manual data entry errors and significantly reduced processing time.
- **Automating Data Transfer to the Accounting System:** The next step involved automating the transfer of invoicing data to the accounting system for billing. This was achieved using a combination of IBM CP4BA and Microsoft Power Automate, ensuring seamless integration between the invoicing and accounting systems.

RESULTS

The implementation of the intelligent automation solution resulted in several key benefits for the client:

- **Improved Process Time:** The automated workflows significantly reduced the time required to process timesheets and generate invoices. Tasks that previously took days to complete were now done in a matter of hours.
- **Enhanced Employee Morale:** By automating repetitive and time-consuming tasks, employees were able to focus on more strategic and value-added activities. This led to improved job satisfaction and morale.
- **Quicker Billing and Collection:** The streamlined process resulted in quicker billing and collection, improving the client's cash flow and financial stability.