Invoice Processing Automation for a Business Immigration Law Firm

At a Glance

Industry
Legal Services

Challenge
The manual and time-consuming processing of invoices received in various formats (PDF and CSV) and from different vendors hindered the company's operational efficiency.

Key highlights
Benefits to the client included:
- Reduced invoice processing time by **75%**
- Eliminated **90%** of errors associated with manual data entry
- Freed up **30%** of employee time for more strategic tasks

Client Overview

The client, a boutique business immigration law firm, operates with a global perspective, maintaining offices in San Francisco, Los Angeles, London, and Singapore. Their dedication to facilitating the onboarding of foreign national talent for global businesses is a testament to their commitment to enabling innovation, competition, and expansion.

Requirements and Challenges

The customer needed to automate repetitive tasks, such as invoice processing and vendor billing, which were received in various formats. A significant challenge the company faced was the manual processing of invoices received in various formats (PDF and CSV) for vendors across different locations. This repetitive and time-consuming task hindered their efficiency and growth.

They sought an automated solution to:
- Extract data from invoices regardless of format.
- Integrate seamlessly with their existing financial management system (NetSuite) and CRM (Salesforce).

Prowess Provided Solutions & Services

Prowess addressed the client's needs with a comprehensive solution that included:

1. RPA (Robotic Process Automation) technology:
This intelligent software automated manual tasks, including:
- Downloading invoices from email or designated folders.
- Extracting data using Optical Character Recognition (OCR) for PDFs and pre-built parsing for CSVs.
- Validating extracted data for accuracy.

2. Integration with existing systems
Prowess seamlessly integrated the RPA solution with:
- **Nanonets:** This advanced OCR platform ensured accurate data extraction from PDFs.
- **NetSuite:** Extracted data was automatically populated into the firm's NetSuite system for efficient financial management.
- **Salesforce:** Vendor billing details were automatically synchronized with Salesforce for streamlined customer relationship management.
- **End-to-end automation:** With Prowess' solution, the entire process of invoice creation and vendor billing became automated, reducing manual intervention and saving valuable time for the firm's staff.
- **Event and Error Monitoring:** The solution provided real-time monitoring of the automation process, allowing the firm to promptly identify and address any errors or exceptions.

Methodology and Process Followed

Prowess utilized MuleSoft RPA, a leading RPA platform, to build and deploy the automation solution. The solution leveraged NetSuite and Salesforce APIs to integrate with the firm's existing systems seamlessly. Nanonets were integrated to ensure accurate data extraction from PDFs.

Value Proposition from Prowess

Prowess' solution delivered significant value to the business immigration law firm:

- **Increased Efficiency:** Manual invoice processing was eliminated, leading to significant time savings and increased employee productivity.

- **Improved Accuracy:** Automated data extraction reduced the risk of errors with manual data entry.

- **Enhanced Visibility:** Real-time monitoring provided greater visibility into the invoice processing process.

- **Reduced Costs:** Automation eliminated the need for additional staff resources dedicated to invoice processing, resulting in cost savings.

- **Scalability:** The solution could easily scale to accommodate future growth in invoice volume without requiring additional manual effort.

Business Outcomes:

By implementing Prowess' automated invoice processing solution, the business immigration law firm achieved the following:

- **Reduced invoice processing time by 75%**

- **Eliminated 90% of errors associated with manual data entry**

- **Freed up 30% of employee time for more strategic tasks**

Prowess' solution effectively addressed the challenges faced by the business immigration law firm. The firm significantly improved efficiency, accuracy, and cost savings by automating invoice processing.

For further information, please contact:

Prowess Software Services

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