

Automating Critical Accounting Processes with Appian

El Ángel, S.A. was established in 1976 as a food processing plant in Costa Rica specializing in two product lines, dulce de leche and guava jam, in a region with no basic infrastructure, including potable water, electricity, or paved roads.

With a strong sense of social responsibility, El Ángel Group unleashed the potential of the region and its people. Today, 45 years later, it has expanded and differentiated activities to six different companies, 87 products, and 500 employees, 55% of whom live in rural areas.

The challenge.

The Services division of Grupo El Ángel (SEA Servicios Múltiples), specializes in providing administrative, financial, and consulting services. They face an increasingly competitive environment, with clients expecting faster responses, personalized attention, and an overall better customer experience.

Due to this demand, El Ángel saw the need to modernize processes and free people from repetitive tasks so that they could focus their efforts on serving their customers.

Their accounting and finance processes in particular stood out as clear automation opportunities, both posing these significant challenges:

- They were highly manual, repetitive processes that included moving data from one application to another.
- They had high error rates as a result of manually entering data into systems, leading to further data reprocessing.

The approach.

To streamline their modernization initiative, El Ángel selected Appian to automate critical accounting processes. They chose Appian because of the key capabilities offered, including the following:

- Rapid implementation of Robotic Process Automation (RPA) driven by low-code development.
- Automation capabilities can be easily expanded to adapt and scale across the organization.
- Integrated workflows that facilitate process design in an efficient and intuitive way.
- Superior process monitoring and optimization console that offers end users full automation control.



Industry:

Food and beverage, services, energy, agro-industrial, exports

Process focus:

Accounting

Website:

elangel.co.cr

Appian solutions:

Appian RPA

Number of employees:

+500

Number of customers:

+8,000

The solution.

Appian automates three key accounting and finance processes at El Ángel:

- **KPI Reporting.** An RPA bot logs into a web-based ERP system to compile statistical information and build, integrate, and edit a report, which is emailed to the process owners. These reports contain supplier data, daily sales amounts, supervisor outreach reports, and are generated on both a daily and monthly basis.
- **Bank Records.** An RPA bot copies 4,000 values from Microsoft Excel and uses them to feed the ERP system to create accounting records. The bot then executes the ERP processes for bank reconciliation and accounting controls.
- **Accounting Records Assistant.** An RPA bot copies information from Microsoft Excel and updates the ERP system for account statements and entries. After the ERP is updated, the bot automatically creates around 250 invoices and bank records so invoices can be paid.

The implementation.

El Ángel's engineering team implemented the automation project, starting with the selection of the best candidates for automation among the identified processes—a key step for the success of the initiative.

Each process was assessed to ensure that it met four main requirements to provide a quick return on investment:

1. Processes needed to be well defined and standardized.
2. Activities were required to be high volume.
3. Bot inputs were clearly identified.
4. Systems and applications involved were stable.

From initial identification through implementation, El Ángel was able to automate all three critical processes in just five weeks with Appian:

- **KPI Reporting:** 1 week.
- **Bank Records:** 2 weeks.
- **Accounting Records Assistant:** 2 weeks.

El Ángel needed to completely shift their mindset on automation, working to identify repeatable tasks that would improve the daily routines of employees.

Employees are encouraged to identify repetitive processes that make ideal candidates for automation.

The results.

Automation with Appian has saved the accounting and finance team an average of 3,360 hours per year.

- **KPI Reporting:** 180 hours/month.
- **Bank Records:** 85 hours/month.
- **Accounting Records Assistant:** 15 hours/month.

Other benefits of Appian include the following:

- The team is more motivated, efficient, and agile in their work thanks to automation. Each member of the team can save up to 72 hours of tedious manual work each month.
- Process quality improved by eliminating reprocessing that used to take up to two hours due to unintentional errors in manual data processing.
- Greater control and visibility of process performance.



Appian technology has become an operational pillar that has permeated throughout our organization, transforming repetitive processes and changing the focus of work.

Alicia Pineda, General Manager
SEA Servicios Múltiples
(Grupo El Ángel)

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appian.com/rpa