

Automated customer invoicing

Overview

With more than 1,800 professionals in eight countries, Entelgy—also known as The BusinessTech Consultancy—helps organizations accelerate digital transformation and remain competitive in a rapidly changing world. Entelgy facilitates the discovery, adoption, consolidation, and maintenance of new technologies that drive business, with a focus on asset safety and security. In addition, Entelgy’s robotic process automation (RPA) streamlines processes and improves the efficiency of manual tasks.



Entelgy Digital specializes in facilitating digital transformation through people and technology. They drive efficiency based on process automation, among other technologies, for the benefit of both client companies and the rest of the organization.

“ The digital transformation of companies has a clear ally in the automation of processes with RPA. The need to automate, digitize, and achieve operational efficiencies involves the implementation of software robots that accelerate and ensure the quality of processes and free people to attend more strategic and higher-valued tasks.

Miguel Ángel Barrio
Head of Entelgy Digital

Automated customer invoicing

Challenge

During the COVID-19 pandemic, Entelgy saw a steady rise in customer invoicing, a complex, high-volume activity that requires a high level of precision and directly impacts cash flow.

As collection periods extended and associated costs rose, Entelgy realized it needed a more streamlined process.

Automation was Entelgy's first step in the path to digital transformation

In addition to increasing efficiency, automating the customer invoicing process would reduce errors when validating:



Approach

Needing an easy-to-use platform to develop scalable automation solutions in a Cloud environment, Entelgy turned to Appian.

The Appian platform's robust, complimentary automation capabilities—including Appian RPA—optimized Entelgy's internal billing process through its:



Easy-to-use, intuitive user interface



Low-code automation components to accelerate development



Full debug capabilities

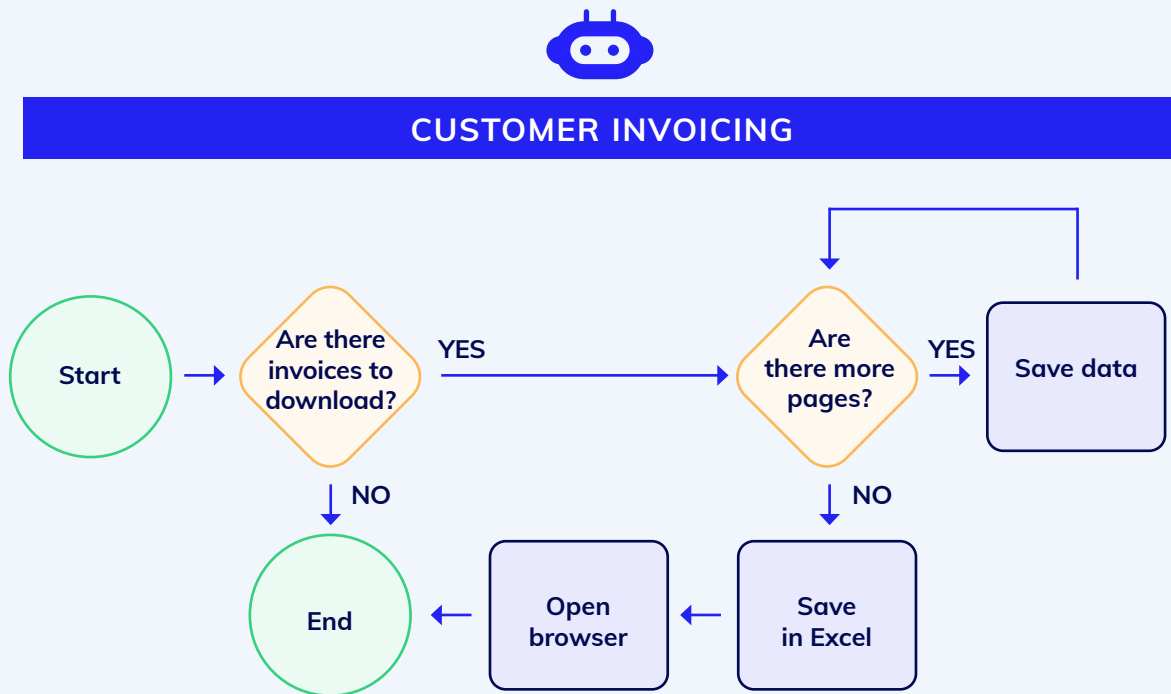


Ability to read unstructured data

The Appian team, located in close proximity to Entelgy's partners and customers, helped Entelgy adopt and implement the automation solution swiftly and easily. The local team enabled direct interaction with Appian automation experts and fast response times.

Solution

Appian provides centralized management and a global view of all automated processes and tasks, including customer invoicing.



The automated customer invoicing workflow includes:

- 1 “Reading” the mailbox where invoices are received.
- 2 Using optical character recognition to process invoice PDFs.
- 3 Saving invoice data in Excel for tracking.
- 4 Recording invoice data in customer systems.
- 5 Informing the administrative department of unprocessed invoices with reasoning why.

Appian RPA’s low-code and Java, empowered Entelgy to create libraries that can be reused in other automation processes, optimizing development times in future projects.

Implementation

Entelgy's internally developed automation framework includes:



Results

Entelgy achieved ROI quickly, automating its customer invoicing process **in just two weeks** from process identification and development through testing and deployment. The Appian solution:

- ✓ **Reduced the average time for invoice collection by 20 days**
- ✓ **Reduced the entire process time by 35%**
- ✓ **Achieved 98% accuracy in each collection cycle**
- ✓ **Increased employee satisfaction by automating tedious, mundane, and low-value tasks**

“ Thanks to the reduction of time in the cycle of the monthly billing process, the pressure on this activity has been reduced, and I’ve gained efficiency in my work time and ability to do other activities. ”

Pilar Miguel
Telco/Media Billing Process Manager

“ Companies that are not considering RPA and other forms of automation will miss important opportunities for efficiency, quality improvement, risk mitigation, innovation, and ultimately, growth. ”

Manuel Ruiz
Head of Cloud Infrastructure, Automation and Operations



Appian helps organizations build apps and workflows rapidly, with a low-code automation platform. Combining people, technologies, and data in a single workflow, Appian can help companies maximize their resources and improve business results. Many of the world's largest organizations use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk management and compliance.

For more information, visit appian.com/rpa