

Global company dramatically improves invoice intake process with Catalytic

CHALLENGE

The company's vendor invoice intake process was too time-consuming, repetitive, prone to error and delays

SOLUTION

Catalytic helped the team design a new invoice intake process that automated 90% of the manual work

IMPACT

\$125,000 was saved during the initial automation project, with \$1.5 million of potential savings once all invoice processes are automated

INDUSTRY

Safety

COUNTRIES SERVED

100+

EMPLOYEES

15,000

CUSTOMERS

70,000+

Invoice intake process challenge

This company set out to free its teams to focus on more meaningful work by uncovering inefficient manual processes that could be improved through automation.

One of the client's teams handles vendor invoicing for multiple business units, processing invoices from more than 30 different systems. With more than a thousand invoices coming in per month, it was time-consuming to collect and process data sent from numerous systems and in a variety of formats.

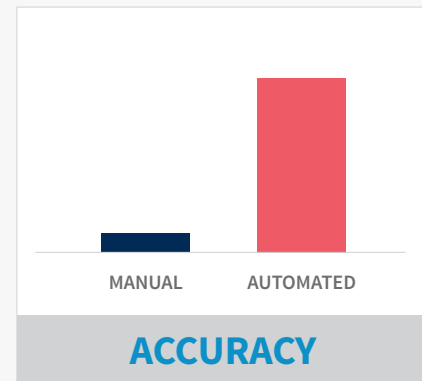
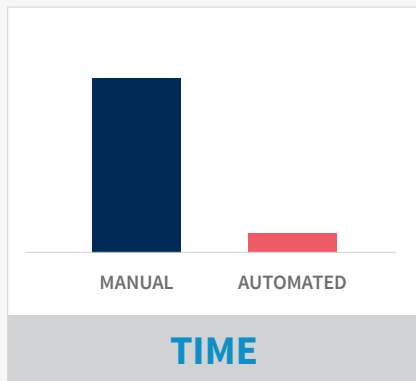
- Employees had to manually extract data from every document
- Analyzing data, identifying missing information, and re-uploading invoices was time-consuming and repetitive
- The required bandwidth to pull invoices from various systems would stretch when the volume of invoices would increase, putting more stress and pressure on each team member
- A high volume of invoices meant the team was more prone to errors, which slowed processing times and created billing delays

Manual process hassles

Catalytic was the right solution because it was quick to deploy, simple to customize, and easy to adjust to accommodate the needs of multiple process owners. Its promise of delivering a better, more strategic employee experience really appealed to the team.

The client selected the system with the largest volume of invoices for the first automation launch. Catalytic’s service delivery team mapped out the existing, exhaustive 95-step manual process. Compare how the manual process stacks up against the new automated solution.

Manual process versus automated process



VS

MANUAL invoice intake process

- Vendor sends an invoice
- Upload the invoice into the system
- Print or convert invoice to parse information for review
 - Identify missing information and exceptions
 - Add exceptions to the data table
 - Note incomplete and missing information
- Extract specific values
- Retype information back into the invoice management system
- Upload the associated invoices
- Wait for the invoice data to load back into the system
- Provide final check and edit invoice information

AUTOMATED invoice intake process

- Vendor sends an invoice
- Automated
- Scan the invoice using Using Optical Character Recognition (OCR)
- Parse out requisite pieces of information
- Browser Automation actions
 - Navigate and log into the system
 - Locate the correct order
 - Upload the invoice information using browser automation
 - Confirm invoice information
 - Update Catalytic data table with exceptions

The results

Automating this workflow for just one system significantly decreased the turnaround time—now this process happens almost instantaneously. It also cut down on the risk and number of human errors associated with tedious manual work.

The client's initial goal was to find an automation solution to perform more than 50% of the process, but Catalytic was able to automate more than 90%. It also reduced the number of human errors. The team can now focus their time on top-line activities and management decisions, and employees have more opportunities to directly support their customers.

Catalytic is now working with the company to scale this automation across all 30 systems and is expected to save more than 1,500 hours each year.

“*I just started using Catalytic when I joined the company. **My ability to get up to speed quickly speaks to the support I've had from Catalytic.** The backbone of support across the entire team is really helpful and unique. We always know someone there is taking care of us.*”



Arjun Gupta
RPA Associate

Ready to get started?

Contact us to learn more about how Catalytic can enable your team to do more meaningful work:

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