



XTGLOBAL AUTOMATES COMPLEX BANK REPORT MANAGEMENT WORKFLOW FOR A PRINTING SERVICE PROVIDER



About Client

As one of the most prominent and the trusted names in the US for premium printing, mailing, and marketing services, the client excels in offering innovative marketing solutions to businesses worldwide. Their mission focuses on creating and customizing advanced print and digital solutions that empower customers to concentrate on their essential business activities.

Client Challenge

The client faced a significant challenge in efficiently managing their bank information due to a manual and time-consuming process that required the full-time attention of one employee. The team was responsible for logging into two banking portals, searching for account numbers using input values from Google Sheets, retrieving reports based on daily, weekly, or monthly date ranges, and downloading the associated PDF files. Additionally, they needed to save these PDFs in a designated location with proper naming conventions that included the account numbers and bank names. This repetitive and labor-intensive task needed to be performed for every entry in the Google Sheet data.

Tech Stack



System Schedule

Daily Management of Reports from Two Bank Portals

XTGlobal Business Solution

To address this tedious process, XTGlobal suggested automating the workflow, aiming to streamline the process, reduce manual effort, and improve overall efficiency. Our experts:

Created a detailed process design document that outlines the current process workflow and the optimized workflow, aiming to minimize steps and identify potential exceptions.

Developed an unattended bot for the automated process, capable of being triggered automatically at set intervals and completing the entire workflow in three minutes or less, depending on the volume of tasks.

Automated the process of sending confirmation emails to each customer's business user for Account Number PDF verification.

Conducted thorough testing to ensure the automated bot handles all business process scenarios accurately and efficiently.

Deployed the bot into the orchestrator to facilitate easy monitoring and maintenance.

Consistently monitored the bot during each scheduled run to ensure successful process completion and to address any issues promptly.

Business Benefits

- End-to-end automation of manual processes improved overall accuracy
- Freed up the full-time hours of one FTE, allowing the employee to focus on more important tasks
- Optimizing customer service over time and streamlining their billing process helped achieve significant annual savings and efficiency improvements
- Achieved overall cost savings of USD 50,000 per year



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