

# MAJOR LEADER IN PRINT INDUSTRY DRIVES OPERATIONAL EFFICIENCY BY AUTOMATING INVOICE AND JOURNAL MANAGEMENT WITH UIPATH



## ABOUT CLIENT

Renowned as a leading provider of premium printing, mailing, and marketing services in the US, the client stands out for delivering cutting-edge marketing solutions to businesses across the globe. Their mission is to design and deliver advanced print and digital solutions tailored to meet customer needs, enabling them to focus on their core business priorities.

## CLIENT CHALLENGE

The client's team currently manages a manual process involving the receipt of Customer Remittance Excel files via email. Upon downloading the file, they extract data to create a new journal in D365, populate the journal with customer data, and export it as a template. This template is then updated using data from the remittance file, the journal is refreshed in D365, deductions are added, and a case log is created to document issues and assign them to the appropriate employee. Finally, the updated journal template is uploaded back to D365. The client seeks to automate this entire workflow using UiPath RPA to improve efficiency, reduce errors, and enhance process reliability.

## BUSINESS NEEDS

- 1 Automate the handling of large-volume customer invoice records to eliminate repetitive, manual steps.
- 2 Reduce the time spent processing each customer's file, currently averaging one hour per customer.
- 3 Streamline daily operations to ensure efficiency in managing high-frequency, time-sensitive tasks.
- 4 Enhance accuracy and consistency in journal creation, data updates, and issue logging within D365.
- 5 Enable scalability to handle increasing volumes of customer data without additional manual effort.

## TECH STACK



## SCHEDULE IN FOCUS

Daily generation and management of reports for three-four customers per day

## XTGLOBAL BUSINESS SOLUTION

XTGlobal delivered a scalable, reliable, and efficient automation framework that not only addressed the immediate pain points but also set the foundation for future process enhancements.



1

### Process Design & Optimization:

Started by creating a detailed **Process Design Document (PDD)**, outlining the “as-is” and “to-be” workflows. This helped us identify inefficiencies, reduce redundant steps, and anticipate exceptions upfront, ensuring the solution was designed for maximum impact.

2

### Workflow Automation:

Developed a fully automated, **unattended BOT** using UiPath that runs on a predefined schedule. The BOT executes the entire process end-to-end within an hour for each customer, significantly reducing the manual effort and processing time.

3

### Automated Confirmation & Business Communication:

Added a feature to send **automated confirmation emails** to business users after each process run. This ensures transparency and allows users to verify successful database updates effortlessly.

4

### Rigorous Testing for Business Scenarios:

Before deployment, the BOT was rigorously tested against all possible **business scenarios and edge cases** to ensure it could handle high volumes of data, unexpected inputs, and exceptions seamlessly.

5

### Deployment in Orchestrator:

The BOT was deployed into **UiPath Orchestrator**, enabling centralized monitoring, scheduling, and streamlined maintenance. This approach ensures that any future changes or updates can be managed efficiently.

6

### Ongoing Monitoring & Support:

Post-deployment, we set up a monitoring mechanism to track the BOT’s performance during each scheduled run. This ensures the process is completed successfully and allows for quick troubleshooting if any issues arise.

## BUSINESS BENEFITS

- ✓ The automation of manual processes significantly reduced human errors, ensuring improved accuracy and efficiency throughout the workflow.
- ✓ By automating repetitive tasks, four part-time FTE hours were freed up (equating to a 2 FTE savings), enabling employees to focus on more strategic and value-added tasks.
- ✓ The reduction of two full-time equivalent workload directly translates to annual savings of \$160,000.



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