



## A GLOBAL LEADER IN THE PRINT INDUSTRY ELEVATES FILE MERGE AND EMAIL DISTRIBUTION PROCESS WITH AUTOMATION



### About Client

The client is among the largest and the most trusted US-based providers of high-quality printing, mailing, and marketing services. They have maintained their role at the forefront of innovative marketing solutions for businesses across the globe and aim to create and customize cutting-edge print and digital solutions that allow their customers to focus on their core business.

### Client Challenge

The client was strained with a legacy workflow that involved retrieving files from an SFTP site, merging them into a single PDF using Adobe Acrobat, reading data from an SAP Master file to identify a second PDF to be merged, and sending the final merged PDF via email to designated recipients. Both PDFs are from two different locations that needed to be merged using the downloaded SAP report on Customer and Invoice Columns as a reference.

This tedious manual task also opened avenues for manual errors and was very time-consuming.

### Systems in Focus

**Web-based Applications:** Secure File Transfer Protocol (SFTP), Gmail, PDF, and Excel.

**Desktop Application:** SAP Application with Transaction Code Y\_SQ01\_OTM\_COMBINED

### Business Needs

- Develop a UiPath workflow that automates this end-to-end process, ensuring accuracy and productivity
- Employ an unattended bot for the automated workflow
- Automate a multi-step document and email process
- Ensure secure file transfers and accurate data extraction from the SAP Master file
- Enhance the process efficiency and reduce manual effort through reliable PDF merging and correct email dispatch

### Tech Stack



## XTGlobal Business Solution

XTGlobal's team of Robotic Process Automation (RPA) experts assessed the client's landscape to develop a strategic process that could automate their entire existing process of One Time Mandate (OTM) PDF Merge and Email Distribution.

1

Developed a Process Design Document (PDD) outlining the current and future state process workflows to streamline operations, reduce process steps, and identify exception scenarios.

2

Engineered an unattended RPA BOT capable of automatically initiating predefined intervals, efficiently executing the entire process within 4 minutes or longer based on transaction volume.

3

Automated the generation and dispatch of confirmation emails to business users, enabling them to verify merged PDFs derived from SAP report downloads.

4

The system was configured to place copies of the merged PDFs in two designated server locations, and all files from the SFTP portal were systematically moved to a 'processed' folder.

5

Conducted extensive testing to validate the BOT's ability to handle all business process scenarios accurately.

6

The BOT was deployed into the Orchestrator for streamlined monitoring and maintenance.

7

Continuously monitored the BOT's performance during scheduled runs to ensure the successful completion of the process.

### Business Benefits

- Automated the manual processes and improved overall accuracy by 90%
- FTE Utilization: Two full-time employees (FTE) have been given back partial-time hours spent in mundane, repetitive manual processes to utilize in other important tasks
- Attained over 50% of Cost Savings



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