

# Case study

Sales reports robotics consolidation

## In a nutshell

### For whom?

Leading international company from the area of technology, innovation and industrial automation products and services provider

### What did the Client want to achieve?

Release the manager of comprehensive monthly sales data reporting preparation

### How?

By rule-based but also self-adjusting automatization process

### What has been achieved?

Automation of the process using a robot without most of the manager's commitment and with reduction of preparation time

Reduction of the process time from 12 to 1-2 hours monthly

## Who did we cooperate with?

The Client is a leading international company specializing in the field of technology and industrial automation and innovation.

## What challenge did the Client face?

Each month, the high-level manager allocated about 1.5 business days to prepare and consolidate financial reports for several business units. Each set of documents consists of various types of sales reports.

Each of the source files can have between one and two thousand rows, containing about 50 columns.

## How did the process work?

The manager manually performed multiple filtering of individual columns in various data configurations so as to obtain the sales value sought (calculated in a traditional way).

Next, the manager entered calculated sales values into a special Excel file with reports (a separate file with reports for each Business Unit) in the appropriate cell corresponding to the given period (or periods in the case of outstanding sales), type of product / service, order number and based on the other criteria.

## How did we solve the problem?

We recommended using RPA class solutions, i.e. Robotic Process Automation. RPA is a modern technology that changes the approach to repetitive business processes by providing repeatable, template-based processes to the machine.

## Why was it good to apply such a solution?

At first glance, the process involved consolidating many Excel files. However, the detail was that, among other things:

- there was a specific sequence according to which you had to first sort the data set and search for records that need to be reported based on specific criteria;
- the financial month was not the same as the calendar month on which the report is based;
- each subsequent month a different column of the report should have been filled;
- each of the files participating in the process every month had a different name and was in a different location (according to a specific scheme).

In connection with all this, the use of RPA tools showed a definite advantage over the built-in Excel automation.

## What benefits have been achieved?

As a result, automation has allowed the Client to:

- shorten the process from approx. 12 h to even one hour (depending on the amount of processed data and the speed of the computer, in extreme cases the duration of the process does not exceed two hours);
- receive more precise data (rounding was often used before);
- adapt the process so that it is possible to use the workstation independently (except Excel) during the process.